ePages

User Guide

for

Creation and Administration

of

Web sites and Shops

- Version 6 -

Should you have questions or suggestions about our products, please contact us at the following address:

ePages Software GmbH
Gerhofstraße 2
20354 Hamburg
Germany

Tel.: +49-40-35 01 88-0
Fax: +49-40-35 01 88-222

E-mail: pm@epages.de
WWW: www.ePages.com

Jena, February 2009

Table of Contents

1. Introduction

General Information

This software is a modern and future-proof e-business platform for mid-sized businesses. It is an uncomplicated, attractively priced, and effective introduction to e-commerce. With this system, you are setting up an additional sales channel for your area of business. You can reach your customers in the Internet comfortably and without extensive technical knowledge or hardware expenditure.

Being a standardised technology platform, the software is flexible and easily extendible. Adjustments to fit a particular customer can be made in a short time.

The many functions of our standard software provide the foundation for quick implementation of varied business models with low operating costs.

The focus of the software, in addition to the large standard package of features, is on security, modular architecture, scalability, high availability, and on a user-friendly interface. Together with the high-performance database, the highest requirements for data volume and access can be met.

The program lets you set up and maintain a Web site on the Internet, through which you can offer your products, and take care of your customers, all without a lot of help from a service provider.

Prerequisites

The program is browser-based. The minimum specification for administrative purposes is:

- Internet Explorer 7.0 and higher
- Mozilla 2.0 and higher

When it comes to displaying the Web site or shop, the system supports the latest browsers on various operating systems.

For administrative tasks, the requires a screen resolution of 1,024 x 786 pixels and a colour depth of at least 65,000 colours.

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

- JavaScript
- Session cookies
- pop-up windows
- Java Applets
- Flash content

2. Quickstart

The following section describes the basic steps involved in making your Web site available for your customers to use. 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

These steps are described below. For more information about all the other options, read the corresponding chapter in the Merchant User Guide or consult the online user help.

1. Sign in

Details on how to access the Administration section of your site are given 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 information*, *on page 51*.

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 47*.

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** ›› **Pages – 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 *Contents*, *on page 139*, 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

What you activate all depends on what you want to offer your customers on the Web site. Depending on the topic you have selected, the most important associated page elements will be displayed on each Web page. You will get information on the basic principles of design and working with page elements in *Design*, *on page 171* and *Page elements and navigation*, *on page 181*. To view an overview of all available page elements, proceed as follows:

1. Click Quick design to start.
2. Move to the header, and click Insert page element

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 171* contains a detailed description of how to customise the layout and design.

6. Create products

If you want to operate an online shop, and sell products or services, you must now create some products and assign them to categories. To create a product, click **Products** in the menu bar and then **New**.

The most important data you need to enter is a product number, product name, list price, and the 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 103*.

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 87*
- Delivery and payment methods; see *Delivery and payment*, *on page 62*
- E-mail settings for various notices and confirmation messages; see *E-mail settings*, *on page 90*

This completes the basic settings needed to operate your shop. A complete description of all parameters and settings can be found in *Settings*, *on page 53*.

8. Testing

Before publishing the Internet address of your web site, you should test it as a customer. 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.

The context-sensitive help for the individual functions will refer back to these basic principles where necessary. Read the next chapters in sequence in order to obtain an overview, or review them individually to refresh your memory.

In the online help section, you can use the table of contents to browse through each chapter and call up the individual help topics.

General page layout

All Administration pages are based on the basic functional structure as shown in *Figure 1*.

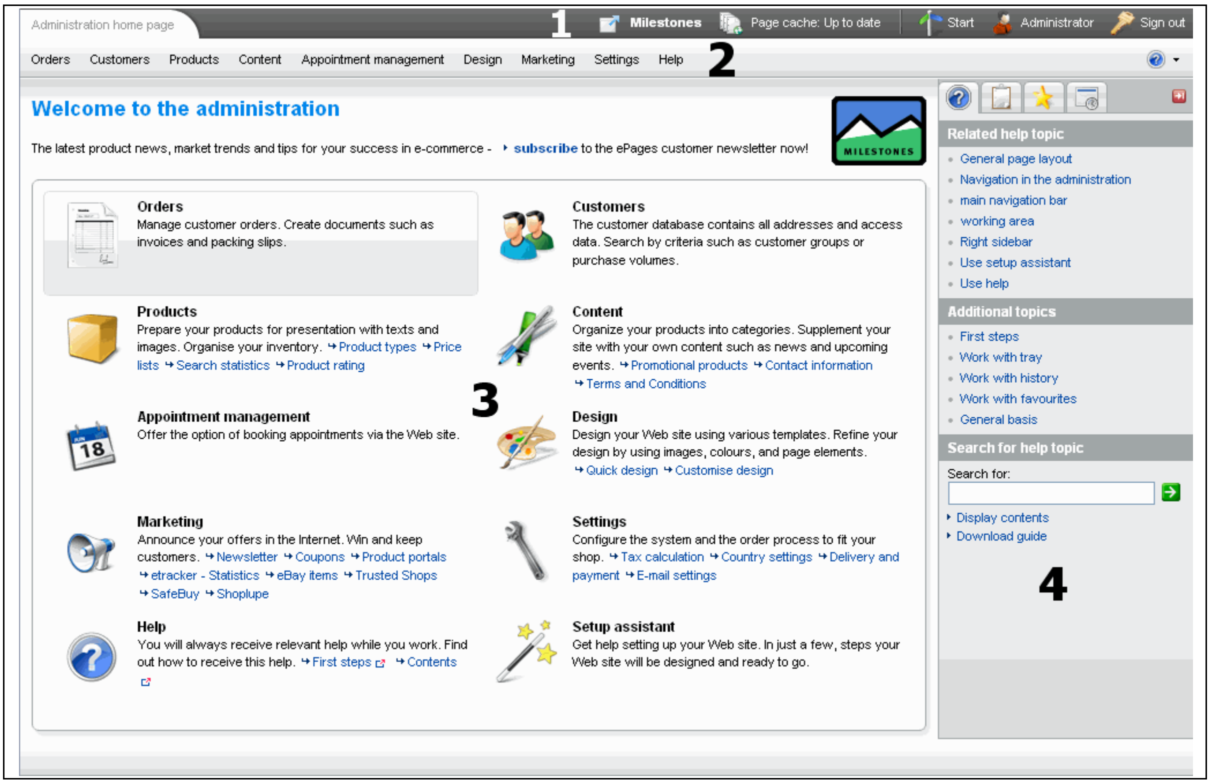


Figure 1: Structure of Administration pages

The areas are:

- Administration navigation (1); see *Administration navigation, below*
- Menu bar (2); see *Menu bar, on page 20*
- Working area (3); see *Working area, on page 21*
- Sidebar (4); see *Sidebar, on page 21*

Administration navigation

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

Web site link

This link bears either the name of the Web site or the name of the current page that you are editing (e.g. Product details). You can use this link to call up the corresponding Web site view of the page. For more information, see *Web site views, on page 25.* The icon placed in front of the link has the following meaning:

Table 1: Key for icons by Web site link

Icon	Description
	This Web site is open for visitors.
	This Web site is closed for visitors.

Page cache link

This link displays the status of the page cache. For more information on the page cache, see *Page cache/optimisation, on page 54.* The following statuses are indicated by the link and the associated icon:

Table 2: status icons for optimisation

Link and icon	Description
Page cache: Up to date  (green)	The page cache is active, some pages are loaded from the cache. There are no outdated pages. Clicking this link has no effect.
Page cache: Update now  (red)	The page cache is active, some pages are loaded from the cache. Relevant information has been modified. There are probably some outdated pages. It is recommended that you update your pages. Clicking this link will cause the pages to be updated.
Page cache: Activate now  (grey)	The page cache has been disabled. All pages are regenerated each time they are displayed. Click this link to activate the page cache and update the pages.

Home link

Click this link to call up the Administration home page.

Administrator link

Click your administrator name to call up the page containing the user settings for the administrator. See *Administrator information, on page 51.*

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.

Menu bar

The menu bar provides access to the main modules (managers) of the Administration area. It always remains the same.

A submenu is provided for each module. The submenu contains the main functions for the corresponding module. You can call up a submenu by moving the mouse pointer over or clicking the corresponding module name.

To call up a function from a submenu, simply click the name of the function.

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 3*. 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 23*
- Tray; see *Tray*, *below*
- Favourites; see *Favorites*, *on page 22*
- History; see *History*, *on page 22*

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 information*, *on page 51*.

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 last entry in the tray; see *Figure 2*.

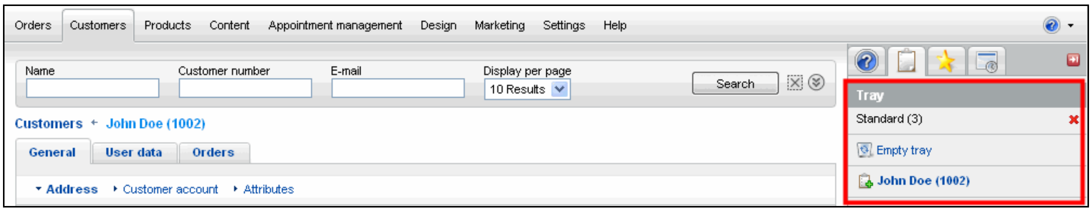


Figure 2: adding a single object to the tray

This object has not yet been added to the tray. To do this, click the name of the object, or the icon. 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.

- 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 Processes in Tables, on page 27*.

On certain pages it is possible to add objects from the tray. On these pages, the *Add from tray* link is available. 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. The page last opened is displayed in bold at the beginning of the list.

To activate the recording of history and to display the list, click the link **Record and display history**.

To deactivate the recording of history and to display the list, click the link **Stop and hide history**. If the list is hidden, the history is not recorded further, although the existing list is retained until you sign out of the Administration area.

By default the history function is deactivated.

To empty the list, click the link **Empty history**. When you sign out, the history is cleared.

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

Favorites

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 bottom entry under *Favourites*. 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.

To remove an individual entry from the list, click the ✖ icon. If you want to clear the list, click the link **Delete all 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.

The individual sections can be selected by clicking the section title; see *Figure 3*.

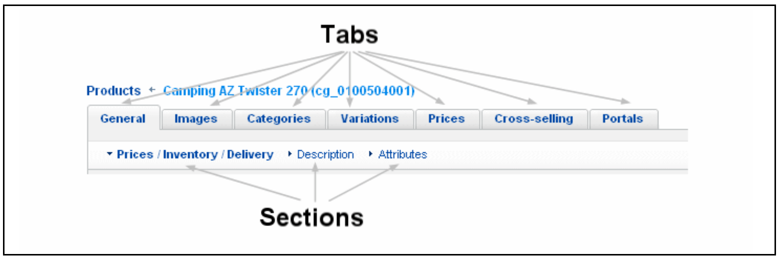


Figure 3: tabs and sections

Help

The application includes a comprehensive Help system. Context-sensitive Help explains the functionality of the current page. Field-specific Help explains the functionality of individual data entry fields. This help is called "short info". Related topics refer to related settings or function on another page.

The following Help components can be accessed:

- Help centre, see *Help area*, *below*
- Context-sensitive Help; see *Context-sensitive Help*, *on page 24*
- Short info, see *Short info*, *on page 25*

Help area

The help centre provides an overview of all help possibilities in the application. The help centre can either be opened by clicking a link on the main navigation bar or a link on the home page; see *Figure 4*.

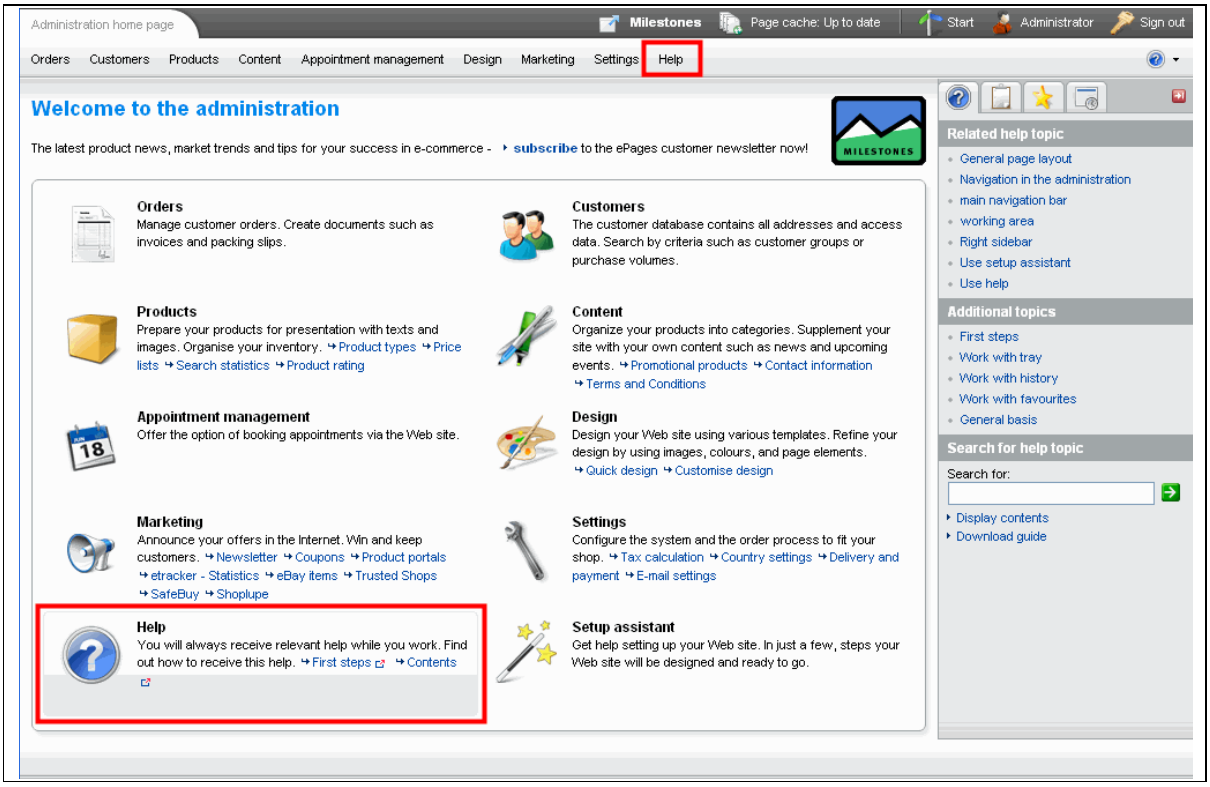


Figure 4: Access to the Help centre

In the Help centre, you can find out how to open the context-sensitive Help and which additional Help functions are available.

Context-sensitive Help

The sidebar displays a list of relevant Help topics for each page. This list is split into two groups. The first group lists topics that describe the functionality of the page being displayed directly. The second group lists more general Help topics, that explain how the current functions interact with other functions or settings.

The Help content is displayed in a new window. Alongside the content, you will also find the following functions:

Go back one page

Go forward one page

Display the table of contents for the entire Help section

Save a bookmark for this page

Print the current page.

Download the guide as a pdf

Short info

Short info is a way of receiving specific help for individual elements on a page, such as entry fields or drop-down menus. Tips about usage or entering information are displayed in the Short info. This sort of Help is available if the  icon is displayed after the element in question. Hold the cursor over the icon to display the Help window.

Related topics

The current page may contain links to related topics on other pages: functions or settings which are related to the current page. These references are displayed in a special display area; see *Figure 5*.

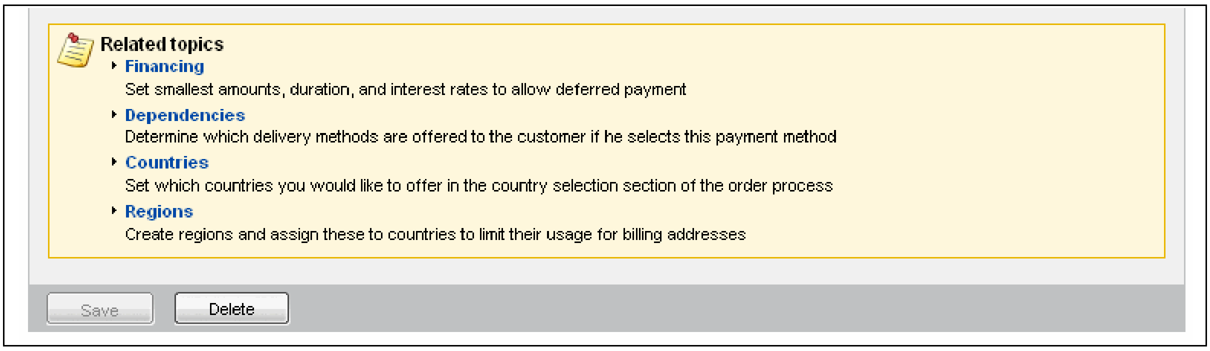


Figure 5: Related topics

Using these links you can open the specified page immediately.

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 long as the values on the page remain the same, the save button is displayed grey and is inactive: 

.

If you have made changes, the button is activated and appears with a green border: 

.

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 call up the latest version of the pages of your Web site in a new window by clicking the first link in the Administration navigation bar; see *Administration navigation*, *on page 19*. 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 *Styles*, *on page 175*.

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.

If the record is displayed as a link, click it to display details.

In some tables, the information is augmented with symbols. These symbols are often links with varying meaning and functionality. The meaning of the icons is explained in the respective chapter.

If there are more records in a table than can be displayed on one page, the display can be managed using paging, see *Paging*, *on page 28*.

The functions are explained individually below.

Adding records

The following methods are available for creating new records:

- Manual record entry

  The last row in the table has a yellow background. Instead of entries there are entry fields and, in some cases, drop-down menus. Enter the information in the fields and save by clicking **Save**. It is possible that the record is inactive and not yet visible. Click the name to edit the details and set the record to visible. This will activate it.

- Add information from the tray

  If you can add information from the tray to the table, the last row in the table with a yellow background takes the form of a link, for example **Add products from tray**. Click the link to insert the records. For more on working with the tray, see *Tray*, *on page 21*.

Which methods you can use are determined by the table.

Working with Entries

You can modify entries in the following ways:

- manual modification in the table

  If multiple or individual entries are shown in entry fields, their value can be modified here directly. Save your entries by clicking **Save**.

- open the detail view and modify the entries in the detail view

  If the ID is shown as a link in the entry, click this 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 Processes in Tables*, *on page 27*.

Deleting entries

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 Processes in Tables*, *below*.

Furthermore, see *Deletion confirmation*, *on page 51*.

Selecting in tables

If a table contains records which can be selected, the first column will contain a check box for each record.

Click the check box to select a record. To remove the check mark, click the check box again. 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 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 Processes 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.

The following general actions will not be explained in the rest of the book:

Table 3: general batch processing commands

Command	Comment
Add to tray	Selected items are added to the tray; see *Tray*, *on page 21*.
Set visible	See also *Visibility*, *on page 31*.
Set not Visible	See also *Visibility*, *on page 31*.
Duplicate	Generate an exact copy of the original item. The ID will not be copied. A new value will be assigned as the ID has to be unique.
Delete	See also *Deletion confirmation*, *on page 51.*
Delete all (...)	Deletes all records from the table; selection is not necessary

The individual chapters only explain specific batch processing actions or describe particular features relating to the general actions.

Sorting using column headings

In some tables, it is possible to sort the contents in columns. In these tables, the headings are displayed as links. Next to the heading are two arrows.

Clicking a link sorts the table according to the value in this column. The small arrows to the right of the column heading indicate the sort direction of the currently active column. The left arrow pointing upwards indicates ascending sort order. The right arrow pointing downwards indicates descending sort order.

Clicking the column heading or the arrow reverses the current sort direction as indicated by the filled arrow.

In multi-page lists, all pages are sorted. The first page is displayed after sorting.

Sorting using key

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 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**.

The sorting key is entered in increments of 10 so that new records can be sorted more quickly. 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.

Paging

Paging deals with displaying and navigating the individual pages of a table. This is necessary if the table contains more records than can be displayed on one page. In this case, the display and navigation elements are displayed in the footer of the table:

On the left, the current page number and the total number of pages is displayed. The number of records in the table is displayed on the right.

In the middle of the footer, the elements for page navigation are displayed. The numbers are the numbers of the pages which can be accessed directly. To do this, click the number of the desired page. The current page is framed with square brackets.

To page through the list, use the arrows " ‹ " and " › " to go to the previous page or to go to the next page. If you want to go immediately to the last page, click " ›| " or to go to the beginning of the list, click " |‹ ".

If the list is more than 10 pages long, 10 page numbers will always be displayed along with the current page. In order to see the next or previous 10 page numbers, click one of the page numbers on the end of the list.

Search

Searching is used to filter and group objects. The results are shown in a table. If searching is possible on the page, a search box is displayed in the upper part of the working area. An example of this can be seen in *Figure 6*.

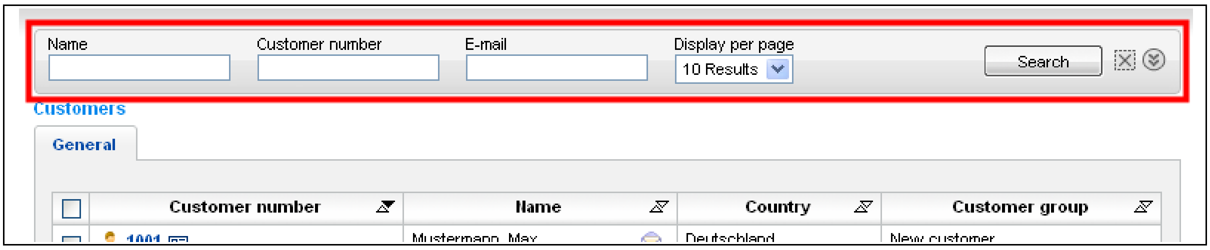


Figure 6: Search box

The search box consists of entry fields and drop-down menus. Enter the terms you want to search for in the entry 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 for portions of the search text you do not wish to enter or cannot enter. Capitalisation is not considered. The system searches for character strings in which the search text appears, regardless of where it is in the target text.

When searching for certain information, you can also use time and date as a search criterion. Date and time information must be entered in the format of the administration language used. To select a date use the icon. See also *Date entry fields*, *on page 30*.

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.

Use the following buttons to activate various functions:

Button	Description
Search	Start the search according to the entries in the search fields; After entering the search terms in the fields, click the button to start the search. The results will appear in the table. You can also start the search by pressing *Enter*.
	Reset the search. All entries are deleted from the search fields. If you perform a search with this setting, all records will be found.
/	Switch between simple and advanced search; If you select the advanced search option, further fields relevant to the object are added to the search box. Using this you can refine the search further.

Using the drop-down menu *Display per Page* you can set how many rows are displayed on each page in the table.

Specific search details will be discussed in the relevant chapters.

Language Dependencies

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 information*, *on page 51*.

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 87*.

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

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 images, files, and other attachments.

At all places where language-dependent content must be maintained, the corresponding entry fields for different languages are displayed; see *Figure 7* for an example.

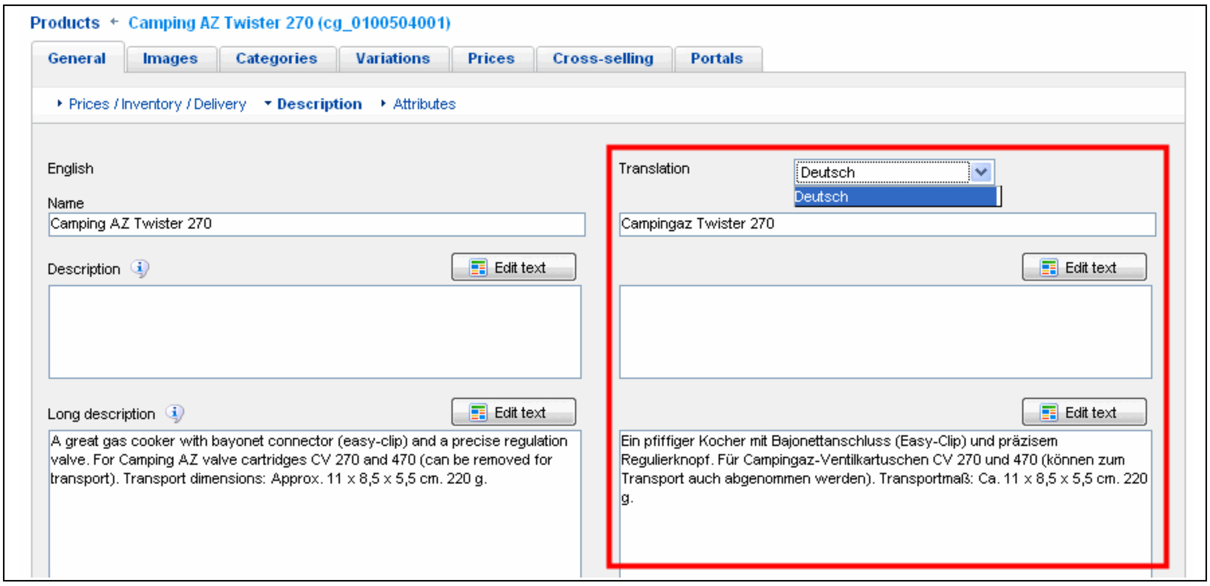


Figure 7: translation fields

The language of the text is set using a drop-down menu and the translation is entered. The procedure is the same for images and attachments. Select the desired language and upload the correct files for this language.

The drop-down menu contains the languages you selected in *Languages*, *on page 87*.

The language settings often require different formats for numbers and dates. These are formatted according to the regional settings which are selected while choosing the administration language. An entry field is displayed to enter the price in each currency. Enter the values in a format according to the administration language. The prices will be displayed in the shop according to the language.

Date entry fields

Date fields have an aid to facilitate selection of a day of the week and entry of dates in the right format. This is a fold-out calendar which can be opened by clicking the 18 icon; see *Figure 8*.

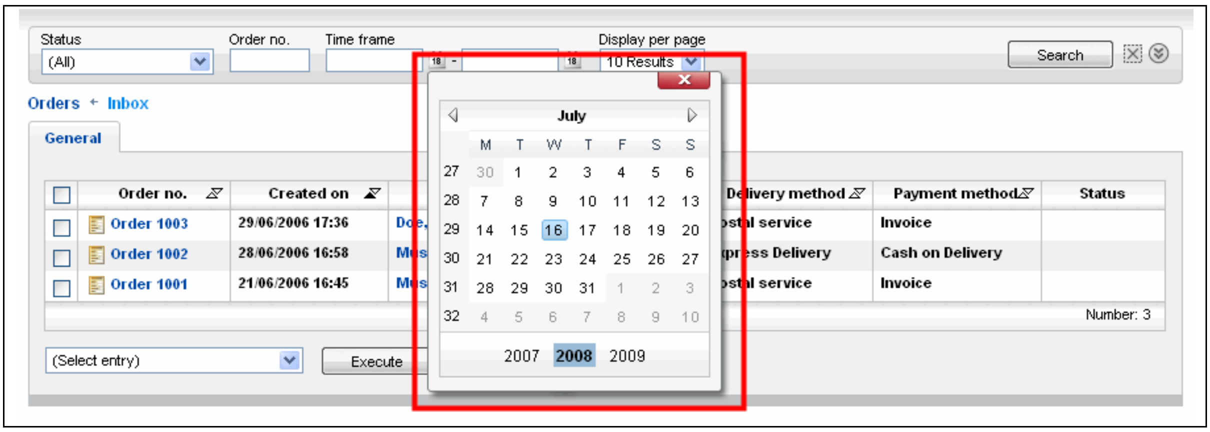


Figure 8: fold-out calendar

If a date is needed in an entry, for example the validity period for a price list, you can select the date from the calendar.

Click the icon to open the calendar. If necessary, set the time. Select the desired date. The information will be copied into the entry field.

Default settings

A default setting can be configured to provide the standard setting for a value. At various places in the shop, the customer must select a value, for example payment or delivery method, or product variations. For each selection you can define a standard value using *Default* as shown in *Figure 9*.

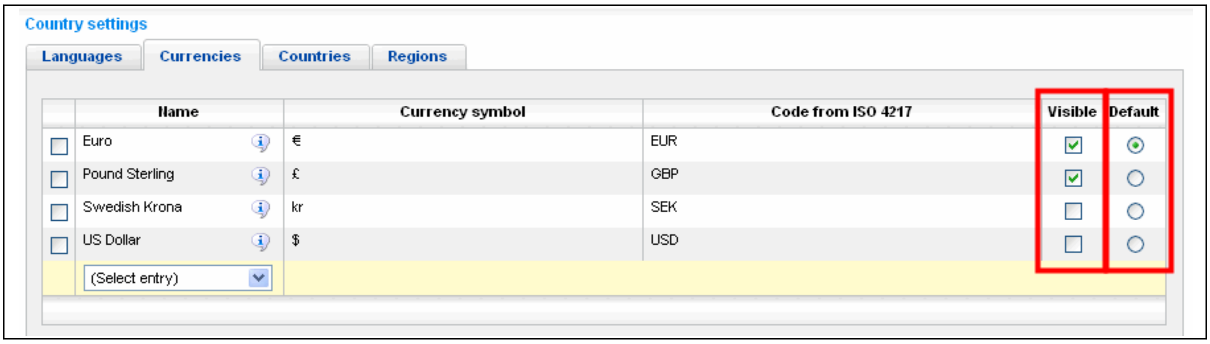


Figure 9: default settings and visibility

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

This default setting remains valid until the customer selects a different value. 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. Using this feature you can prepare settings and functions, for example for products, and make them available to the customer at a later date.

You can manage the visibility using option buttons in the detail views or using the check boxes in the tables as in *Figure 9*.

Click the check box of the element which should be visible in the Web site. Save your entries by clicking **Save**.

> 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.

Navigation history

The navigation history shows your current location in the application. It contains the links which lead to this point, according to the page structure. Using the navigation history you can track the page hierarchy step by step. An example is shown in *Figure 10*.

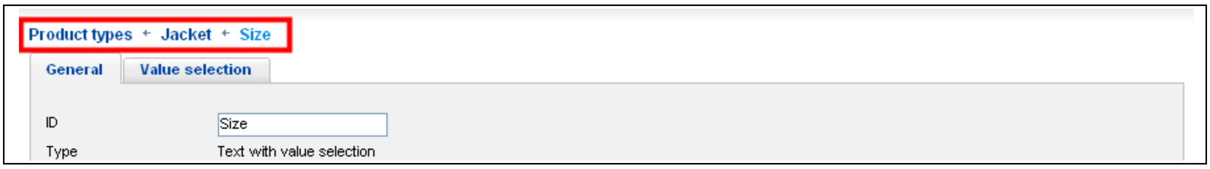


Figure 10: example of navigation history

In this example, you are currently located in the detail view of a product attribute. Clicking **Jacket** takes you to the details of the *Jacket* product type. Clicking **Product types** takes you to a list of all product types.

Attribute types

Attributes are used to describe properties of objects. For example, customers have attributes such as salutation, username or e-mail address. 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. In other words, you define what kind of values you or the customer can enter into the fields. The individual attribute types have the following meanings:

Table 4: 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	Invoice Rechnung
Text with value selection	Text for building a set of possible values	Multiple values can be assigned to the attribute. The values are displayed in a drop-down menu. The user selects one of these. For more information, see *Using text with value selection, on page 33*.	Material: Wool Linen Leather
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 Dependencies, on page 29* and *Using text with value selection, on page 33*.	Material: Wool/Wolle Linen/Leinen Leather/Leder
Options	Selection	Multiple values can be assigned to the attribute. Every value is displayed with a check box. The user can select multiple values. See *Using options, on page 34*.	CD DVD
Language-dependent options	Selection	Can be used as options; one value can be entered for each active language	Optical mouse Optische Maus English keyboard Englische Tastatur
Customer options	Selection	This allows you to offer options for appointments that the customer can select when booking an appointment. See *Resource details - Options, on page 166*.	

Type	Description	Usage	Example
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.		12.06.2008
Time	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*	12.6.2008 11:11
File	File name	You can use this field to assign a file to a product.	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 133*. Create the preset values in the attribute details on the **Value selection** tab as shown in *Figure 11*.

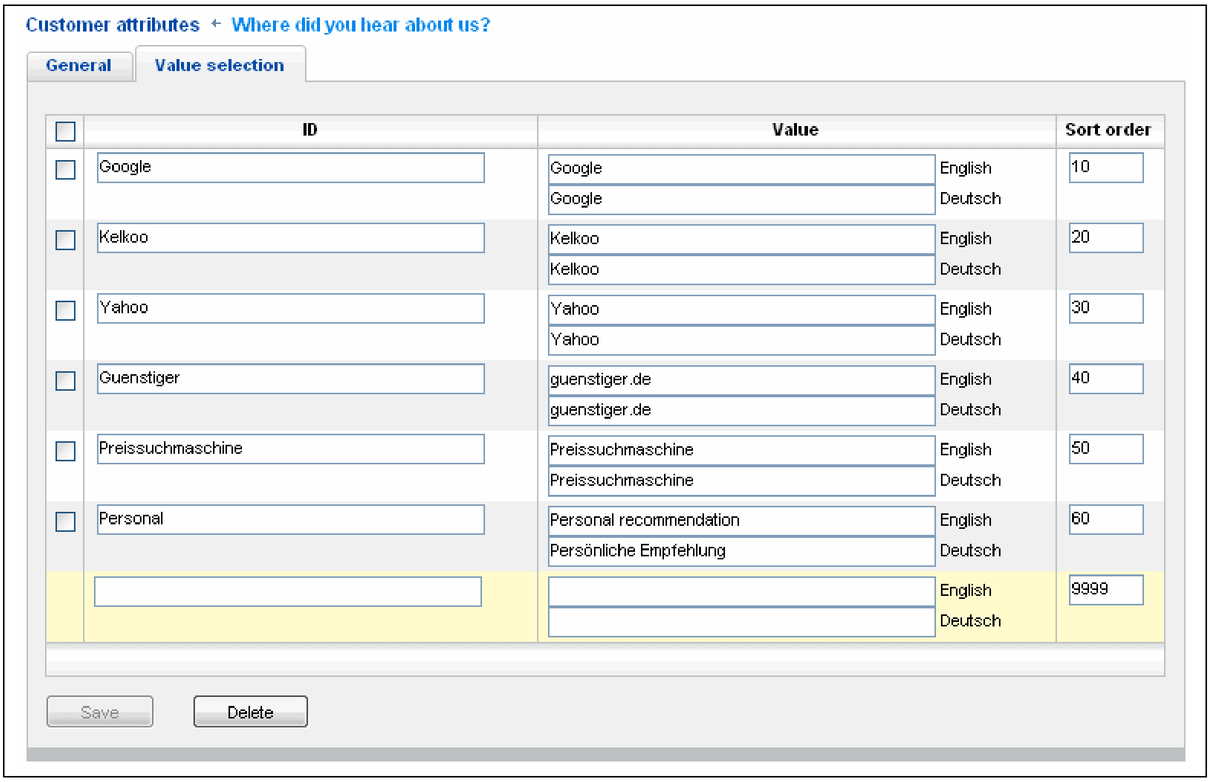


Figure 11: Value pool for the attribute type *Language-dependent text with value selection*

Save your entries by clicking **Save**.

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

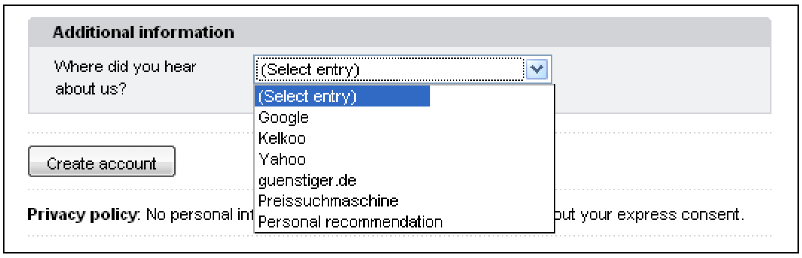


Figure 12: using an attribute with value selection

You can use these attribute types in the administration area, for example, for product attributes. This saves you time when creating elements, helps you avoid mistakes and ensures valid values are entered.

You can read how to use attribute types for product variations in *Creating a variation*, *on page 115*.

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 13*.

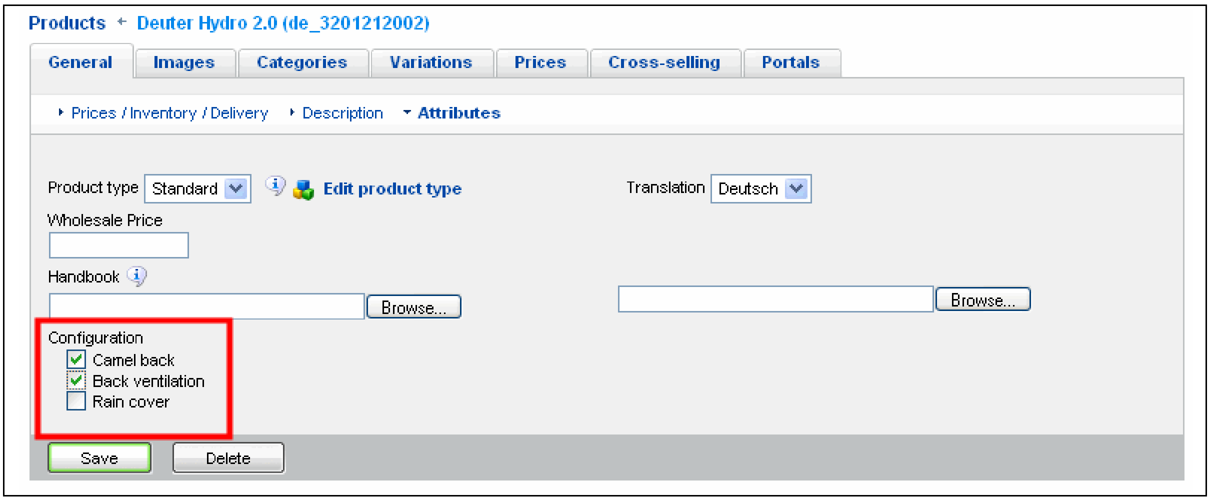


Figure 13: attribute type options

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:

- Using HTML formatting commands in the text directly; see *Using HTML code in text fields*, *below*
- Using the integrated WYSIWYG editor; see *WYSIWYG editor*, *on page 36*

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 *Pages – Preview*, *on page 140* and *Multifunction bar and content*, *on page 141*. 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.

Using HTML code in text fields

To do this, HTML tags are used directly in the text to format and design the content. For simple formatting, the functions *Bold*, *Italics*, or *Underline* are the most useful. The tags listed in *Table 5* will cover most if not all of your requirements.

Table 5: Selection of HTML formatting tags

Tag	Description	Usage	Effect
	The following text is shown in **bold**.	Bold	**Bold**
<i>	The following text is shown in *italics*.	<i>italics</i>	*italics*
<u>	The following text is shown underlined.	<u>underlined</u>	underlined
<s>	The following text is shown~~struck out~~.	<s>struck out </s>	~~struck out~~
 	A carriage return is inserted at this point in the text.	New row	New row

You can also use any other HTML tags.

> **Note:** For further information about design options using HTML, we recommend consulting specialist publications or sites such as http://www.selfhtml.org/ (only partially in English).

