Online sales management Software
Quick store setup


v 1.1

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# 1  Shopizer Urls

Administration console is available at

**http://<your host>/central**

User name is : **admin**

initial password is : **password**

Online store is available at

**http://<your host>/shop**

If you are running multiple merchants, you will invoke a specific store by using

**http://<your host>/shop/store?merchantId=<your merchant id>**

You will find your merchant id on the administration dashboard (home)

# 2  Configure your store

The administration web site menu won't fully appear until the system minimum informations are filled. At first, you will be asked to complete your 'profile' and 'store' information as displayed in the administration menu.
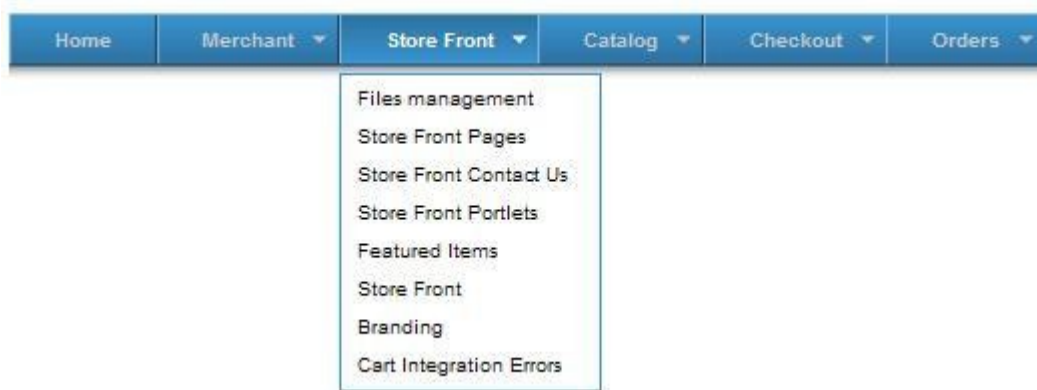
### *Store and profile*



Your '**Store**' information will contain information that will be public in different areas of the system such as in the store front pages and in communication email.

| Field | Description |
|---|---|
| Currency | Make sure your payment gateway or paypal is configured for the selected currency |
| Weight units | Will be used to determine shipping quote |
| Seize units | Will be used to determine shipping quote |

| Domain name | If you use this system on your localhost, just type localhost, if you have a domain name, type your domain name. If you use a specific port, type it too (localhost:8080). This field is used to build urls in the store front |
| --- | --- |
| Languages | Supported languages by the system. Store front pages support multiple languages. |
| Store template name | Should be **decotemplate** unless you use another template |

Your '**profile**' information is kept private and used for authentication purpose. From the profile left menu it is possible to create a new Merchant and change your password.

## *Store Front Configuration*



The following information is relevant if you intent to create a store front.

**Store Front** menu link fields

| Field | Description |
| --- | --- |
| Landing page text | Text that will be displayed on the store front landing page under the header and before featured items |
| Landing page title | Landing page title. Will appear in browser window. |
| Meta tags description | Web site description. Important for search engines |
| Meta tags keywords | |
| Google Analytics ID | UA-XXXXXXX-X google analytics tracking id |
| Google API key | Used for different Maps and IP Geo location. API |

| Field | Description |
|---|---|
| | keys are available here http://code.google.com/apis/maps/signup.html |