WYSIWYG editor

As well as using HTML tags directly, the program offers a second 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. You format the text not with HTML tags directly but using buttons with formatting functions. 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:

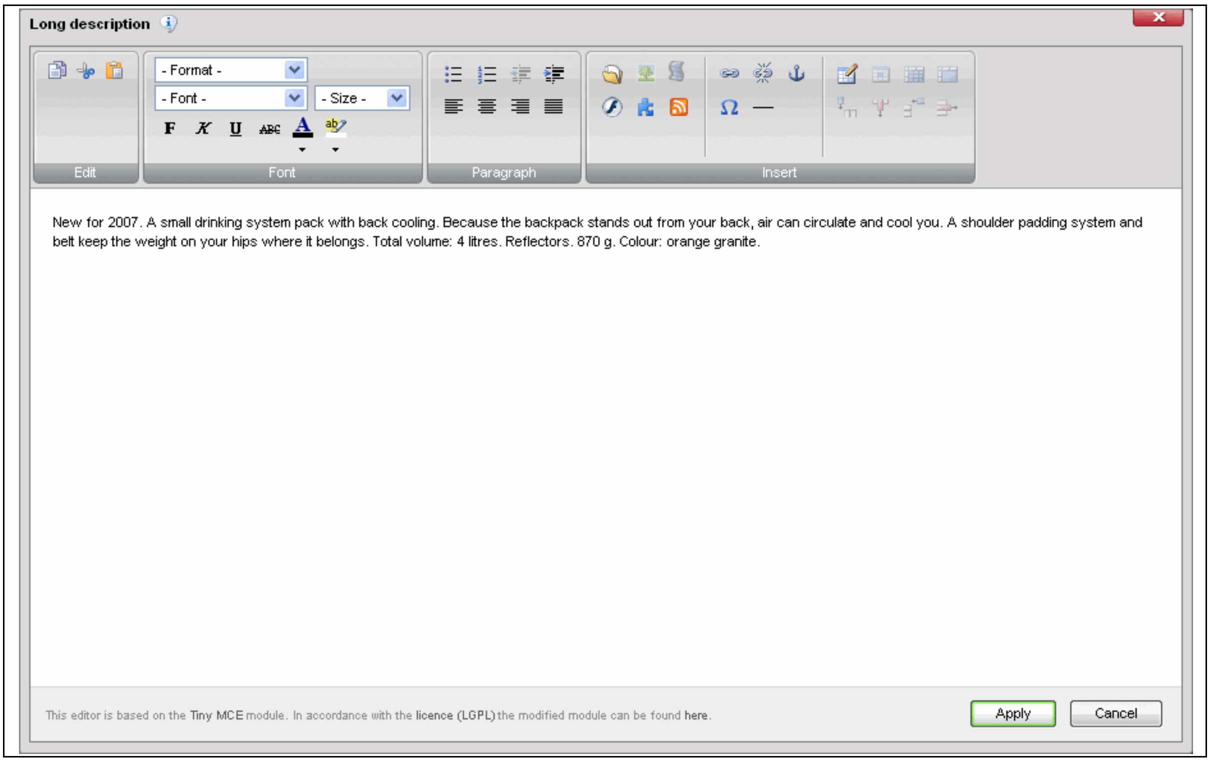


Figure 14: WYSIWYG Editor

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

The individual functions are started by clicking buttons. If you hold the cursor over a button, a tag appears explaining the button. If the button is greyed out, this function is not currently available.

A function is applied at the current cursor position. Tables or multimedia elements are inserted at this position. When formatting text, select the text you wish to format before activating a function.

The functions are grouped together in function groups. The following groups exist:

- Edit; see *Edit, on page 37*
- Font; see *Font, on page 37*
- Paragraph; see *Paragraph, on page 37*
- Insert; see *Insert, on page 37*

Edit

This group contains all the functions that can be used to cut and copy portions of text.

Table 6: Formatting text in the WYSIWYG editor

Function	Description
	Cut selected areas and paste these in the tray
	Copy selected areas into the tray
	Insert the content of the tray at the current cursor position

Font

This group contains all the functions that can be used to format the text. They are used in the similar way as in other word processors such as Word. These functions allow you to select the font, font size and colour. For more on selecting colours, see *Colour selector, on page 43*.

Paragraph

This group contains all the functions that can be used to position text on the page. Functions to indent paragraphs and create bullet lists are also included. In general, you must highlight the text to be modified, and then click the corresponding function.

Insert

This group contains all the functions that can be used to insert and edit tables, links, files, images and other multimedia elements. The following functions are available:

- Insert file; see *File management, on page 44*
- Edit image properties, see *Edit image properties, on page 38*
- Edit media element

  Depending on the type of media, various properties are displayed on the details page. These are the same properties that were edited when inserting the corresponding media element. See also *Flash, on page 41*, *External page content (gadgets), on page 42*, and *RSS, on page 42*.

- Insert Flash; see *Flash, on page 41*
- Insert gadget; see *External page content (gadgets), on page 42*
- Insert RSS feed; see *RSS, on page 42*
- Insert/edit link; see *Insert link / Remove link, on page 38*
- Insert anchor; see *Insert anchor, on page 39*
- Insert symbol

  Click the relevant icon to insert the symbol at the current cursor position. Clicking this icon opens a window containing the available special characters. Click the desired special character.

- Insert separator

  Click the icon to insert the horizontal separator at the current cursor position.

- Insert and editing table; see *Insert and edit tables, on page 39*

Edit image properties

To edit the properties of an image you have already inserted, select it and then click the icon. A new window will open for editing.

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://...*. You may also enter a description and a title for the image. The description is also important for search engines.

Save your entries by clicking **Apply**.

You can also select a specific layout for each image. To do this, click the **Advanced** tab. Here you can position the image in relation to the text, set the distance to the text, and activate a border for the image. Changes are displayed in the preview.

Insert link / Remove link

Insert links by clicking the icon. Select the text the link should be added to and then click on the icon. This opens a window where you can enter the desired URL; see *Figure 15*.

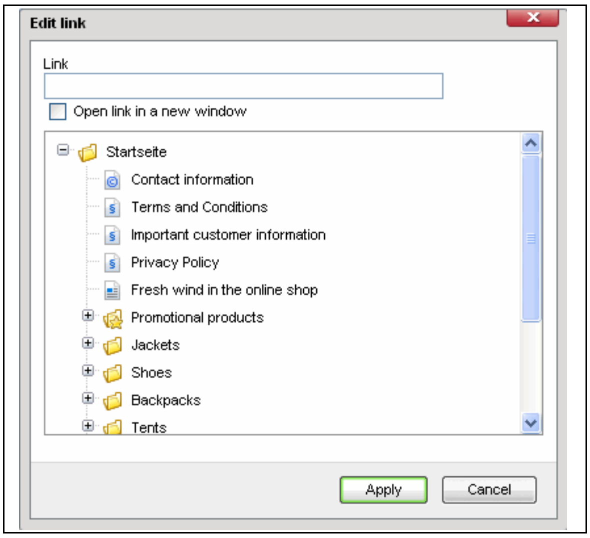


Figure 15: general parameters for links

If you have not highlighted any text, you can enter the corresponding text in the *Link text* field.

Enter an Internet address in the *Link URL* field. Always use the following format: *http://...*.

You can also link to specific pages of your Web site as created in the administration area. These pages can be seen in a tree structure in the bottom part of the window. Select the desired page. The name and address of this page are transferred to the entry fields.

The list also contains any anchors you have added to the text in the lower section. See also *Insert anchor, on page 39.*

Click **Insert** to apply the settings.

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. This function is only available when the icon is displayed.

Click the icon to place an anchor. This opens a new window. 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 , on page 38*. Choose the desired anchor from the list.

Insert and edit tables

Click the icon to insert a table. This opens a window where you can configure the basic parameters for the table; see *Figure 16*.

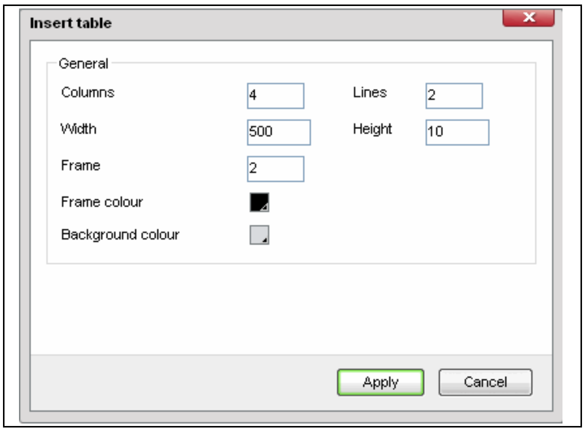


Figure 16: Basic parameters for tables

The various fields have the following meanings:

Table 7: basic parameters for tables

Field	Comment
Columns	
Lines	
Width	Indicates the width of the entire table in pixels
Height	Line height in pixels
Border	Indicates the width of the border in pixels
Border colour	Use the colour selector in order to select a colour; see *Colour selector, on page 43.*
Background colour	Use the colour selector in order to select a colour; see *Colour selector, on page 43.*

Complete the selection by clicking **Apply**. This inserts the table at the current cursor position.

You can edit the properties of an existing table by using the buttons next to the button. The relevant buttons will become active when you position the cursor in the table.

The following functions are available:

Table 8: table manipulation functions

Button	Function
Table properties	The basic parameters of the table are displayed and can be edited.
Cell properties	For more information, see *Edit cell properties below.*
Add row above current row	A new row is inserted above the current row.
Delete row	Current row is deleted.
Add column on the left	A new column is inserted to the left of the current column.
Delete column	Current column is deleted.
Split cells	For more information, see *Merge/split cells, on page 41.*
Merge cells	For more information, see *Merge/split cells, on page 41.*

Edit cell properties

If you want to edit the properties of a cell, place the cursor in the cell and click . You can edit the properties in the new window; see *Figure 17.*

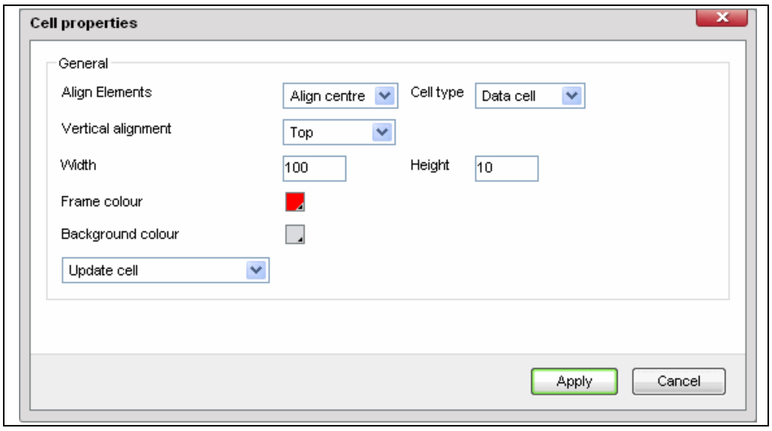


Figure 17: Cell properties

The various fields have the following meanings:

Table 9: Cell properties

Field	Comment
Align elements	Horizontal alignment of the text in the cell
Vertical alignment	Vertical alignment of the text in the cell
Width	
Height	
Border colour	The border colour of the cell overwrites that of the table for that cell. Use the colour selector in order to select a colour; see *Colour selector, on page 43.*

Field	Comment
Background colour	The background colour of the cell replaces the background colour of the table for the cell. Use the colour selector in order to select a colour; see *Colour selector, on page 43*.
Drop-down menu with values for effected cells	Here you can set which cells are effected by the settings. This can be just the current cell or all cells of the table.

Click on **Update** to apply all settings.

Merge/split cells

You can merge cells together to one combined cell. This can be done using the following methods:

- Select the cells that you want to merge. Do that by moving the mouse over the affected cells while keeping the left mouse button pressed down. Then click the icon. The cells are joined together into one.
- Place the cursor into a cell and click the icon. This opens a new window; see *Figure 18*.

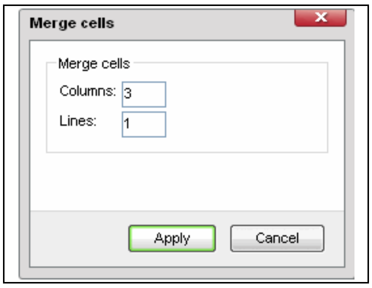


Figure 18: Merge cells

Use this option to define the size of the merged cell.

When merging cells from within a cell, you should be aware of the following:

- The starting point is the current cell, the cell you called the function from.
- The cells to the right and below the current cell are effected.
- Use the *Columns* and *Rows* fields to define which cells will be merged. The current cell is also taken into account in the number.
- The cell contents will be joined and displayed in the combined cell.
- If the number entered in the *Columns* field is larger than the number of available cells, the function will only be applied to the available cells. The table will not be expanded.

The *Split cells* function allows you to split merged cells. This will divide the merged cell into the original number of cells. The content to be merged will be written in one line.

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.

When you have clicked the icon, a new window allows you to select various types of multimedia elements. The area for selecting and inserting Flash page content is expanded. This allows you to select between the Flash categories *Eye Catcher* and *Intro*.

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 *Home page*, *on page 147*.

To select a template click its name. The details page for the Flash element is displayed. Enter your text and define its size. You can enter an Internet address if required. If an Internet address has been stored, visitors can click the Flash component and jump to the specified page. You can also define a background colour. See also *Colour selector*, *on page 43*. Click **Update** to check your changes in the preview.

Click **Apply** to insert the Flash element into the text field at the cursor position.

Click **Overview** to return to the list of Flash templates.

To cancel the command and return to the editor, click **Cancel**.

External page content (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 a daily joke.

When you have clicked the icon, a new window allows you to select various types of multimedia elements. The area for selecting and inserting gadgets is expanded.

To select a gadget, click the name or the preview image. The details page for the gadget is displayed. Some gadgets allow or require you to configure settings. Click **Update** to check your changes in the preview.

Click **Apply** to insert the gadget into the text field at the cursor position.

Click **Overview** to return to the list of gadgets.

To cancel the command and return to the editor, click **Cancel**.

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 summarised 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.

When you have clicked the icon, a new window allows you to select various types of multimedia elements. The area for selecting and inserting RSS feeds is expanded. The RSS feeds are sorted according to topic.

To select an RSS feed, click the name or the preview image. The details page for the RSS feed is displayed. You can configure certain settings here. Try these settings out to optimise the way the RSS feed integrates into your page. Click **Update** to check your changes in the preview.

Click **Apply** to insert the RSS feed into the text field at the cursor position.

Click **Overview** to return to the list of RSS feeds.

To cancel the command and return to the editor, click **Cancel**.

Uploading images

You can load images using an Open file dialog in the administration. A functional area is shown for this at the correct place in the corresponding page. On this area, you can see the Upload button. To upload files, click the Upload button. The *Browse for files* dialog is then opened. Search for the desired file in your file system and confirm by clicking **Open**. In some instances you can also enter the filenames directly in an entry field.

To delete the current image, click the icon.

Notes on background images

Matching templates are loaded for the background images in each style. 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. Do this by clicking **Delete template** , which is then displayed. 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. Select *Yes* if the image should fill the whole page.

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 left side you can see two tabs – **Colour selector** and **Colour schemes**. 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. The colour that is displayed in this box can be applied. The parameters for the current colour are automatically entered in the entry field.

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.

The WYSIWYG editor allows you to manage all the files that can be inserted using the text fields.

You can also use file management in conjunction with uploading images in the design process. In this case, its usage is limited to image files.

The file management system allows you to create a folder structure into which you can sort your files. You can import the desired file into the text from this structure.

In addition, it also incorporates an image database made available by your provider. 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 displayed the folder structure. Above this is a command bar. 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:

Table 10: Commands in file management – left section

Function	Comment
Create new folder	A new folder is created in the folder structure. This new folder is created as a subfolder for the currently selected folder.
Delete files	All highlighted files in the selected folder will be deleted.

Function	Comment
Copy files	This function allows you to copy image files from the image database into your site structure. Proceed as follows: 1. Select the target folder. 2. Select a folder in the image database. 3. Highlight the relevant images. 4. Under Commands click Copy file.
Rename folder	The selected folder can be renamed. Enter the new name in the entry field that is displayed and confirm by clicking **Save**. This is only available for folders that you have created yourself.
Delete folders	The highlighted folder is deleted. This is only available for folders that you have created yourself.

The right side of the file management control displays the files in the current folder. Above this is the area that can be used to upload files. The following functions are available:

Table 11: Commands in file management – right section

Function	Comment
Upload files	This area is used to upload files to the file management system. For more details, see *Uploading images*, *on page 43*. The files will be saved in the selected folder.
Apply file	Select the desired file and click **Apply**. The file is inserted into the text at the current cursor position. The file management control is closed.
Preview	Double-click a file. The file is displayed in a new window.
Delete file	Click the icon. The file is removed from the list.

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*, *on page 46*. 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. Since exporting generates CSV files, you can use this to generate a template for import files. For more on CSV files, see also *Editing csv files with Microsoft Excel*, *on page 47*. Use of an export file as a template for the import file ensures that you correctly spell field names or column names.

In the areas where import and export are possible, the function is displayed in the context menu. Click the **Import and export** link. The page that is displayed is used for both *Import* and *Export*.

> 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 various fields have the following meaning for the export:

Table 12: parameters for exporting product data

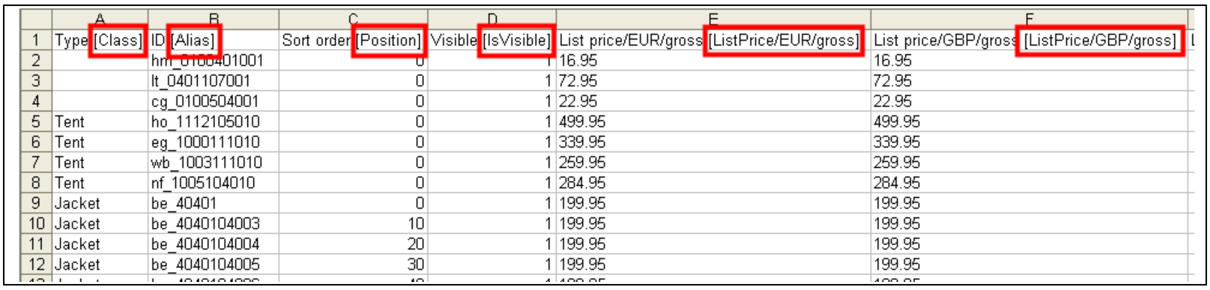
Field name	Description	Field type	Example
Object Type		Drop-down menu	
Formatting	Regional setting for the data format in the export file, for example, for currency or date information. The selection also determines the corresponding separator symbol.	Drop-down menu	
Coding	Selection of the character set to be used. The entry *Default (xxxxxx)* 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.	Drop-down menu	
Delimiter	Setting for the delimiter used to divide data fields in the export file This setting overwrites the delimiter setting entered in *Formatting*.	Drop-down menu	
Languages	Setting that defines which fields relevant for a language will be exported	Drop-down menu	

Once you have entered all the settings, click **Export** to start exporting. To complete the process, you must enter a target directory for the export file to be saved.

> 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

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. *Figure 19* shows an example.



	A	B	C	D	E	F
1	Type [Class]	ID [Alias]	Sort order [Position]	Visible [IsVisible]	List price/EUR/gross [ListPrice/EUR/gross]	List price/GBP/gross [ListPrice/GBP/gross]
2		hm_0100401001	0	1	16.95	16.95
3		lt_0401107001	0	1	72.95	72.95
4		cg_0100504001	0	1	22.95	22.95
5	Tent	ho_1112105010	0	1	499.95	499.95
6	Tent	eg_1000111010	0	1	339.95	339.95
7	Tent	wb_1003111010	0	1	259.95	259.95
8	Tent	nf_1005104010	0	1	284.95	284.95
9	Jacket	be_40401	0	1	199.95	199.95
10	Jacket	be_4040104003	10	1	199.95	199.95
11	Jacket	be_4040104004	20	1	199.95	199.95
12	Jacket	be_4040104005	30	1	199.95	199.95

Figure 19: Field names in the header of the import file for products

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.

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

- *Column does not exist in the file*: The values in the database will not be changed.
- *Column does exist in the file, but no data entered*: The corresponding data is deleted in the database.

- *Column does exist in the file, and contains data*: 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 13: 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 formats in the import file must match the formatting setting for 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	
Import file	Enter the name of the import file in this field. Either enter the name of the file with its path directly or click **Browse** to search for the file.	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. 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. 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.

The Setup assistant starts automatically when you call the Administration function up for the first time. You can start it manually 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 176*. For the basic principles of design and customisation, see *Styles, on page 175*.

Click **Next** to open the next page.

2. Pages and content

The selected design has a basic structure of pages, in which there is already a basic set of content. The suggested basic structure of the corresponding pages is displayed on the left. Each page has its own check box. You can use these check boxes to apply a page from the template to your own Web site. Do this simply by selecting the corresponding check box. When a check box is highlighted, then the associated page has already been added to the Web site.

You will see the current structure of your own Web site and its pages on the right. After selecting a template, all the pages associated with that template are highlighted and copied to the current Web site. Any pages that were already part of the Web site are retained.

If you want to remove a template page from the current Web site, uncheck the corresponding check box on the left.

The symbols have the following meanings:

Table 14: Structure symbols

Icon	Description
	This page already existed in the Web site structure before the template was loaded. It cannot be removed using the check box.
	Mandatory page Some templates contain pages that are defined as mandatory. These pages cannot be removed from the Web site structure using the check box. The check box is disabled.

For basic information on editing the structure and the individual pages, see *Contents, on page 139*.

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

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. To edit this information without using the assistant, see *Address, on page 55*, *E-mail settings, on page 90* and *Contact information, on page 151*.

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 87*.

You can upload a logo for your Web site here. See also *Uploading images, on page 43*.

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

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 61*. You also have to enter data such as the VAT registration number, etc.

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 226*.

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

5. Finish

The information you entered is displayed on this page.

Click **Back** to edit the information again, or **Finish** to apply the information.

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.

Caution: When you apply the data by clicking *Finish*, the existing data in the fields mentioned previously will be overwritten. Fields in which you did not enter any values will not overwrite the existing data.

Search 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.

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 31*.

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.

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.

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.

4. Administrator information

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 these administrator settings correspond to the general sign-in settings for users and administrators. See also *User details – Sign-in data*, *on page 56*, and *Administrator details – Sign-in data*, *on page 59*. 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 21*.

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.

Deletion confirmation

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

Here you can manage all the basic settings and methods of your system.

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 various fields have the following meanings:

Table 15: Fields for the general Web site status

Field name	Description	Field type	Example
Created on	Date Web site created	Display	Monday, 25 March 2008
Link to home page		Display	
The Web site is open/closed	Depending on the option selected, the Web site may or may not be available for customers on the Internet.	Option button	
Name of the Web site	This name is language-dependent. Page element; see *Page elements and navigation, on page 181*	Entry field, alphanumeric	Milestones
Slogan	Page element; the text is language-dependent. For more on formatting, see *Working with text fields, on page 35.*	Text field	Well prepared to meet your goals
Text when Web site closed	Information displayed to the customer if the shop is closed. This text is language dependent. For more on formatting, see *Working with text fields, on page 35.*	Text field	<h3>Short technical break...
Logo	Page element; see *Page elements and navigation, on page 181* For more on using images, see *Uploading images, on page 43.* After clicking Save, the image is displayed in the preview area. To see the image original size, click the image name or the preview image.	Entry field, alphanumeric	Logo.gif
Scale image	The image is uploaded in the optimised size (90 px). The size can only be customised during uploading.	Check box	
(Delete)	Click the icon to delete the logo.	Symbol	
Create own favicon from logo	A favicon is generated from the Web site logo; see below.	Link	

Field name	Description	Field type	Example
Favicon	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. For more on using images, see *Uploading images*, *on page 43*.	Entry field, alphanumeric	Favicon.ico

Save your entries by clicking **Save**.

Page cache/optimisation

Page: Settings ›› General settings ›› Page cache

This function controls the speed at which certain pages are displayed.

The pages that your customers see contain both static and dynamic content. 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.

Updating and creating the page takes time. The display rate of the page is therefore dependant on the proportion of the content which has to be updated.

Pages where the content does not change 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, pages which display prices need only be updated 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 96*.

The status of the page cache is displayed in the Administrator menu; see *Administration navigation*, *on page 19*.

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.

The symbols have the following meanings:

Table 16: legend for resource symbols

Icon	Description
	The function is activated for the Web site.
	The function has not been activated for the Web site.
Status bar	The status bar shows how much of a limited function is being used. A red bar indicates that the limit has been reached.

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

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 appointments. The hours on this page are the centrally maintained default hours that apply for all resources as long as no special hours have been defined for a specific resource. For more about this, see *Resource details - Appointments*, *on page 167*.

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.

Save your entries by clicking **Save**.

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 153*. In addition, you can create a user-defined page element of the type Link and create a reference to the business hours from there. For more information, see *User-defined page elements*, *on page 182*.

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.

Save your entries by clicking **Save**.

User management

The User management function allows you to edit information concerning your users and administrators; see *Users*, *below* and Administrators, on page 59.

This is also where you define the content of the registration form; see *Registration*, *on page 58*.

You can also stipulate whether only registered users can visit your Web site, and whether users can register automatically. See also *Signing in*, *on page 58*.

Users

Page: Settings ›› User management ›› Users

Users are visitors to your Web site who have completed the registration process and have been allocated a username and password. Users have specific rights. 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.

The table lists all users who have registered to use your Web site. The symbols have the following meanings:

Table 17: status symbols for users

Icon	Description
	If a user is active, then he is permitted to sign in to the Web site.
	When a user is not active, he is not permitted to sign in to the Web site.

To open the details of a user, click the name.

You can sort the table by column. For more details, see *Sorting using column headings*, *on page 28*.

Batch processing commands are available to manage the table entries. For an introduction to this, see *Batch Processes in Tables*, *on page 27*.

To create a new user, proceed as described in *Adding records*, *on page 26*.

User details – Sign-in data

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

The fields have the following meanings:

Table 18: User data fields

Field name	Description	Field type	Example
Registration process complete	The user will receive an e-mail after filling out the registration form. This includes a confirmation link. The user must click on this link in order to complete the registration process. This selects the checkbox. If the checkbox is not selected, the registration process was not completed successfully.	Check box, Read-only field	
Allow sign in	This allows you to deactivate the user, and thus prevent him from signing in to the site.	Check box	
Display Name		Entry field, alphanumeric	Administrator
User Name	User name used when signing in	Entry field, alphanumeric	WebAdmin
E-mail	If the user forgets his current password for signing into the administration area, a new password will be sent to the address entered here.	Entry field, alphanumeric	admin@provider.com
Old Password	Enter the currently valid password here; this is not displayed for security reasons	Entry field, alphanumeric	admin
New Password	This is not displayed for security reasons. The password must contain at least 5 characters.	Entry field, alphanumeric	admin
Password Confirmation	This is not displayed for security reasons	Entry field, alphanumeric	admin
Language	Display language for the administration	Drop-down menu	

To change the password, you must enter the current password in the field *Old password*. If you do not enter the current password, the password change will not be accepted.

Save your entries by clicking **Save**.

> Note: When a new user is created, the password is not generated automatically. You must enter a password so that the user can sign in to the Web site. In this case, you have not entered an *Old password*.

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 guestbooks on your Web site. You can use the links in the first column to call up the corresponding topics or pages.

You can sort the table by column. For more details, see *Sorting using column headings*, *on page 28*.

Batch processing commands are available to manage the table entries. For an introduction to this, see *Batch Processes in Tables*, *on page 27*.

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.

All user groups which you have created are listed in the table.

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

- Proceed as described in *Adding records*, *on page 26*.
- When you create a customer group, a user group with the same name is created automatically.

To delete a user group, proceed as described in *Deleting entries*, *on page 26*.

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

- Proceed as described in *Adding records*, *on page 26*.
- If you 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.

To delete users from the list, proceed as described in *Deleting entries*, *on page 26*.

To open the details of a user, click the user name.

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 95*.

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 (by closing the browser or leaving the session to expire), 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. It is then no longer possible to sign in automatically.

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 can navigate your Web site. New visitors can only access the Web site once you have created user profiles for them in the administration area. This is only allowed in a B2B business model.

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. This field is only active if the *Require sign in* option has been set to *Yes*.

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. The customers are asked to agree to the privacy policy on registration, or, for unregistered customers, when they enter their address. For more on the privacy policy, see *Privacy policy*, *on page 153*.

Save your entries by clicking **Save**.

Administrators

Page: Settings » User management » Administrators

The table shows all the administrators who have been created for your Web site. The symbols have the following meanings:

Table 19: Status icons for administrators

Icon	Description
	The administrator is active. He is authorised to sign into the administration area.
	The administrator is not active. He is not authorised to sign into the administration area.

To open the details of an administrator, click the name. The user name of the administrator who is currently signed in is not active as a link. You can edit this information in the administrator menu. For more on this, see *Administrator information*, *on page 51*.

Batch processing commands are available to manage the table entries. For an introduction to this, see *Batch Processes in Tables*, *on page 27*. The following specialised actions can be performed:

Table 20: Specialised batch processing commands for administrators

Command	Comment
Activate	The administrator can sign in to the administration area.
Deactivate	Administration is disabled for the administrator.

To create a new administrator, proceed as described in *Adding records*, *on page 26*.

You can edit the data in the same manner as described in *Administrator information*, *on page 51*. Please note the following exceptions:

- Use the *Sign in allowed* field to set whether an administrator can sign in and have access to the administration area.
- You can delete an administrator. To do this, click the **Delete** button in the details.

Administrator details – Sign-in data

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

By and large this administrator data corresponds to the general sign-in data for users. See also *User details – Sign-in data*, *on page 56*. The remaining fields are described as follows:

Table 21: Fields for administrator information

Field name	Description	Field type	Example
Deletion confirmation	See *Deletion confirmation, on page 51*	Option button	
Automatically sign in via cookies	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 58*.	Option button	

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.

Save your entries by clicking **Save**.

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 guestbooks on your Web site. You can use the links in the first column to call up each post.

You can sort the table by column. For more details, see *Sorting using column headings, on page 28*.

Batch processing commands are available to manage the table entries. For an introduction to this, see *Batch Processes in Tables, on page 27*.

User search

You can use the search to find individual users or administrators directly, or search via user groups. For basic information on using the search function, see *Search, on page 28*.

Tax calculation

Here you can manage and edit all tax settings relevant to your shop.

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**. A security check will request confirmation of this command. 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.

Save your entries by clicking **Save**.

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*, *on page 60*.

The table lists all the tax areas which have been created for your shop. To set a tax area to default, click the option button in the corresponding row. When a new customer registers, this preset tax area will always be suggested as the *default*.

To create a new tax area, follow the steps described in *Adding records*, *on page 26*.

Save your entries by clicking **Save**.

To delete a tax area, proceed as described in *Deleting entries*, *on page 26*.

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*, *on page 60*.

The table lists all the tax classes which have been created for your shop. 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.

To create a new tax class, follow the steps described in *Adding records*, *on page 26*.

Save your entries by clicking **Save**.

To delete a tax class, follow the steps described in *Deleting entries*, *on page 26*.

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 option *Displaying prices and calculation in the shop based on* sets the default tax model, which determines how the prices are displayed in the shop. This applies to the way prices are displayed in product lists and in the product details. The way prices are displayed and calculated in the shopping basket also depends on the tax model that has been configured.

According to the tax model that has been configured, a suitable price text is displayed alongside the price, for more information, see *Texts*, *on page 97*.

You can specify a different tax model for individual customers. This setting then overrides the default setting for this customer. The customer sees the prices according to the model that has been configured for him.

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. If you do not need to reveal the tax amount, you can create a corresponding note for the customer using the text field. This text is then displayed in the correct place. 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 97*.

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, reductions, payment methods and delivery methods, or for all price information that is 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.

Save your entries by clicking **Save**.

Delivery and payment

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

Delivery methods

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

The system provides the following calculation models as the basis for the delivery methods:

Free delivery	Basis for delivery methods where no further costs are incurred. Use this to offer the customer free delivery, for example; see *General properties for delivery methods*, *on page 63*.
Fixed price	Basis for delivery methods at a fixed price. Use this to configure delivery methods for a fixed price; see *General properties for delivery methods*, *on page 63* and *Fixed price delivery methods*, *on page 64*
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 *General properties for delivery methods*, *on page 63* and *Delivery methods with an exemption limit*, *on page 64*
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 *General properties for delivery methods*, *on page 63* and *Delivery method* Shopping basket total, *on page 65*

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 *General properties for delivery methods*, *below* and *Delivery method* Weight of the products in the shopping basket, *on page 65*
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 *General properties for delivery methods*, *below* and *Delivery method* Number of products in the shopping basket, *on page 66*

The table lists all the delivery methods. The symbols have the following meanings:

Table 22: status of the delivery methods

Icon	Description
	Delivery method visible.
	Delivery method not visible.
	Some parameters have not been set correctly. The link forwards you to the settings of the relevant method.

Caution: A delivery method cannot be made visible until all necessary parameters have been set correctly.

To open the details of a payment method, click the name.

You can set the sequence using the sorting key in the last column of the table. For more details, see *Sorting using key*, *on page 28*.

Batch processing commands are available to manage the table entries. For an introduction to this, see *Batch Processes in Tables*, *on page 27*.

To create a new delivery method, follow the steps described in *Adding records*, *on page 26*.

Save your entries by clicking **Save**.

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 calculation models. The general properties are the same for all delivery methods.

The various fields have the following meanings:

Table 23: general fields for all delivery methods

Field name	Description	Field type	Example
ID		Entry field, alphanumeric	PickupByCustomer
Visible		Option button	
Default	Defined as the default method	Option button	

Field name	Description	Field type	Example
Permit usage for following delivery addresses	This option allows you to set the regional validity for the delivery method. For more on regions, see *Regions, on page 89*.	Drop-down menu	
Name	Name used to display the method. This is language-dependent.	Entry field, alphanumeric	Pick up
Comment	Additional information about the delivery method; The language-dependent contents are displayed to the customer during the order process, directly below the method and the packing slip is printed. For more on formatting, see *Working with text fields, on page 35*.	Entry field, alphanumeric	Please check in at the depot.

Save your entries by clicking **Save**.

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 61*.

Fixed price delivery methods

The various fields have the following meanings:

Table 24: Specialised fields for delivery using a fixed price

Field name	Description	Field type	Example
Tax class		Drop-down menu	Normal
Delivery price		Entry field, numeric	€12.00 $14.00

Save your entries by clicking **Save**.

Delivery methods with an exemption limit

The various fields have the following meanings:

Table 25: specialised fields for delivery with an exemption limit

Field name	Description	Field type	Example
Tax class		Drop-down menu	Normal
Base price	Price which will be incurred if the exemption limit is not reached.	Entry field, numeric	€ 8.00 $10.00
Free above order value of	The order limit, above which delivery is free	Entry field, numeric	€100.00 $130.00
Price *Free above order value* refers to...	Here you can set how the order value is calculated, above which delivery is free of charge to the customer.	Drop-down menu	See *Table 26, on page 65*

Save your entries by clicking **Save**.

The field *Price "Free above order value of" refers to...* has the following options:

Table 26: options for calculating payment price

Option	Comment
Products	Maximum value refers to the total of the product prices in the shopping basket.
Products and coupons	The maximum value relates the to the value calculated from the product prices and coupon values in the shopping basket.
Products, coupons, and shopping basket discount	The maximum value relates the to the value calculated from the product prices, coupon values in the shopping basket, and the shopping basket discount.

Delivery method *Shopping basket total*

The various fields have the following meanings:

Table 27: Specialised fields for delivery method *Shopping basket total*

Field name	Description	Field type	Example
Tax class		Drop-down menu	Normal
Price of the shopping basket refers to	Selection of the option used to determine the order value; see *Table 26, above*	Drop-down menu	
Multiplier	Variable part used to calculate the delivery price; The price of the shopping basket is multiplied by this value. See the formula below the table on the Web page.	Entry field, numeric	0.1
Base price	Fixed part used to calculate the delivery price; See the formula below the table on the Web page.	Currency field	€ 5.00

You can scale delivery prices dependent upon the shopping basket price. To do so, enter the limit with the multiplier and the base price.

Save your entries by clicking **Save**.

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

The various fields have the following meanings:

Table 28: Specialised fields for the delivery method *weight of the products in the shopping basket*

Field name	Description	Field type	Example
Tax class		Drop-down menu	Normal
Calculation of the weight of the products is performed in	Selection of the weight unit used to calculate the total weight of the order.	Drop-down menu	
Multiplier	Variable part used to calculate the delivery price; The order weight is multiplied by this value. See the formula below the table on the Web page.	Entry field, numeric	0.1

Field name	Description	Field type	Example
Base price	Fixed part used to calculate the delivery price; See the formula below the table on the Web page.	Currency field	€ 5.00

You can scale delivery prices depending upon the weight of the order. To do so, enter the limit with the multiplier and the base price.

Save your entries by clicking **Save**.

Delivery method *Number of products in the shopping basket*

The various fields have the following meanings:

Table 29: Specialised fields for the shipping method *Number of products in the shopping basket*

Field name	Description	Field type	Example
Tax class		Drop-down menu	Normal
Multiplier	Variable part used to calculate the delivery price; The number of products in the basket is multiplied by this value. See the formula below the table on the Web page.	Entry field, numeric	0.1
Base price	Fixed part used to calculate the delivery price; See the formula below the table on the Web page.	Currency field	€ 5.00

You can scale delivery prices dependent upon the number of products in the shopping basket. To do so, enter the limit with the multiplier and the base price.

Save your entries by clicking **Save**.

Payment methods

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

The system provides the following calculation models as the basis of the payment methods:

Free	Basis for payment methods where no further costs are incurred. No other costs are charged to the customer when this method is used. For more details, see *General properties for payment methods, on page 69*.
Fixed price	Basis for payment methods at a fixed price. For payment methods at a constant price, For more details, see *General properties for payment methods, on page 69* and *Fixed price payment method, on page 70*.
Exemption limit	Basis for payment methods with an exemption limit. Apportion delivery costs to your customers dependent on the order value. For more details, see *General properties for payment methods, on page 69* and *Payment method with exemption limits, on page 71*.

Direct debit	As with *Free*, the customer incurs no additional costs at this point. This model issues a request for the customer's bank details during the ordering process in the shop. For more details, see *General properties for payment methods*, *on page 69* and *Direct debit payment methods*, *on page 70*.
Direct debit via fax	As with *Free*, the customer incurs no additional costs at this point. The customer downloads a fax form during the order process that he uses to send his bank details. For more details, see *General properties for payment methods*, *on page 69* and *Payment method with direct debit via fax*, *on page 70*.
Credit card	Basis for payment methods via credit card; Using this method, you can offer your customers all the credit cards you accept and manually process. For more details, see *General properties for payment methods*, *on page 69* and *Payment method with credit card, manual*, *on page 71*.
WorldPay	Basis for payment methods using WorldPay; When using this method, customers will be forwarded to the secure WorldPay system for payment. This is where the data is collected and the transaction takes place. For more details, see *General properties for payment methods*, *on page 69* and *Payment method with WorldPay*, *on page 72* and *WorldPay* , *on page 193*.
T-Pay	Basis for payment methods using T-Pay; For the transaction and the payment method selection, the customer is forwarded to the T-Com payment system where the transaction is completed. For more details, see *General properties for payment methods*, *on page 69* and *T-Pay payment method*, *on page 74* and *T-Pay*, *on page 194*.
PayPal	Basis for payment methods using PayPal; This method allows the customer to use the PayPal payment system. For more details, see *General properties for payment methods*, *on page 69* and *Payment method with PayPal*, *on page 75* and *PayPal*, *on page 195*.
PayPal Pro	Basis for payment methods using credit cards via PayPal; This allows the customer to use the PayPal payment system to pay by credit card. For more details, see *General properties for payment methods*, *on page 69* and *PayPal Pro payment method*, *on page 75* and *PayPal Pro*, *on page 196*.
PayPal Express	Basis for payment methods using PayPal; This allows the customer to use the PayPal payment method. For more details, see *General properties for payment methods*, *on page 69* and *PayPal Express payment method*, *on page 76* and *PayPal Express*, *on page 197*.
Google Checkout	Basis for payment methods using Google; This allows the customer to use the Google payment method. For more details, see *General properties for payment methods*, *on page 69* and *Google Checkout payment method*, *on page 77* and *Google Checkout*, *on page 198*.
ClickandBuy	Basis for payment methods using ClickandBuy; This allows the customer to use the ClickandBuy payment system. For more details, see *General properties for payment methods*, *on page 69* and *ClickandBuy payment method*, *on page 78* and *ClickandBuy*, *on page 199*.

Atos Worldline	Basis for payment methods using Atos Worldline; This allows the customer to use the Atos Origin Group's payment system. For more details, see *General properties for payment methods*, *on page 69* and *Atos Worldline payment method*, *on page 80* and *Atos Worldline*, *on page 200*.
Sofortüberweisung	Basis for payment methods using *Sofortüberweisung*; This allows the customer to use the Payment Network AG's payment system. For more details, see *General properties for payment methods*, *on page 69* and *Sofortüberweisung payment method*, *on page 80* and *Sofortüberweisung*, *on page 201*.
HSBC	Basis for payment methods via HSBC. When using this payment method, the customer will be forwarded to the secure HSBC system. This is where the data is collected and the transaction takes place. For more details, see *General properties for payment methods*, *on page 69* and *Payment method with HSBC*, *on page 82* and *HSBC*, *on page 201*.
Moneybookers	Basis for payment methods using Moneybookers; When using this payment method, the customer will be forwarded to the secure Moneybookers system. This is where the transactions take place. For more details, see *General properties for payment methods*, *on page 69* and *Moneybookers payment method*, *on page 83* and *Moneybookers*, *on page 202*.
Saferpay	Basis for payment methods using Saferpay; When using this payment method, the customer is forwarded to the secure Saferpay system. This is where the transactions take place. For more details, see *General properties for payment methods*, *on page 69* and *Saferpay payment method*, *on page 84* and *Saferpay*, *on page 203*.

The table lists all of your payment methods. The symbols have the following meanings:

Table 30: status of payment methods

Icon	Description
	Payment method visible
	Payment method not visible
	Some parameters have not been set correctly. The link forwards you to the settings of the relevant method.

> *Caution:* A payment method cannot be made visible until all necessary parameters have been set correctly.

To open the details of a payment method, click the name.

You can set the sequence using the sorting key in the last column of the table. For more details, see *Sorting using key*, *on page 28*.

Batch processing commands are available to manage the table entries. For an introduction to this, see *Batch Processes in Tables*, *on page 27*.

To create a new payment method, follow the steps described in *Adding records*, *on page 26*.

Save your entries by clicking **Save**.

General properties for payment methods

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

The properties and parameters for the individual payment methods have different underlying calculation models. The general properties are the same for all payment methods.

The various fields have the following meanings:

Table 31: general parameters for all payment methods

Field name	Description	Field type	Example
ID		Entry field, alpha-numeric	CashOnDelivery
Visible		Option button	
Default	Defined as the default method	Option button	
Deferred payment	Some payment methods allow you to offer deferred payment. See also *Deferred payment*, *on page 86*. When using payment methods that do not permit deferred payment, the option fields are greyed out.	Option button	
Discount	Percentage discount for the payment method.	Entry field, numeric	3
Creating order...	You can use this option to determine whether an order is created before the data is passed to an external payments system, or after finalisation of the transaction. This option is not available for all payment methods.	Option button	
Permit usage for the following invoice addresses	Her you can define the region(s) for which this payment method is valid.	Drop-down menu	
Name	Name used to display the method. This is language-dependent.	Entry field, alpha-numeric	cash on delivery
Comment	Additional information about the payment method; The language-dependent contents are displayed to the customer during the order process, directly below the method and order documents are printed. For more on formatting, see *Working with text fields*, *on page 35*.	Text field, alphanumeric	Cash on delivery incurs a surcharge of...

Save your entries by clicking **Save**.

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.

> Note: It is also possible to enter negative amounts for the discount. If a payment method incurs charges that you want to pass on to the customer, enter a negative amount here.

For the payment methods with special settings, there is an addition Settings tab on which these settings can be configured. This tab is used to set the 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 61*.

Customer groups in payment methods

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

Each payment method can be assigned to customer groups. This means that only the customers that belong to an assigned customer group can use this payment method. It is then only displayed for these customers.

The table shows all the customer groups to which this payment method has been assigned.

To add a customer group, select one from the drop-down menu and click **Save**.

To remove a customer group from the list, click the relevant check box and click **Remove assignment**.

Direct debit payment methods

Before the ordering process is completed, the customer is shown a from in which he enters the account details required for direct debit.

For international bank transfers, the customers can enter IBAN and SWIFT codes in the form.

> Note: 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.

Payment method with direct debit via fax

The various fields have the following meanings:

Table 32: Parameters for the payment method *Direct debit via fax*

Field name	Description	Field type	Example
Fax form	Document with the form which the customer must download, fill out, and fax to the merchant. Either enter the name of the file with its path directly or click **Browse** to search for the file.	Entry field, alphanumeric	FaxForm_en.pdf
(Delete)	Delete document	Button	

Save your entries by clicking **Save**.

Fixed price payment method

The various fields have the following meanings:

Table 33: Parameters for fixed price payment methods

Field name	Description	Field type	Example
Tax class		Drop-down menu	none
Charge for payment		Entry field, numeric	€4.00 $5.00

Save your entries by clicking **Save**.

Payment method with exemption limits

The various fields have the following meanings:

Table 34: parameters for payment methods with exemption limits

Field name	Description	Field type	Example
Tax class		Drop-down menu	Normal
Base price		Entry field, numeric	€ 10.00 $ 15.00
Limit	The value of an order above which shipping is free	Entry field, numeric	€100.00 $ 150.00
Price for the limit refers to the total of	Here you can set how the order value is calculated, above which payment is free of charge to the customer.	Drop-down menu	See *Table 35 below*

Save your entries by clicking **Save**.

The *Price for the limit refers to the total of* field has the following options:

Table 35: options for calculating payment price

Option	Comment
Products	The maximum value relates the to the value calculated from the product prices in the shopping basket.
Products and coupons	The maximum value relates the to the value calculated from the product prices and coupon values in the shopping basket.
Products, coupons, and shopping basket discount	The maximum value relates the to the value calculated from the product prices, coupon values in the shopping basket, and the shopping basket discount.
Products, coupons, shopping basket discount, delivery costs	The maximum value relates the to the value calculated from the product prices, coupon values in the shopping basket, and the shopping basket discount and delivery costs.

Payment method with credit card, manual

Use this payment method if you want to process credit card payments used by your customers manually.

> Note: In order for your customers to be able to use credit cards, certification based on the Payment Card Industry Data Security Standard (PCI DSS) is required. Make sure that, wherever your customers' credit card data is stored, you are working according to this standard. For more on this, see *https://pcisecuritystandards.org/*.

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. Corresponding entry fields will be displayed to the customer. Entry fields for *Card number*, *Card holder*, and *Expiry date* are displayed by default. This cannot be modified.

The various fields have the following meanings:

Table 36: input parameters for credit cards

Column	Description	Field type	Example
Credit card	Name of the credit card	Entry field, alphanumeric	MasterCard

Column	Description	Field type	Example
Credit Card Identification Code	A specific number, usually in the signature field on the back of the credit card	Drop-down menu	See *Table 37*, *below*
Issue number	Extra issue numbers on some credit cards	Drop-down menu	See *Table 37*, *below*
Issue date	Issue date on some credit cards	Drop-down menu	See *Table 37*, *below*

The drop-down menus offer the following options:

Table 37: options in the drop-down menus

Option	Description
Entry required	The customer must enter the required value
Entry optional	The customer can enter the required value if desired
No entry	The field is not displayed.

You can set the sequence using the sorting key in the last column of the table. For more details, see *Sorting using key*, *on page 28*.

To add a new entry, follow the steps described in *Adding records*, *on page 26*.

Save your entries by clicking **Save**.

In the **Credit card logos** section, select the card logos for display in your shop. Select the relevant check boxes. Save your entries by clicking **Save**.

Before the logos can be displayed in your shop, the corresponding page elements must be placed on your Web site. For more information, see the section *Page elements and navigation*, in the *Page elements and navigation* chapter, *on page 181*.

> Note: Due to security reasons, credit card data in the database for orders paid to you by credit card 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.

Payment method with WorldPay

The basic details of working with WorldPay can be found in *WorldPay*, *on page 193*.

The ordering of the individual points and their entry fields and settings corresponds to the general process for configuring the WorldPay payment method.

1. Register with WorldPay

Click this link to open the WorldPay registration page. After registration is complete, you will receive an installation ID. Enter this installation ID in the *Installation ID* field in section 2.

2. To your WorldPay administration page

Click this link to open the WorldPay administration page. You need to set a few parameters in the WorldPay administration so that the data exchange between the WorldPay system and your shop can function correctly.

On the WorldPay administration page, call up *Installation management*; see *Figure 20*.

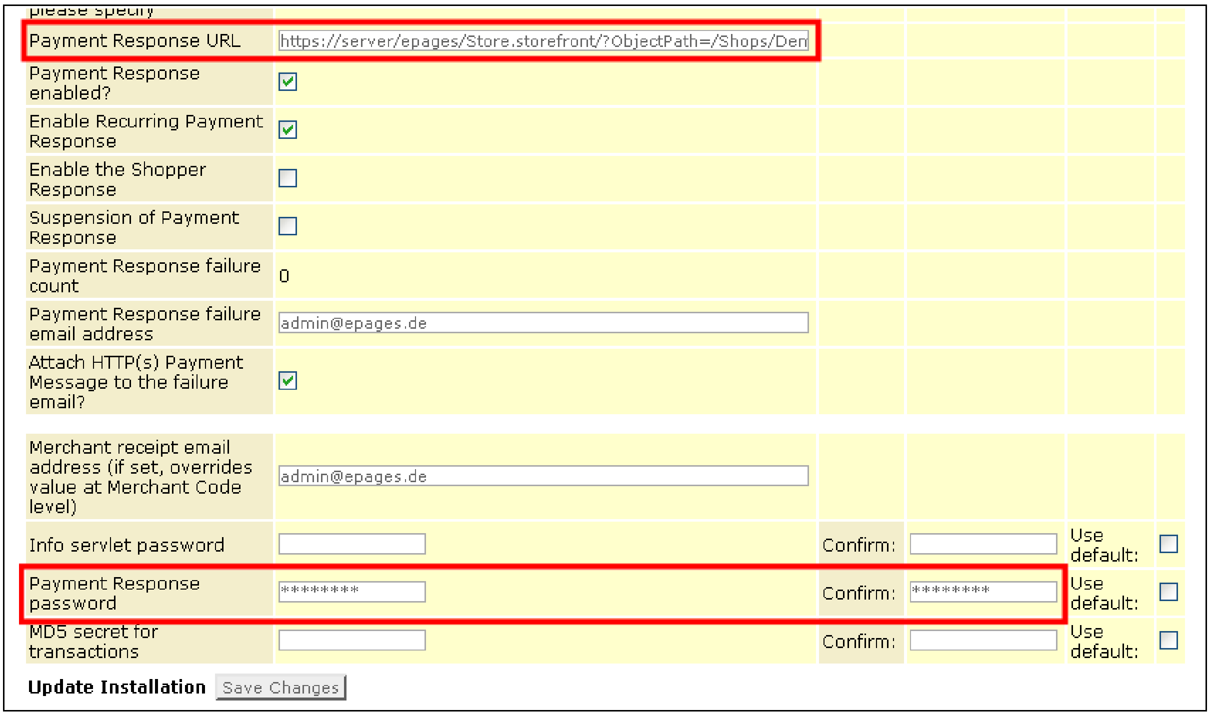


Figure 20: Entering the URL and password to forward transaction data for WorldPay

In the *Payment Response URL* field, enter the Internet address displayed in the *Payment Response URL* field in the shop administration.

Enter the same *Payment Response password* in both systems. When data is transmitted, both entries are compared. If the passwords match, the transaction continues.

3. Settings for payment processing

In the *Transaction is finalised* drop-down menu, you can specify how the transaction is to be finalised and the point at which the payment is booked from the customer's account.

Table 38: options for finalising the transaction

Option	Description
Manually on the WorldPay administration page	The amount is not deducted from the customer's account until you have finalised the order in your WorldPay account.
Automatically with the order	The amount is deducted from the customer's account after he has finished entering information with WorldPay.

For more information, see *WorldPay transactions*, *on page 193*.

Before you make the payment method available for your customers, test the process to make sure it functions correctly. You can do this by selecting the corresponding mode in the Operational mode field:

Table 39: options for the operational mode

Option	Description
Test mode - OK	The transaction data is not validated in WorldPay but is otherwise processed normally. You can use this procedure to conduct positive test runs. The responses from WorldPay are marked accordingly.
Test mode - Error	Use this option to simulate transactions that are returned by WorldPay as invalid. This allows you to perform negative test runs.

Option	Description
Live	This is the setting for real transactions that customers perform with WorldPay using your shop.

Note: As soon as you have sufficiently tested the payment method and have released it for your customers, set the operational mode to *Live*. This will allow the invoiced amount to be deducted from your customer's account.

4. Activate your account

In order to activate the WorldPay payment method and use the WorldPay logo on your shop page, you need to have your shop accepted and your account activated by WorldPay. To accomplish this, click the **Activate your WorldPay account** link and complete the form that is displayed.

5. Select credit cards

Once you have completed activation with WorldPay, you are allowed to display the WorldPay logo in your shop. In addition, you can also display the logos of the credit cards for which you have a contract with WorldPay.

Note: The credit card logos are placed on the Web page and displayed using a WorldPay page element. For more on working with page elements, see *Page elements and navigation*, *on page 181.*

Save your entries by clicking **Save**.

T-Pay payment method

The basics on working with T-Pay can be found in *T-Pay*, *on page 194*.

The sequence of the individual points and their entry fields and settings corresponds to the general procedure for configuring the T-Pay payment method.

1. Register with T-Pay

Click this link to open the T-Pay registration page.

2. Set up your T-Pay account

During the process of registering with T-Com, you will be allocated a MerchantID, a ShopID and a *MerchantSecrets* code. Enter these values in the fields of the same name in section 2.

You can set the operational mode using the *Operational mode* drop-down menu.

Table 40: Options for the operational mode

Option	Description
Test/ Test with payment limit query	In these modes, no transactions are billed, except for Micromoney.
Live	Transactions are marked real and are charged to the customer.

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.

3. Selection of payment variants

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.

4. Select credit cards

You can display the logos of credit cards you accept with T-Pay in your shop. To do so, select the check boxes of the respective credit cards.

> Note: The credit card logos are placed on the Web page and displayed using a T-Com page element. For more on working with page elements, see *Page elements and navigation, on page 181.*

Save your entries by clicking **Save**.

> *Caution:* If you have entered incorrect data in section 2, transactions will trigger an e-mail event. You will receive an e-mail containing an error message. To enable this, you must enter a suitable recipient address under the e-mail settings for the *T-Pay - Incorrect settings* event. For more information about e-mail events, see *E-mail settings, on page 90*.

Payment method with PayPal

The basics about working with PayPal can be found in *PayPal*, on page 195.

Click the **Create new PayPal account** link to call up the page used for registering with PayPal. In the *E-mail* field you should enter the e-mail address that you provided when registering with PayPal and that you use to sign in to PayPal.

Save your entries by clicking **Save**.

PayPal Pro payment method

The basics about working with PayPal Pro can be found in *PayPal Pro, on page 196*. The various fields have the following meanings:

Table 41: Parameters for the PayPal Pro payment method

Field name	Description	Field type	Example
Create and manage an account in the PayPal Manager	Link to live PayPal system to create a new PayPal Manager account or to sign into an existing account	Link	
Vendor, Partner, User, Password	Access data These are used for identification during data transfer. The data can be found in the PayPal Manager under **Account administration** ›› **Manage users**.	Entry field, alpha-numeric	Ukpromerchant123, PayPal123, Ukpromerchant985, password
Operational mode	Set whether transactions are performed on the live or test system	Drop-down menu	

Field name	Description	Field type	Example
Transaction type	Set how transactions are finalised; For *Authorisation*, you must perform the debiting manually either in the shop administration or in the PayPal Manager. For *Debit*, every valid transaction is automatically finalised by debiting.	Drop-down menu	

Save your entries by clicking **Save**.

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.

Note: The PayPal Pro logo is placed on the Web page and displayed using a page element. For more on working with page elements, see *Page elements and navigation*, *on page 181.*

PayPal Express payment method

The basics about working with PayPal Express can be found in *PayPal Express*, on page 197. The various fields have the following meanings:

Table 42: parameters for the PayPal Express payment method

Field Name	Description	Field type	Example
Create new PayPal account	Link to live system of PayPal to create a new merchant account	Link	
Go to PayPal administration	Link to open your PayPal administration	Link	
User name, API password	Unique name and password generated by PayPal that can only be used for API calls; These are used in every API call. The API user name and password are not the same as the PayPal user name (e-mail address) and password. You can find this parameter in your PayPal administration at **My Profile** ›› **API access** ›› **Request API access data**.	Entry field, alphanumeric	Pre_api1.user.com Z24DH2RTF9LF3W
Signature	String for secure identification during data transfer; You can find these parameters in your PayPal administration at **My Profile** ›› **API Access** ›› **Request API access data**.	Entry field, alphanumeric	ACeyDbq-Yy5qFWAOA2QHhyvP-NP-AGWuwcdlUam
Operational mode	To use the test mode, you need a merchant and buyer account on the PayPal sandbox. The sandbox is a test system. To create a new merchant test account, click **Create a PayPal test account on the sandbox system**.	Drop-down menu	

Field Name	Description	Field type	Example
Header image URL	Internet address for an image that the customer is shown on the payment page at PayPal. Here you can show your shop logo, for example.	Entry field, alpha-numeric	http://imageserver/_data/index/logo.jpg
Header background colour, Header border colour, Payment flow back-ground colour	Use these colours to customise the PayPal payment page to your shop colours. Enter the colour code directly or click the colour chooser after the entry field. See also *Colour selector, on page 43*.	Entry field, alpha-numeric	#FFF200, #CC000, #99CCFF

Save your entries by clicking **Save**.

> *Caution:* Note that for test operation, the correct access data must be entered for the test system and for live operation, the correct access data must be entered for the live system.

> Note: The PayPal Express button is only shown in the shopping basket if you have set the payment method to *Visible*.

Google Checkout payment method

The basics about working with Google Checkout are available in *Google Checkout, on page 198*. The various fields have the following meanings:

Table 43: Parameters for the Google Checkout payment method

Field Name	Description	Field type	Example
Create new Google Checkout account	Link to the Google Checkout live system to create a new merchant account.	Link	
API callback URL	This URL is generated automatically by the shop system. You must enter it into the Google Checkout merchant administration (in **Settings** » **Integration**). This URL is used to send status changes and other notices to the shop.	Display	http://server/provider/Store.sf/?ChangeAction=BlockMonitor&ViewAction=GoogleCheckoutNotification
Merchant ID Merchant key	Parameter for identification during data transfer; These parameters are provided by Google Checkout. Use the values from the place where the API callback URL is entered.	Entry field, alpha-numeric	123456789098765 HxEsfgsdlfghVDLLUIWEZ6
Operational mode	In order to use test mode, you need a merchant account and buyer account on the Google Sandbox. The sandbox is a test system. To create a new merchant test account, use the link **Create a Google Checkout test account on the sandbox system**	Drop-down menu	

Field Name	Description	Field type	Example
Currency	Currency of your Google Checkout account; Customers to your shop who use this currency can pay using Google Checkout. If the customer orders in a different currency, the GoogleCheckout function is not displayed.	Drop-down menu	
Forward telephone number	This option allows you to decide whether the customer's telephone number should be forwarded along with the transaction data from Google to the shop system.	Option button	
Size	Size of the Google Checkout button displayed in the shopping basket	Drop-down menu	
Background colour	Background for the Google Checkout button displayed in the shopping basket	Drop-down menu	
Connection to Google Analytics and Adwords	These two entry fields are only available if you operate your shop through your own domain, e.g. www.xyzShop.com. If you want your own domain, please contact your provider.		
Google Analytics ID	You will find the ID in the Analytics section of your Google account. In the case of problems, please contact Google.	Entry field, alphanumeric	Abcd1234
Google Adwords URL	This URL can be found in your Google Adwords administration pages under *Conversion Tracking* in campaign management. In the case of problems, please contact Google.	Entry field, alphanumeric	http://www.googleadservices.com/pagead/conversion/13456798/imp.gif?value=1&label=purchase&script=0

Save your entries by clicking **Save**.

> Note: The Google Checkout button is only shown in the shopping basket if you have set the payment method to *Visible*.

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

ClickandBuy payment method

The basics about working with ClickandBuy can be found in *ClickandBuy*, *on page 199*. The various fields have the following meanings:

Table 44: Parameters for ClickandBuy

Field Name	Description	Field type	Example
Create new ClickandBuy account	Link to live system of ClickandBuy to create a new merchant account	Link	

Field Name	Description	Field type	Example
Go to the Clickand-Buy administration	Link to the ClickandBuy administration	Link	
Merchant ID	Parameter for identification during data transfer; These parameters are found in the customer data in the ClickandBuy administration.	Entry field, alpha-numeric	12345678
Transaction Link	Parameter for identification during data transfer; This parameter can be found in the ClickandBuy administration. It is the default link from the link list of the created domain. For more details, see the chapter on setting up ClickandBuy links in the ClickandBuy providers manual.	Entry field, alpha-numeric	http://premium-123abc456.eu.clickandbuy.com/
Transaction manager password	Parameter for identification during data transfer; This parameter can be found in the ClickandBuy administration.	Entry field, alpha-numeric	
Domain	Domain name of your shop that you will enter into the domain management of the ClickandBuy administration; Contact your contact person at ClickandBuy for more information.	Read-only field	
Link	Link to the domain named in the ClickandBuy administration that is entered into the domain management; Contact your contact person at ClickandBuy for more information.	Read-only field	
EMS Link	The ClickandBuy system sends messages to your shop. Enter the URL from this field into your ClickandBuy administration to set the target of these messages. Contact your contact person at ClickandBuy for more information.	Read-only field	
DynKey	The transactions link parameters are encrypted in order to protect against manipulation. This is done using a dynamic key that is created for the payment method. The key is displayed in this field. Copy the key in order to forward it to ClickandBuy.	Read-only field	

Save your entries by clicking **Save**.

> Note: 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.

The ClickandBuy system can send messages (such as error messages) to the shop system when various events occur. These are sent as e-mails. Create an corresponding e-mail event by providing a recipient e-mail address. For more information, see *E-mail settings*, *on page 90*.

Atos Worldline payment method

The basics about working with Atos Worldline are available in *Atos Worldline*, *on page 200*. The various fields have the following meanings:

Table 45: Parameters for the Atos Worldline payment method

Field Name	Description	Field type	Example
Merchant ID	Identifier code that you receive on registering your shop with Atos Worldline; The shop is identified with this ID.	Entry field, alphanumeric	011223344551111
Merchant country	Country for which you register your shop	Drop-down menu	
Certificate file	The certificate file is provided by Atos Worldline. Save it on your local computer and upload the file using **Browse**. If a certificate file already exists, the name of the file is shown.	Entry field, alphanumeric	
Transaction type	*Debit*: The amount is automatically debited from the customer account. The debiting occurs after the set number of days. *Authorisation*: The amount will be reserved for you. You must trigger the debiting yourself in the Atos Worldline administration. The reservation is cancelled after the set number of days.	Drop-down menu	
Debiting of the amount occurs after ... / Validity of the authorisation expires after ...	Number of days after which the debit is performed automatically or the authorisation expires.	Entry field, numeric	14
Display shop logo on the Atos Worldline page	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.	Option button	

Save your entries by clicking **Save**.

> **Note:** The Atos Worldline payment method is only shown in the shopping basket if you have set the method to *Visible*.

Sofortüberweisung payment method

The basics about working with *Sofortüberweisung* are available in chapter *Sofortüberweisung*, *on page 201*. The various fields have the following meanings:

Table 46: Parameters for the payment method *Sofortüberweisung*

Field Name	Description	Field type	Example
Customer number	You will receive this number after registering with *Sofortüberweisung*	Entry field, alphanumeric	12345
Password	Enter the password that you entered when registering with *Sofortüberweisung*.	Entry field, alphanumeric	password
Success link	The customer is forwarded to this page if the transfer is successful. Copy the address to the project data in your *Sofortüberweisung* administration. For more information, see *Create project in Sofortüberweisung, below.*	Read-only field	
Cancellation link	The customer is forwarded to this page if the transfer is interrupted. Copy the address to the project data in your *Sofortüberweisung* administration. For more information, see *Create project in Sofortüberweisung, below.*	Read-only field	
HTTP notification URL	All transfer-related data is sent to this address. Copy the address to the project data in your *Sofortüberweisung* administration. For more information, see *Create project in Sofortüberweisung, below.*	Read-only field	
Project number	Here you can enter the number that is displayed as the current project number in *Sofortüberweisung* administration. For more information, see *Create project in Sofortüberweisung, below.*	Entry field, alphanumeric	987654

Save your entries by clicking **Save**.

> Note: The *Sofortüberweisung* payment method is only shown in the shopping basket if you have set the method to *Visible*.

Create project in Sofortüberweisung

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 *Sofortüberweisung* administration. This requires you to register with *Sofortueberweisung.de*. Do this using the link **Register with Sofortüberweisung** in the shop Administration area.

Below is a description of the settings of the shop-related parameters in your *Sofortüberweisung* administration:

1. Sign in to your Sofortüberweisung administration.
2. Under Project create a New project.
3. If necessary, select the ePages entry for Shop system.
4. Enter the required data in General settings.
5. Please enter your bank details, including the IBAN and BIC.
6. Under Interface ›› Success link you need to enter the success link from the shop administration (payment method Sofortüberweisung ›› Settings).

7. Under Interface ›› Failure link you need to enter the failure link from the shop administration (payment method Sofortüberweisung ›› Settings))
8. Enter your e-mail address under Notifications ›› E-mail address. If you have enabled this option (selected the check box), then you will be informed of the exact transfer data when the transfer has completed successfully.
9. Under Notifications ›› HTTP(S) URL you need to enter the HTTP notification URL from the shop administration (payment method Sofortüberweisung ›› Settings).
10. Save your entries by clicking Save.

In case of queries regarding the creation and processing of a project, please contact your account manager at *sofortuberweisung.de*.

Payment method with HSBC

The basics about working with HSBC can be found in *HSBC, on page 201*.

The various fields have the following meanings:

Table 47: parameters for the HSBC payment method

Field name	Description	Field type	Example
Go to HSBC administration		Link	
Client alias	Client user name for sign in to the HSBC administration	Entry field, alphanumeric	
Shared Secret	Security code from registration	Entry field, alphanumeric	
Transaction type	This setting determines whether debits are made automatically or manually by you in the HSBC administration.	Drop-down menu	
Operational mode	Setting that determines whether transactions are processed on the test or live system. See also Caution, *below*	Drop-down menu	
Selection of credit cards...	Selection of credit cards whose symbols are displayed in the shop for payment using HSBC	Check box	

Save your entries by clicking **Save**.

> *Caution:* 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. This activates your account with HSBC. 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.

> Note: The credit card logos are placed on the Web page and displayed using an HSBC page element. For more on working with page elements, see *Page elements and navigation, on page 181.*

Moneybookers payment method

> *Caution:* You can offer various payment options using Moneybookers. However, you must create a new payment method based on Moneybookers for each option.

The basics about working with Moneybookers can be found in *Moneybookers, on page 202*. The various fields have the following meanings:

Table 48: Parameters for the Moneybookers payment method

Field Name	Description	Field type	Example
E-mail address	E-mail address that you use for Moneybookers registration	Entry field, alpha-numeric	mb@provider.com
Customer ID	Customer number that you receive from Moneybookers	Entry field, alpha-numeric	123456
Secret word	This is a secret word that you enter in your Moneybookers account in the merchant settings; The secret word is not the account password.	Entry field, alpha-numeric	secret
Payment method	Setting how your customers can pay with Moneybookers.	Drop-down menu	
Selection of the symbols ...	Select the symbols for the payment methods that you use to accept payment via Moneybookers and which will be displayed in the shop.	Check box	
Would you like to create another Moneybookers payment method?	Click here to create another payment method using Moneybookers. For more information, see *Creating Moneybookers payment methods, below*.	Link, Drop-down menu	

Save your entries by clicking **Save**.

Creating Moneybookers payment methods

When you create a payment method based on Moneybookers, you see a list of instructions on the side with settings for you to perform step-by-step.

Note the following:

- When 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 181*.
- 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. Click the link to create an additional payment method. Select the desired payment type from the drop-down menu and click **Create**. This creates a new Moneybookers payment method. All fields are already filled with data and the desired payment method is configured in the drop-down menu.

> Note: The Moneybookers payment method is only shown in the shopping basket if you have set the methods to *Visible*.

Saferpay payment method

Basic information on working with Saferpay is available in chapter *Saferpay*, *on page 203*. The various fields have the following meanings:

Table 49: Parameters for the Saferpay payment method

Field Name	Description	Field type	Example
Saferpay account number	You will receive this number from Saferpay after registration.	Entry field, alphanumeric	123456-987654
Transaction type	Set how transactions are finalised; For *Authorisation*, you must perform the debiting manually in the shop administration. For *Debit*, every valid transaction is automatically finalised by debiting.	Drop-down menu	
Operational mode	Set whether transactions are performed on the live or test system	Drop-down menu	
Selection of the symbols ...	Select the icons for the payment methods that you accept for payment via Saferpay and which will be displayed in the shop.	Check box	

Save your entries by clicking **Save**.

> Note: The Saferpay payment method is only shown in the shopping basket if you have set the methods to *Visible*.

Dependencies

Page: Settings ›› Delivery and payment ›› Dependencies

You can set the availability of different payment methods for different delivery methods here. If you would like to activate a payment method for a specific delivery method, select the corresponding check box.

A special assignment is set using the *No delivery* column. If you are selling goods or services for which delivery is not required or useful, assign the corresponding payment methods here. For example, if you offer chargeable services through the booking system, you can define the valid payment methods for this here, see also *Booking system*, *on page 163*.

Save your entries by clicking **Save**.

> 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*. Enter a different name for this link for each language.

The table lists the available delivery options. The symbols have the following meanings:

Table 50: status for delivery options

Icon	Description
	The delivery option is visible to the customer and can be selected.
	The delivery option is not visible to the customer and cannot be selected.

To see the details, click the ID.

The options are displayed in the same order in the shop as in the table. Use the sorting key to change the order. For more details, see *Sorting using key*, *on page 28*.

You can run batch processing actions to process the table entries. For an introduction to this, see *Batch Processes in Tables*, *on page 27*.

To create a new delivery option, follow the steps described in *Adding records*, *on page 26*.

Save your entries by clicking **Save**.

Delivery options: Details - general

The various fields have the following meanings:

Table 51: fields for general details for delivery options

Field name	Description	Field type	Example
ID	Internal name	Entry field, alpha-numeric	GreetingCard
Visible		Option button	
Name	Name used to display the option. This is language-dependent.	Entry field, alpha-numeric	Greeting card
Description	Description and information displayed for customers. This is language-dependent. For more on formatting, see *Working with text fields*, *on page 35*.	Entry field, alpha-numeric	Deliver the order with a greeting card.
Price	Price for this delivery option for each available currency.	Entry field, numeric	3.00 €
Tax class		Drop-down menu	
Display entry field	Shows an entry field for the delivery option; In this field, the customer can enter text that is submitted together with the delivery option, for example, text for a greeting card.	Option button	

Save your entries by clicking **Save**.

Delivery options: Details - Selecting

In **Selection** you can create all variations of a delivery option 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. You can optionally add an image.

The names are displayed in entry fields. Enter changes directly in the respective field.

For more on using images, see *Uploading images*, *on page 43*. If an image is present, the name is displayed below the entry field as a link. Click the link to view the image on the right in the preview window. If you would like to view the image in its original size, click the display in the preview window. To delete the image, click the trash icon.

To create a new variant, follow the steps described in *Adding records*, *on page 26*.

Save your entries by clicking **Save**.

> 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. For these payment methods, activate deferred payment in the general settings by clicking the *Deferred payment possible* option button; see *General properties for payment methods*, *on page 69*.

The individual fields for deferred payment have the following meanings:

Table 52: fields for deferred payment

Field name	Description	Field type	Example
Text for "Financing" stage of ordering	This text is displayed on the page 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
Interest rates for the number of monthly payments	Interest rates in percent for the duration; 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.

Save your entries by clicking **Save**.

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:

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

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 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. The contents are made available by the application in the relevant language. You are responsible for the language-dependent contents such as product descriptions, the content of newsletters, or the correct price in each available currency.

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 Dependencies*, *on page 29*.

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.

Using the checkbox in the *Visible* column, you can set whether the country is displayed for selection on the Web site.

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.

Save your entries by clicking **Save**.

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 entries*, *on page 26*. The language will still be available in the drop-down menu.

> Note: Note that for language-dependent fields, a translation can no longer be displayed if you delete the corresponding language.

Caution: You must make sure you create and manage all the text for the product data and its associated contents in the relevant languages. 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 can 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 181.*

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. You must offer prices in these currencies.

In the table, you can see the currencies you have activated for the shop.

Using the check box in the *Visible* column, you can set if the currency is displayed for selection in the shop.

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.

Save your entries by clicking **Save**.

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 entries*, *on page 26*. 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. The same applies for delivery methods.

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

Special case - Swiss Francs

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.

The countries in the table will be listed in the country drop-down menus. Use the *Default* option button to set which country will be displayed as standard.

You can set the sequence using the sorting key in the last column of the table. For more details, see *Sorting using key, on page 28*.

Save your entries by clicking **Save**.

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 entries, on page 26*. 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. You can use them 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 88*. These countries can be assigned to regions. During the order process, the country from the delivery and invoice address is checked for assignment to a region.

The table lists all the regions already created. To open the Details for a region, click its ID.

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, see *Regions - Details - General, on page 90.*

To delete a region, select the corresponding table entry and click **Delete**.

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, Seite 88.
2. Create a new region.
3. Select the corresponding countries in the region details. For more information, see Regions - Details - General, on page 90.
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 invoice 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 different delivery areas:
  For example, you can have a different price for delivery via UPS in Germany than delivery via UPS shipping outside of the EU. For this purpose, create two regions, Germany and Non-EU. Then create two delivery methods: UPS Germany and UPS Non-EU. 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.
- Countries used for customer registration must be included in at least one region. Customers must not be able to select an invoice or delivery country which is not assigned to a region.

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**.

All countries that are assigned to the region are shown in bold and their checkbox is selected.

To assign a country to a region, select the corresponding checkbox.

To remove the assignment of a country to a region, remove the selection in the corresponding checkbox.

Save your entries by clicking **Save**.

To delete the entire region, click **Delete**.

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 respect of e-mail events, you must configure both the general e-mail settings (see *E-mail settings – General*, *below*) and the list of potential e-mail events (see *E-mail settings - Events*, *on page 91*).

E-mail settings – General

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

On this page, define the sender settings that are used to send e-mail messages. The various fields have the following meanings:

Table 53: fields for general e-mail settings

Field name	Description	Field type	Example
Sender address	You can enter an extended e-mail address in the form *Name ‹e-mail address›*	Entry field, alphanumeric	Milestones ‹msinfo@provider.com›
Coding	Set how your characters are coded and processed in the e-mail. *Unicode* is a setting which allows all known characters to be processed.	Drop-down menu	

Field name	Description	Field type	Example
Signature	Attachment at the end of each e-mail which is displayed language-dependent. For more on formatting, see *Working with text fields, on page 35.*	Text field	 Milestones Demoshop GmbH Leutragraben 1 ...

Save your entries by clicking **Save**.

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 icon next to the event name indicates the status. The symbols have the following meanings:

Table 54: Status of e-mail events

Icon	Description
	Delivery is activated. If the event occurs, an e-mail will be sent to the configured recipient.
	Delivery is deactivated. If the event occurs, an e-mail will not be sent.

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

Events with a grey check box cannot be deactivated.

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.

Some events cannot be activated if address information has not been entered. In these cases, you will receive a relevant notification.

Event e-mail – Details

The general settings are the same for most event e-mails. For special cases, see *Exception, on page 93*.

The various fields have the following meanings:

Table 55: fields for event e-mail messages

Field name	Description	Field type	Example
Active		Option button	
Sender address	Special sender for the respective event; This setting replaces the default sender in **E-mail settings – General**	Entry field, alpha-numeric	info@provider.com

Field name	Description	Field type	Example
Cc address	Recipient of a copy of the e-mail. The name is displayed to all other recipients. Multiple recipients are separated using a semi-colon (;).	Entry field, alphanumeric	system@provider.com
Bcc address	Recipient of a copy of the e-mail. This name is not displayed to the other recipients. Multiple recipients are separated using a semi-colon (;).	Entry field, alphanumeric	admin@provider.com
Subject	A short note about the contents.	Entry field, alphanumeric	Welcome to the shop
Header	Introductory language-dependent text for the e-mail; For more on formatting, see *Working with text fields, on page 35*.	Text, alphanumeric	
Text	Language-dependent notification text; For more on formatting, see *Working with text fields, on page 35*.	Text, alphanumeric	You have successfully registered...

Save your entries by clicking **Save**.

The fields are mainly used in e-mails as follows:

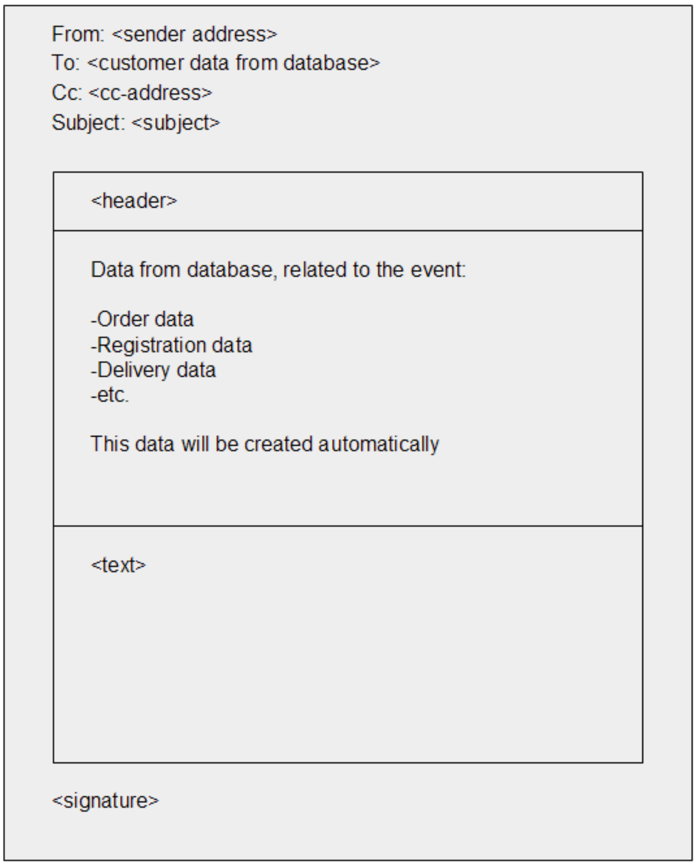


Figure 21: use of details in the e-mail

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*
- *T-Pay - incorrect settings*
- *Change of user address*
- *ClickandBuy – error e-mail*
- *Product inquiries*
- *Product feedback*
- *Customer contact e-mail*

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. Multiple addresses can be entered. The delimiter is a semi-colon.

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 181*.
- 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:

"Add to shopping basket" command

Set the command is run after the customer has added an object to the shopping basket. The following options are possible:

Table 56: Options for add to shopping basket

Option	Comment
Does not change the current view	The customer remains on the current page.
Opens the shopping basket	The shopping basket is displayed to the customer.

Adding a duplicate product

This option allows you to configure what happens to a product in the shopping basket when an identical product is added. The following options are possible:

Table 57: options for adding a duplicate product

Option	Comment
increases the number in the shopping basket	The number of the product already in the shopping basket increases accordingly.
replaces the product in the shopping basket	The product in the basket is replaced by the new product.