**Branding** menu link fields

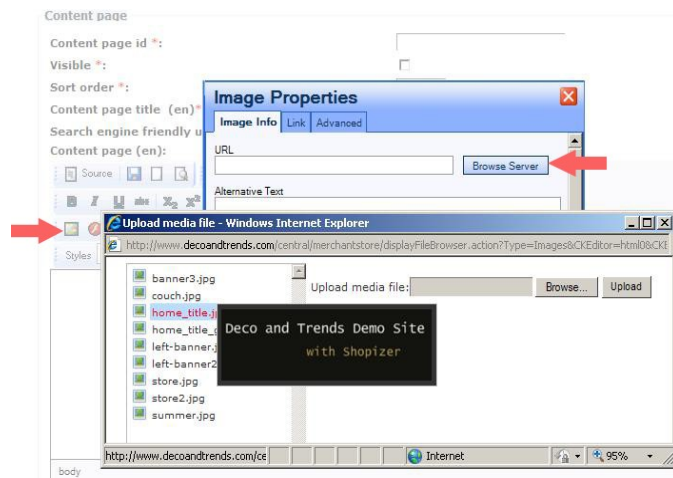| Field | Description |
|---|---|
| Continue shopping URL | Link that will appear in the shopping cart inviting the user to continue shopping. Refer to section1 of this document for home page url. |
| Logo file | The logo file that will appear in the store front. The name of the store from Merchant-Store panel will be writen if no logo is uploaded. |
| Store Banner | A banner that will appear in the store front header, shopping cart and order fulfillment |
| Store front default language | Default store front language |
| | |
| | |

**Store Front Portlets** menu link

Enable / disable store front pre-built portlets. It also allows the creation of custom portlets that can be embedded in different areas (left side / right side) of your store front.

**Files management** menu link

Allows to upload files to media bin. It is possible to uplaod images, flash files and other files such as documents, css, javascripts... that can be used in your custom content or custom portlets. It is possible to use an uploaded file from the content management tool

by clicking first on the image icon or flash icon and then clicking on browse server you will have access to uploaded images. Otherwise, images and files can be invoked using this url pattern for

images
```
<img src="http://<your host>/media/bin/images/<your merchant id>/yourimage.jpg" />
```

Files (ie uploaded javascript)

```
<script src="http://<your host>/media/bin/files/<your merchant id>/image-rotator.js"></script>
```

As you can see the url assume you are using media web application for managing your images and other files

# 3  Configure Shipping



If you are planning to sell products that needs to be shipped, you must configure the shipping policies and quote module. The system actually supports USPS, UPS, Fedex and Canada Post for getting real time quotes. It is also possible to configure custom fees per coutry.

After selecting Shipping Modules, select the type of shipping (national or international). This information will be displayed on the store front if you enabled pre-built shipping portlet. When you select international shipping, it is possible to exclude countries you don't want to ship.

Shipping rates configuration

Each shipping carrier contains information specific to their API agreement. You can configure only one shipping carrier

## Canada Post

Register with sell online by sending an email to sellonline@canadapost.ca

Once your account is created you will be notified of your retailer identification. You will fill that retailer identification in the field Canada Post account identification field.

## USPS (United States Postal Services)

Register with USPS Web Tools at https://secure.shippingapis.com/registration/

You will receive an email containing your USPS rate-quote Web Tools User ID.
Insert the Web Tools User ID in the USPS shipping module.
Telephone USPS 1-800-344-7779 and ask them to move your account to the Production Server or email them at icustomercare@usps.com, quoting your Web Tools User ID.
They will send another confirmation email. Set the module into Production mode (instead of Test mode) to finish activation.

## UPS

Register for an account

https://www.ups.com/myups/registration

Once logged in

https://www.ups.com/upsdeveloperkit?loc=en_US

Click on Request an Access Key

You will have to click on open an account

Once the process finished, go back to https://www.ups.com/upsdeveloperkit?loc=en_US
click again on Request an Access Key and add your UPS account number

Shopizer will ask you for your Access Key, your userid (used to create your account) and your account password.

## Fedex

Before you can communicate with FedEx electronically you need to have both a FedEx account number and a FedEx meter number.