Option	Comment
does not change the number in the shopping basket	The entry in the shopping basket remains unchanged.
creates a new line item in the shopping basket	The product is added as a new line item to the shopping basket.

Layout of the function "Add to shopping basket"

This function is used to place products in the shopping basket. The function is available on product detail pages and in product lists. The following options are available for displaying this function:

Table 58: Options for displaying the function *Add to shopping basket*

Option	Comment
Link	The function is a link. By clicking the link, the minimum order quantity of the product is placed in the shopping basket.
Entry field for quantity	The function comprises an entry field and a link. A minimum order quantity is entered in the entry field. Any quantity can be entered. Click the link to place the specified quantity in the shopping basket.
Entry field for quantity with +/- function field	The function comprises an entry field, a +/- function and a link. A minimum order quantity is entered in the entry field. The +- function can be used to change the amount by the increment defined. It is also possible to enter any number. Click the link to place the specified quantity in the shopping basket.
Quantity drop-down menu	The function comprises a drop-down menu and a link. The drop-down menu contains 10 quantities that are calculated from the minimum order quantity and corresponding intervals. It is not possible to enter just any figure. Click the link to place the selected quantity in the shopping basket.

The other fields on this page have the following meanings:

Table 59: Fields for general shopping basket settings

Field name	Description	Field type	Example
Minimum order value	The customer will not be able to order until the minimum order value has been reached.	Entry field, alphanumeric	€50
Price of minimum order value relates to total of	This option specifies how the minimum order value is calculated, which parts of the shopping basket are used to calculate the order value.	Drop-down menu	
Allow tax area selection	If you make different tax areas available for selection, remember to take the tax conditions for this area into account. Remember that you as a merchant must verify that the invoice address of the customer corresponds with the selected tax area or that the customer is entitled to make purchases in the selected tax area.	Option button	

Field name	Description	Field type	Example
Confirm Terms and Conditions before ordering	Stipulate that the customer will not be able to order until he has accepted your Terms and Conditions. However, this requires that you make your Terms and Conditions easily accessible on your page. See also Terms and conditions, *on page 152*.	Option button	
Shopping basket only for registered customers	This option allows you to stipulate that only registered customers can place items in the shopping basket. Non-registered customers are required to register first.	Option button	
Permit ordering straight after registration	This option allows you to stipulate whether the customer is able to order straight after registering. If you first want to check the registration data, set this option to *No* and use the customer details to permit ordering manually.	Option button	

Save your entries by clicking **Save**.

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

The text fields are language-dependent. For more on formatting, see *Working with text fields*, *on page 35*.

Save your entries by clicking **Save**.

Registration

Page: Settings » Shopping basket settings » Registration

This option allows you to define the contents of the various forms visitors must complete in the Web site. There are the following:

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

The table lists the names of all entry fields which you can assign to the forms. The values the customer enters will be saved as customer attributes.

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

You can configure whether or not a field should be mandatory. In this case, click the check box for the desired field in the *Required* column.

If a field contains a gray check box you cannot assign this field or you cannot modify the assignment.

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 136*. Click the name to edit the details.

Save your entries by clicking **Save**.

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

Product settings

Here you can configure the behaviour when products reach a critical stock level. You can also manage the basic settings for the *Auto cross-selling* sale enhancing measure, additional texts for prices and product comparison.

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 various fields have the following meanings:

Table 60: inventory options

Option	Comment
it remains available without restrictions	The product can be added to the shopping basket without restrictions.
a notification about possible delayed delivery is displayed	The product can be added to the shopping basket without restrictions. In addition, the text in the *Notification text* field is displayed. Use this to inform your customers of longer delivery times. The text displayed is language-dependent.
it cannot be added to the shopping basket	The product cannot be ordered. In addition, the text in the *Notification text* field is displayed. Use this to inform your customer about why he cannot order the product. The text displayed is language-dependent.
it is set to "Not Visible"	The product is no longer displayed in the shop and cannot be ordered.

Save your entries by clicking **Save**.

> Notes:
> 1. This function requires that you fill out the Stock level field for the products. If this field is not filled, the subsequent options will be ignored.
> 2. If a product reaches the stock level of 0 during an order, that is, two items are on stock but four items have been ordered, the available amount will be added to the shopping basket in the case of options with order stop.

> *Caution:* If you increase the stock level in the administration area, 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 103*.

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 91*.

Auto cross-selling

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

As opposed to manual cross-selling (see *Product details – Cross-selling*, *on page 119*), automatic cross-selling is based on analysis of customer buying patterns. In this process, data is collected about how often a product is bought in relation to another product. Using this information allows products that are often purchased together to be offered for sale together.

The various fields have the following meanings:

Table 61: auto cross-selling fields

Field name	Description	Field type	Example
Collect statistics	Activate/deactivate the automatic collection of product data for automatic cross-selling; Statistics collection must be activated in order for the corresponding database to be set up and to provide data for meaningful cross-selling suggestions.	Option button	
Visible	Cross-selling products are displayed in the shop	Option button	
Number of product recommendations	Number of cross-selling products to be displayed. The values range from 1 to 20.	Entry field, numeric	5
Minimum match	How often a product needs to be sold along with another in order to be displayed as a cross selling product; The value ranges from 1 to 100.	Entry field, numeric	3

Save your entries by clicking **Save**.

> Note: This 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 text fields are language-dependent and the texts can be formatted. For more on formatting, see *Working with text fields*, *on page 35*.

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 108*.

Save your entries by clicking **Save**.

If you do not want to display this information with the price, leave the text fields empty.

Product comparison

Page: Settings ›› Product Settings ›› Product comparison

This option allows you to enable your customers to compare products in the shop. To do this, set the option *Allow product comparison* to *Yes*.

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.

eBay settings

eBay has become one of the largest sales platforms on the Internet. The eBay interface enables you to offer your products on eBay.

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 buying an item, the customer must finalise the order process in your shop. He will be informed about this via e-mail when he buys the item. This e-mail also contains a link which will forward the customer to the shop. The item the customer bought is in the shopping basket. The customer finalises the order process here as a *normal* shop customer.

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 90*.

> Note: The customer can add additional products to the shopping basket. You can offer him the option of adding the *eBay product* to the shopping basket again. To do this, you must go to the *Shopping basket and orders* settings and for the action *Adding a duplicate product* activate the option *Creates a new line item in the basket*. See also *Shopping basket settings*, *on page 93*.

General settings

Page: Settings ›› eBay Settings ›› General

On this page, you can configure how items placed on eBay effect your stock level. As well as this, you can define a default feedback text which will be used for completed items.

The various fields have the following meanings:

Table 62: fields for general eBay settings

Field name	Description	Field type	Example
Reduce stock level	Using the specified options, you can configure when the stock level for an eBay product is reduced.	Option button	
Default setting for feedback	Default setting for feedback for completed eBay items. Because of eBay rules, as a seller you can only provide positive ratings.	Option field + Entry field, alphanumeric	Transaction perfect

Save your entries by clicking **Save**.

eBay accounts

Page: Settings ›› eBay Settings ›› eBay accounts

Every eBay account is based on an eBay country platform. This determines certain settings such as category lists or available delivery and payment methods.

The table lists all the eBay accounts you have created. To open the details of an account, click the name.

Batch processing commands are available to manage the table entries. For an introduction to this, see *Batch Processes in Tables*, *on page 27*.

To create a new account, proceed as described in *Adding records*, *on page 26*. Before creating an account, you must configure the necessary language and currency. See also *Country settings*, *on page 87*.

Save your entries by clicking **Save**.

To delete an account, proceed as described in *Deleting entries*, on page 26. 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 235*.

> 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

This page is used to authenticate your account with eBay, whether for purposes of renewal or creation of a new account. The various fields have the following meanings:

Table 63: general fields for eBay accounts

Field name	Description	Field type	Example
Name		Entry field, alpha-numeric	eBay_Germany
Sales platform	Platforms will be made available and configured by your provider.	Display	
Authentication	Access authorisation for eBay; see *Authentication, below*.		
User account		Display	
Country	Country where the product is located.	Drop-down menu	
Region	Region where the product is located, dependent on country.	Drop-down menu	
Town	Product location	Entry field, alpha-numeric	Jena

Save your entries by clicking **Save**.

Authentication

To improve security, eBay has introduced a new authentication mechanism. During the authentication process you must sign in with your eBay user name and password once. You then receive a so-called token from eBay which is then saved in the shop system. This token is used to authorise all further data transfer you conduct with eBay. It is used, among other things, to upload offers, query offer statuses, and to download sales data.

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 90*.

The following methods exist to receive a token for an account:

- Request the token from eBay

  Click the **Request authentication** button. The system tests whether a connection to eBay can be created and shows the results.
  If the test is successful, the link **Request authentication by eBay** is displayed. Click the link. After this you must sign in to eBay.
  eBay verifies the information and generates a corresponding token. To transfer the token to your shop, click **Agree and continue** on the eBay page.
  You will be returned to the shop. You will see confirmation in the authentication field in the eBay account details; see *Figure 22*.

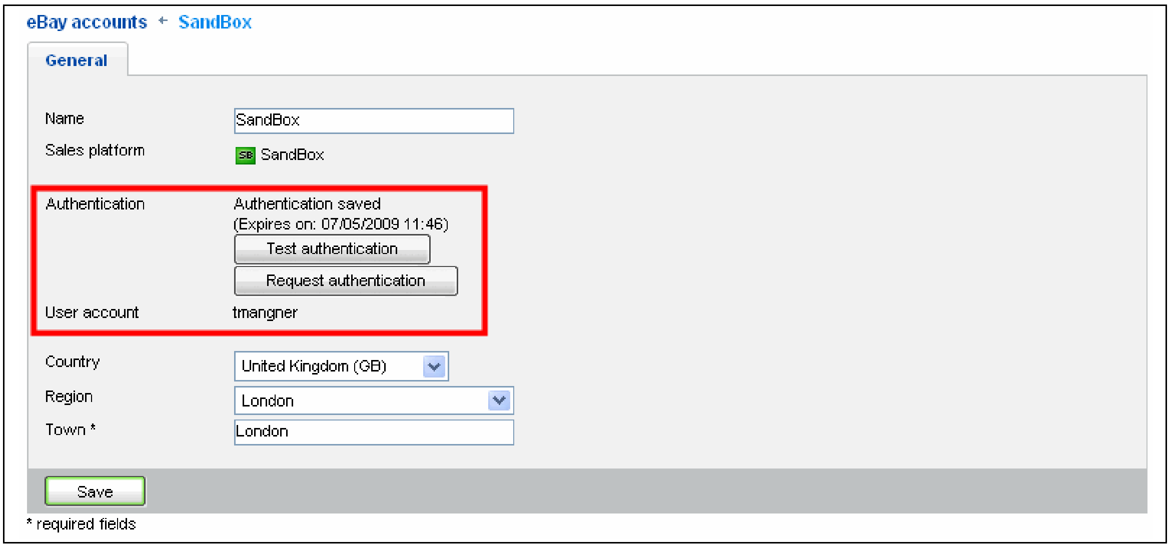


Figure 22: Successful authentication

- Using a valid token of another account.

  If you already have an account with valid authentication, you do not have to request the token for a new account through eBay, but can instead use the token from the other account. The function to do this will be displayed on the tab.

> Note: The token can only be exchanged between 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.

The table shows a list of the available templates that can be used for items.

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

- Proceed as described in *Adding records*, *on page 26*.
- Go to the **Select sample templates** section. Select a template on this page and click **Apply**.

Batch processing commands are available to manage the table entries. For an introduction to this, see *Batch Processes in Tables*, *on page 27*.

To open the details of a template, click the name. You can edit the name and text of the template here; see *Working with text fields*, *on page 35*. 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**.

Templates – details

The various fields have the following meanings:

Table 64: general fields for eBay templates

Field name	Description	Field type	Example
Name		Entry field, alpha-numeric	MyDesign
Item text	Presentation of the item which is displayed on eBay; For more on formatting, see *Working with text fields*, *on page 35*. The placeholders in the box to the right of the sale text are used to include product data. Position the cursor and click the desired placeholder. When the item is offered, the placeholders are replaced with current information.	Text field	...<td width="680" align="center"> <h1 >#Name</h1> <p>#Description</p> ...

Instructions about using these templates with your eBay offers are available in the description of the eBay assistant in *Title*, *on page 232*.

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.

6. Products

Page: Products

The table lists all the products. If you have created more than 100 products, after calling the first page initially no more products will be displayed. Start a search to display all products. The symbols have the following meanings:

Table 65: product icon legend

Icon	Description
	Product in stock at a sufficient level and visible or no stock level has been entered.
	Product in stock, inventory below minimum level, visible.
	Product not in stock, visible.
	Product in stock, not visible.
	Product in stock, inventory below minimum level, not visible.
	Product not in stock, not visible.
	The product is a master product, that is, variations of this product have been defined; see *Product details – Variations, on page 113*. Clicking the icon forwards you to a list of the variations which belong to this master product.
	The product is a variation of a master product; see *Product details – Variations, on page 113*.
	The product is a product bundle, that is, multiple products are combined into one package; see *Creating a product bundle, on page 105*. Clicking the icon forwards you to a list of the products which belong to this 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 delete a product, proceed as described in *Deleting entries, on page 26*.

You can sort the table by column. For more details, see *Sorting using column headings, on page 28*.

Batch processing commands are available to manage the table entries. For an introduction to this, see *Batch Processes in Tables, on page 27*. The following specialised actions can be performed:

Table 66: 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*.
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 219*.

Command	Comment
Set *New* marker	Highlighted products are all flagged immediately as *New*. See also *Mark as* New, on page 110.
Remove *New* marker	Marked products are no longer displayed as new products. See also *Mark as* New, on page 110.

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

Save your entries by clicking **Save**.

Creating a new product

The sub menu offers the following possibilities for creating a new product:

- Creating a single product; see *Creating a single product*, *below*
- Creating a product with variations; see *Creating a product with variations*, *on page 105*
- Creating a product bundle; see *Creating a product bundle*, *on page 105*

Creating a 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 26*, 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 106*.

If you create a product using the context menu, 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. A product cannot be saved without a valid number. Repeated numbers are rejected by the system. Having done this, enter additional general information; see *Product details – General* , *on page 106.*

Save your entries by clicking **Save**.

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 111* and following. In the **Variations** tab in the details, you can add variations at a later date.

> *Caution:* Save your changes before you click the tab to enter additional information. Otherwise, the changes will be lost.

> 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 product with variations

To create a product with variations directly, click the link **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 106.*

Save your entries by clicking **Save**.

Having done this, you will be forwarded to the product variation assistant directly. For more information, see *Product variation assistant, on page 115*. For the basics about variations, refer to *Product details – Variations, on page 113*.

At the same time, the remaining tabs will be activated in the background. Enter the remaining information as described in *Product details – Images, on page 111* 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 106.* 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 111* 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.

The *Quantity* column allows you to set the quantity of a product offered in the bundle.

The order in which the products are displayed is defined by the numbers in the *Sort order* column; see *Sorting using key*, *on page 28*.

To add a product, either enter the product number directly or insert a product from the tray. For more information, see *Adding records*, *on page 26*.

Save your entries by clicking **Save**.

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.

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.
- During import, the bundles are imported as normal products. The assignments for the individual products are not retained.
- 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.

Product details – General

Here you can collect basic information for your product such as prices, units, manufacturer information, and so on. The tab is divided into the following sections:

- Prices/inventory/delivery; see *Prices/inventory/delivery*, *below*
- Description; see *Description*, *on page 109*
- Attributes; see *Attributes*, *on page 110*

Prices/inventory/delivery

Page: Products » [product] » General » Prices/inventory/delivery

The various fields have the following meanings:

Table 67: Product detail fields *Prices/inventory/delivery*

Field name	Description	Field type	Example
Product number	Unique product ID, corresponds to the ID code for other objects	Entry field, alphanumeric	eg_1000111010
Visible		Option button	

Field name	Description	Field type	Example
List price	Price of the product, displayed in the shop; According to the settings, either gross or net prices must be entered; see *Tax model*, *on page 61*.	Currency field	339.95
Display comparison price	Displays fields to allow entry of comparison prices; See also *Comparison price*, *on page 108*.	Link	
Total of individual prices	Displayed with product bundles	Currency field	
Daily price dependent		Option button	
Tax class		Drop-down menu	Normal
Order unit		Drop-down menu	Pieces
Price refers to	Number of order units the price refers to	Entry field, numeric	1.00
Minimum order quantity	If the customer enters a lower amount in the shopping basket, the amount is automatically increased to the minimum order quantity.	Entry field, numeric	1.00
Increment	Amount increment, according to which the products can be ordered	Entry field, numeric	1.00
Reference unit	See *Reference unit*, *on page 108*.	Entry field, numeric and drop-down menu	1 Item
Amount in product	Number of products or amount of product per reference unit.	Entry field, numeric	1.00
Manufacturer		Entry field, alphanumeric	Eureka
Manufacturer product no.	Product number of the manufacturer	Entry field, alphanumeric	
Product code (e.g. EAN)	You can enter the product code here. This can be formatted according to various specifications (EAN, UPS, etc.). The entry is tested to ensure it matches an EAN or UPS specification.	Entry field, alphanumeric	1234567890123
Stock level	You can set various options which will be triggered if a customer orders a product with a stock level of *0*; see *Inventory*, *on page 96*. In the case of master products, you can enter a default setting for the variations here. You can configure the system to send you an e-mail if the stock level falls to *0*; see *Exception: E-mail messages for the merchant*, *on page 93*.	Entry field, numeric	12 items

Field name	Description	Field type	Example
Minimum stock level	Value, below which you want to order 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 93.*	Entry field, numeric	2 items
Delivery period	Please enter a number of days (*3*) or time reference (e.g. *2 to 4* or *at least 3*). The suffix *day(s)* is predefined.	Entry field, alphanumeric	at least 3
Display delivery data	Shows fields to configure and record delivery data. For more information, see *Delivery information, on page 109.*		

Save your entries by clicking **Save**.

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 from different manufacturers, 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.

A possible case would be purchasing chocolate from a food retailer. A bar of chocolate *X* from manufacturer *A* weighs 150 grams and costs € 1.49, a bar of chocolate *Y* from manufacturer *B* weighs 75 grams and costs € 0.99. The reference price per 100g is € 0.99 for chocolate *X* and € 1.32 for chocolate *Y*. This makes it easy to see without having to calculate which chocolate is more attractively priced.

You are required to offer this service to your customers in the shop.

The system calculates the reference price using the values in the *List price*, *Reference unit*, and *Amount in product* fields. So if, for example, you select a reference unit of 100 g, you sell your product for € 10.00 and the product weighs 250 grams, the reference price for 100g is € 4.00.

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 show off the price comparison more effectively, you can add text and define the way the comparison price is to be displayed. For more details, see *Texts, on page 97*.

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.

To display a product with the list price and comparison price, proceed as follows:

1. Enter the current list price or a special price for the product in the List price field.

2. Click Display comparison price to view the entry fields for comparison prices.
3. Enter a comparison price per currency.
4. Save your entries by clicking Save.
5. Call up the page Settings ›› Product settings ›› Texts.
6. Enter a corresponding text in the field Text before comparison priceif desired.
7. Select the checkbox Strike through comparison price if desired.
8. Save your entries by clicking Save.

Call up the shop and check the way prices are displayed in product lists and in the product details.

Delivery information

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

You enter the delivery weight for the quantity or number of the product that you have entered as the base unit for the price. The value is displayed for greater clarity.

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

Description

Page: Products ›› [product] ›› General ›› Description

The various fields have the following meanings:

Table 68: Product detail fields - *Description*

Field name	Description	Field type	Example
Name	Language-dependent name used to display the product.	Entry field, alphanumeric	Eureka El Capitan IV
Description	Language-dependent product description to be displayed in list view in the shop; For more on formatting, see *Working with text fields*, *on page 35*.	Text field, alphanumeric	Dome tent for four persons; 2 doors.
Long description	Language-dependent detailed description of the product for the product detail view in the shop; For more on formatting, see *Working with text fields*, *on page 35*.	Text field, alphanumeric	Dome tent for four persons. 2 doors and well-cut apses create efficient use of space thereby making ...
Keywords for search engines	These are used for internal searches as well as for external search engines; No third-party brand names may be entered here.	Entry field, alphanumeric	camping tent geodetic dome light weight

Field name	Description	Field type	Example
Mark as *New*	Option *Yes*: The product is immediately displayed in the shop as a new product. Option *After*: In the associated date field, enter the date from which the product should be displayed as a new product. To select a date use the icon. See also *Date entry fields*, *on page 30*. The display will be activated automatically on the specified date. Option *No*: The product will not be specifically highlighted,	Option button + date field	
For sale	This sets whether a product is available for sale or should only be displayed; Option *Yes*: The product can be purchased. Option *From*: In the associated date field, enter the date from which the product should be available for sale. To select a date use the icon. See also *Date entry fields*, *on page 30*. The display will be activated automatically on the specified date. Option *No*: The product cannot be purchased.	Option button + date field	
Note if not available for purchase	If you enter a date from which the product will be on sale, a corresponding text proposal will be entered in this field. The text is displayed as long as the product is marked as not for sale. You can change this text at any time. For more on formatting, see *Working with text fields*, *on page 35*.	Text field	Available from 01.07.2008

Note: Dates must be entered in the correct format. Use the date function next to the entry fields to avoid mistakes See also *Date entry fields*, *on page 30*.

Save your entries by clicking **Save**.

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 122*.

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**.

The **Edit product type** link takes you to the current product type of the product.

> Note: Once a product has variations (see *Product details – Variations*, *on page 113*), the product type assignment can no longer be changed.

Product details – Images

Page: Products » [product] » Images

Product images are displayed at various places: in categories, 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 sized on each page, you can upload the image files in various formats:

Table 69: 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.
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 using the image upload button . For more details, see *Uploading images*, *on page 43*. 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. For this, use the image upload button for the specific format.

To remove an image for a specific format, click the icon.

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 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 field in the bottom row of the table. See also *Uploading images*, *on page 43*.

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 key*, *on page 28*.

Save your entries by clicking **Save**.

To the right of the table is the image display as seen by visitors to the Web site. The lower portion displays the list of the images that have been marked as visible. The upper section has the following functions:

- Display an individual image. To do this, click an image in the image list.
- Start and control the slideshow. If you move the mouse over the preview area, a bar containing controls is displayed; see *Figure 23*. Use these tools to control the slideshow and view the images in their original size.

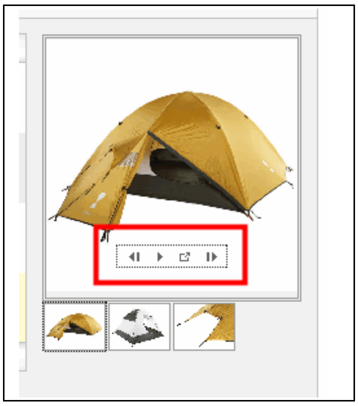


Figure 23: Control elements for slideshow

The control elements have the following meanings:

Table 70: Print preview controls

Format	Description
	Starts the slideshow. The images are played back in the sequence in which they are listed in the table. The *Visible* marker must be set.
	Shows the previous image. A running slideshow is paused.
	Shows the next image. A running slideshow is paused.
	The current image is shown in its original size. A running slideshow is paused.

To delete an image from the table, proceed as described in *Deleting entries*, *on page 26*.

> *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.

Save your entries by clicking **Save**.

> 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 that are derived from a master product and that only differ in terms of the values of certain 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 initial product is referred to as the master product, while the variations represent sub products or variation products. Variation products are completely separate self-contained products. You can modify any individual property if necessary.

> *Caution:* If you delete the master product, all the derived variation products will be deleted as well.

> Note: You cannot derive any further variations from a variation product.

The tab allows you to edit variation attributes and variation products, and to start the Variation assistant. See also *Variation attributes*, *below*, *Variation products*, *on page 114*, and *Product variation assistant*, *on page 115*.

You can read how to create variations in *Creating a variation*, *on page 115*. You can read how to extend existing variations in *Extending variations later*, *on page 117*.

Variation attributes

Page: Products » [product] » Variations » Variation attributes

Variation attributes are the attributes which differ from one variation product to another. Attribute types with value selection are used for variation attributes; see *Product types*, *on page 122*. These attributes are defined in a corresponding product type. The product type is assigned to the master product, so that the attributes are available for selection for this product.

The **Variation attributes** section shows the available variation attributed for the current master product, along with the available values. Each value has its own check box. When you select a check box, you can generate a new variation product on the basis of this value.

Save your entries by clicking **Save**.

All highlighted values will be copied to the drop-down menu for the creation of variation products; see *Variation products*, *below*.

> Note: As long as a variation product is using a variation value, the check box is deselected and the selection cannot be removed. If you would like to select this check box again, you need to delete all the variation products that use this value.

The complete process and the methods for creating variations are described in *Creating a variation*, *on page 115*.

Variation products

Page: Products » [product] » Variations » Variation Products

All the variation products that have been created for the current product are displayed in the table in the **Variation products** section.

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. Note the following:

- 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.
- If the variation product is priced differently, the list price of the master product is displayed next to the variation product.
- 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.

You can sort the table by column. For more details, see *Sorting using column headings*, *on page 28*.

The order in which the products are displayed is defined by the numbers in the *Sort order* column; see *Sorting using key*, *on page 28*.

The variation product marked as default is displayed in the shop as the default variation product. For more on default settings, see *Default settings*, *on page 31*.

Batch processing commands are available to manage the table entries. For an introduction to this, see *Batch Processes in Tables*, *on page 27*. The following specialised actions can be performed:

Table 71: specialised batch processing actions for product administration

Command	Comment
Set *New* marker	Highlighted products are all flagged immediately as *New*. See also *Mark as* New, on page 110.

Command	Comment
Remove *New* marker	Marked products are no longer displayed as new products. See also *Mark as* New, on page 110.
Delete all variations for this product	All existing variations of this product will be deleted.

To create new variation products, proceed as described in *Creating a variation*, *below*.

Save your entries by clicking **Save**.

Note: You have the option of selecting a separate type of variation display for each product type; see *Product type details - Layout*, *on page 124*.

Creating a variation

The following methods of creating variations exist:

- use the variation assistant; see *Product variation assistant*, *below*
- Create the variations manually in the product details on the **Variations** tab; see *Manual creation*, *on page 116*

You can read about adding attributes to variations in *Extending variations later*, *on page 117*.

Product variation assistant

The product variation assistant helps you to create variations for a product quickly and simply. For the basics about variations, refer to *Product details – Variations*, *on page 113*. The assistant can be started in the following ways:

- Use the **New** ›› **Product with variations** function from the product context menu; see *Creating a product with variations*, *on page 105*.
- 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. 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.

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

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 above.

> 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:

- The icon allows you to delete values and attributes.
- Attributes which have already been saved for the product type are displayed in grey. The available values cannot be changed. You may still add values.
- Saved attributes can only be deleted in the details of the relevant product type. See also *Product type details - Attributes*, *on page 123*.
- 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.
- Only the attributes defined in the assistant are displayed for a new product type. If you would like to create additional attributes, open the details of the product type; see *Product type details - Attributes*, *on page 123*.
- For language-dependent attribute values, you can only create the value for the administration language in the assistant. The values for additional languages must be created in the product type details; see *Product type details - Attributes*, *on page 123*.

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. If necessary, you can modify the suggestions by overwriting them in the entry fields.

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

To set the generated variation products to visible, mark the *Set the generated variation products to visible* check box.

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.

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

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 *Product type details - Layout*, *on page 124*.

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

Manual creation

To create variation products manually, proceed as follows:

1. Create a product type with attributes which contain the variation values. To do this, use attribute types with value selection. For more information, see Product types, on page 122.

2. Create a new single product; see Creating a single product, on page 104. This is the master product. Assign the newly generated product type to the master product.
3. Switch to the Variations tab in the product details of the master product, and select the section Variation attributes
4. In the overview, select the attribute values to be used to generate variation products. Save your entries by clicking Save.
5. Switch to the Variation products section. The drop-down menus in the bottom table row contain the values that you selected for creation of variations.
6. Select the variations you wish to create in the drop-down menu(s). If necessary, enter a new product number. Otherwise a number will be automatically generated on the basis of the master product number. Save your entries by clicking Save.

Extending variations later

The following methods exist for extending existing variations with a new variation attribute:

- use the product variation assistant
- create a new variation attribute manually.

Extending a variation using the product variation assistant

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

1. Create a new variation attribute as described in step 1 of Product variation assistant, on page 115.
2. The existing variation products must also be assigned a value for the new attribute. In the next step, select the value that is to be used for the existing variations. After selection, click "Display variation products" to display the possible product variations.
3. When the product list is displayed, continue as described in step 2 of Product variation assistant, on page 115.

Extending manually

To extend existing variations of a product with an additional variation attribute manually, proceed as follows:

1. Extend the product type of the master product with an additional attribute with value selection and enter the variation values for this attribute.
2. Switch to the Variation attributes section of the Variations tab in the product details of the master product. Here you can see the new attribute with the corresponding values.
3. Select the values for which you wish to generate variation products. Save your entries by clicking Save.
4. The existing variation products must also be assigned a value for the new attribute. In the next step, select the value that is to be used for the existing variations. Save your entries by clicking Save.
5. Proceed as described in Manual creation, on page 116, from step 5.

Product details – Prices

Page: Products » [product] » Prices

For every product, you can create bulk prices and discounts as well as a list price. To do this, a price list must already exist; see *Price lists*, *on page 124*.

You can configure the following price reductions:

- Bulk discount/prices; see *Bulk discount*, *on page 118*
- Value discount; see *Value discount*, *on page 119*

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.

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 reductions are connected to a price list in which you can also set the validity period and the customer or customer group; see *Price lists*, *on page 124*.

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.

When you call up the page, the first two price lists of your price list table are displayed. If these do not include the price list that you wish to edit, simply select the correct price list from the drop-down menu.

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. To do so, click the icon.

> 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.

After you have selected a price list, the entries it contains are displayed. Edit the values directly in the entry fields. Save your entries by clicking **Save**.

To create a new bulk price or discount, proceed as described in *Adding records*, *on page 26*.

To delete a bulk price, follow the steps described in *Deleting entries*, *on page 26*.

You can see an example for bulk pricing with a discount in *Figure 24*.

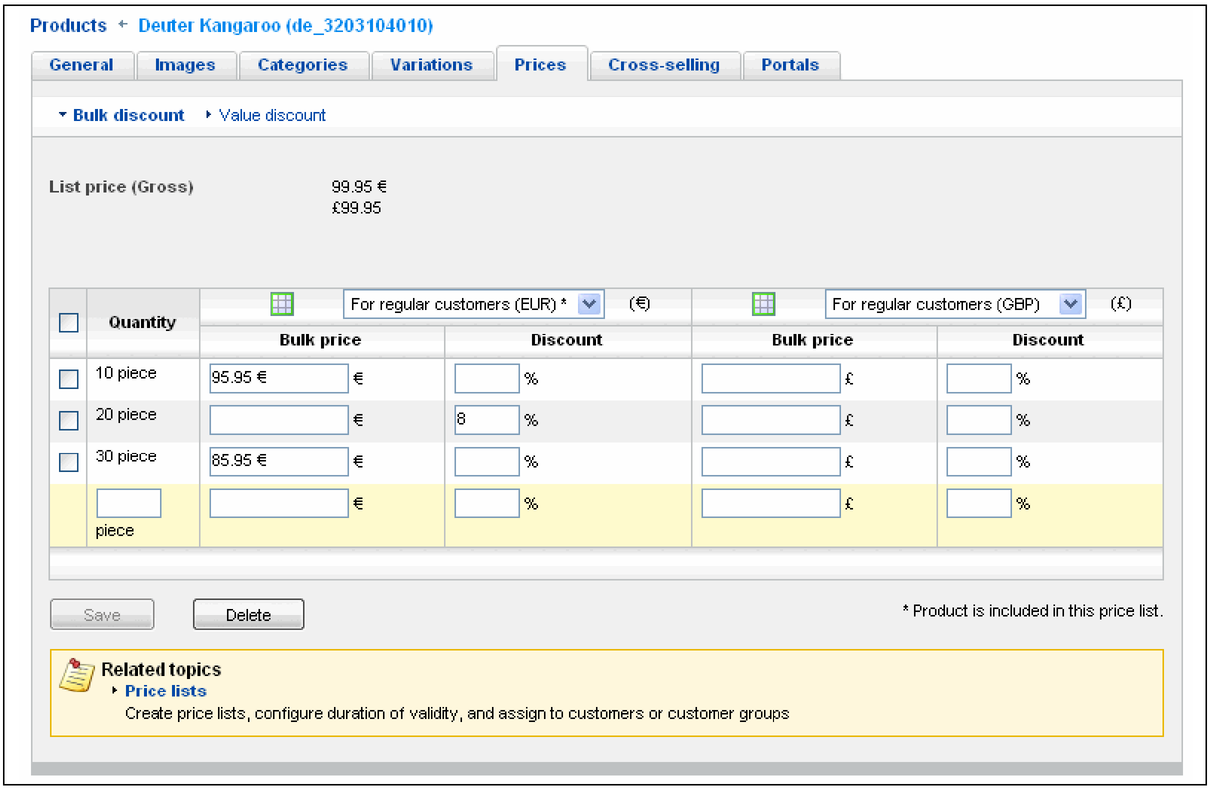


Figure 24: combined price list

When doing this, please 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*, *below*.
- 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.

> 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 124*.

When you call up the page, the first price list of your price list table is displayed. If this is not the price list that you wish to edit, simply select the correct price list from the drop-down menu.

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. To do so, click the icon.

> 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.

After you have selected a price list, the entries it contains are displayed. Edit the values directly in the entry fields. Save your entries by clicking **Save**.

To create a new value discount, proceed as described in *Adding records*, *on page 26*.

To delete an entry, follow the steps described in *Deleting entries*, *on page 26*.

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.
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.

Manual cross-selling is divided into the following sections:

- *Accessories*; see *Cross-selling - Accessories*, *below*
- *Related products*; see *Cross-selling - Related products*, *below*
- *Alternative items*; see *Cross-selling – Alternative items*, *below*
- *References*; see *Cross-selling - References*, *on page 121*

The number in parentheses behind the section heading displays the total number of assigned products.

Cross-selling - Accessories

Page: Products ›› [product] ›› Cross-selling ›› 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).

The table lists all the accessories for the current product. The content of the *Comment* column is displayed in the shop as an explanation. Enter a note or description here explaining why or how this product enhances the current product. A comment field is offered for every language in your shop.

You can set the sequence using the sorting key in the last column of the table. For more details, see *Sorting using key*, *on page 28*.

To add a product, either enter the product number directly or insert a product from the tray. For more information, see *Adding records*, *on page 26*.

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. Reciprocal assignments affect direct entries as well as items imported from the tray.

Save your entries by clicking **Save**.

To remove an assignment, select the relevant products and click **Remove assignment**.

> 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.

Cross-selling - Related products

Page: Products ›› [product] ›› Cross-selling ›› 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, flashlights for tents, and so on.

The table is comparable with the table in the *Accessories* section; see *Cross-selling - Accessories*, *above*.

Cross-selling – Alternative items

Page: Products ›› [product] ›› Cross-selling ›› Alternative items

The alternative items function is not so much about offering the customer product enhancements as presenting alternatives for the chosen product. You can use this function to show the customer similar products you are offering and therefore show him products for sale that he otherwise may not have ever seen.

In its basic functionality, the table is comparable with the table in the *Accessories* section; see *Cross-selling - Accessories*, *on page 120*.

We recommend comparing products of the same type since then these products all have the same attributes, which make a meaningful comparison possible.

Cross-selling - References

Page: Products ›› [product] ›› Cross-selling ›› References

The table shows an overview of the products the current product is linked with and the type of link.

The ID of the target product (the product the current product is linked with) is displayed in the first column.

The last column shows the type of assignment (how the current product is assigned to the target product).

In addition to the various cross-selling types, assignment to a product bundle is also displayed.

To remove an assignment, select the relevant products and click **Remove assignment**.

Variation products and cross-selling

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

- Manual assignment using the **Cross-selling** tab; see *Product details – Cross-selling*, *on page 119*
- 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 26*.
- Enter the desired values in the *Comment* and *Sort order* fields. Save your entries by clicking **Save**.

The system then uses the updated information for display in the shop.

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. The page is divided into the following sections:

- Product portals; see *Product Portals*, *below*.
- eBay; see *eBay*, *on page 122*

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 exported. For these, the corresponding check box in the *Assigned* column is selected. To assign the current product to a list for a portal, click the relevant check box. To delete a product from an export list, remove the tick in the relevant check box.

Save your entries by clicking **Save**.

To open the details for a product portal, click the relevant link. See also *Product Portals*, *on page 219*.

eBay

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

All eBay items based on a 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 230* 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 235*. To edit item details, see *Item settings/eBay assistant*, *on page 232*.

You can also upload the item to eBay when it is created. Select the *Upload as an eBay item immediately* check box before clicking the link. The item will be checked and sent to eBay.

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

Product types

Page: Products ›› Product types ›› General

Product types are used to group similar products. These are products which share additional attributes as well as the standard attributes. These additional attributes are made available in the product type. The product type is assigned to all relevant products. In this way, the products receive the desired additional attributes.

The table lists all the created product types. To open the details of a product type, click the name.

To create a new product type, proceed as described in *Adding records*, *on page 26*.

Save your entries by clicking **Save**.

To delete a product type, follow the steps described in *Deleting entries*, *on page 26*.

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

A special type is the *Base* product type. This is the base 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 base product type cannot be deleted. The shared additional attributes can only be deleted via the base product type.

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

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

Product type details - General

Page: Products » Product types » [product type] » General

The name is language-dependent; enter a value for every defined language.

Save your entries by clicking **Save**.

Product type details - Attributes

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

The table lists all the attributes which have been created for this product type. To display the details of an attribute, click the attribute name.

You can set the sequence using the sorting key in the last column of the table. For more details, see *Sorting using key*, *on page 28*.

To create a new attribute, proceed as described in *Adding records*, *on page 26*.

Save your entries by clicking **Save**.

To delete an attribute, proceed as described in *Deleting entries*, *on page 26*. The attributes which have been inherited from the basic product type cannot be deleted here. See also *base product type*, *on page 122*.

Attribute – Details

Page: Products » [product] » [product type] » Attributes » [attribute]

The various fields have the following meanings:

Table 72: fields for attributes

Field name	Description	Field type	Example
ID		Entry field, alpha-numeric	TentWeight
Visible	See *Visibility*, *on page 31*	Option button	
Support HTML formatting	Text attribute setting; see *Attribute types*, *on page 32*; Use this to determine whether the texts that are later entered in the field should be able to be formatted with HTML	Option button	
Name	Language-dependent name used to display the attribute.	Entry field, alpha-numeric	Weight
Tool tip text	Language-dependent short explanation of the field displayed in the administration.	Entry field, alpha-numeric	Tent weight (travel weight)

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 33* and *Using options*, *on page 34*.

Product type details - Layout

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

Using the layout options for a product type you can configure how products of this type are displayed in the shop.

You can use the following layouts:

Table 73: layout variations for product display

Layout	Comment
Product details display	Alignment of product image and descriptive text to each other in the product view in the shop
Variations display	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 display	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.

Save your entries by clicking **Save**.

Price lists

Page: Products » Price lists » Overview

Price lists form the basis for customer-specific pricing. 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 117*. In addition, shopping basket discounts are configured using price lists.

All price lists that have been created are displayed in the **Overview** section of the table. The symbols have the following meanings:

Table 74: icons in the table for price lists

Icon	Description
 (green)	Price list is active. The current date lies within the list validity period and the affected customers receive the defined price reduction.
 (grey)	Price list is not active. The current date lies outside of the list validity period and the price reductions are not applied.

To open the details of a price list, click the price list name.

Batch processing commands are available to manage the table entries. For an introduction to this, see *Batch Processes in Tables*, *on page 27*.

To create a new price list, follow the steps described in *Adding records*, *on page 26*.

Note: Information for the validity period must be entered in the correct format for date and time. Use the date function next to the entry fields to avoid mistakes See also *Date entry fields, on page 30*.

Save your entries by clicking **Save**.

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 *Use list prices* is active, the list prices of the products are displayed. These prices are edited in the general product details; see *Prices/inventory/delivery, on page 106*.

If the option *Take account of bulk and value discounts on basis of price lists* is active, then a special price can be displayed in the product lists and product details view. The prerequisites for this are:

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

Once these requirements are fulfilled, the corresponding customer will see the prices that are valid for him in the product lists and product details view. Other price reductions such as bulk prices are displayed on the product detail page using the **Price reductions** link.

Note: Using this option can cause the page display speed to fall for that page, since the prices must be calculated first.

Price list details – General

Page: Products » Price lists » [pricelist] » General

The various fields have the following meanings:

Table 75: fields for general price list details

Field name	Description	Field type	Example
ID		Entry field, alpha-numeric	RegularCustom-ers_EU
Name	Language-dependent name used to display the price list.	Entry field, alpha-numeric	For regular custom-ers (€)
Currency	Valid currency for this price list	Display	
Valid from	See also *Date entry fields, on page 30*.	Date field	01.01.08 00:00
Valid until	See also *Date entry fields, on page 30*.	Date field	30.06.08 23:59

Save your entries by clicking **Save**.

Price list details – Customer groups

Page: Products » Price lists » [pricelist] » Customer groups

The table lists all the customer groups for whose members the price reduction is valid.

To add a new customer group, select it from the drop-down menu at the end of the table and click **Save**. All the customer groups you manage in **Customers** » **Customer groups** are listed in the drop-down menu; see *Customer groups*, *on page 136*.

To remove a customer group assignment, select the entry you wish to remove and click **Remove assignment**.

Price list details - Customers

Page: Products » Price lists » [pricelist] » Customers

In addition to customer groups, individual customers can also be assigned to a price list. The table lists all customers for whom the price reduction is valid.

Add new entries by entering a customer number directly or inserting the customer from the tray. For more information, see *Adding records*, *on page 26*.

Save your entries by clicking **Save**.

To remove a customer assignment, select the entry you wish to remove and click **Remove assignment**.

> 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 has precedence for the customer.

Price list details - Shopping basket discount

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

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

The table shows all the shopping basket discounts for the current list.

To create a new discount, proceed as described in *Adding records*, *on page 26*.

Save your entries by clicking **Save**.

To delete an entry, follow the steps described in *Deleting entries*, *on page 26*.

> 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.

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 lowercase 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.

You can sort the table by column. For more details, see *Sorting using column headings*, *on page 28*.

Batch processing commands are available to manage the table entries. For an introduction to this, see *Batch Processes in Tables*, *on page 27*.

You can evaluate the overview to adapt to the search terms used in your shop. The following considerations or actions are recommended:

- Use the search terms as keywords for products that you offer in these areas; see the *Keywords for search engines* field in *Description*, *on page 109*.
- Use these search terms in descriptions or product names, if possible.
- 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
- Decide if you wish to keep products for which no one searches in your assortment.

Product ratings

Product feedback gives your customers the opportunity to give their opinions on the products and discuss their own experiences. Positive feedback is great advertising for the product. Ratings are also a means of obtaining feedback on the quality of your products, so you can react accordingly. Customers are able to award points from 1 to 5, and can also enter some feedback text.

You must activate the function using the product ratings settings; see Settings, below. For the list of received feedback, see General , below.

General

Page: Products ›› Product ratings ›› General

The table lists all the product ratings that have been submitted to your shop with the corresponding products. The most recent rating is at the top. The symbols have the following meanings:

Table 76: Status of product rating

Icon	Description
(Yellow icon)	The product rating is displayed in the shop.
(Grey icon)	The product rating is not displayed in the shop.

The icons before the product name correspond to those in the product table; see *Products*, *on page 103*.

To delete a rating, follow the steps described in *Deleting entries*, *on page 26*.

You can sort the table by column. For more details, see *Sorting using column headings*, *on page 28*.

Batch processing commands are available to manage the table entries. For an introduction to this, see *Batch Processes in Tables*, *on page 27*.

To open the details of a rating, click the name. The details allow you to configure the visibility of every rating, as well as delete the rating. Moreover, the author's name and e-mail address are also shown and you can send him an e-mail directly.

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. The various fields have the following meanings:

Table 77: Settings for product ratings

Field name	Description	Field type	Example
Activate product ratings	This setting specifies that product ratings can be awarded your shop.	Option button	
Display new product ratings immediately	This setting defines whether new ratings are displayed immediately in the shop. If you want to moderate the ratings before they are published, set the option to *No*. You can then set the ratings to *visible* in the table or in the details.	Option button	
Product ratings only for signed in customers		Option button	

You can 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 90*.

Import and export

Page: Products » Import and export

You can read a general description about importing and exporting in the chapter *Import and export*, *on page 45*.

In the import file, the following columns are mandatory for creating new products:

- "ID [Alias]"

If no further data is specified, the products are created using the corresponding alias and are assigned to the default product type. 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.

In the import file, you can enter the file name for images which have already been uploaded or a reference to the image file. Enter a reference if the image is already in the Internet. This is comparable with uploading product images in the administration; see *Product details – Images*, *on page 111*.

These alternative entries are possible for the following columns in the import file:

Table 78: Columns for image information in a CSV import file

Column	Example image file	Example reference
Image for list view [ImageSmall]	camera_s.png	https://bildserver/ProductImages/camera_s.png
Image product view [ImageMedium]	camera_m.png	https://bildserver/ProductImages/camera_m.png
Image magnified view [ImageLarge]	camera_l.png	https://bildserver/ProductImages/camera_l.png
Image for promotional products [ImageHotDeal]	camera_hd.png	https://bildserver/ProductImages/camera_hd.png

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 79: 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

Products are the most important elements of your shop. Therefore, the access to individual products or product groups must be uncomplicated and convenient. Not only is catalogue management important for this, you also need an easy to use search with extensive filter options.

The product search can be accessed on every page in the *Products* area. For basic information on using the search function, see *Search*, *on page 28*.

Product search has been expanded with the following buttons:

 /  Switch between inventory and text search; see *Inventory search below* and *Text search*, *below*. Different search fields are displayed according to the setting.

> 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 113*.

Text search

You can search for individual products in the *Product number* field. You **cannot** use wildcards (*) in this field. The number of the product you are looking for must be entered completely.

> Note: Searching by product number is quicker than searching using the *Text search* field because, in this case, only one field is evaluated per record.

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 engines*, as well as all the attributes based on the *Text* variable type. For more information about attribute types, see *Attribute types*, *on page 32*.

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 search

There are two fields for searching the inventory: the *Stock level* field and the *Minimum stock level* field.

Use the *Stock level* search field to query the stock levels of individual products. To do this, enter a number.

> Note: If the stock level of a product is lower than the number entered into the search field, it will be displayed in the search results.

If you want to list all the products that have reached a minimum stock level or have already fallen below it, select the *Stock level below minimum* check box.

> Note: Inventory searches find and list variation products and *single 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. In addition, they are allocated user names and passwords, thus providing them with user accounts in addition to their customer accounts. As users, registered customers can be given permissions for certain commands. See also *Users*, *on page 56*

The table lists the customers of your shop. The symbols have the following meanings:

Table 80: customer symbols

Icon	Description
	Customer is active and can sign in
	Customer is inactive and cannot sign in
	The customer is a registered customer.

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.

Batch processing commands are available to manage the table entries. For an introduction to this, see *Batch Processes in Tables*, *on page 27*. The following specialised actions can be performed:

Table 81: specialised batch processing actions for customer administration

Command	Comment
Assign to customer group...	Simple assignment of multiple customers to a customer group; Select the customers you wish to assign and start the command. In the second step, select the target customer groups and click **Assign** to confirm.

Caution: If you delete a customer, her orders will also be deleted.

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 58*. A registered customer is also referred to as a user.
- A customer does not register, and orders without signing in. He is created as an unregistered customer. You can also convert this customer into a registered customer by providing sign in data for her. See also *Customer details - User data*, *on page 133* or *Sign-in*, *on page 134*.
- Use the **New customer** command in the customer context menu in the administration area. Enter information as described in *Customer details – General*, *below* and following. To add a registered customer (a user), enter the sign-in information for the customer. See also *Customer details - User data*, *on page 133*.
- Customer import; see *Import and export*, *on page 137*

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. The tab is divided into the following sections:

- Address; see *Address, below*
- Customer account; see *Customer account, below*
- Attributes; see *Attributes, on page 133*

Address

Page: Customers » [customer] » General » Address

Here you can edit the address information of the merchant-side customer data. A date of birth must be entered in date format. Use the calendar function for this purpose. See also *Date entry fields, on page 30*.

In this section you can manage multiple e-mail addresses for the customer. The e-mail fields have the following meanings:

Table 82: customer e-mail settings

Field name	Description	Field type	Example
HTML e-mail messages	*Yes*: The message will be displayed with the correct formatting. *No*: The text will be sent without HTML codes.	Option button	
E-mail	If the customer is not a registered customer, all system-generated e-mail messages related to this customer are sent to this address. For more information, refer to the note in *Sign-in, on page 134*.	Entry field, alphanumeric	j.doe@provider.co.uk
Business e-mail	Business e-mail address of the customer	Entry field, alphanumeric	j.doe@provider.co.uk
Private e-mail	Private e-mail address of the customer	Entry field, alphanumeric	john@home.co.uk

Save your entries by clicking **Save**.

If the merchant-side user data differs from the user information, 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 135*. For more information about user data, see *Customer details - User data, on page 133*.

Customer account

Page: Customers » [customer] » General » Customer account

The various fields have the following meanings:

Table 83: fields for the customer account

Field name	Description	Field type	Example
Customer number	Unique number. You can accept the number generated by the system or use your own.	Entry field, alphanumeric	1001
Customer group	When the customer registers and creates a new account, the customer group you set in the *Customer groups* is set as default. See *Customer groups, on page 136*.	Drop-down menu	Regular customer
Allow orders	Order block for registered customers	Option button	
Account holder		Entry field, alphanumeric	John Doe

Field name	Description	Field type	Example
Account number		Entry field, numeric	1234567890
Bank sort code	bank code	Entry field, numeric	13245678
Bank name		Entry field, alphanumeric	A bank
Tax model	Tax model according to which the prices are displayed and calculated on the Web site for this customer. See also *Tax model, on page 61*.	Option button	
VAT ID	VAT identification number; Merchants who can deduct VAT receive a separate VAT ID number upon request.	Entry field, alphanumeric	DE 123 456 789
Tax area		Drop-down menu	EU country
Created on	Date of registration	Display	
Last confirmed	Date entry for displaying the time of last verification. Click **Confirm now** to enter the current date.	Display	
Internal Note	Field for information and notes about the customer. The customer cannot see these notes.	Text field, alphanumeric	This contact is a sample customer.

Save your entries by clicking **Save**.

You can also verify the EU VAT reg. no. immediately. Simply click **Verify** after entering the number. This will forward you to the corresponding verification page provided by the European Union, which will display the result.

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 136*. Click the link marked with the corresponding attribute name to jump directly to the detail page for the attribute.

Save your entries by clicking **Save**.

Customer details - 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 58*.

The tab is divided into the following sections:

- Sign in; see *Sign-in, on page 134*
- Invoice address; see *Billing address, on page 135*
- Default delivery address; see *Default delivery address, on page 135*

> **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 invoice address and the default delivery address.

Sign-in

Page: Customers » [customer] » User data » Sign in

On this page, you can manage data used to control customer access rights to your shop. The various fields have the following meanings:

Table 84: sign in fields

Field name	Description	Field type	Example
Allow sign in	This is where you give the customer the right to access the areas of your shop that require signing in.	Option button	
Name	Display name in the sign in box in the online shop if the customer has signed in.	Entry field, alphanumeric	John Doe
User Name	Sign in name for the Web site	Entry field, alphanumeric	jdoe
HTML e-mail messages	*Yes*: The message will be displayed with the correct formatting. *No*: The text will be sent without HTML codes.	Option button	
E-mail	All system-generated, customer-relevant e-mail messages are sent to the registered customer at this address.	Entry field, alphanumeric	j.doe@provider.co.uk
Language	The language in which the user views the Web site	Drop-down menu	
Currency	This is the currency that the user has currently configured for the Web site. You can change the currency settings. The user will then see this currency when he next signs on.	Drop-down menu	
Assign password automatically	Click **Send new password** to send the customer a new password via e-mail. The system automatically generates the password and sends it to the e-mail address entered in the *E-mail* field. The function can only be used if the customer has registered in the shop.	Button	
Password	Manual assignment of a new password for a customer. After being saved, the password will be sent to the e-mail address entered. It is not displayed for security reasons.	Entry field, alphanumeric	Password
Repeat password		Entry field, alphanumeric	Password
ID Confirmation question	A security mechanism that works together with the confirmation answer in case the password has been forgotten.	Entry field, alphanumeric	What is the name of my grandmother's cat?
ID confirmation answer	The customer's answer to the confirmation question	Entry field, alphanumeric	Nostradamus

Field name	Description	Field type	Example
Send the user the sign-in data for his user account via e-mail.	This function is only available if you are managing a non-registered customer.	Check box	

> 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 132*.

Save your entries by clicking **Save**.

Billing address

Page: Customers » [customer] » User data » Invoice address

This option shows the invoice 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 *Data synchronisation*, *below*.

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

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 91*.

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 invoice 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 invoice 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 comprehensive description of all the functions relevant to orders can be found in *Orders*, *on page 185*.

The following methods of creating orders for a customer exist:

- Click **New order** in the bottom row of the table.

- Click **New order** in the sub menu. This link only appears in the sub menu when you are located in a customer detail view.

An order will be created for the customer and you will now be in edit mode; see *Editing mode*, *on page 187*.

Customer groups

Page: Customers ›› Customer groups

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.

To create a new customer group, proceed as described in *Adding records*, *on page 26*.

To delete a customer group, proceed as described in *Deleting entries*, *on page 26*. 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 132*.

To edit the details of a customer group, click the ID. The page with the general properties is then shown. You can change the ID here. Save your entries by clicking **Save**.

Customer attributes

Page: Customers ›› Customer attributes

Here, you can manage the customer attributes you have created yourself. This allows you to collect and analyse additional information about your customers which is not collected using the standard attributes. For more information about using these attributes and the standard attributes, see *Registration*, on page 58. The additional attributes are only available for registered customers.

The table contains a list of the attributes you have created. Click the ID to view the details of an attribute.

You can set the sequence using the sorting key in the last column of the table. For more details, see *Sorting using key*, *on page 28*.

To create a new attribute, proceed as described in *Adding records*, *on page 26*. For more information about attribute types, see *Attribute types*, *on page 32*.

Save your entries by clicking **Save**.

To delete an attribute, proceed as described in *Deleting entries*, on page 26.

Caution: When you delete an attribute, all the customer data saved in this attribute is also deleted.

Customer attributes - Details

Page: Customer attributes » [customer attribute]

The various fields have the following meanings:

Table 85: attribute detail fields

Field name	Description	Field type	Example
ID		Entry field, alpha-numeric	Contact Info
Type		Display	
Name	Name used to display the attribute. This is language-dependent	Entry field, alpha-numeric	How did you find out about us?
Tool tip text	Short explanation of the field contents displayed in the administration. This is language-dependent	Entry field, alpha-numeric	

Save your entries by clicking **Save**.

Dependent on the attribute type, a **Value selection** tab may be displayed in the details. This applies to the attribute types *Text with value selection*. In this case, refer to *Using text with value selection*, *on page 33*.

Search

You can use the search to find individual customers or customer groups. For basic information on using the search function, see *Search*, *on page 28*.

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 45*.

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. For more information about user data, see *Customer details - User data*, *on page 133*.
- If user data is entered in the import file, the customer is created as a user and can sign in to the Web site.

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 91*.

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.

8. Contents

In the *Content* area you can edit the structure and content of your Web site. Do this using the structure elements such as *Category* or *Page*. These allow you to group the content for your customers into a desired hierarchy of pages.

In *Pages - Preview* you can manage the structure and edit text fields directly within the page preview. See also *Pages – Preview*, *on page 140*.

In *Pages - Datasheet* you can edit all the other data that forms part of a structure element. See *Datasheet view*, *on page 143*.

Use the function *Current page – Preview/Datasheet* to switch between the edit modes.

You can import and export existing structures. See *Import and export*, *on page 159*.

Creating new pages

This section provides the basics on how to create a page and insert this page into the existing Web site structure.

The **Content** area in conjunction with the page browser provide an overview of the current structure of the Web site and the content of each page. See also *Pages – Preview*, *on page 140*. This is the starting point for creating a new page.

First you must decide what sort of page you want to add. There are various page types, depending on content and function; see table *Page types*, *on page 140*. To create a new page, see *New*, *on page 142*.

The new page is displayed in the page browser and in the page preview. If necessary, move the page now to the correct position in your site structure. See also *Move*, *on page 142*.

If you want to assign other pages as sub pages of your new page, drag them under the new page.

Save the new structure using .

Now edit the content of the new page. If the new page is not yet selected in the page browser, click its name now. The page layout view is shown on the right. You can edit certain content immediately, mainly texts and titles. See *page preview*, *on page 141*. You can also upload images.

Save your entries by clicking .

Additional parameters can be modified for each page. To do this, switch to the datasheet view; see *Datasheet view*, *on page 143*. To do so, click the icon.

Switch back to the page preview using **Current page – Preview**. There are various layout options for each page. You can use these to select the best page layout. See *Layout*, *on page 142*.

Save the settings using .

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 the page is part of a product catalogue, you must also assign products to it. This assignment can be done using the page browser or from the datasheet view. In the page browser, simply drag the products under the current page. In the datasheet view, use the tray to assign the products to the current page. See *Products*, *on page 146*. Texts can also be edited for the products in the page preview.

Once the new page has been configured as you want, set it to visible so that your customers can see it too.

Save the page using .

The chapters *Pages – Preview*, *below* and *Datasheet view*, *on page 143* explain the basics on editing the individual pages.

Pages – Preview

Page: Content ›› Pages – 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 141*
- Page browser on left
- Page preview on right

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 structure elements. These structure elements are referred to as pages. The following types exist:

Table 86: Page types

Page	Description
Home page	Structure basis; see *Home page*, *on page 147*
Page / Category	Basic element for creation of catalogue structures; see *Page / Category*, *on page 149*
Content page	Page to create editorial-type content; see *Content page*, *on page 149*
Link	Page to include links; see *Link*, *on page 150*
Site map	Page to display all pages on the Web site; see *Site map*, *on page 153*
Forum	Page to include a forum on the Web site; see *Forum*, *on page 154*
Blog	Page to include a blog on the Web site; see *Blog*, *on page 155*
Guestbook	Page to include a guestbook on the Web site; see *Guestbook*, *on page 157*
Image gallery	Page to include an image gallery on the Web site; see *Image gallery*, *on page 157*
Contact information	Page to display the contact information on the Web site; see *Contact information*, *on page 151*
Privacy policy	Page to display the privacy policy; see *Privacy policy*, *on page 153*
Customer information	Page to display additional, important customer information on the Web site; see *Customer information*, *on page 152*
Terms and Conditions	Page to display the Terms and Conditions on the Web site; see *Terms and conditions*, *on page 152*
Promotional products	Page to manage products that are displayed in the shop as promotional products; see *Promotional products*, *on page 150*
Business hours	Page to display the usual business hours on the Web site; see *Business hours*, *on page 153*

You can use these elements to construct your site structure as you wish. The icon next to the ID displays type and status. A coloured icon means *visible*, while a grey icon means *not visible*. See also *Visibility, on page 31*.

The right side of the page shows the current structure element in a page preview. Some of the elements in the content area are highlighted by a dashed border, and can be edited directly. These include the areas used to upload images, as in the image gallery, or text fields for names and descriptions. For more information on uploading images, see *Uploading images*, *on page 43*. Click a text element to activate and edit it. In the page preview, there are two types of editable text field:

- *Text fields*: In these fields you can use all available functions to edit text. When the field is activated, the multifunction bar changes and provides functions for text editing. These functions correspond to the functions of the WYSIWYG editor. See *WYSIWYG editor*, *on page 36* and also *Working with text fields*, *on page 35*. Such fields are product descriptions, or the terms and conditions text.
- 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.

A particular feature here in comparison with the WYSIWYG editor, is that you can enter HTML code in the text fields. To do so, click the **Edit HTML** icon in the multifunction 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.

Multifunction bar and content

In the **Content** module, the multifunction bar contains all the functions that are required to create the structure and edit content. Only the functions that can be used or activated in the selected context are shown.

When in the page browser, you will see all the functions needed to edit the structure and assign existing content to the corresponding pages. Depending on the page type, the available functions may differ.

When in editing mode, you will see all the functions needed for working with text fields.

The functions are grouped together, as described in the next chapter. Different content can be selected for some function groups. This is indicated by the black arrow in front of the group name. Click the arrow to view the selection options. Select the desired content for editing. The associated setting options are displayed in the group area.

To save the changes to the structure and content, always exit the page by clicking **Save**.

The next chapter will describe the individual function groups. The functions when editing the individual text fields correspond to those of the WYSIWYG editor. See *WYSIWYG editor*, *on page 36*.

The following function groups are available.

- File; see *File*, *below*
- Commands; see *Commands*, *on page 142*
- Layout; see *Layout*, *on page 142*
- Language; see *Language*, *on page 143*

File

This group contains general functions that are always available.

Table 87: Function group *File* in the multifunction bar

Function	Comment
	Save changes
	Use this to undo the previous edit. This function can be carried out as many times as you wish.
	Repeat an action that was previously reversed using *Undo*. This function can be carried out as many times as you wish.
Editing help	Show or hide highlight for active area

Commands

This group contains functions allowing you to edit the structure of your Web site.

Table 88: Function group *Commands* in the multifunction bar

Function	Comment
New	This allows you to create new pages. Proceed as follows: 1. Activate a page in the page browser. The new page is then created as a sub page of the selected page. 2. Click the icon. 3. In the entry field, enter the name of the new page. 4. Select the page type from the drop-down menu. 5. Decide whether or not the page should be visible immediately. 6. Click Create. The new page can be seen immediately as the current page in the preview. Text fields can be edited immediately. Other parameters can be edited in the datasheet view.
/ Visibility	This option allows you to set the corresponding page as visible or not visible. The visibility status of the page is indicated by the icon in front of the page name.
Datasheet view	Call up the datasheet view of the current page; see *Datasheet view, on page 143*
	Delete the current page; The page is deleted from the view immediately. Deletion from the site will occur when you save the changes for the current page.
/	Move up or down within the same branch of the site structure. This allows you to define the sequence in which pages on a given branch are displayed.
	The current page moves down one level in the structure. It becomes a sub page of the pages above it in the same level.
	The current page moves up one level in the structure. It is promoted to the same structure level as its previous parent page and is located directly below it.

Layout

This group contains functions allowing you to arrange and display the content of the individual pages. Various layout options are available depending on the current page type.

The icons indicate the currently configured options.

Explanations about the individual options can be found in descriptions of the corresponding page types, from chapter *Home page*, *on page 147* and following.

Explanations about the layout options for products can be found in *Product type details - Layout*, on page 124.

Since there is no space here to describe each function individually, we recommend that you try them out to learn how they work. You can return to the original state of your work at any time using the *Undo* function.

You can also configure the layout using the datasheet view of the corresponding page, on the **Layout** tab. The various available variants are listed there in a table, with a short explanation of each.

Language

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. See also *Language Dependencies*, *on page 29*.

Datasheet view

Page: Content ›› Pages – Datasheet view

In a datasheet view, you can configure all the available parameters for the current page. Select this view to enter and edit data that cannot be edited in page preview mode.

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 145*
- Products; see *Products*, *on page 146*
- Images; see *Images*, *on page 147*
- Layout; see *Layout*, *on page 147*

General

Page: Content ›› Pages – Datasheet view ›› Pages ›› [page] ›› General

There are general settings for each page type. All available settings are listed in the table below. Depending on the page type, a specific selection of these settings are displayed and must be edited.

Table 89: Entry fields for general properties

Field name	Description	Field type	Example
ID	Unique ID for the corresponding page	Entry field, alphanumeric	Equipment
Type	Page type; see *Page types*, *on page 140*	Display	
Visible	See *Visibility*, *on page 31*	Option button	

Field name	Description	Field type	Example
Visible in page element	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.	Option button	
Allow display for	The corresponding page can only be called up by the configured user group.	Drop-down menu	
Permit editing for	This setting is valid for pages on which visitors can edit entries (forum, blog, etc.). These entries can then only be edited by the configured user group.	Drop-down menu	
Name	Language-independent name used for the page. For links the name of the link which is assiged to the Internet address. It is shown on the title page of the browser.	Entry field, alphanumeric	Equipment
Caption for page element	Language-dependent name of the link in the corresponding page element. (for example, in the list of the categories)	Entry field, alphanumeric	Contact information
Title	Text that is shown language-dependently on the Web site as a page heading, in the navigation history, and on the title page of the browser.	Entry field, alphanumeric	Contact information
Text / Texts / Description	Language-dependent information text depending on page type; Some page types have a separate **Texts** section in which several text fields can be managed. For more on formatting, see *Working with text fields*, *on page 35*.	Text field	Big and small things - complete your toolset. Browsing is worth it!
Keywords for search engines	These terms are also used for the internal search. They are not shown. No third-party brand names may be entered here.	Entry field, alphanumeric	Jackets, overcoats
Image on the detail page	It is possible to enter a local image file or the URL (Internet address) of an image. For more on using images, see *Uploading images*, *on page 43*. If you click the link with the name of the image file, the image will appear in a new browser window original size.	Entry field, alphanumeric	category.gif, http://www.provider.com/_data/_globals/logo.gif

Field name	Description	Field type	Example
Scale image	Upload and display the category image on the Web site in an optimised size (50 x 50 pixels)	Check box	
(Delete)	Delete category image.	Button	
Translation	See also *Language Dependencies, on page 29*		

Save your entries by clicking **Save**.

For some page types there are additional, special settings. These are explained in the descriptions of the individual page types.

Pages

Page: Content » Pages – Datasheet view » Pages » [page] » Pages

All structural elements which are located hierarchically beneath the current page are referred to as sub-pages of this page. The term *Subcategory* is also used.

The table lists all the sub pages that have been created for this page. The icon next to the ID displays type and status. A coloured icon means *visible*, while a grey icon means *not visible*. See also *Visibility, on page 31*. The other icons have the following meanings:

Table 90: customer symbols

Icon	Description
	Call directly the list of sub pages for the page in this row
	Call directly the product list for the page in this row
	The corresponding page is visible in the navigation menu.
	The corresponding page is not visible in the navigation menu. See the *Visible in page element* option in *General, on page 143.*
	The corresponding page can only be edited by certain users.

To open the details of a page, click the name.

You can sort the table by column. For more details, see *Sorting using column headings, on page 28*. You can set the sequence using the sorting key in the last column of the table. For more details, see *Sorting using key, on page 28*.

Batch processing commands are available to manage the table entries. For an introduction to this, see *Batch Processes in Tables, on page 27*. The following specialised actions can be performed:

Table 91: specialised batch processing actions for categories

Command	Comment
Set as visible/not visible in page element	See the *Visible in page element* option in *General, on page 143.*

Command	Comment
Duplicate	Results in an identical image with the same general data, the same category and product assignments, and the same layout; Only the ID is different since each ID may only be used once within a category.
Move to	Use this function to move categories or other elements to a different place in your tree structure. 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 a category contains sub pages, these will be deleted together with their contents. The products assigned are not deleted, just the page assignments.

To create a new page, follow the steps described in *Adding records*, *on page 26*. Select the desired page type.

Save your entries by clicking **Save**.

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/optimisation*, *on page 54*.

Products

Page: Content ›› Pages – 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 *Table 65*. To open the detail view of a product, click the product number or the icon.

The following methods exist to assign products to the current category:

- Adding new entries, as described in *Adding records*, *on page 26*. 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 104*. 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 key*, *on page 28*. Save your entries by clicking **Save**.

Batch processing commands are available to manage the table entries. For an introduction to this, see *Batch Processes in Tables*, *on page 27*. The following specialised actions can be performed:

Table 92: Specialised batch processing commands for category products

Command	Comment
Remove assignment	
Sort alphabetically	
Sort by ascending price	
Sort by descending price	
Sort by *New*	Products which are marked as new are moved to the top of the table.
Sort by stock level	Products with the highest stock level are moved to the top of the table.
Sort by product number	Products are sorted in ascending order of their number.

Save your entries by clicking **Save**.

Note: Sorting via batch processing commands is not dynamic. If you change the value of an entry in the current sort field, the display is not updated to show the new sort order. If you wish to update the sort order to fit the current values, you must execute the sort command again.

If you execute more than one sort process, the current sort process bases itself on the previous process. If, for example, you sort the products in alphabetical order and then sort them again according to *New*, the new products will be sorted alphabetically as will the others.

Images

Page: Content ›› Pages – Datasheet view ›› Pages ›› [page] ›› Images

You can manage up to four images for each category. The *List view* image is used for category lists. A small image is displayed for each category here, alongside the title and description. The other images are displayed in the category details along with any existing long description fields. You can specify which image is displayed using the layout options. See also the *Layout* section in *Home page*, *below*.

An image upload button is displayed for each image on the page. You can upload the corresponding image using the appropriate area; see also *Uploading images*, *on page 43*. An optimum image size is entered for each image. If you select the check box *Adjust on upload*, the image is automatically saved using the specified size when it is uploaded. If you want to save and display the image in its original size, uncheck this box.

Layout

Page: Content ›› Pages – Datasheet view ›› Pages ›› [page] ›› Layout

The table lists all the options for displaying the content of the corresponding page in the Web site. Select an option for the corresponding are and save your entries by clicking **Save**.

The page is equivalent by the *Layout* function group in the multifunction bar, which you work with in the **Page – Preview** view. The same layout options are available for each individual page. Explanations about the individual options can be found in descriptions of the corresponding page types, from chapter *Home page*, *below*.

Home page

Page: Content ›› Pages – Datasheet view

The home page is the root of your site tree structure. This structural element cannot be deleted and its ID cannot be changed.

The following parameters are configured in the datasheet view.

General

Here you can edit the text that is displayed on the home page, which greets the visitors to your Web site. For more on formatting, see *Working with text fields*, *on page 35*.

Pages

Here you can see the entire structure of your Web site in table format. All the pages and their corresponding sub pages and products are listed. At this stage, too, you can explore the entire structure, but not as easily as in the page browser; see *Pages – Preview*, *on page 140*. For more on working with the table, see *Pages*, *on page 145*.

Products

Here you can see all products that are automatically displayed on the home page. For more on working with the table, see *Products*, *on page 146*.

Layout

All the available options for displaying the elements in the content area of the home page are shown here. The following options are available:

Table 93: Layout options for the home page

Function	Comment
Sort order	Select what content should be displayed in what order here. This applies to the page elements in the content area of the home page: home page texts, home page products and the sub pages: By selecting the corresponding icon you can select to show or hide the element groups, as well as define the order in which the elements are displayed.
Texts	Select here how the home page text and images are arranged. Use the icons to select how many text fields and images you want to place on the home page, and how they are arranged. If the icons display indicate more text fields or image than are currently available on the home page, these are created and can then be edited by you.
Sub pages	Select here how the sub pages are listed.
Products	Select here how the products are listed. The selections available range from one to three columns, or display products in large or small boxes. The column setting does not then apply here. Instead, the number of products displayed in rows is dependent on the size of the box.

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. This means that the first element in the multi-column arrangement is on the top left, the second to the right in the same row, etc. When all the columns are filled, the following elements are listed in the next row starting from the left.

Select the corresponding option and save your entries by clicking **Save**.

For basic information on displaying using the datasheet view, see *Layout*, *on page 147*.

Introduction

Page: Content » Pages – Datasheet view » Introduction

You can define a splash (introduction) to your Web site. This is an animated introduction that is shown before the home page is displayed.

Use the option *Display splash before home page?* to specify whether a splash screen should be displayed when your Web site is called up.

If you want to display a splash page, you can create this from a predefined Flash template, or create your own splash page. This function always uses the most recently edited and saved splash.

All available splash templates can be found in the **Select and adapt splash from template** section. To select a splash page, click the corresponding preview image. The details of this splash template are then displayed. Edit these details and adjust the settings to your requirements. Click **Update** to display the splash page with your current settings. Save your entries by clicking **Save**.

You can create your own splash page using the section **Integrate own splash**. Enter the required code into the text field. For more on formatting, see *Working with text fields*, *on page 35*. 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

The category is the element which allows the construction of a hierarchical catalogue structure. A category has a direct parent category and can be assigned any number of subcategories and products. 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.

The following parameters are configured in the datasheet view:

General

The general settings are edited as described in *General*, *on page 143*. Save your entries by clicking **Save**.

Pages

Here are all sub pages for the corresponding category. For more on working with the table, see *Pages*, *on page 145*.

Products

Here are all products that have been assigned to the category. For more on working with the table, see *Products*, *on page 146*.

Images

Here are all the images that have been uploaded for the category. If no images are available, the corresponding upload button is displayed. For more information on uploading images for categories, see *Images*, *on page 147*.

Layout

The table lists all the options that govern how categories are displayed on the Web site. The options are similar to the layout options for the home page; see *Layout*, *on page 148*. Select the corresponding option and save your entries by clicking **Save**.

For basic information on displaying using the datasheet view, see *Layout*, *on page 147*.

Content page

The *Content page* component allows you to create text articles and display these on your Web site.

General

In addition to some settings that are valid for all pages, *General*, *on page 143*, you can also edit the following settings:

Table 94: Additional fields for a *Content page*

Field name	Description	Field type	Example
Date	If a date is entered, it will automatically be displayed with the name. See also *Date entry fields, on page 30.*	Date field	
Description	Language-dependent short summary of the content to be displayed in the list view and in the header for the detail view of this page; For more on formatting, see *Working with text fields, on page 35.*	Text field	As well as a fresh design, Milestones offers you the opportunity...
Attachment	Language-dependent attachment for the *Content page*. Either enter the name of the file with its path directly or click **Browse** to search for the file.	Entry field, alphanumeric	Flyer_de.pdf
(Delete)	Delete attachment	Button	
Attachment label	Language-dependent title for the link to the attachment	Entry field, alphanumeric	Print our Specials

Save your entries by clicking **Save**.

Link

You can use the *Link* component to place a link to another page in your Web site.

General

In addition to some settings that are valid for all pages, *General, on page 143*, you must also edit the following settings:

Table 95: Additional fields *Link*

Field name	Description	Field type	Example
New window	Display in a new browser window.	Option button	
web page	Internet address (URL) of the link; Always enter absolute links in the form *http://...* You can enter a separate URL for each language.	Text field	http://www.meindl.de

Save your entries by clicking **Save**.

Promotional products

Promotional products are products which are presented separately in the shop. Use this opportunity to conduct promotions or special offers.

> Note: There are two navigation elements for displaying promotional products in the shop: *Promotional products* and *Link to the promotional products*. These are placed on the Web site in the **Layout** area. For more information, see *Page elements and navigation, on page 181.*

In the page preview mode you can edit the category texts and texts of the associated products.

The following parameters are configured in the datasheet view.

General

The general settings are edited as described in *General*, *on page 143*. Save your entries by clicking **Save**.

Products

Here you can prepare the products you wish to display as promotional products. For more on working with the table, see *Products*, *on page 146*.

Layout

The table lists all the options that govern how promotion products can be displayed on the Web site. The options are similar to the layout options for the home page; see *Layout*, *on page 148*. Select the corresponding option and save your entries by clicking **Save**.

For basic information on displaying using the datasheet view, see *Layout*, *on page 147*.

Contact information

The contact information is an important part of your Web site and may be a legal requirement. For example, the German Teleservices Act (section 6) has required commercial Web sites to include a contact information page since 01.01.2002. This must include the following information:

- Name and address of the company
- Telephone, fax, and e-mail address
- Managing director/board/stockholder/shareholders (depending on the company status)
- Company location/applicable court
- Registration number
- VAT identification number
- Party responsible for the contents (name of the responsible party in the sense of the media services national contract)

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 181*.

General

In addition to some settings that are valid for all pages, *General*, *on page 143*, you must also edit the following settings:

Table 96: Fields for *Contact Information*

Field name	Description	Field type	Example
Merchant (Company)	Provider name	Entry field, alphanumeric	Milestones Demostore GmbH
Address	Language-dependent address; For more on formatting, see *Working with text fields*, *on page 35*.	Text field	MusterFirma Software GmbH Leutragraben 1 07743 Jena, Germany
Phone	Telephone number	Entry field, alphanumeric	
Fax	Fax number	Entry field, alphanumeric	

Field name	Description	Field type	Example
Job title	Title for person responsible for Web site	Entry field, alpha-numeric	Managing Director
Name	Name of person responsible for Web site	Entry field, alpha-numeric	Matthew Merchant
E-mail	E-mail address for the company	Entry field, alpha-numeric	info@provider.de

Save your entries by clicking **Save**.

If you have run through the Setup assistant, some fields in the Contact page will be filled already.

Terms and conditions

The terms and conditions are a component of a shop, and strict regulations also apply here.

In Germany, for example, the Terms and Conditions have been legally regulated since 2002 (BGB paragraph 305 ff.). There they are defined as "all pre-formulated contractual requirements for a multitude of contracts that one party (the user) provides to the other contract party when a contract is concluded".

They apply as soon as the purchaser is explicitly referred to them during the conclusion of a contract and has had a reasonable opportunity to inform himself of the contents of these requirements and is in agreement with them. If the customer says nothing about the Terms and Conditions, then this is considered as being in agreement.

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 181*.

Note: You can set up the order process so that the customer must confirm the Terms and Conditions before the purchase can be completed; see *Shopping basket settings*, *on page 93*.

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*.

General

The general settings are edited as described in *General*, *on page 143*. Save your entries by clicking **Save**.

Customer information

Customer information is a supplement to the Terms and Conditions; see *Terms and conditions*, *above*. It is meant to notify customers of the conditions of use, as well as the processes and procedures on the Web site. As opposed to the Terms and Conditions, customer information is meant to be more informational and explanatory in nature.

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 181*.

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.

General

The general settings are edited as described in *General*, *on page 143*. Save your entries by clicking **Save**.

Privacy policy

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 181*.

Note: You can set up the order process so that the unregistered customers must confirm the privacy policy before purchasing. Customers who register must accept the privacy policy as part of the registration form. See also *Signing in*, *on page 58*.

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.

General

The general settings are edited as described in *General*, *on page 143*. Save your entries by clicking **Save**.

Business hours

This page shows your visitors the times or hours during which you usually offer your services. These times are set for the Web site; see *Business hours*, *on page 55*. Times that are specifically allocated for individual resources in the booking system are only valid for the corresponding resources. For more information, see *Resource details - General*, *on page 166*.

The remaining parameters for the business hours are configured in the datasheet view.

General

The general settings are edited as described in *General*, *on page 143*. Save your entries by clicking **Save**.

Site map

The purpose of the site map is to provide 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.

The following parameters are configured in the datasheet view.

General

The general settings are edited as described in *General*, *on page 143*. Save your entries by clicking **Save**.

Layout

In this table you decide whether the site map is displayed in a block form or as a tree. Select an option and save your entries by clicking **Save**.

For basic information on displaying using the datasheet view, see *Layout*, *on page 147*.

Forum

The purpose of the forum is 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.

You can restrict who can read the forum and who is permitted to submit topics or posts. Visitors 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. The following parameters are configured in the datasheet view.

General

The general settings are edited as described in *General*, *on page 143*. Save your entries by clicking **Save**.

Topics

The table lists all the topics in this forum.

Click the ID to display the details of the topic. See also *Topics – Details*, *below*.

You can sort the table by column. For more details, see *Sorting using column headings*, *on page 28*.

To create a new post, proceed as described in *Adding records*, *on page 26*.

To delete a post, follow the steps described in *Deleting entries*, *on page 26*.

Batch processing commands are available to manage the table entries. For an introduction to this, see *Batch Processes in Tables*, *on page 27*. The following specialised actions can be performed:

Table 97: Specialised batch processing commands for forum topics

Command	Comment
Delete *Suspected spam* marker	The marker that identifies a post or topic as being spam is deleted.

Layout

The table lists all the options that govern the way that forum topic and post entries can be displayed on the Web site. You can decide whether the entries are displayed in a list form or as a tree. Select an option and save your entries by clicking **Save**.

For basic information on displaying using the datasheet view, see *Layout*, *on page 147*.

Topics – Details

The topic details allow you to edit the general settings for the topic and the list of associated posts.

The various fields have the following meanings:

Table 98: Entry field for topics

Field name	Description	Field type	Example
Subject	Topic title	Entry field, alpha-numeric	Forum etiquette
Permit further posts	No further posts can be added to this topic, even if users have sufficient permission.	Option button	

Save your entries by clicking **Save**.

The table lists all the posts for the topic. If visitors report that a post is suspected of being spam, the post is marked with the ⚠ icon. As well as the username, the IP address of the computer from which the post was submitted is also displayed.

You can sort the table by column. For more details, see *Sorting using column headings*, *on page 28*.

You can also create your own posts here. To create a new post, proceed as described in *Adding records*, *on page 26*.

To delete a post, follow the steps described in *Deleting entries*, *on page 26*.

Batch processing commands are available to manage the table entries. For an introduction to this, see *Batch Processes in Tables*, *on page 27*. The following specialised actions can be performed:

Table 99: Specialised batch processing commands for forum posts

Command	Comment
Delete *Suspected spam* marker	The marker that identifies a post or topic as being spam is deleted.

Save your entries by clicking **Save**.

Blog

The blog, also known as a Web log or a Web journal, is used to tell your visitors about new content on the Web site at regular intervals. In general, blogs are used in the same way as diaries, with the author placing personal information on the Internet. The visitors can leave comments on the blog entries.

You can restrict who can read the blog and who is permitted to submit comments for the entries. Visitors 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. The following parameters are configured in the datasheet view.

General

The general settings are edited as described in *General*, *on page 143*. Save your entries by clicking **Save**.

Posts

The table lists all posts of the blog.

Click the ID to display the details of an entry. See also *Posts – Details*, *below*.

You can sort the table by column. For more details, see *Sorting using column headings*, *on page 28*.

To create a new post, proceed as described in *Adding records*, *on page 26*.

To delete a post, follow the steps described in *Deleting entries*, *on page 26*.

Batch processing commands are available to manage the table entries. For an introduction to this, see *Batch Processes in Tables*, *on page 27*.

Posts – Details

The post details allow you to edit the general settings for the blog post and the list of associated comments.

General

The various fields have the following meanings:

Table 100: Entry field for blog entries

Field name	Description	Field type	Example
Visible		Option button	
Permit further comments	You can use this option to prevent any further comments being posted, irrespective of users' permissions.	Option button	
Heading	Topic of the blog entry	Entry field, alphanumeric	What happened today...
Text	Content of your entry; For more on formatting, see *Working with text fields*, *on page 35*.	Text field	Today we successfully...
Keywords	You can allocate keywords for each entry. Visitors can use these keywords to search. The keywords are displayed along with the entry. If the user clicks a keyword, all the other entries that carry this keyword are also displayed. Use commas as a separator	Entry field, alphanumeric	Diary, journal

Save your entries by clicking **Save**.

Comments

The table lists all the comments for the blog entry. If visitors report that a comment is suspected of being spam, the comment is marked with the icon. As well as the username, the IP address of the computer from which the post was submitted is also displayed.

You can sort the table by column. For more details, see *Sorting using column headings*, *on page 28*.

You can also enter your own comments here. To create a new comment, proceed as described in *Adding records*, *on page 26*.

To delete a comment, follow the steps described in *Deleting entries*, *on page 26*.

Batch processing commands are available to manage the table entries. For an introduction to this, see *Batch Processes in Tables*, *on page 27*. The following specialised actions can be performed:

Table 101: Specialised batch processing commands for blog posts

Command	Comment
Delete *Suspected spam* marker	The marker that identifies a comment as being spam is deleted.

Save your entries by clicking **Save**.

Guestbook

The guestbook provides your visitors with the opportunity to publish their own text comments on the Web site. In general, visitors to the Web site will use this option to leave their opinions, notes or criticism of the Web site.

You can restrict who can write or read guestbook entries. Visitors 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.

The following parameters are configured in the datasheet view.

General

The general settings are edited as described in *General*, *on page 143*. Save your entries by clicking **Save**.

Entries

The table lists all the entries in the guestbook. If visitors report that an entry is suspected of being spam, the entry is marked with the icon. As well as the username, the IP address of the computer from which the entry was submitted is also displayed.

You can sort the table by column. For more details, see *Sorting using column headings*, *on page 28*.

You can also create your own entries here. To create a new entry, proceed as described in *Adding records*, *on page 26*.

To delete an entry, follow the steps described in *Deleting entries*, *on page 26*.

Batch processing commands are available to manage the table entries. For an introduction to this, see *Batch Processes in Tables*, *on page 27*. The following specialised actions can be performed:

Table 102: Specialised batch processing commands for guestbook entries

Command	Comment
Delete *Suspected spam* marker	The marker that identifies an entry as being spam is deleted.

Save your entries by clicking **Save**.

Image gallery

The image gallery allows you to show photographs on your Web site. Alongside a simple image list, the images are also displayed in a slideshow that can be controlled by the viewer.

The page preview allows you to upload images and edit text elements; see *Pages – Preview*, *on page 140*. The following parameters are configured in the datasheet view:

General

In addition to some settings that are valid for all pages; see *General*, *on page 143*, you must also edit the following settings:

Table 103: Special settings for the image gallery

Field name	Description	Field type	Example
Scrollbars	The viewer can control the slideshow Special control elements are displayed for this purpose. You must stipulate whether large or small control elements are displayed.	Option button	
Size of images	Value in pixels (px) specifying the size in which the images are displayed on the Web site. *Preview*: Size of images in enlarged view (zoom function) *Detail view*: Large view of images in the slideshow	Drop-down menu	
Directory	If you save your photos in a directory in File Management, specify the corresponding directory here. For more about this, see *File management*, *on page 44*. You can click **Browse** to open the File Management and select a directory.	Entry field, alphanumeric	/Photos/

Save your entries by clicking **Save**.

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 archiving 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.

Save your entries by clicking **Save**.

You can set the sequence using the sorting key in the last column of the table. For more details, see *Sorting using key*, *on page 28*.

To upload new images follow the instructions found in *Uploading images*, *on page 43*.

To delete an image, proceed as described in *Deleting entries*, *on page 26*.

Layout

All the available options for displaying the images and the preview on the Web site are shown here. The following options are available:

Table 104: Layout options for the image gallery

Function	Comment
Sort order	The image gallery is composed of three elements: Descriptive text, slideshow and preview list of images. Select what sequence in which the individual elements of the image gallery should be displayed here. By selecting the corresponding icon you can select the order in which the elements are displayed.
Preview	This option allows you to set how the list of available images is displayed. You can select options from a simple list to a scrolling image bar. When selecting, take account of the number of images and the width of the area available.

Select the corresponding option and save your entries by clicking **Save**.

For basic information on displaying using the datasheet view, see *Layout*, *on page 147*.

Image search

You can search for images both on the Web site and in the Administration area. To enable proper searching, you can 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 that allow images to be located. Multiple terms must be separated by commas.
- Image location
- Description

The search form 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.

Search in blog, guestbook and forum

There is a single, unified search form for these page types. You can use this form to search in a specific page type, or in all three together. You can restrict the search to a specific page type using the check boxes and drop-down menus. In the search results, the corresponding page type is indicated for each entry.

For basic information on using the search function, see *Search*, *on page 28*.

Import and export

Page: Content ›› Import and export

You can read a general description about importing and exporting in the chapter *Import and export*, *on page 45*.

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.

The following import and export types exist for categories. Note the following features for these types:

- Import/export of content/categories; see *Content/Categories/Pages - Import/Export*, *below*
- Import/export of category-product assignments; see *Category - Product assignment - Import and export*, *below*

Content/Categories/Pages - Import/Export

The *Categories Import/Export* function allows you to import or export the catalogue structure of your Web site. This refers to all of the structure elements and their properties, and how they are arranged in the catalogue structure. You can see a sample of an export file of this kind in *Figure 25*.

	A	B	C	D	E	F	G
1	Type [Class]	Parent object [Parent]	ID [Alias]	Sort order [Position]	Visible [IsVisible]	Visible in page element [VisibleInNavigation]	Name/English [Name/en]
2	Imprint		Imprint	10	1	0	Contact information
3	TermsAndConditions		TermsAndConditions	20	1	0	Terms and Conditions
4	CustomerInformation		CustomerInformation	30	1	0	Important customer information
5	PrivacyPolicy		PrivacyPolicy	40	1	0	Privacy Policy
6	Article		NewShopServices	110	1	0	Fresh wind in the online shop
7	CategorySpecialOffer		SpecialOffers	120	1	0	Promotional products
8	Category		Jackets	130	1	1	Jackets
9	Category		Shoes	140	1	1	Shoes
10	Category		Rucksacks	160	1	1	Backpacks
11	Category		Tents	170	1	1	Tents
12	Category		Equipment	180	1	1	Equipment
13	Category		Books_Maps	190	0	1	Books & Maps
14	Article	Shoes	SizeTable	10	1	1	Shoe size table
15	Link	Shoes	ManufacturerInfo	30	1	1	More Manufacturer Information
16	Category	Shoes	ShoeInfo	150	1	1	How to Care for Your Shoes

Figure 25: category export file

If there is no entry in the *Parent Object [Parent]* column, the corresponding elements are assigned to the Home page.

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 other columns are filled in the import file, the values are entered for the corresponding attributes.

Category - Product assignment - Import and export

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. An example is shown in *Figure 26*:

	A	B	C
1	Category [Category]	Product [Product]	Sort order [Position]
2	Categories	ho_40407	10
3	Categories	lt_0401107001	20
4	Categories	eg_1000111010	30
5	Categories/SpecialOffers	vs_3202112018	10
6	Categories/SpecialOffers	md_49417110	20
7	Categories/SpecialOffers	hm_0100401001	30
8	Categories/Jackets	ho_40407	10
9	Categories/Jackets	be_40402	20
10	Categories/Jackets	be_40401	30
11	Categories/Shoes	md_49412090	10
12	Categories/Shoes	md_49417110	20
13	Categories/Rucksacks	de_3201212002	10
14	Categories/Rucksacks	de_3203104010	20
15	Categories/Rucksacks	vs_3202112018	30
16	Categories/Rucksacks	js_3200705005	40
17	Categories/Rucksacks	de_3206199010	50
18	Categories/Tents	ho_1112105010	10
19	Categories/Tents/IndividualTents	wb_1003111010	10
20	Categories/Tents/IndividualTents	nf_1005104010	20
21	Categories/Tents/FamilyTents	eg_1000111010	10
22	Categories/Tents/FamilyTents	ho_1112105010	20
23	Categories/Equipment	hm_0100401001	10
24	Categories/Equipment	lt_0401107001	20

Figure 26: category import/export file

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*.

BMECat import

Page: Content ›› BMEcat import

For more about BMECat import see *BMECat import* in *BMECat import*, *on page 129*.

9. Booking system

The booking system allows you to offer services that your customers can reserve through the Web site. This could including the rental of tools, reservation of a table in a restaurant, or making an appointment at the hairdressers. These services are referred to as resources.

The daily availability of the resources is defined via your business hours; see *Business hours*, *on page 55*. Within these periods, the customers can reserve or book the resource.

You can configure overriding default settings for all resources; see *Booking system settings*, *on page 164*. These apply as default values as long as they are not overwritten by special settings for an individual resource; see *Resource details - Appointments*, *on page 167*.

Settings define whether appointments are confirmed automatically or manually, by e-mail. To enable this, the corresponding e-mail events must be activated; see *E-mail settings - Events*, *on page 91*.

Resources 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.

If your customers have to pay to reserve a given timeslot, you have to define the payment methods that you accept for this payment. For more information, see *Dependencies*, *on page 84*.

The appointments for each resource are listed in a special tab; see *Resource details - Appointments*, *on page 167*.

Working with the booking system

This chapter describes the basics of working with the booking system. This covers the provision of resources through the site to the editing of appointments. This description is a guide – it does not explore not every single last detail or option.

1. Set and display business hours

   Enter the business hours during which you want to offer your resources or during which you are available for your customers. See also *Business hours*, on page 55. Display these hours on the Web site. See also *Business hours*, *on page 153*.

2. Activate e-mail events

   Various e-mail events can be triggered in conjunction with the booking system. These must be enabled. Call up the list of e-mail events, search for the relevant events and enable them. See also *E-mail settings - Events*, *on page 91*.

3. Enter general settings for the booking system

   You can configure default settings for all resources; see *Booking system settings*, *on page 164*.

4. Create resources

   Create a new resource and enter the corresponding data. For more information, see *Resource details - General*, *on page 166*, *Resource details - Options*, *on page 166*, *Resource details - Images*, *on page 167* and *Resource details - Categories*, *on page 167*.

5. Special settings for appointments

You can set separate availability or non-availability hours for appointments for a resource. Check whether you need to configure any such exceptions. For more about this, see the relevant sections of Resource details - Appointments, on page 167.

6. Book appointments

   Appointments can be reserved or booked by your customers using the Web site, or by you through the Administration area. This is done by selecting the corresponding resource and entering the required data. Finally, the booking is sent or saved. The appointments are entered in the appointment overview for the individual resource.

7. Control and confirmation

   In the Administration area you can display the appointments either using the calendar function or using the search tool. If the manual confirmation option is active, you must check and confirm each appointment individually so that the confirmation e-mail is sent to the customer. If required you can change the appointment times in the appointment details at any time, or also cancel the appointment. See also *Appointment details*, *on page 170*,

Once that is done, the appointments are entered into the calendar and confirmed with the customer.

Booking system settings

Page: Booking system ›› Resources

Here you can edit the default settings that apply for all resources as long as specific settings have not been defined for an individual resource.

The various fields have the following meanings:

Table 105: Fields for general resource settings

Field name	Description	Field type	Example
Confirmation of appointments by administrator is required	The appointment is only considered to be entered or reserved. It is not yet binding. The confirmation must be issued manually using a check box in the appointment details.	Option button	
Minimum period for agreement of appointment	"Lead time"; This is the time before an appointment starts up until which the appointment can still be reserved – i.e., creating a buffer period between the end of registration and the start of the appointment. The time units are defined in a drop-down menu.	Entry field, numeric	2 day(s)
Minimum period for cancellation of an appointment	This is the minimum amount of time between cancellation and the start of the appointment, i.e. the latest time at which the customer can still cancel. The time units are defined in a drop-down menu.	Entry field, numeric	2 day(s)

Field name	Description	Field type	Example
Intervals for appointments overview	Time interval in the appointment view; The calendar contains the interval after which the next appointment can be made. Varying intervals can be entered into the appointment details.	Drop-down menu	30 min
Variant text for the command *Appointments*	Name of the link via which the appointment arrangement page is called up	Entry field, alphanumeric	Arrange appointment
Variant text for command *Finalise appointment*	Name of the link via which the appointment arrangement page is exited	Entry field, alphanumeric	Finalise appointment
Notification of requirement for appointment confirmation	Notes and information for your customer in respect of the reserving of appointments via the Web site; For more on formatting, see *Working with text fields, on page 35*.	Text field	You will receive an e-mail in confirmation...
Note text about the resource price (gross)	This texts is shown when using gross prices together with the price. This is similar to the texts for products. See *Texts, on page 97.* For more on formatting, see *Working with text fields, on page 35*.	Text field	Price including VAT, plus delivery
Note text about the resource price (net)	This texts is shown when using net prices together with the price. This is similar to the texts for products. See *Texts, on page 97.* For more on formatting, see *Working with text fields, on page 35*.	Text field	Price without VAT, plus delivery

Save your entries by clicking **Save**.

Resources

Page: Booking system ›› General

The table lists all the resources that you have created. The symbols have the following meanings:

Table 106: legend for resource symbols

Icon	Description
	Resource is visible on the Web site
	Resource is not visible on the Web site
	The appointments list for this resource is called up directly

To open the details of a resource, click the name. Click the icon to the left of the name to open a new browser window with the resource details.

To create a new resource, follow the steps described in *Adding records, on page 26.*

To delete a resource, follow the steps described in *Deleting entries, on page 26.*

You can sort the table by column. For more details, see *Sorting using column headings, on page 28.*

Batch processing commands are available to manage the table entries. For an introduction to this, see *Batch Processes in Tables*, *on page 27*.

Resource details - General

Page: Booking system » General » [resource] » General

The general properties for resources are the same largely as those for products. For more information, see the relevant settings *Product details – General* , *on page 106*. The differing fields have the following meanings:

Table 107: Fields for resource details

Field name	Description	Field type	Example
Manual confirmation	Specify whether the reservations for this resource must be confirmed manually by the administrator; This overrides the general settings for all resources; see *Booking system settings*, *on page 164*.	Option button	
Limit duration to reservation periods	An interval is defined for the reservation of a resource; see *Booking system settings*, *on page 164*. Here you can stipulate whether the duration that is reserved for the service can differ from the booking interval.	Option button	
Customer can define duration	The customer can set how long he wants the service to be provided.	Option button	
Customer can pay for reservation		Option button	
Reserve by	Here you can override the default settings for the booking system; see *Booking system settings*, *on page 164*.	Entry field, numeric	1 hr
Cancel by	Here you can override the default settings for the booking system; see *Booking system settings*, *on page 164*.	Entry field, numeric	1 hr
Appointment intervals	Here you can override the default settings for the booking system; see *Booking system settings*, *on page 164*.	Drop-down menu	
Duration	Here you can set the duration of the service.	Entry field, numeric	45 minute(s)
Price per	Here you can set the price per time unit.	Entry field, numeric	24 hour(s)

Save your entries by clicking **Save**.

Resource details - Options

Page: Booking system » General » [resource] » Options

You can create options for a resource. Using these options you can allow your customers to make certain selections for the resource. 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 default product type. Proceed as follows:

1. Click **Edit product type**. This takes you to the page containing the attributes for the default product type.
2. Enter the ID and name of the attribute 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. Save your entries by clicking **Save**.
5. Switch to the page with the options for the corresponding resource. 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 resource.

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 types*, *on page 122* and Product type details - Attributes, on page 123.

Resource details - Images

Page: Booking system » General » [resource] » Images

The management of images for resources is identical to management of images for products. See *Product details – Images*, *on page 111*.

Resource details - Categories

Page: Booking system » General » [resource] » Categories

The assignment of resources to categories is done in the same way as the assignment of products to categories. See *Product details – Categories*, *on page 113*.

Resource details - Appointments

Page: Booking system » General » [resource] » Appointments

Here you will see all the appointments that have been reserved for a resource.

Overview

You can use the calendar to access all the appointments for the resource. 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 markers in the days bar have the following meanings:

Table 108: Key to calendar icons

Icon	Description
Day number with highlighted background	Currently selected day; The appointments list is displayed for this day.
Day number with border	Current date

Icon	Description
Day number displayed in bold	Day has at least one appointment
Day number grey	No appointments can be made for this day

If you move the mouse over the days bar, an overview of the appointments is displayed for the corresponding day in a small window.

If you click a specific date, the table containing the appointments for this day is displayed and you can edit the appointments for this day. The number of columns that are displayed is governed by what was entered for this resource in the stock level.

The individual icons in the appointments list have the following meanings:

Table 109: Key to appointments list

Icon	Description
	Released reservation period can be blocked for reservations
	Blocked reservation period can be released for reservations
 Delete	Delete selected appointment; This option appears when you move the mouse over an appointment.

To configure a new appointment, the following options are available:

- Click a time period in the day list and enter the details; see *Appointment details*, *on page 170*.
- Click the **New appointment** link and enter the details; see *Appointment details*, *on page 170*
- Creating an appointment using the Web site.

To call up the details of an appointment, click the corresponding name in the appointments list.

Set allowed booking times

Here, you can enter the periods during which the current resource may be reserved. The standard business hours are entered as the default setting; see *Business hours*, *on page 55*. You can override these times here. These times then only apply for this resource.

Save your entries by clicking **Save**.

Batch release

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 resource is not available as usual. However, in order not to have to change the general hours of business for this resource for this limited period, you can enter the exception period here.

The various fields have the following meanings:

Table 110: 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	12.02.2008

Field name	Description	Field type	Example
End date	Date of the last day to which the exception should apply	Option button + date field	12.04.2008
Repeated 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	Changed opening hours in the morning	Entry field, alphanumeric	09:00 12:00
Afternoons from/to	Changed opening hours in the afternoon	Entry field, alphanumeric	13:00 18:00

Closing through noonday is not necessary.

Save your entries by clicking **Save**.

> Note: The exception periods for the resource are entered in the calendar for the number of weeks specified in Repetition. The maximum number is limited by the system to 30.

Examples for batch approval:

- Temporary closure due to holiday;
  - For the start date, enter the first day of vacation.
  - Leave fields for opening hours empty (not open)
  - Enter the end date for the holiday
  - Repetition: daily
- Shut Fridays in the coming month:
  - For the start date, enter the date of the Friday on which the rule commences.
  - Enter morning opening hours; leave afternoon hours empty
  - Number: 4
  - Repetition: weekly

Resource details - Cross-selling

Page: Booking system » General » [resource] » Cross-selling

Cross-selling for appointments works like cross-selling for products. See *Product details – Cross-selling, on page 119*.

Bookings

Page: Booking system » Bookings

You can see all appointments/bookings that exist in the table. To see the details about an appointment, click the link on the *Appointment* column.

To delete an appointment, follow the steps described in *Deleting entries*, *on page 26*.

You can sort the table by column. For more details, see *Sorting using column headings*, *on page 28*.

Batch processing commands are available to manage the table entries. For an introduction to this, see *Batch Processes in Tables*, *on page 27*. The following specialised actions can be performed:

Table 111: Specialised batch processing commands for appointments

Command	Comment
Confirm appointment	Multiple appointments can be confirmed at once. An e-mail for this will be sent to the corresponding contact person.
Cancel appointments	Multiple appointments can be cancelled at once. An e-mail for this will be sent to the corresponding contact person.

Appointment details

Page: Booking system ›› Bookings] ›› *[appointment]*

This shows an overview of all the data for the corresponding appointment. You can change the data if you need to, or move, or cancel the appointment.

To confirm the appointment manually, highlight the *Appointment confirmed* check box. When the appointment is saved, a corresponding e-mail is sent to the customer.

To cancel the appointment, highlight the *Appointment cancelled* check box. When the appointment is saved, 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 also *E-mail settings - Events*, *on page 91*.

Save your entries by clicking **Save**.

Search

The search allows you to access specific appointments. You can also filter by resource or day. For basic information on using the search function, see *Search*, *on page 28*.

10. Design

The *Design* option has comprehensive functions to help you adapt the layout and design of your Web site to your needs.

Click **Styles** to edit the list of styles that you have prepared for your Web site; see *Styles*, *on page 175*.

A wide selection of templates is available under **Templates**. The templates are categorised into topics, and provide suitable designs for each topic. For more information, see *Templates, on page 176*.

In addition, the sub menu contains the styles that you have already selected for your Web site. The style that is currently active is highlighted. You can call up each individual style directly and edit the design and layout. You are working in a page preview. The available functions are provided by the multifunction bar in the upper area; see *Multifunction bar and design*, *on page 176*.

The **Quick Design** function helps you to make basic adjustments to the design. For more information, see *Quick Design, on page 183*.

Design basics

You edit the design and layout in a WYSIWYG mode. In the browser you can see the preview of the page that you are editing. Any changes are displayed 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 design*, *on page 176*.

In the lower section you can see the page preview. You can edit the design directly there. The page preview shows you the current Web page in the design and layout specified by the selected style; see *Styles*, *on page 175*.

The pages are split into the following possible functional areas; see *Figure 27*.

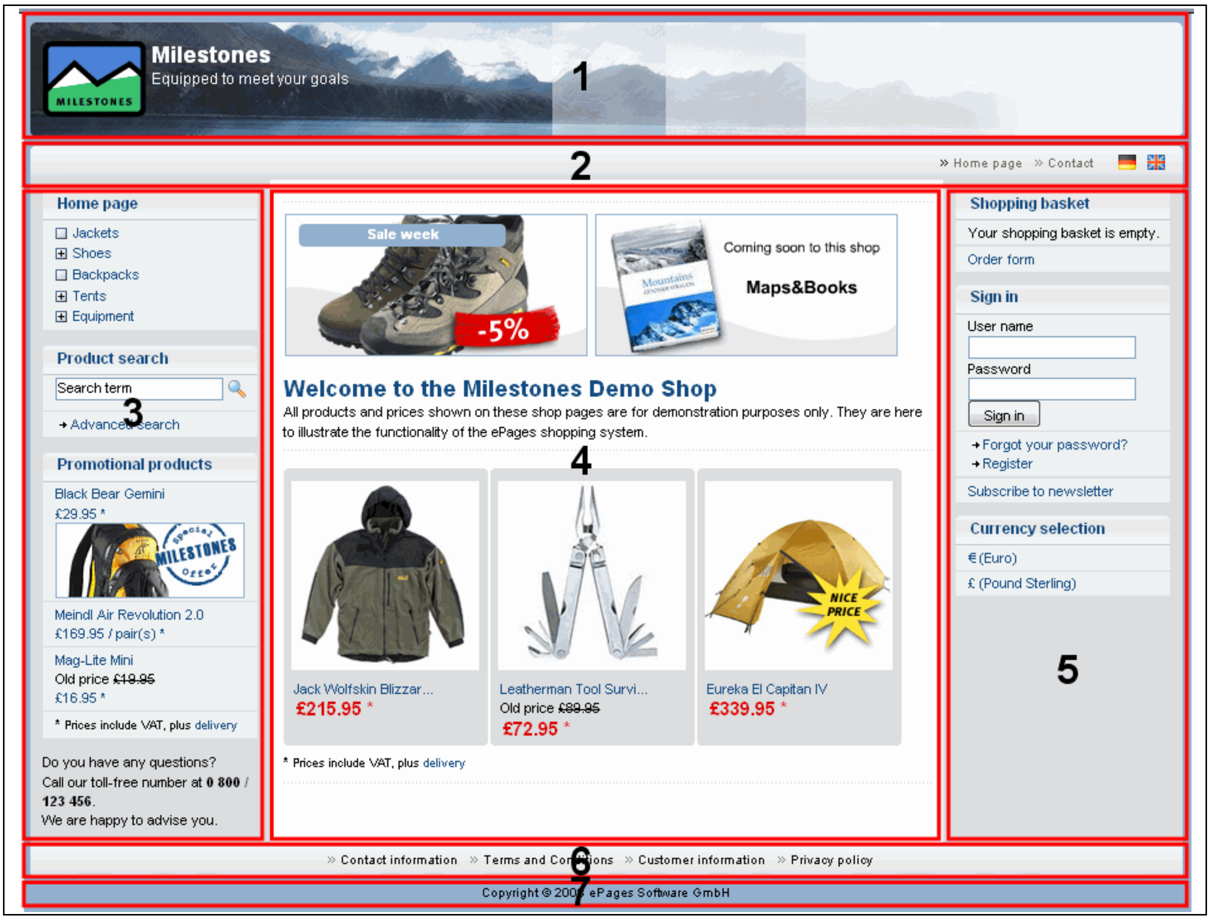


Figure 27: Web site structure

The following areas are defined:

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 in which the Web site is displayed. See *Configuring the general page layout in the browser, on page 173*.

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 in two groups. All the areas in each group are edited in the same way. The groups are as follows:

Horizontal areas:	*Header*, *Top*, *Bottom*, *Footer*; see *Horizontal areas, on page 173*
Vertical areas:	*Left*, *right; see Vertical areas, on page 173*
Content area:	*Content area*; see *Configuring the content area, on page 174*

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:

- Background images always take precedence over background colours. This means that if you load a background image and also set a background colour, the background image will cover the colour.
- Note the effect of individual area parameters on other areas. The height information for horizontal areas, and the width information for vertical areas will affect the size of the content area, for example.
- 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 also *Styles*, *on page 175*. Once you have created the desired design there, activate the style for your customers.

Configuring the general page layout in the browser

Alongside the design and layout of your Web site, you can also define how the Web site is shown within the browser. These settings include the width of the Web site, or the space between the top edge of the browser window and the top of the Web site. To edit these settings, click the display area of the browser, in the area adjacent to the Web site. The available functions are displayed in the multifunction bar.

When the display area is active, the following function groups are available in the multifunction bar:

- File; see File, on page 177
- Area; see *Area*, *on page 177*
- Page areas; see *Page areas*, *on page 178*
- Icon set; see *Icon set*, *on page 178*

Horizontal areas

The horizontal areas (*Header*, *Top*, *Bottom*, *Footer*), mostly extend over the entire width of the Web site. They are wider than they are high; see *Figure 27, on page 172*.

Horizontal areas 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

For more information on page elements, see *Page elements and navigation*, *on page 181*.

When a horizontal area is active, the following function groups are available in the multifunction bar:

- File; see File, on page 177
- Area; see *Area*, *on page 177*
- Font; see *Font*, *on page 178*
- Page elements; see *Page elements*, *on page 179*

Vertical areas

The vertical areas (*left*, *right* are mostly located between horizontal areas and lie parallel to the content area. They are higher than they are wide; see *Figure 27, on page 172*.

Vertical areas mostly contain boxes with texts, lists, links or entry fields. Typical page elements for horizontal areas include:

- List of main categories
- Signing in
- Compact shopping basket view, Shopping basket status
- Product search
- Country and currency selection
- Promotional products

For more information on page elements, see *Page elements and navigation*, *on page 181*.

When a vertical area is active, the following function groups are available in the multifunction bar:

- File; see File, on page 177
- Area; see *Area*, *on page 177*
- Font; see *Font*, *on page 178*
- Page elements; see *Page elements*, *on page 179*

Configuring the content area

Whereas the other areas contain mainly functional elements such as menus and links, the content area contains the product data and all the other information for your customers.

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.

When the content area is active, the following function groups are available in the multifunction bar:

- File; see File, on page 177
- Area; see *Area*, *on page 177*
- Font; see *Font*, *on page 178*
- Preview with selection of function group; see *Preview with selection of function group*, *on page 180*

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 171*. 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 select a style directly. For more on working with the Quick Design function, see *Quick Design*, *on page 183*.

> 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 *Styles*, *on page 175*.

After selecting the style, your Web site will be displayed in the browser using the design that is specified by the style. For more on styles see *Styles*, *on page 175*.

When you select and display a style, 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 *Configuring the general page layout in the browser*, *on page 173*.

The multifunction bar at the top of the browser displays the corresponding functions that are available. For more information, see *Multifunction bar and design*, *on page 176*.

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 showing different 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.

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. You can click the icon to reverse any changes that you do not like, at any time.

Once you are happy with the design, save all the changes by clicking .

Styles

Page: Design » 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 table in the **My Styles** section lists the 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.

The style that is set to *Visible* determines the appearance of the shop for your customers.

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. Click the *Visible* option button for the corresponding style.

You can edit a style using one of the following methods:

- Click the link **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 183*.
- Click the link **Start advanced design** or click the preview image. 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 171*.

The **View in the shop** 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. To do so, click the link **Create backup copy**.

Batch processing commands are available to manage the table entries. For an introduction to this, see *Batch Processes in Tables*, *on page 27*.

Save your entries by clicking **Save**.

You can create new styles by importing them from the templates or duplicating existing styles. For more information about importing, see *Templates*, *below*. You can duplicate styles using a batch processing command.

> Note: Deleting removes styles from the table. Standard styles can be imported in their original state from the *Templates* section.

Templates

Page: Design » Templates

All available style templates can be found in the **Templates** section. You can either use these styles unchanged for your Web design or use them as a basis for individual customisations. Each template defines a specific layout and design, as well as site structure.

The style 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 styles 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 design you prefer from those that are shown. The design is displayed in a magnified view in the right column. If there are variants of the selected design, 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. These refer to the possibilities available for customising the template. If more paintbrushes are displayed, you have more freedom to customise the template. According to the degree of customisation, notices about requirements or limitations are displayed. 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 style 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 ground up, the *Templates* group in the *Business Web sites* area is available. This contains various layout variants that do not contain any design information. 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.

> Note: If you do not change the name of a style and reload the style with the same name from the templates, 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.

Multifunction bar and design

In the **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.

The functions are grouped together, as described in the next chapter. Different content can be selected for some function groups. This is indicated by the arrow in front of the group name. Click the arrow to view the selection options. Select the desired content for editing. The associated setting options are displayed in the group area.

To save the changes that you have made to the design and layout of a given area, always use the icon to save and exit the page.

The next section describes the functions and settings of the individual function groups. For individual areas, only a subset of these functions is displayed. The following function groups are available:

- File; see File, below
- Area; see *Area, below*
- Page areas; see *Page areas, on page 178*
- Icon set; see *Icon set, on page 178*
- Font; see *Font, on page 178*
- Page elements; see *Page elements, on page 179*
- Preview with selection of function group; see *Preview with selection of function group, on page 180*

File

This group contains general functions that are always available.

Table 112: Function group *File* in the multifunction bar

Function	Comment
	Save changes
	Use this to undo the previous edit. This function can be carried out as many times as you wish.
	Repeat an action that was previously reversed (undone). This function can be carried out as many times as you wish.
Edit tools	Show or hide highlight or selection of active area

Area

This group contains all the functions that can be used to configure the background and dimensions of the areas.

Background colour and image

Here you can design the background of the active area. You can either select a coloured background or configure an image to be used for the background.

Table 113: Functions in *Background colour and image* in the multifunction bar.

Function	Comment
Background colour	The box contains the current colour for the selected area. Click the box in order to change the colour. See also *Colour selector, on page 43*.
Background image	Upload an image for the background here. See also *Uploading images, on page 43*.
Delete / **Delete template**	Click the link to delete the current background image. After deleting the image, the template of the current style is still located over the background. You can remove this using **Delete template**. Use the **Restore template** link to reinstate the template setting for the background of the style.
Insert file	This function allows you to add a background image using the File Management system. For more about this, see *File management, on page 44*.

Function	Comment
Tile image	Repeat the background image; see also *Uploading images*, *on page 43*.

Height / width and padding

Here you can define the height, width, and padding of the active area.

Table 114: Functions in *Height/width and padding* in the multifunction bar

Function	Comment
Width (general page view)	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 browser window. A width of 90% means that the Web site takes up a width of 90% of the browser window.
Padding top	This option defines the space from the top of the browser window to the top of the Web site.
Height (horizontal areas)	Indicates the height of the area in pixels (px)
Width (vertical areas)	Indicates the width of the area in pixels (px)
Margin	The outer padding is the space between the active area and the neighbouring areas. Enter the values in pixels (px).
Padding	The inner padding is the space between the edge of the page elements (e.g. link or flags for country selection) and the edge of the active area. Enter the values in pixels (px).

Align elements

Here you can define the orientation of the page elements in the active area. Select the corresponding value from the drop-down menu.

Page areas

Here you can define which individual sub areas of your Web site are displayed. See also *Design basics*, *on page 171*.

> 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; see *Page elements and navigation*, *on page 181*.

Icon set

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. Activate the set from the list that matches your design best. Click the corresponding option button and save your selection by clicking **Apply**.

Font

Different designs of font can be used for texts, links and headings in the individual areas. You can configure the individual fonts here.

Formatting

Here you can define the formatting of the text for the page elements in the active area. For the specified text elements you can define the size, colour, and special formatting.

The sizes are entered in pixels (px). For more on selecting colours, see *Colour selector*, *on page 43*. To configure special formatting, click the corresponding button.

Font

Here you can define the font for the individual text elements in the active area. Select the corresponding value from the drop-down menu.

Texts and links

Here you can format the texts and links in the content area. The sizes are entered in pixels (px). For more on selecting colours, see *Colour selector*, *on page 43*. To configure special formatting, click the corresponding button.

Headings

Here you can format the headings in the content area. The sizes are entered in pixels (px). For more on selecting colours, see *Colour selector*, *on page 43*. To configure special formatting, click the corresponding button.

Page elements

Page elements are functional elements that can be placed in all areas apart from the content area. These page elements are used to insert various functions. For more information, see *Page elements and navigation*, *on page 181*. In addition to making the elements available, you can also edit their design to a certain extent by uploading images and changing colours.

New page element

If your current layout and design does not contain all the page elements that you need, you can add the missing elements to the corresponding areas. Activate the corresponding area and click .

The overview shows all available page elements. Page elements that are marked by an asterisk have already been added to the Web site. This display will be updated after saving.

To place an element, highlight the associated check box and click **Insert**. The element is placed in the active area.

(Active) button / (Active) button - Right Image

Buttons are areas that contain links. You can use these buttons to provide the links with background colours or images. If you just want the background to be an image, simply upload an image for the **button**. If you want the background to be a tab label, for example, you have to upload left and right-hand image sections, each containing the respective parts of the tab image. In such a case, you can upload the left-hand section using **Button** and the right-hand portion of the image using **Button - Right image**.

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 of this are *Sign in*, the *Currency selection from list* and *Shopping basket overview with all items in box format*.

You can upload a background image and configure a background colour for the entire box. See also *Uploading images*, *on page 43* and *Colour selector*, *on page 43*.

Box header row

This is where you define the background image and colour of the header row. See also *Uploading images*, *on page 43* and *Colour selector*, *on page 43*.

Box width

This is where you define the width of the box within the navigation bar. Enter the values in pixels (px).

Preview with selection of function group

This function group is only displayed if the content area is active. 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 on the selected content type, an additional function group may be displayed in the multifunction bar. The corresponding configuration options can be edited in this group.

You can configure and edit the following content types:

Texts and links

Different elements in the content area are separated by dividing lines or separators. You can upload a background image for use as a separator. See also *Uploading images*, *on page 43*.

Lists, tables and dialogs

You can define how tables, lists and dialogs are displayed here. These elements have header rows, cells in which to display data, and footer rows, which you can design as required.

Header

You can define the background and font for the header here. For more on selecting colours, see *Colour selector*, *on page 43*. If you want to set a special format for the heading, click the corresponding button.

Header image

You can upload a background image for the header. See also *Uploading images*, *on page 43*.

Colours

When displaying data in rows in lists or tables, you can alternate the row colour to improve readability of the data. You can define two row colours. The rows are displayed using these alternating colours. For more on selecting colours, see *Colour selector*, *on page 43*.

Footer

You can upload a background image or define a background colour for the footer. See also *Colour selector*, *on page 43* and *Uploading images*, *on page 43*.

Prices and product views

Price information

Product prices are displayed at various locations. This is where you define how the prices are displayed at each location. For more on selecting colours, see *Colour selector*, *on page 43*.

Product box on the home page

On the home page, the products are displayed in special boxes. You can upload a background image for these boxes. See also *Uploading images*, *on page 43*.

Ordering process

Progress bar background

During the order process, the individual steps are indicated to the customer in form of a progress bar. The step that the customer has reached can be highlighted. This is the active step.

You can upload two background images, one for the inactive steps and one for the active step. See also *Uploading images*, *on page 43*.

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,
- Logo display
- display of a compact shopping basket,
- display of the sign-in box,
- product search display.

A corresponding page element exists for every available function. This element is used to display and call the function on the page. You can display the page elements on the page as you see fit. Do this by selecting the page elements from the *Page elements* ›› *New* group in the multifunction bar. For more information, see *Multifunction bar and design*, *on page 176*. In addition to this, you can create user-defined page elements; see *User-defined page elements*, *on page 182*.

All page elements are available for every area shown in *Figure 27*, *on page 172* 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.

The following functions are available for page elements in design mode:

Table 115: 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 positions at which you can deposit the page element. Now release the left mouse button. The page element is displayed at the corresponding location.

Function	Comment
	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.

There are special configuration options for the following page elements:

- Shopping basket overview with all items in box format

  The information in the *Shopping basket overview with all items in box format* view is displayed in alternating light and dark rows. You can configure the background colours for the rows; see *Colour selector*, *on page 43*. Save your entries by clicking **Save**.

- Logo

  You can enter a link for the logo here. This can point to internal or external Web pages. Always enter external links in the form *http://...* You can enter a separate link for each language. Save your entries by clicking **Save**.

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 into which the element is to be inserted.
2. Click the icon for the new page element in the multifunction bar.
3. Look for the User-defined section in the page elements overview.
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:

- 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 35*.

- 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 35*.

- 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.

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 effective immediately and can be seen on the Web site. Changes to the colour blend cannot be undone. If necessary, create a backup copy first.

As in the design function, the page is split in two, with the multifunction bar above and the page preview below. For more information, see *Design basics*, *on page 171*.

The following special function groups appear in the multifunction bar for the Quick Design function.

Preview

The content area displays various text, tables, product lists or product details, etc., according to the current function. You can select and display these types of content using the *Preview* drop-down menu. This means that you can check very easily whether all content is readable using the colour selection.

Using the *Editing help* you can hide all the design elements from the page preview.

Images

This option allows you to upload logos and images for the *Header* area of your Web site. See also *Uploading images*, *on page 43* and *File management*, *on page 44*.

For more on editing the logo, see Status, on page 53. For more on the header and other areas of the Web site, see *Design basics*, *on page 171*.

Settings

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 displayed in the box. 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. For more on selecting colours, see *Colour selector*, *on page 43*.

You can define the font for the entire Web site using the *Font* option.

The *Icon set* option allows you to select a matching set of icons for the Web site. For more information, see *Icon set*, *on page 178*.

Template

You can select a template for your Web site here. All other design settings will be overwritten.

Use the function *Insert page element* to place additional page elements in any area of the page. See also *Page elements and navigation*, *on page 181*.

> *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, you should read the chapter *Design basics*, *on page 171* and following.

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. You must use the search function to display additional orders; see *Search*, *on page 186*.

> Note: The last status set is always shown for the order in the table.

The symbols have the following meanings:

Table 116: legend for order icons

Icon	Description
(coloured icon)	Order will be opened in display mode. The *Viewed* status is not set.
(Grey icon)	Order will be opened in display mode. The *Viewed* status is set.
	Order is in process and will be opened in editing mode
Conflict	There is a difference between the current order value and the value paid by the customer. See also *Conflict warning*, *on page 187*.

To see the details of an order, click the order number. To open the details in a new window, click the icon.

> 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.

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 90*.

All orders for which the status *Viewed* has not yet been set will be shown in bold.

You can sort the table by column. For more details, see *Sorting using column headings*, *on page 28*.

Batch processing commands are available to manage the table entries. For an introduction to this, see *Batch Processes in Tables*, *on page 27*. The following specialised actions can be performed:

Table 117: specialised batch processing actions for processing orders

Command	Comment
Set status	You can set different status levels for the orders. The corresponding commands are listed in the drop-down menu.
Export	Selected orders are saved in a text file. They can be opened by any text processing program and processed or saved for archiving purposes.

Caution: You can only delete orders with the status *Rejected* or *Archived*.

Note: You can have the system automatically inform the customers per e-mail as soon as you have set a status for an order. The corresponding e-mail event must be active for this. For more information, see *E-mail settings*, on page 90.

Search

The search allows you to access specific orders or groups of orders. For basic information on using the search function, see *Search*, *on page 28*.

The advanced search allows you to filter by status, payment method and/or delivery method. When you select the *In edit mode* check box, only orders that are in edit mode are displayed. If the check box is not selected, all orders are displayed, depending on the other filter settings.

Note: If you need an overview of all orders for a customer, then go to the *Customer* area to display the details for the customer. 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 invoice address, and so on.

The various fields have the following meanings:

Table 118: fields for order details

Field name	Description	Field type	Example
Status	When you click **Save**, the current date is added to the selected status. Multiple statuses can be set. Registered customers can view the status in the shop.	Check box	
Order number	Unique number that is assigned by the system when the order is created. This can be changed here.	Entry field, alphanumeric	1005
Send order receipt confirmation	This sends information about the current order to the customer by e-mail. The order confirmation is sent to the e-mail address specified in the invoice address for this order.	Link	
Print view	Preview and print the order confirmation	Link	
Order comment	During the order process, customers can enter a comment about the order. If the customer has entered a comment, it is displayed here.	Display	
Internal note	Comments or information about the order. For internal use.	Text field, alphanumeric	Call the customer back.

Field name	Description	Field type	Example
Edit	This activates the order information for processing.	Button	
Delete	You can only delete orders with the status *Rejected* or *Archived*.	Button	

Save your entries by clicking **Save**.

Notes:
1. If you set an order to *Rejected*, the stock level for the relevant product is corrected automatically.
2. 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.
3. Before the order confirmation e-mail message can be sent, the *Order confirmation* e-mail event must be active. For more information, see *E-mail settings*, *on page 90*.

Caution: Before you leave this page, save your entries with **Save**, otherwise they will not be applied. This also applies if you click **Edit** or **Documents**.

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.

Editing mode

To edit the order data, 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.

The various fields have the following meanings:

Table 119: Fields for order details in editing mode

Field name	Description	Field type	Example
Quantity		Entry field, numeric	2
Delivery method		Drop-down menu	
Payment method		Drop-down menu	
Tax area		Drop-down menu	
Quantity/Product no.	Add a specific quantity of a product by directly entering the quantity and product number. Finish your entries by clicking .	Entry field, numeric, Entry field, alphanumeric	3 / eg_100111011
Add products from tray		Link	
	Delete a product from an order. The product itself is not deleted.	Button	

Field name	Description	Field type	Example
Update	The order is recalculated and displayed with the new values. This processing status remains until you accept the changes with **Apply** or cancel all changes with **Cancel**. After the update, you will receive a message that the data has not been saved permanently.	Button	
Apply	Save all changes and end the editing mode.	Button	
Cancel	Changes are deleted. The order retains the original information.	Button	

Caution: You must **Update** the page before you apply the changes.

Use search function to display all orders in edit mode. See also *Search*, *on page 186*.

Note: It is also a good idea to notify the customers about changes made to their orders. To do this, use, for example, the **Send order confirmation mail** link; see *Orders – Details*, *on page 186*.

Orders – Documents

Page: Orders ›› Orders ›› [order] ›› Documents

For each order, it is possible to generate various documents, such as invoices, packing slips, and credit notes. 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.

The table on this page lists all the documents that you have created for the current order. The symbols have the following meanings:

Table 120: icons for order documents

Icon	Description
	Document is active and can be processed
	Document is finalised and can no longer be edited

To open the details of a document, click the type.

As soon as you finalise a document, the date of finalisation is displayed in the last table column.

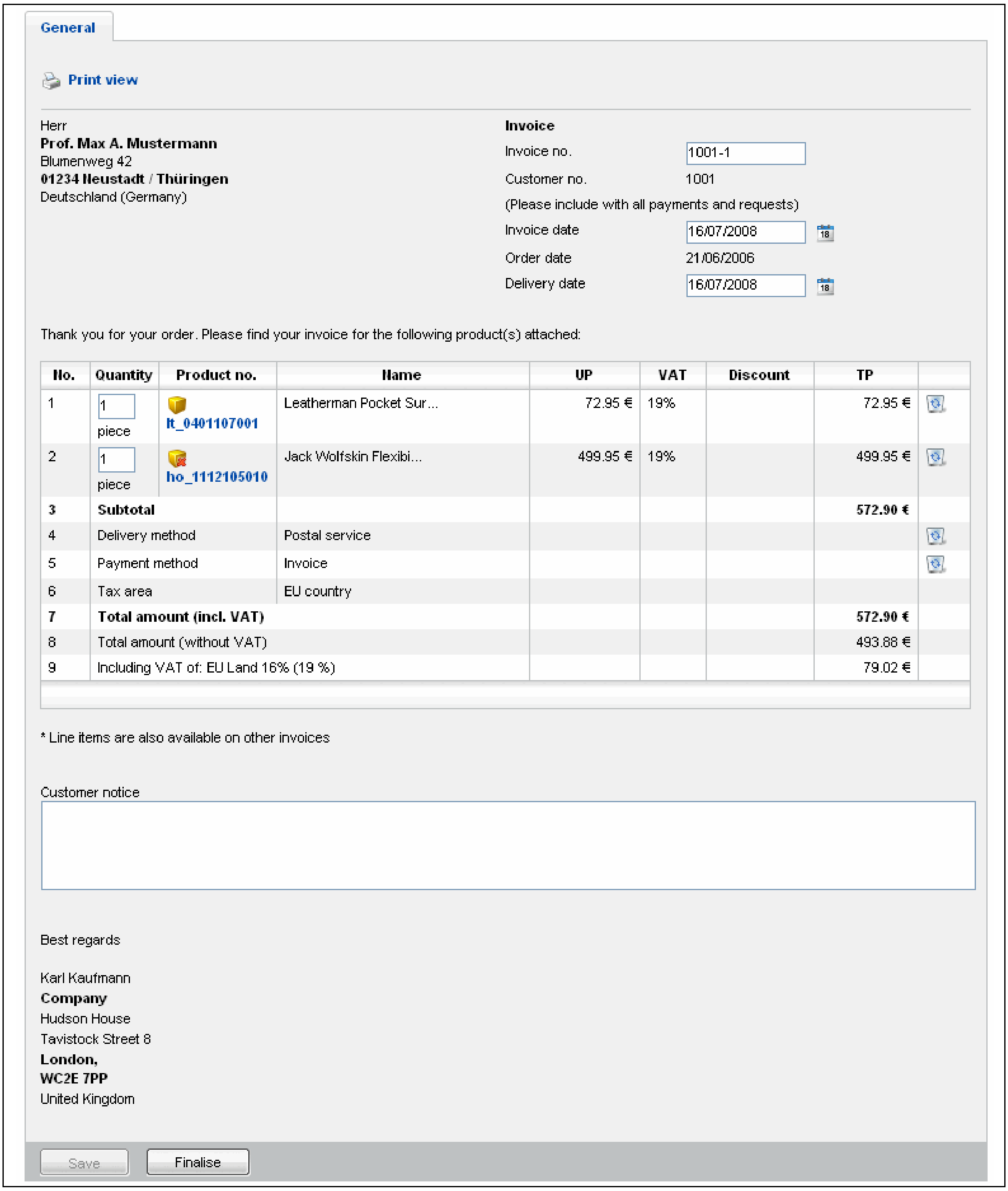
To open a print view for the document, click the print symbol in the last column.

If you would like to generate a new document, select the type from the drop-down menu below the table and click **Save**.

To delete a document, proceed as described in *Deleting entries*, *on page 26*. You can only delete documents which have not been finalised.

All documents are constructed and processed in a similar manner. The similarities are shown using the example of an invoice in *Figure 28*. Specific details will be illustrated later.

Every document contains address information and order information as well as function fields:



General

Print view

Herr
Prof. Max A. Mustermann
Blumenweg 42
01234 Neustadt / Thüringen
Deutschland (Germany)

Invoice
Invoice no. 1001-1
Customer no. 1001
(Please include with all payments and requests)
Invoice date 16/07/2008
Order date 21/06/2006
Delivery date 16/07/2008

Thank you for your order. Please find your invoice for the following product(s) attached:

No.	Quantity	Product no.	Name	UP	VAT	Discount	TP	
1	1 piece	lt_0401107001	Leatherman Pocket Sur...	72.95 €	19%		72.95 €	
2	1 piece	ho_1112105010	Jack Wolfskin Flexibi...	499.95 €	19%		499.95 €	
3	**Subtotal**						**572.90 €**	
4	Delivery method		Postal service					
5	Payment method		Invoice					
6	Tax area		EU country					
7	**Total amount (incl. VAT)**						**572.90 €**	
8	Total amount (without VAT)						493.88 €	
9	Including VAT of: EU Land 16% (19 %)						79.02 €	

* Line items are also available on other invoices

Customer notice

Best regards

Karl Kaufmann
Company
Hudson House
Tavistock Street 8
London,
WC2E 7PP
United Kingdom

Save Finalise

Figure 28: invoice view

The sender information is taken from the Web site address data; See *Address*, *on page 55*.

Various numbers and date entries must be entered for each document type. To enter dates, use the calendar function; see *Date entry fields*, *on page 30*. Always click **Save** after entering the document number and date. Otherwise, the current data will not be applied in the print view.

The quantity values can be adjusted to fit the individual order positions. Enter the relevant quantity. You can create a notice for the customer in connection with the current document in the *Customer notice* text field.

Save your entries by clicking **Save**. Totals in the document are updated.

If a position number is marked with an asterisk (*), this means that this product is contained in at least one other document of the same type.

Use the icon to delete individual positions from the list. The position will be deleted from the document without deletion confirmation.

Clicking **Print view** displays the print view of the document. In the print preview, additional customer information is displayed below the customer address. This is information that the customer has entered in *My Account*.

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.

Take note of the following information when working with order documents:

- Finalised documents cannot be selected and therefore cannot be deleted.
- Changes in amount or deleting positions 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 Internet Explorer, click *File* ›› *Page Setup* in the menu bar. This has a *Header and Footer* section. 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.

Packing slip

For basic information on editing the document, see *Orders – Documents*, *on page 188*. The specialised fields have the following meanings:

Table 121: Specialised fields for *Packing slip*

Field name	Description	Field type	Example
Packing slip no.	This number is suggested by the system and consists of the order number and a running number for packing slips	Entry field, alphanumeric	1001-1
Packing slip date		Date field	19.04.08

Save your entries by clicking **Save**.

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 current status of the package.

For more information on the basic principles of packing slips, see *Packing slip*, *above* and *Orders – Documents*, *on page 188*. The specialised fields have the following meanings:

Table 122: Specialised fields for *UPS packing slip*

Field name	Description	Field type	Example
UPS tracking number	This number is generated by the WorldShip software and imported. This is a requirement for package tracking.	Entry field, alpha-numeric	1ZOV77645388887
UPS registration and software	Display of the area with the specialised functions for UPS	Link	
Register with UPS	Forwarding to registration with UPS You will receive a customer number which you need in order to install the UPS software.	Link	
Order UPS WorldShip software	Using the software you can create the UPS tracking number. You can also create all necessary UPS delivery documents.	Link	
File format for exporting data to UPS WorldShip	Selection of the file format in which you can import the data to your UPS WorldShip account. Depending on the version of WorldShip, you can use CSV or XML formats. The format is configured using the corresponding option. The data is then saved to a file in the required format.	Option button	

Save your entries by clicking **Save**.

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.

UPS will then send you the software. Please install this after it has been received. Follow the instructions provided by UPS.

Creating the UPS tracking 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. If all information is correct, export the information by clicking Export. Choose a place to save the file and a name for the export file.
2. Start WorldShip and activate the Import function in the File menu.
3. Enter the name of the export file for the import file name. Either enter the name of the file with its path directly or click Browse to search for the file. Enter the remaining parameters according to the instructions in WorldShip.

4. Since the file always contains a header, you need to select the First row contains field names check box.
5. To import information correctly, you must select the corresponding data and map the field names in the import file to the internal WorldShip field names when you first import a file. If the language in your shop administration when exporting the file is the same as the language of your WorldShip software, the field names will also be the same. This makes mapping simple. Map the fields in the Recipients and Package tabs. Map the data as follows:

   a) Select the field in the right list field for external data fields by clicking it
   b) Select the corresponding field in the left list field for internal data fields by clicking it.
   c) Click Map

If all the options are set correctly and all the fields are mapped, click the **Import** button.

Continue to edit the shipment as described in the *WorldShip* instructions. To create the UPS tracking number, click **Finish** after you have entered all necessary information.

Among other things, this saves the shipment in the delivery history and gives you the option of viewing the UPS tracking number.

Activating 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.

Invoices

For basic information on editing the document, see *Orders – Documents*, *on page 188*. The specialised fields have the following meanings:

Table 123: Specialised fields for Invoices

Field name	Description	Field type	Example
Invoice no.	This number is suggested by the system and consists of the order number and a sequential number for invoices.	Entry field, alphanumeric	1001-1
Invoice date		Date field	19.04.08

Save your entries by clicking **Save**.

The comments on the payment method are only printed on the invoice if the order status *Paid* is not set.

Credit notes

For basic information on editing the document, see *Orders – Documents*, *on page 188*. The specialised fields have the following meanings:

Table 124: Specialised fields for *Credit notes*

Field name	Description	Field type	Example
Credit note no.	This number is suggested by the system and consists of the order number and a sequential number for credit notes.	Entry field, alphanumeric	1001-1
Credit note date		Date field	19.04.08

Save your entries by clicking **Save**.

WorldPay

WorldPay (*http://www.WorldPay.com*) belongs to the Royal Bank of Scotland Group. They provide electronic payment solutions. The *WorldPay* payment method offers an interface between your shop and the WorldPay payment system. With this, you can offer payment options for your shop by credit card and, within Germany, by direct debit. WorldPay checks the customer's payment data and only permits transactions with secure data.

> Note: Since the recording and processing of an end customer's payment data is performed by WorldPay, you as the merchant are not involved in the handling of this sensitive data and therefore cannot be held liable.

First, register as a merchant. This qualifies you for an installation ID and access to the WorldPay administration area. After this, you can configure your shop for the *WorldPay* payment method. For more details, see *Payment method with WorldPay*, *on page 72*. After you set up and test the payment method, you need to have WorldPay activate your shop.

This will allow you to offer your customers this payment method in your shop and display the WorldPay logo with the accepted credit cards.

Payment process from the customer's point of view,

During the order process, the customer selects the *WorldPay* payment method. As part of the process, he is then transferred to the WorldPay Web site. Data entry and the transaction are carried out on the WorldPay system. After completion, the customer is returned to the shop, where he is shown the order confirmation. This contains the payment method and transaction number assigned by WorldPay.

WorldPay transactions

Page: Orders ›› Transactions ›› WorldPay

The table lists all the transactions which have been conducted using WorldPay. 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.

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 WorldPay access methods support this AVS code. It depends on the customer's bank and the type of contract you signed with WorldPay.

The code structure and the meaning of the individual areas are found in the *AVS Code* area in the lower part of the page.

According to the settings for the payment method, the customer account is either debited the amount automatically, or you must do this manually; see *Payment method with WorldPay*, *on page 72*. Click the *To your WorldPay administration page* link for this purpose.

Search for WorldPay orders

Using the search, you can group and filter WorldPay transactions. You can search with the following additional criteria:

- Transaction no.
- Time period in which the transaction was performed.

For basic information on using the search function, see *Search*, *on page 28*.

T-Pay

T-Pay is the payment system from Deutsche Telekom. Customers are offered various payment variations. The customers are forwarded to the T-Pay system for payment. The transaction information is entered here. You, the merchant, must conclude the transaction in your shop administration. To use this payment system, your customers must register and you must register as a merchant with T-Pay. All information about T-Pay can be found at *www.T-Pay.de*.

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*.

For more information about merchant registration and setting the necessary parameters in the shop administration as well as testing, see *T-Pay payment method*, *on page 74*.

Payment process from the customer's point of view

During the order process, the customer selects the *T-Pay* payment method. He is then transferred to the T-Pay Web site. The payment variations you have activated are displayed there, from which the customer can select one. Then he must enter his identification. After he has successfully signed in, he enters the information required by the payment method he selected. Finally, he checks the information in an overview and confirms the transaction. Afterwards, he is brought back to the shop and receives the order confirmation. This contains the payment variant and the transaction number assigned by T-Pay.

T-Pay transactions

Page: Orders » Transactions » T-Pay

The table lists all the transactions customers have performed using T-Pay. The *Status* column informs you about the current status of the transaction.

Table 125: status of T-Pay transactions

Status	Description
Authorised	The customer has successfully finalised the transaction with T-Pay. Payment has not occurred.
Paid	Payment has been initiated

You can set the transaction type in the *T-Pay* payment method settings; see *T-Pay payment method*, *on page 74*. If *Authorisation* has been configured, you must initiate payment by T-Pay to your merchant account manually, once 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*.

Search for T-Pay transactions

Using the search, you can group and filter T-Pay transactions. You can search with the following additional criteria:

- Transaction no.,
- Status
- Time period in which the transaction was performed.

For basic information on using the search function, see *Search*, *on page 28*.

PayPal

PayPal is an online payment system operated by eBay. 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.

The prerequisite is that you register with and create an account at PayPal. More detailed information about *PayPal* is available at *www.paypal.com*.

To set all necessary parameters in the shop administration, see *Payment method with PayPal*, *on page 75*.

Payment process from the customer's point of view

During the order process, the customer selects the *PayPal* payment method. He is then transferred to the PayPal Web site. Depending upon your membership, he can select between credit card payment and PayPal payment methods.

The customer enters and confirms the data required by his selection. Afterwards, he is brought back to the shop and receives the order confirmation. This contains the payment method and transaction number assigned by PayPal.

Paypal transactions

Page : Orders ›› Transactions ›› PayPal

The table lists all the transactions customers have performed using PayPal. The *Status* column informs you about the current status of the transaction.

Table 126: Status of Paypal transactions

Status	Description
Pending	The transaction must be verified and manually finalised or rejected by you in the PayPal administration; As soon as you have set the status in PayPal, it is updated in the shop administration.
Closed	Transaction is finalised automatically. Payment has been initiated.

Use the **Go to PayPal administration** link to switch to your PayPal administration.

Search for PayPal transactions

Using the search, you can group and filter PayPal transactions. You can search with the following additional criteria:

- Transaction no.
- Time period in which the transaction was performed.

For basic information on using the search function, see *Search*, *on page 28*.

PayPal Pro

PayPal Pro is a payment method from PayPal. Customers use it to pay directly by credit card. PayPal verifies the data immediately. More detailed information about this topic is available at *www.PayPal.com* ›› *Merchant Services*.

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. Read about the settings and necessary parameters in *PayPal Pro payment method*, *on page 75*.

Payment process from the customer viewpoint

The customer selects the *PayPal Pro* payment method in the shopping basket. In the last step of the order process, he enters his credit card data.

PayPal immediately verifies the data. If errors occurred, the customer can correct these or select another payment method.

Once PayPal has verified the data successfully, the order confirmation is shown to the customer along with the PayPal transaction number.

PayPal Pro transactions

Page: Orders ›› Transactions ›› PayPal Pro

After the customer has completed the order, this is shown in your PayPal Pro Manager as well as in the list of PayPal Pro transactions in your shop administration.

The table lists all the current PayPal Pro transactions. 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 *Status* column informs you about the current status of the transaction.

Table 127: Status for PayPal Pro transactions

Status	Description
Authorised	The verification of credit card data by PayPal was successful. The amount can be debited.
Debited	Transaction is finalised; The amount was debited. In the *Transaction no. Debit* column, the debit number is shown.
Rejected	The verification of credit card data from PayPal was not successful. The amount cannot be debited.

To see the details of an order, click the order number.

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.

Searching PayPal Pro transactions

Using the search, you can group and filter your PayPal Pro transactions. This enables you to search by PayPal Pro transaction number. Otherwise, searching for PayPal Pro transactions is identical to the general search for all orders. For basic information on using the search function, see *Search*, *on page 28*.

PayPal Express

PayPal Express is a payment method from PayPal. For this payment method, the shopping basket data is transferred to the external system. The further steps of the order process are conducted there. The customer selects his payment method and delivery address there. The order is finalised in the shop. More detailed information about this topic is available at the PayPal Web site.

The prerequisite for you is that you register with and create a merchant account at PayPal. You can register with PayPal in the shop administration. Read about the settings and necessary parameters in *PayPal Express payment method*, *on page 76*.

Payment process from the customer viewpoint

Once the customer has placed products in the shopping basket, he can start PayPal Express. Buttons for this are available in the mini-shopping basket and in the shopping basket itself.

The customer is transferred to the PayPal Express page and must register there or create a new account.

After registration, the customer selects payment and delivery data and confirms these. Afterwards, he is brought back to the shop and finishes the order from there. Finally, the order confirmation is shown in the shop.

PayPal Express transactions

Page: Orders » Transactions » PayPal Express

Once the customer has confirmed the transaction, it is entered into the PayPal merchant administration as well as in the list of PayPal Express transactions in the shop administration.

The table lists all current PayPal Express transactions.

The *Status* column informs you about the current status of the transaction. PayPal sets this status. The following states exist:

Table 128: Status for PayPal Express transactions

Status	Description
Paid	The transaction was verified by PayPal and successfully performed. The amount will be debited and transferred.
Pending	The transaction 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.
Rejected	The transaction was not performed

To see the details of an order, click the order number.

Use the **Go to PayPal administration** link to switch to the PayPal administration.

Searching PayPal Express transactions

Using the search, you can group and filter your PayPal Express transactions. You can also specifically search for PayPal Express transaction numbers. The advanced search provides search for delivery and payment status and Buyer ID.

Otherwise, searching for PayPal Express transactions is identical to the general search for all orders. For basic information on using the search function, see *Search*, *on page 28*.

Google Checkout

Google Checkout is the online payment system from Google. For this payment method, the shopping basket data is transferred to the external system. 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.

More detailed information about this topic, including a list of countries that can use Google Checkout is available at *http://checkout.google.com/sell*.

The prerequisite for you is that you register with and create a merchant account at Google. You can register with Google in the shop administration. Read about the settings and necessary parameters in *Google Checkout payment method*, *on page 77*.

Payment process from the customer viewpoint

Once the customer has placed products in the shopping basket, he can start Google Checkout. Buttons for this are available in the mini-shopping basket and in the shopping basket itself.

The customer is transferred to the Google Checkout page and must register there. If he does not yet have an account, this is created automatically after entering the credit card data.

At Google Checkout, the customer sets the payment and delivery data and finalises the payment. The order is filled out with Google data and not with the data that are in the shop system.

After successful completion, a link is shown to the customer that allows him to return to the shop. He receives an order confirmation e-mail with the Google order number that is shown in the administration as a transaction number.

Google Checkout transactions

Page: Orders » Transactions » Google Checkout

Once the customer has confirmed the transaction, it is entered into the Google Checkout merchant administration as well as in the list of Google Checkout transactions in the shop administration. The order status is then set to *Invoiced*.

The table lists all the Google checkout transactions.

The risk information for this transaction is displayed using the icon after the transaction number. This data is transferred from Google. AVS means *Address Verification System* and CVN means *Cardholder Verification Number*.

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. Open your Google Checkout Merchant account manually or using the **Display Google orders** link. The customer receives an alert mail with every status change. You must activate the corresponding e-mail events before doing this. For more information, see *E-mail settings*, *on page 90*.

As soon as you have set a status in the Google Checkout administration, it is updated in the shop administration as well.

Search for Google Checkout transactions

Using the search, you can group and filter your Google Checkout transactions. You can also search specifically for Google Checkout transaction numbers. The advanced search provides search for delivery and payment status and Buyer ID.

Otherwise, searching for Google Checkout transactions is identical to the general search for all orders. For basic information on using the search function, see *Search*, *on page 28*.

ClickandBuy

ClickandBuy is an Internet payment system that enables secure payment processing. Customers 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.

During the order process, the customer is forwarded to the payment page of ClickandBuy. There, he selects his payment method, finishes payment, and is returned to the shop.

More detailed information about this topic is available at *http://www.clickandbuy.com/*.

The prerequisite for you is that you register with and create a merchant account at ClickandBuy. ClickandBuy is only enabled as a transaction system for premium accounts. You can register with ClickandBuy in the shop administration. Read about the settings and necessary parameters in *ClickandBuy payment method*, *on page 78*.

Payment process from the customer's point of view

The customer selects the *ClickandBuy* payment method in the shopping basket. For the payment step in the order process, he is transferred to the ClickandBuy page.

The ClickandBuy settings for the specific country set in the customer settings will be used to show the customer the valid payment methods for this country. Unregistered customers select their payment method and enter the required data.

Registered customers sign in at ClickandBuy. The preferred payment method is selected for them.

After successful payment, the customer is returned to the shop page. The order confirmation will be shown there with the ClickandBuy transaction number.

ClickandBuy transactions

Page: Orders » Transactions » ClickandBuy

Once the customer has confirmed the transaction, it is entered into the ClickandBuy administration as well as into the list of ClickandBuy transactions in the shop administration. The payment status is set to *Paid*.

The table lists all the ClickandBuy transactions.

The *Status* column shows the status of the payment at ClickandBuy.

Use the **Go to ClickandBuy administration** link to switch to your ClickandBuy administration.

Searching for ClickandBuy transactions

Using the search, you can group and filter your ClickandBuy transactions. You can also search specifically by ClickandBuy transaction numbers. The advanced search provides a search by ClickandBuy status, customer reference number, and BDR ID.

Otherwise, searching for ClickandBuy transactions is identical to the general search for orders. For basic information on using the search function, see *Search*, *on page 28*.

Atos Worldline

Atos Worldline is a subsidiary of the Atos Origin Gruppe and offers payment services for the Internet throughout Europe. A part of the payment methods offered are verification methods such as credit and address checks as well as the *Verified by Visa* and *MasterCard Secure Code* systems. You can offer credit card payment using Atos Worldline in your shop.

More detailed information about this topic is available at *http://www.atosworldline.de* and *http://www.atosorigin.com*.

The prerequisite for you is that you register with Atos Worldline. This registration can be performed from your shop administration. Read about the settings and necessary parameters in *Atos Worldline payment method*, *on page 80*.

Payment process from the customer viewpoint

The customer selects *Atos Worldline* as the payment method in the shopping basket. After the confirmation of the shopping basket, the customer is shown the page for the Atos Worldline payment method. Once there, he clicks on the symbol of his preferred credit card.

The customer is forwarded to the page of the Atos Worldline payment system and enters his credit card data there.

After this, the customer is shown a page with the reference information for this transaction.

If desired, he can return to the shop. To do so, he clicks the respective button. The order confirmation is shown in the shop.

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.

The table lists all the Atos Worldline transactions.

A transaction number is shown if the authorisation was successful. The code shows the transaction result; *00* means that the authorisation was accepted.

Search for Atos Worldline transactions

Using the search, you can group and filter your Atos Worldline transactions. You can also search for Atos Worldline transaction numbers and authorisation IDs. The advanced search also supports searching by transaction type.

Otherwise, searching for Atos Worldline transactions is identical to the general search for all orders. For basic information on using the search function, see *Search*, *on page 28*.

Sofortüberweisung

Sofortüberweisung is an online payment system from the Payment Network AG company. 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.

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.

More detailed information about this topic is available at *www.sofortueberweisung.de* or *http://www.Directpay24.com*.

The prerequisite is registration with *Sofortüberweisung*. This registration can be performed from your shop administration. You must also create a project for the shop in the *Sofortüberweisung* administration. Read about the settings and necessary parameters in *Sofortüberweisung payment method*, *on page 80*.

Payment process from the customer's point of view

To use this payment method, the customer must have an online banking account. In order to make the payment, he must have all the information required for the online transfers, such as bank account details, PIN and TAN.

The customer selects *Sofortüberweisung* as the payment method in the shopping basket. He is then transferred to the *Sofortüberweisung* Web site. Here he fills out a transfer form. The transaction is performed after the PIN and TAN have been entered. When this has been completed, the customer receives a transaction confirmation.

If desired, he can return to the shop. To do so, he clicks the respective button. The order confirmation is shown in the shop. This contains the payment method and transaction number assigned by *Sofortüberweisung*.

Sofortüberweisung transactions

Page: Orders ›› Transactions ›› Sofortüberweisung

After the customer has confirmed the transaction, it is entered into the list of *Sofortüberweisung* transactions in the shop administration. Since the transaction has been performed, the *Paid* status is set for the order.

The table lists all the *Sofortüberweisung* transactions.

Search for Sofortüberweisung transactions

Use the search function to group and filter your *Sofortüberweisung* transactions. You can also search specifically by *Sofortüberweisung* transaction numbers.

Otherwise, searching for *Sofortüberweisung* transactions is identical to the general search for orders. For basic information on using the search function, see *Search*, *on page 28*.

HSBC

HSBC (*www.hsbc.com*) provides solutions for electronic payment processes. The payment method *HSBC* offers an interface between your shop and HSBC's own payment system. This allows you to support payment by credit card in your shop, via HSBC. HSBC checks the customer's payment data and only permits transactions with secure data.

> Note: Since the recording and processing of an end customer's payment data is performed by HSBC, you as the merchant are not involved in the handling of this sensitive data and therefore cannot be held liable.

To set all necessary parameters in the shop administration, see *Payment method with HSBC*, *on page 82*.

You must register as a merchant with HSBC. This qualifies you for a *Client Alias* and a security code (*Shared Secret*) as well as access to the administration area of HSBC. After this, you can configure the *HSBC* payment method for your shop.

HSBC transactions

Page: Orders » Transactions » HSBC

The table lists all the transactions customers have performed using HSBC. The *Type* column provides information about the transaction.

Table 129: Type for HSBC transactions

Type	Description
Authorised	The customer has successfully finalised the transaction with HSBC. Payment has not occurred.
Paid	Payment has been initiated.

> Note: Note that in the table of HSBC transactions, the type and not the status is shown.

Debiting of *Authorised* transactions must be done manually by you in the HSBC administration. This will, however, **not** change the type display to *Paid*. You must set this using either batch processing commands or for each order individually.

Search for HSBC transactions

Using the search, you can group and filter HSBC transactions. You can search with the following additional criteria:

- Transaction no.,
- type,
- Time period in which the transaction was performed.

For basic information on using the search function, see *Search*, *on page 28*.

Moneybookers

Moneybookers is an e-money institute and offers all key national and international payment methods from one source. The money will be transferred in real time. This means that it is available immediately.

Moneybookers offers its payment methods in a unique way:

- Simplicity for the merchant: As a merchant, you only need a Moneybookers account in order to use all payment methods. Through this interface, you offer your customers all the major payment methods without needing contracts with each payment method provider. You can very easily offer credit cards and local payment methods without installation costs and monthly fees.

- Simplicity for the customer: Your customer can select his desired payment method without being a Moneybookers customer. He sees the payment methods he is familiar with on the payment page. The customer's data is transferred to the payment page for Moneybookers so that he does not have to register there.

Another advantage of Moneybookers is that the customer does not have to enter any sensitive information such as bank details or credit card numbers in the online shop. These are all processed by Moneybookers. The company has an e-banking license and was licensed by the FSA (Finance and Securities Market Regulator of the UK) as an "electronic money issuer" to issue electronic money.

More detailed information about Moneybookers is available at *http://www.moneybookers.com*.

You can offer your shop customers the Moneybookers wallet and all additional payment methods. Create another payment method for each payment option. The prerequisite for you is that you register with Moneybookers and activate the respective payment options. This registration can be performed from your shop administration. Read about this and about the required parameters in *Moneybookers payment method*, *on page 83*.

Payment process from the customer viewpoint

The customer is shown the payment methods that you have created in the shop administration.

The customer selects a payment method in the shopping basket based on Moneybookers. Then he is transferred to the secure payment environment of Moneybookers. There he enters the required payment details and completes the payment.

Finally, the customer is returned to the shop. The order confirmation is shown to him here. This contains the transaction number that was assigned by Moneybookers.

Moneybookers transactions

Page: Orders ›› Transactions ›› Moneybookers

After the customer has confirmed the transaction, it is entered into the list of Moneybookers transactions in the shop administration.

The table lists all the Moneybookers transactions. As soon as a transaction is set to *Processed* in the table, the status of the order is set to *Paid*.

Search for Moneybookers transactions

Use the search function to group and filter your Moneybookers transactions. You can also search specifically by Moneybookers transaction numbers.
Otherwise, searching for Moneybookers transactions is identical to the general search for orders. See also *Search*, *on page 28*.

Saferpay

Saferpay is an Internet payment platform that was developed for use in e-commerce by the Swiss companies *3C Systems AG* and *Spolex AG*. Saferpay operates in Switzerland. Saferpay communicates with all the major European banks and has direct connections to the global credit card networks.

Saferpay supports various payment methods and means of payment. It accepts both international credit cards and locally valid payments.

It guarantees customers a high degree of data security. Before entering payment-related data, customers are forwarded to the Saferpay platform. Since the shop software and Saferpay operate on different, physically separate computers, the payment data of the customer is never stored in the shop system. This significantly reduces the risk of abuse of customer data.

All information on accepted payment methods, security standards and about Saferpay in general can be found at *www.saferpay.com*.

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. For information on the settings required, see *Saferpay payment method*, *on page 84*.

Payment process from the customer's point of view

The customer selects a payment method in the shopping basket based on Saferpay. As part of the process, he is then transferred to the Saferpay Web site. A new window will open displaying the payment options that you have agreed with Saferpay.

Depending on the selection made here, the customer is taken through a specific Saferpay process to complete the transaction.

Finally, the customer is returned to the shop. The order confirmation is shown to him here. This contains the transaction number allocated by Saferpay.

Saferpay transactions

Page: Orders ›› Transactions ›› Saferpay

After the customer has confirmed the transaction, it is entered into the list of Saferpay transactions in the shop administration.

The table lists all the Saferpay transactions. As soon as a transaction is debited, the status of the order is set to *Paid*.

To see the details of an order, click the order number.

To see the details of the transaction, click the transaction number. This takes you to the Saferpay administration, where the corresponding transaction data is displayed. If the transaction number is grey, it is a test transaction. No details can be displayed for these.

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.

Search for Saferpay transactions

Use the search function to group and filter your Saferpay transactions. You can also search specifically by Saferpay transaction numbers.

Otherwise, searching for Saferpay transactions is identical to the general search for orders. See also *Search*, *on page 28*.

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 about your shop, such as promotional offers or discounts for your customers. Newsletters are sent as e-mail messages.

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. Visitors always subscribe to campaigns on the Web site, not to individual newsletters. This way, they always receive all new newsletters of one campaign.

The table lists all the newsletter campaigns you have created. The symbols have the following meanings:

Table 130: table symbols for newsletter campaigns

Icon	Description
	Blue icon: Campaign is active and therefore visible on the Web site; vistors can sign up for it
	Grey icon: The campaign is not active and therefore not visible on the Web site; visitors cannot sign up for it. The newsletters can still be sent to addressees that you have assigned in the administration page.

Click the ID to open the details of a campaign.

Batch processing commands are available to manage the table entries. For an introduction to this, see *Batch Processes in Tables*, *on page 27*.

To create a new campaign, follow the steps described in *Adding records*, *on page 26*.

Save your entries by clicking **Save**.

Newsletter campaigns – Texts

Page: Marketing » Newsletter » Texts

You can configure and edit the texts that describe your newsletters here. 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.

For more on formatting, see *Working with text fields*, *on page 35*.

Save your entries by clicking **Save**.

Creating a newsletter

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; see Newsletter campaigns, above. Allocate 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, below. Do not make the campaign visible until all data has been entered and tested.
3. Create a newsletter; see Newsletter campaigns – Details – Newsletter, on page 207. Allocate a meaningful name.
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 208 and Creating the newsletter content, on page 209. Conduct a test distribution, and check the results. Note that in this test e-mail, the placeholders will not be replaced by current data.
5. Normally, subscribers register for your newsletter using the Web site. However, if you already have addressees for the newsletter 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 211.
6. 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 – Texts, Seite 205.
7. 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.
8. In order to allow your Web visitors to sign up for the newsletters, you also have to make the corresponding function available on the Web site. This is done using the navigation elements Newsletter subscription and Link to newsletter subscription. See also Page elements and navigation, on page 181 and Page elements, on page 179.

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

The various fields have the following meanings:

Table 131: general fields for newsletter campaigns

Field name	Description	Field type	Example
ID		Entry field, alphanumeric	NewProducts_DE
Visible		Option button	
Name	Language-dependent name used to display the campaign	Entry field, alphanumeric, max. 255 characters	New ideas at Milestones
Description	Language-dependent descriptive text for the campaign displayed on the Web site; For more on formatting, see *Working with text fields, on page 35*.	Text field	Every month, we will let you know how we have expanded our selection of products and services.
Language	Language for which the campaign was created; One feature is the language selection *International*. Campaigns created with this option are valid for all languages.	Drop-down menu	
Sender Name	Default setting for all newsletters in the campaign; Together with the sender's e-mail address, this comprises an extended e-mail address. *Milestones-Team ‹info@provider.de›*	Entry field, alphanumeric	Milestones Team

Field name	Description	Field type	Example
Sender e-mail	Default setting for all newsletters in the campaign	Entry field, alpha-numeric	info@provider.de
Test e-mail	Every newsletter in the campaign uses this address for test newsletters; see *Newsletter details – General, on page 208*. At the time of creation, the Web site e-mail address is entered automatically; See *Address, on page 55*.	Entry field, alpha-numeric	test@provider.de
Subject	Default setting for all newsletters in the campaign	Entry field, alpha-numeric, max. 255 characters	New ideas at Mile-stones

Save your entries by clicking **Save**.

Newsletter campaigns – Details – Newsletter

Page: Marketing » Newsletter » General » [campaign] » Newsletter

The table lists all the created newsletters. The symbols have the following meanings:

Table 132: Newsletter status

Icon	Description
	The newsletter has not yet been sent.
	The newsletter has not yet been sent, however a sending date has been entered on which the newsletter will automatically be sent.
	The newsletter has been sent. No more changes can be made. You can however still duplicate the newsletter.

The following icons supplement the status and apply to the send date:

Table 133: icons for the send date

Icon	Description
	No send date was entered. The newsletter has not yet been sent.
	The planned send date has been entered.
	The date when the newsletter was sent is displayed.

To open the details of a newsletter, click its name.

You can sort the table by column. For more details, see *Sorting using column headings, on page 28*.

Batch processing commands are available to manage the table entries. For an introduction to this, see *Batch Processes in Tables, on page 27*. The following specialised actions can be performed:

Table 134: specialised batch processing commands for newsletters

Command	Comment
Duplicate	The send date and subscriber list will not be applied.

To create a new newsletter, proceed as described in *Adding records, on page 26*.

Save your entries by clicking **Save**.

Newsletter details – General

Page: Marketing ›› Newsletter ›› General ›› [campaign] ›› Newsletter ›› [newsletter] ›› General

The various fields have the following meanings:

Table 135: fields for newsletters

Field name	Description	Field type	Example
ID		Entry field, alpha-numeric	BooksAndMaps
Name	Name used to display the newsletter. This is language-dependent.	Entry field, alpha-numeric, max. 255 characters	Announcement: Books and cards
Template + **Load template**	Selection of a template for the newsletter text; This is loaded into the text field. Any text present will be removed after the deletion confirmation is displayed and confirmed.	Drop-down menu + Button	
Use HTML	*Yes*: All formatting information will be included. *No*: The text will be sent without HTML codes. If the recipient does not receive HTML, the text is sent without HTML (in plain text) regardless of the current setting.	Option button	
Subject	Used as a subject in the newsletter e-mail message	Entry field, alpha-numeric, max. 255 characters	Travel literature at Milestones
Text	Newsletter content For more information, see *Creating the newsletter content , on page 209*.	Text field	On any tour, you not only need the right equipment but also the right travel literature. We are excited…
Add products and categories from tray	For more on working with the tray, see *Tray, on page 21*.	Link	
Sender Name	Together with the sender's e-mail address, this comprises an extended e-mail address. *Milestones–Team ‹info@provider.de›*	Entry field, alpha-numeric	Milestones Team
Sender e-mail		Entry field, alpha-numeric	info@provider.de
Send date	Time at which the newsletter is automatically sent.	Date field	10.8.2008 08:30
Date sent		Display	

Field name	Description	Field type	Example
Test e-mail	Test sending to this address; To do this, click **Send test e-mail**. The button is disabled if no recipient has been entered for the test e-mail; see *Newsletter campaigns – Details – General, on page 206.* When sending a test e-mail, the placeholders will not be replaced by current data. No coupons are created for test e-mails.		balu@provider.de
Coupon campaign	Adding coupon information to the newsletter; After selection and saving, two new functions are activated for this. See *Coupons, on page 214* and especially the section *Using coupons in newsletters, on page 217.*	Drop-down menu	

Save your entries by clicking **Save**.

A newsletter can be sent in the following ways:

- Enter the send date and save your entries by clicking **Save**. The newsletters will be sent at the scheduled time.
- Click **Send now**. The newsletters are sent immediately. The send date is ignored. A window with a progress bar indicates the send status. You can close the window at any time and the send process continues in the background.

> Note: The system has a setting for the maximum number of e-mails that can be sent immediately. If the number of e-mails to be sent using the **Send now** command exceeds this, the e-mails will automatically be sent later in the background. You will receive notification of this.

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.

Creating the newsletter content

The content of a newsletter can contain manually-created text and contents from the database, such as product and customer data.

Figure 29 shows a page that offers all these possibilities.

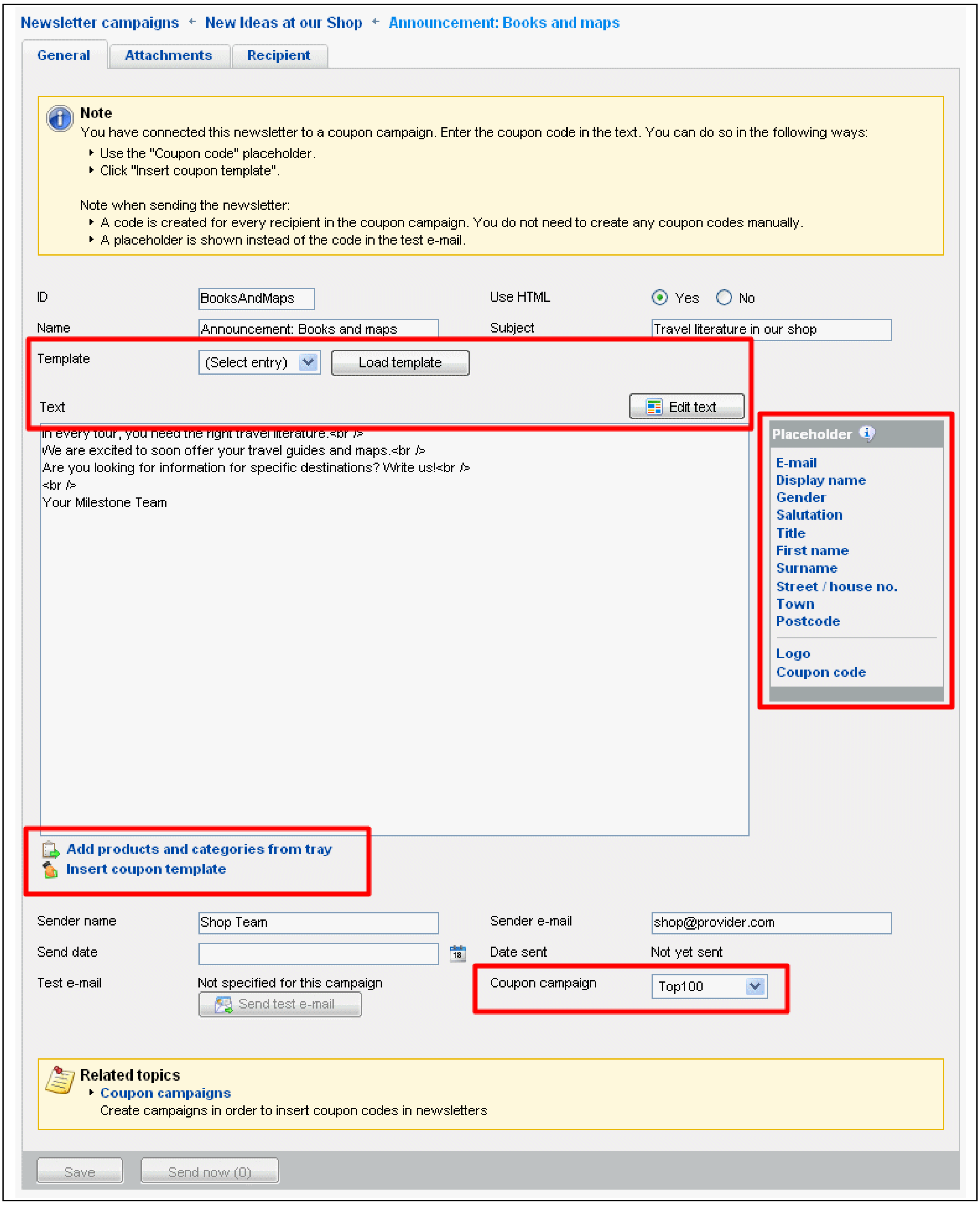


Figure 29: creating the newsletter content

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. For more information, see *Working with text fields, on page 35*.

To insert product and category information into the newsletter text, put the desired objects into the tray and insert them using **Add products and categories from tray**. See also *Tray on page 21*.

The information is entered at the cursor position. Product images are inserted as attachments and a reference to them is placed within the text; see *Newsletter details – Attachments*, *below*.

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.

You can also send coupons with newsletters. You must create a corresponding campaign before doing this. See *Coupons*, *on page 214* and especially the section *Using coupons in newsletters*, *on page 217*.

The following should be additionally noted:

- 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.
- The templates contain text which allows the customer to unsubscribe from the newsletter. This text must be part of every newsletter. It is usual that the customers be informed about the possibility of unsubscribing from newsletters.
- 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.

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.

> <u>Note:</u> 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.

If there are a large number of recipients, the time sent shown may differ slightly from the planned send time.

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*, *above*.

The table lists all the addressees who are entered in the current campaign. The symbols have the following meanings:

Table 136: Status symbols for the list of addressees

Icon	Description
(blue)	The addressee is a registered customer who has subscribed to newsletters
(blue)	The addressee is a registered customer who has unsubscribed from newsletters
(blue)	The addressee is a registered customer who has subscribed to newsletters, but the relevant system e-mail has not been confirmed by the subscriber.
(green)	The addressee is not a registered customer, but has subscribed to newsletters
(green)	The addressee is not a registered customer and has unsubscribed from newsletters
(green)	The addressee is not a registered customer who has subscribed to newsletters, but the relevant system e-mail has not been confirmed by the subscriber.

Only visitors in this list can receive the campaign newsletter. Visitors can register for newsletter campaigns on the Web site. For more information, see *Subscription from the Web site*, *on page 213*.

If necessary, you as the administrator can add addressees to newsletter campaigns. You can do so through the following methods:

- 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 *Importing addressees*, *on page 213*

Basic information on creating new entries in the table is available in *Adding records*, *on page 26*.

Save your entries by clicking **Save**.

Batch processing commands are available to manage the table entries. For an introduction to this, see *Batch Processes in Tables*, *on page 27*. The following specialised actions can be performed:

Table 137: specialised batch processing actions for addressee administration

Command	Comment
Subscribe	Status is set to Subscribed
Unsubscribe	Status is set to Unsubscribed
Delete	This cancels the assignment of registered visitors to the campaign; 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 deleting a customer from the addressee list.

For registered customers, deleting from the list only removes the assignment to the campaign. The rest of the customer data remains intact.

Importing addressees

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. When creating the file, orient yourself on the example shown on the page.

The various fields have the following meanings:

Table 138: general fields for a newsletter campaign

Field name	Description	Field type	Example
Delimiter	Selection of the delimiter used to divide data fields in the import file; The default setting matches the current regional setting in the administration.	Drop-down menu	
Import file	Enter the name of the import file in this field. Either enter the name of the file with its path directly or click **Browse** to search for the file.	Entry field, alphanumeric	C:\temp\import.csv

Click **Import** to begin the import.

Addressee search

Use the search to find a specific group of addressees or a specific addressee. For basic information on using the search function, see *Search*, *on page 28*. The search only applies to the current campaign.

Subscription from the Web site

Registered users can view the available campaigns on the Web site in the *My Account* section under *Newsletter* and can subscribe to the newsletter.

To do so, he selects the newsletter 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.

Unsubscribing from newsletter is done the same way. The customer 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 91*. If you, as the administrator, assign customers to newsletters, then no event is triggered.

For unregistered customers, you must provide one of the following page elements:

- *Link to newsletter subscription*

  The customer is shown a table listing the available newsletter campaigns. He selects the newsletter and provides the name and e-mail address of the recipient in the corresponding fields. The rest of the process is the same as for registered users.

- *Newsletter subscription*

The customer provides a name and a e-mail address and clicks *Subscribe*. He is shown a table with the available newsletters. His data is entered into the fields and he is informed of the confirmation e-mail. He is then automatically subscribed to all newsletter campaigns shown. Note this when using this page element.

For more on working with page elements, see *Page elements and navigation*, *on page 181*.

Coupons

Page: Marketing » Coupons

Use coupons to offer your customers various price reductions. Create a coupon campaign for each promotion.

> Note: 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.

The table lists all the coupon campaigns which you have created. To see the details of a coupon campaign, click the ID.

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.

Batch processing commands are available to manage the table entries. For an introduction to this, see *Batch Processes in Tables*, *on page 27*.

> Note: 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.

To create a new campaign, follow the steps described in *Adding records*, *on page 26*. Save your entries by clicking **Save**.

Coupon campaign – General

Page: Marketing » Coupons » [coupon] » General

The various fields have the following meanings:

Table 139: parameters for coupons

Field name/ ID	Description	Field type	Example
ID		Entry field, alphanumeric	NewPayment
Name	Language-dependent name used to display the campaign	Entry field, alphanumeric	New payment method
Description	Description of the campaign. This is language-dependent; For more on formatting, see *Working with text fields*, *on page 35*.	Text field	Use of the payment method *cash on delivery* is rewarded with a coupon.
Currency		Display	
Absolute value	Absolute amount per coupon	Option button + entry field, numeric	€4

Field name/ ID	Description	Field type	Example
Percentage value	The value of the coupon is proportional to the value of the goods in the shopping basket All products in the shopping basket will be discounted.	Option button + entry field, numeric	5 %
Waive delivery costs		Option button	
Minimum order value	Shopping basket value at which the coupon can be redeemed	Entry field, numeric	€50
Coupon code length	Variable length of the coupon code for different uses and security levels	Drop-down menu	16
Time frame	Length of the validity period for the coupons in the campaign; It is necessary to enter both the date and time; Use the symbols next to every date field to enter the current date along with the time.	Date field	01.05.08 00:00
Number of valid coupon codes	Number of coupon codes that will be accepted by the system.	Entry field, numeric	100
Redemption voids the coupon code	*Yes*: Every coupon code can only be used once *No*: A coupon code can be redeemed multiple times	Option button	

Save your entries by clicking **Save**.

Note: You can only edit the parameters on this page if coupon codes have not yet been generated. If you would like to edit the values again, you need to delete all coupon codes.

Caution: 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 for the current time period.

Note: If you specify the validity period of coupons, remember to respect any statutory provisions regarding the validity of coupons.

Coupon campaign – Validity

Page: Marketing » Coupons » [coupon] » Validity

You can link the validity of coupons to certain 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.

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 according to the general settings.

The various entries are inserted into the table from the tray. For more on working with the tray, see *Tray, on page 21*.

The conditions of the same type are connected with an OR. Conditions of different types are related by AND.

The following example demonstrates this:

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*.

To remove a condition from the table, select the relevant conditions and click **Remove assignment**.

Coupon campaign – Coupon codes

Page: Marketing ›› Coupons ›› [coupon] ›› Coupon codes

The table shows all the coupon codes that belong to this campaign.

You can sort the table by column. For more details, see *Sorting using column headings*, *on page 28*.

Batch processing commands are available to manage the table entries. For an introduction to this, see *Batch Processes in Tables*, *on page 27*. The following specialised actions can be performed:

Table 140: specialised batch processing actions for coupon codes

Command	Comment
Export all coupon codes	This saves all the coupon codes in a text file for use in external systems.

You can generate coupon codes with the following methods:

- Manual creation

  Proceed as described in *Adding records*, *on page 26*.

- Automatic generation using the code generator

  Enter the number of codes that you want to generate in the *Number* field and click **Generate codes automatically**.

- Creating new coupon codes using newsletter dispatch

  See *Using coupons in newsletters*, *on page 217*.

Note: As soon as you have generated coupon codes, you can no longer modify the basic settings on the *General* page. Delete all coupons in order to be able to change the parameters again.

Note: Deleted coupon codes lose their validity and can no longer be redeemed by customers.

Creating coupons

What should you do when you create coupons? 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 coupons and make them available to your customers, proceed as follows:

1. First, create a coupon campaign; see Coupons, on page 214. Allocate a meaningful name.

2. Enter the details of 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. For information on the settings required, see Coupon campaign – General, on page 214.
3. If you want to stipulate further conditions on the redemption of the coupon, in addition to the minimum order value and validity period, see Coupon campaign – Validity, on page 215. Configure the corresponding conditions on the Validity tab.
4. Create the coupon codes. For more details, see Coupon campaign – Coupon codes, on page 216. 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, unten.
5. If you do not want to distribute the coupons to your customers through a newsletter, you can export the generated coupon code and then distribute them to your customers via other channels.

Using coupons in newsletters

For basic principles on newsletters, see *Newsletter campaigns*, *on page 205*.

First, create a coupon campaign.

> Note: You do not need to generate any coupon codes. The system generates a new code for each newsletter that is sent.

In the newsletter, you have the ability to select and assign these coupon campaigns; see *Figure 30*.

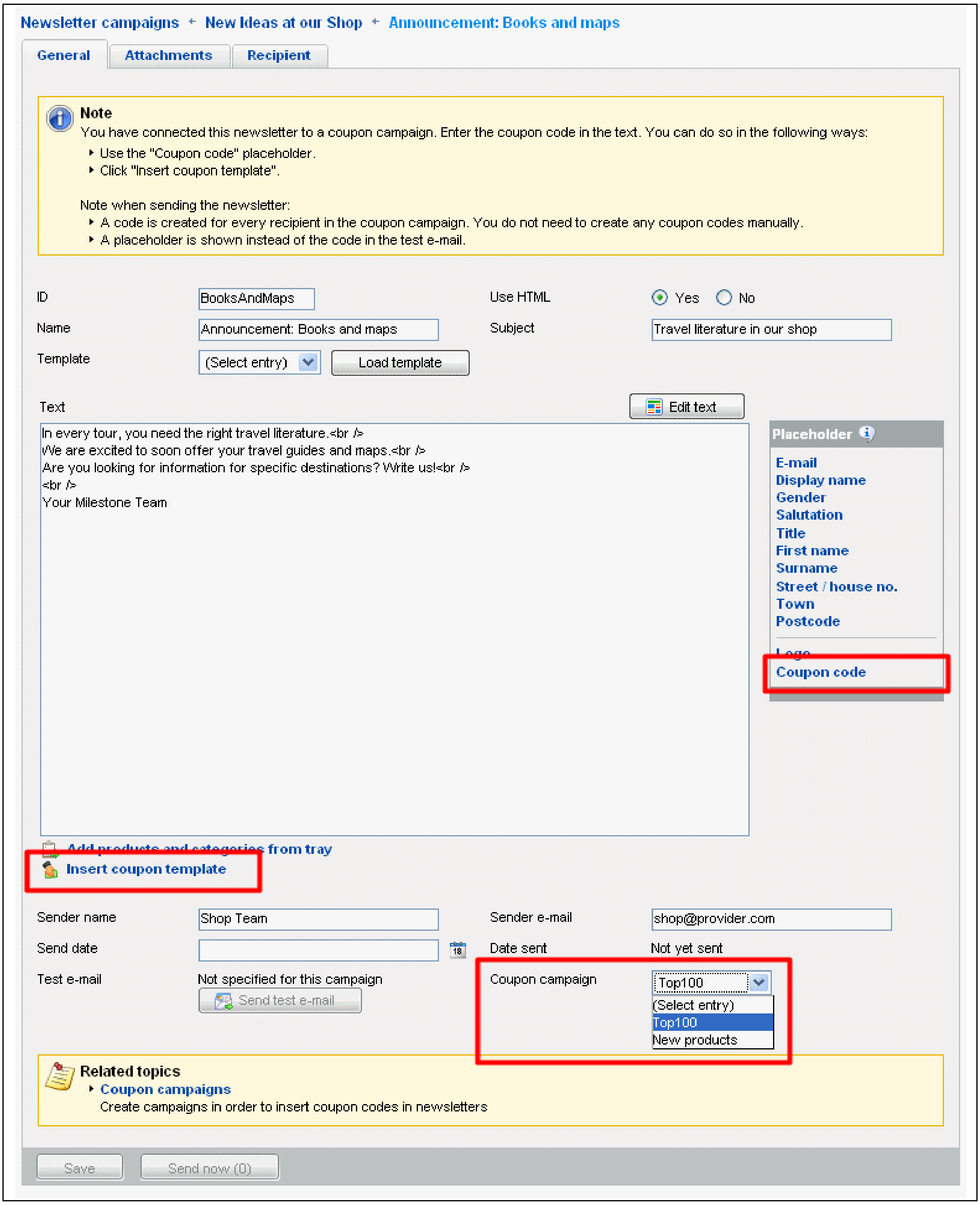


Figure 30: selecting a coupon campaign for the newsletter

After selecting the coupon campaign and clicking **Save**, certain functions are available for your newsletter:

- A new placeholder for a 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 link **Insert coupon template**

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 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 87*, and whether the portal supports this country.

Every country platform must be configured individually. 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 name of an active platform is displayed as a link. Click this link to open and edit the settings for this platform. If a platform is active, you can open the export product list directly by clicking the icon.

Clicking the icon opens the home page of the relevant country platform.

To deactivate a platform, remove the mark in the relevant check box in the *Active* column and save your entries by clicking **Save**.

If you cannot select a check box, the requirements for the corresponding platform have not been satisfied. A relevant notification is displayed.

The settings for each country platform are edited in the following tabs:

- **General**: By and large these are common setting options; see *General settings*, *below*. 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*, *below*. Differing contents are possible
- **etracker reporting:** All platforms are edited in the same way; see *etracker reporting*, *on page 221*. Differing contents are possible.

> <u>Note:</u> The portals do not support HTML coding in the product descriptions. The HTML codes are filtered out during export to allow you to use your product descriptions in the portals.

General settings

Page: Marketing ›› Product portals ›› [portal] ›› General

These settings and comments are valid for all portals.

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.

The fields which are the same for all portals have the following meanings:

Table 141: general settings for all portals

Field name/	Description	Field type	Example
Land	Regional setting	Display	Germany
Language		Display	German
Currency		Display	€
Export all products	The current product list is ignored. All products are exported. New products are automatically considered during the next export.	Option button	
Export variation products individually	If variation products exist, this setting determines whether the variation products themselves are exported or only the master product. The option becomes active when *Export all products* is set to active.	Option button	
Delivery method	The costs of the method you select here are displayed together with the product on the portal.	Drop-down menu	
Image	All the attachments for the product are listed in this drop-down menu. An image file is expected for the export. If you have allowed other file types for the product type, such as PDF files, then you may only select one image file from the drop-down menu.	Drop-down menu	
Description		Drop-down menu	
Repetition	The export and uploading (if required) are repeated automatically at set intervals. This updates modified product information on the platform. This is also necessary 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.	Drop-down menu	
Display export file	Link to the export file. This becomes visible after export.	Link	

Save your entries by clicking **Save**.

Note: Due to security reasons, passwords are displayed as 8 asterisks in the entry field irrespective of their original length.

If the *Export all products* option is set to *Yes*, the **Products** tab is inactive. Although the product list cannot then be edited, any assignments remain.

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.

To edit the product list, go to the **Products** tab.

Product list and export

Page: Marketing » Product portals » [portal] » Products

The **Products** tab can be found in the details of every country platform in a product platform. On this page, you can manage the products which are exported to the relevant platform. The editing for all portals is the same.

The table lists all the products which are to be exported. You can sort the table by column. For more details, see *Sorting using column headings*, *on page 28*.

Batch processing commands are available to manage the table entries. For an introduction to this, see *Batch Processes in Tables*, *on page 27*. The following specialised actions can be performed:

Table 142: specialised batch processing commands for product export to product portals

Command	Comment
Remove assignment	If you remove products from the export list, the products themselves are not deleted
Remove all assignments	All the products are removed from the export list.

To add new entries, follow the steps described in *Adding records*, *on page 26*.

> *Caution:* The products can only be exported to a portal if the prices are only 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.

If errors occur, you will be notified of this and offered additional details. To do this, click the **Details** link. You will receive notification of every error and can then directly open the relevant product using the link and edit and correct the information.

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. Verify that the **etracker** link in the Marketing sub menu is active. Contact your provider and apply for the activation of this function. 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 apply for the *Advanced Services*:

- Open the **Configuration** in the etracker administration.
- Open the **Change service** function.
- Select the *Advanced Services* option and complete the process according to the instructions.

The basis for the reporting is a parameter you enter on the **etracker reporting** tab for each country platform. Each platform has its own parameter. The parameter is 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 parameter 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 relationship between the channel and the campaign in etracker is comparable with the relationship between the country platform and the portal in the shop administration.

To create an etracker parameter for a country platform, you must create a channel in a campaign in your etracker administration, and export the parameters there. Proceed as follows:

1. To do this, start the campaign assistant from Marketing ›› Campaigns ›› Management ›› Campaign assistant.
2. Select the Manual option and click Next.
3. Enter the name and additional parameters for the campaign. It is recommended that you name the campaign after the portal for which it is being configured. Save your entries by clicking Enter new campaign.
4. You can now add a new channel to the campaign. This must be a URL parameter channel. When you create the channel, the necessary parameter is also created. Enter the channel and the country platform for which the parameter is intended.
5. Open the details for this channel.
6. The parameter is generated and is located in the read-only URL field, e.g. et_cid=3&et_lid=4.
7. In addition you can enter some cost parameters which are specified in the contract for the relevant platform.
8. Save your entries by clicking Save changes.

Enter the parameter in your Web site administration. To do this, open the portal page in the Web site administration and click the corresponding country platform for the parameter. Switch to the **etracker evaluation** tab. Enter the parameter in the *URL parameter* field. Save your entries by clicking **Save**.

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.

Pangora

The general settings, which must be edited for every portal, are described in *General settings*, *on page 219*.

Note the following exceptions:

Table 143: specialised settings for the Pangora export

Field name/ ID	Description	Field type	Example
Merchant ID	You receive this ID when you register with Pangora.	Entry field, alpha-numeric	1234
FTP user name	FTP transfer is password protected. You receive the information when you register with Pangora. This is not identical with the sign in name for the Pangora administration area.	Entry field, numeric	
FTP password	Password needed to transfer information via FTP; This is not displayed for security reasons.	Entry field, numeric	
Promotional Text	A short description of the product, max. 25 characters.	Drop-down menu	

Save your entries by clicking **Save**.

For more on product export, see *Product list and export*, *on page 221*. For more on etracker evaluation, see *etracker reporting*, *on page 221*.

Kelkoo

The general settings, which must be edited for every portal, are described in *General settings*, *on page 219*.

For more on product export, see *Product list and export*, *on page 221*. For more on etracker evaluation, see *etracker reporting*, *on page 221*.

Note the following exceptions:

The *Export file* and the *Export interval* fields do not exist for 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. Use the **Register with Kelkoo** link. 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. In Kelkoo, enter the shop URL that is displayed in the note at the top of the page.

Click the **Upload product data** link on your Kelkoo administration page. In the next dialog, enter the file name of the export file. Either enter the name of the file with its path directly or click **Browse** to search for the file. Start the upload by clicking **Submit catalog**. 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

The general settings, which must be edited for every portal, are described in *General settings*, *on page 219*.

Note the following exceptions:

Table 144: specialised settings for Google Base Export

Field name/ ID	Description	Field type	Example
FTP user name	FTP transfer is password protected. You receive this information when you register with Google. This is not identical with the sign-in name for the Google Base administration area.	Entry field, numeric	
FTP password	Password needed to transfer information over FTP. This is not displayed for security reasons	Entry field, numeric	
File name	Name of the file you entered in the Google Base administration for upload.	Entry field, numeric	googleExport.txt

Save your entries by clicking **Save**.

Note the following exceptions:

- After uploading your data to Google, it may take up to two weeks 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.
- Always use the same file name, otherwise the system will not recognise the file and it will not be processed.
- Your products will be removed from the Google Base catalogue after a certain time. Therefore, to offer your products on Google again, upload a file at least once a month.

For more on product export, see *Product list and export*, *on page 221*. For more on etracker evaluation, see *etracker reporting*, *on page 221*.

guenstiger.de

The general settings, which must be edited for every portal, are described in *General settings*, *on page 219*.

For more on product export, see *Product list and export*, *on page 221*. For more on etracker evaluation, see *etracker reporting*, *on page 221*.

Preissuchmaschine

The general settings, which must be edited for every portal, are described in *General settings*, *on page 219*.

For more on product export, see *Product list and export*, *on page 221*. For more on etracker evaluation, see *etracker reporting*, *on page 221*.

Shopping.com

The general settings, which must be edited for every portal, are described in *General settings*, *on page 219*.

Note the following exceptions:

Table 145: specialised settings for Shopping.com export

Field name/ ID	Description	Field type	Example
Merchant ID	You receive this ID when you register with Shopping.com.	Entry field, alpha-numeric	1234
FTP user name	FTP transfer is password protected. You will receive this information when you register with Shopping.com. This is not the same as the sign-in name for the Shopping.com administration area.	Entry field, numeric	
FTP password	Password needed to transfer information via FTP; This is not displayed for security reasons.	Entry field, numeric	

For more on product export, see *Product list and export*, *on page 221*. For more on etracker evaluation, see *etracker reporting*, *on page 221*.

Ciao

The general settings, which must be edited for every portal, are described in *General settings*, *on page 219*.

Note the following exceptions:

Table 146: Special settings for Ciao export

Field name/ ID	Description	Field type	Example
Merchant ID	You receive this ID from Ciao.	Entry field, alpha-numeric	12345678
Show link to review	Here you can show a link that your customers can use to leave a review at Ciao. This link is shown on the order confirmation page and in the order confirmation e-mail	Option button	

Save your entries by clicking **Save**.

You can display the Ciao logo in the form of a page element. A link is available for this logo. This also allows the customers to enter a review at Ciao.

The export file is retrieved by Ciao each day.

For more on product export, see *Product list and export*, *on page 221*. For more on etracker evaluation, see *etracker reporting*, *on page 221*.

Google registration

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**.

Registering your site with Google does not guarantee that it will be added to the search index. Note the information about this on the Google Web site.

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.

Trusted Shops

Page: Marketing ›› Trusted Shops

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.

The quality seal offers you, as a merchant, additional benefits:

- You present the image of a professional, proven online merchant and are listed on the Trusted Shops Web page.
- There is a lower rate of purchase cancellations because customers trust the seal of approval;
- Your shop is also advertised on the secure shopping portal.

The customer can click the seal. This opens the Trusted Shops site and shows him the advantages and security measures of you shop.

You can find all relevant information at *http://www.trustedshops.com/*.

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 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 181*. An information message will be shown if you have not yet placed a page element on your Web site, despite having entered an ID.

If you have not saved a Trusted Shops ID, the Trusted Shops page element will not be displayed on the Web site.

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. Depending on the services offered, there may be a fee. Etracker normally offers recording and reporting of visitors, click behaviour, pages opened, click paths, viewing times, and so on. Use these numbers to evaluate and influence the success and effectiveness of your Web page.

Based on a cooperation agreement between etracker and your provider, the shop system transmits additional data to the etracker reporting to enable statistical reporting.

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.

General

Page: Marketing ›› etracker statistics ›› General

This is where you should enter your etracker registration data, and where you can manage the basic settings for search engine campaigns. If necessary, you can register automatically with etracker. The tab is divided into the following sections:

- Set up etracker account; see *Setting up an etracker account*, *below*
- Registration data; see *Registration data*, *below*.
- Search engine reporting; see *Search engine reporting*, *on page 228*

Setting up an 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 47*, under *Finish*.

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 **Configuration** ›› **HTML code** ›› **Automatic creation**.

You can create the Direct Login Bookmark in your etracker administration under **Configuration** ›› **Personal settings** in the *Statistics settings* section.

Save your entries by clicking **Save**.

After you save the registration data, the **Show etracker statistics** link is displayed. Click this to go to your etracker administration.

The statistics displayed depend on your contract with etracker. The following statistics are available by default:

Table 147: default statistics for etracker

Statistics area	Name
General	History
	Hourly performance
Usage	Page impressions per page
Origin	Overview
	Top providers
	Top sites
	Search engines
Geographic range	by country
Visitor tracking	Last Visitor
Visitors	per hour
	per weekday
	per week
	per month
	per year
Technology	Operating systems
	Screen size
	Colours
	Browsers
	Language
	Supported techniques
Reports	Daily statistics report
Marketing reports	Leads & Sales

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. For basic information on campaigns and how to create them in etracker, see *etracker reporting*, *on page 221*.

For this purpose, choose the *Search engine* campaign type. After you have created the search engine campaign, open the details. The code parameter for this campaign is displayed here. It takes the following form:

```
var et_se=13;
```

Enter the number, in this case 13, in the field of the same name on the **General** tab in the Web site 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 more information, see *Page cache/optimisation*, *on page 54*.

To view the records and statistics for your Web site, open your etracker administration page.

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. The **Recommend product** link is displayed in the shop for this purpose.

The various fields have the following meanings:

Table 148: fields for product recommendation

Field name	Description	Field type	Example
Allow product recommendations	The function is activated for your customers; The corresponding link is displayed in the product detail view.	Option button	
Product recommendation only for signed in customers	This restricts the function to registered customers.	Option button	
Maximum number of recommendations	This is the maximum number of product recommendations per day for registered customers.	Drop-down menu	

> Note: This limitation can only be set for registered customers. If this function is available to all customers (registered and unregistered), then all customers can send product recommendations up to a maximum limit. This is set at 100 recommendations per customer per day.

Save your entries by clicking **Save**.

> *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 90*.

Product inquiries

Page: Marketing » Question about product

You can give your customers the opportunity of submitting questions about products. For this purpose, set the *Allow question about product* option to *Yes*.

When this option is enabled, customers to your shop can call up a form in the product details view, in which they can enter questions or suggestions about the specific product for submission to you. You will receive a corresponding e-mail.

> *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 90*.

eBay

You can manage your eBay items and orders here. For information about the settings required, see *eBay settings, on page 98*.

Items

Page: Marketing » eBay » Items

The table lists all the items for sale on eBay. The symbols have the following meanings:

Table 149: icons for eBay items

Icon	Description
	The item has been created, but not yet verified and not yet placed on eBay. It can still be edited.
	The item has been created and verified but not yet placed on eBay. It can still be edited.
	The item has been created, has been verified, and will be placed on eBay at the set time. It can still be edited.
	The item has been placed on eBay and the sale is running. It can no longer be edited.
	The sale is finalised. The product has been sold.
	The sale is finalised. The product has not been sold.
	The item has been created as a "Buy It Now" item, but has not yet been verified or placed on eBay. It can still be edited.
	The item has been created as a "Buy It Now" item, and has been verified, but has not yet been placed on eBay. It can still be edited.
	The item has been created as a "Buy It Now" item, has been verified, and will be placed on eBay at the set time. It can still be edited.
	The item has been placed on eBay as a "Buy It Now" item and the item is for sale. It can no longer be edited.
	The sale is finished, the product has been sold for the Buy It Now price.
	The sale is finished, the product has not been sold for the Buy It Now price.

Icon	Description
	The sale is still running. The customer has received an e-mail about finalising the order in the shop, but has not yet finalised the order. You can resend the finalisation request e-mail. To do this, click the link. You are then forwarded to the page of eBay orders. Run the corresponding batch process command. For more information, see *Orders*, *on page 235*.

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*, *on page 232*.

The availability of the corresponding product is shown using an icon following each item. The icons are the same as those used in the product table; see *Products*, *on page 103*. To view a product, click the icon.

Details of items which are for sale on eBay and of closed eBay sales are displayed in an overview. They cannot be edited. To view the product details, click the product link. To view the item offered on eBay, click the item link. There is also an **Orders** tab. 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 235*.
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 150: 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

You can sort the table by column. For more details, see *Sorting using column headings*, *on page 28*.

Batch processing commands are available to manage the table entries. For an introduction to this, see *Batch Processes in Tables*, *on page 27*. The following specialised actions can be performed:

Table 151: 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.

Command	Comment
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 and updates the display in the table

To create a new item, follow the steps described in *Adding records*, *on page 26*. Enter the product number in the direct entry field. Save your entries by clicking **Save**.

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 235*.

It is also possible to create a new item from a product directly. For more information, see *eBay*, *on page 122*.

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. You use these as if you were entering an item on eBay directly. If you are unsure about the meaning of these parameters or how to use them, they are explained in depth on eBay.

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 information is 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

The various fields have the following meanings:

Table 152: Fields in the *Title* page

Field name	Description	Field type	Example
Product		Link	
Item type	Possibilities are provided by eBay.	Drop-down menu	
eBay account	You decide which eBay page the offer is placed on. For more information, see *eBay accounts*, *on page 99*.	Drop-down menu	
Name		Entry field, alphanumeric	Deuter Hydro 2
Subtitle	This is a short description of the item, which is displayed on the eBay page and also in the gallery directly under the name of the item	Entry field, alphanumeric	

Field name	Description	Field type	Example
Description	Description of the item that is displayed for eBay bidders. For more on formatting, see *Working with text fields*, *on page 35*. Product information is displayed via the template.	Text field, alphanumeric	<P><STRONG><FONT size=5>Deuter Hydro 2.0</FONT></STRONG> </P> <P>New 2004. Small drinking system backpack with ....
Template + **Assign**	Formatted sample texts for the description. After selection these are imported into the *Description* field. See also *Templates*, *on page 101*.	Drop-down menu	

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.

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.

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* field.
- Select the category from the *Recently used categories* drop-down menu. After selection, the number is entered into the Category 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. Select the option button for the desired category. After selection, the number is entered into the Category 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 *Category 1* and *Category 2* drop-down menus.

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.

For the start-time setting, you can use the date entry function via the icon to enter the date in the right format. See also *Date entry fields*, *on page 30*.

Save your entries by clicking **Next >>** or **<< Previous**.

Layout

This is where you define settings that affect the presentation of the item on eBay. 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.

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 111*. 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.

> Note: Since the customer finalises the process in your shop, the delivery methods mentioned here are only for his information. The methods should however be the same as those that you offer in the shop. The types that are valid for the customer are shown in the finalising order process in the shop.

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. If you save without selecting a method, the **Next** button remains disabled. A universal method is available. This refers to the description of the item. Use this if none of the methods offered applies to you.

> Note: Since the customer finalises the process in your shop, the payment methods mentioned here are only for his information. The methods should however be the same as those that you offer in the shop. The types that are valid for the customer are shown in the finalising order process in the shop.

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.

If one of the settings does not fulfil eBay requirements, an error message will be displayed.

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 232*.

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 153: 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 in the shop; 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 99*.

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. See *Table 154*below*on page 236*

Batch processing commands are available to manage the table entries. For an introduction to this, see *Batch Processes in Tables*, *on page 27*. The following specialised commands can be performed:

Table 154: specialised 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 99*. 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 finalise the transaction in your shop. See also *Configuration of notification e-mail*, *on page 98*. 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.

eBay orders are indicated in the list of all orders by the eBay icon.

Search for eBay items and orders

eBay items and eBay orders each have their own search box. This is displayed when the relevant tab is active. You can search according to various criteria. For basic information on using the search function, see *Search*, *on page 28*.

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*, *32*.
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 141* and *Multifunction bar and design*, *on page 176*.
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.

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 108*.
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 35*.
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

A

B

C

D