Register for an account

http://fedex.com/us/developer

Click on developer solution

Click on Access FedEx web services for shipping technical resources

Click on Develop and test your solution

Click on Obtain developer test key

This procedure is for getting test key only, follow the instruction and the steps for having production keys

## Custom rates

It is possible to configure your custom rates and delivery time per country by using Custom Rates from shipping rates menu



There are 5 price zones available each price zone can contain many countries. Each price zone can have many price – weight configuration and a delivery time range. The delivery time range if enabled (checked) will appear in the catalogue product details page when the system can detect from the IP address the visito's country. It is possible to use shipping time estimate with carrier real time quote by enabling a carrier module(canada post, usps...) and enabling the estimate checkbox on the screen above.



The above image shows the delivery estimate that will appear on a product detail page when IP location can determine visitor's country.

# 4  Configure payment modules

There must be at least one payment method configured to let the system complete an order flow. Just fill the appropriate information required by the credit card gateway system or paypal.
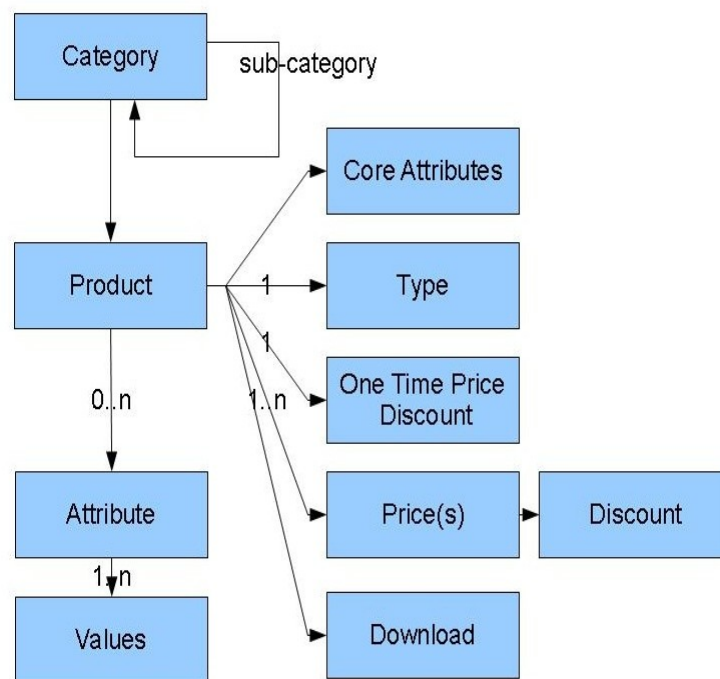
# 5 Configure sales tax

The system supports one click configuration for European Union, United States and Canadian sales tax. Once enabled, verify if the rates are still accurate. It is possible to modify, add and delete a tax line or to build your own sales tax rules.

Sales tax calculation can be done based on the shipping address location or the billing address location. Sales tax also support 'piggybacking' (applying sales tax on another sales tax). It is also possible to configure multiple Tax Classes with different tax rates. Tax Classes will be applied at the product level, in other words this means that sales tax rate can vary per type of product.

# 6 Product catalogue

Here are the concepts behind Shopizer catalogue, those concepts are common in all catalogue implementation.

Catalogue conceptual functions



## *Category*

A category is the first mean of cataloging items. A category can contain sub-categories usualy used for narrowing product grouping. A category of product is displayed as product listing. Sub categories if existing are displayed in side bar navigation menus.

## *Product*

In order to define a product in the catalogue, you will have to define at least one category to attach your product to. A product contains a list of core attributes required to the system to work properly. You product definition planning should consider the following product core attributes values:

| Product core property | Description |
|---|---|
| Product Type<br>- Product General (Hard Good)<br>- Service<br>- Subscription | Product type will have an impact in the order fulfillment flow assuming a service or a subsription have no shipping. Also, it won't be possible to modify the quantity in the shopping cart for service and subscription products.<br><br>A check box also specifies if the product is virtual and therefore has no shipping and do not allow shopping cart quantity. |
| Product availability / visibility | It is possible to set the availibility date and a visibility checkbox. Those entries will determine if a product is visible or not in listing page.<br><br>When testing a new product, set the availability date to a futur date or uncheck the visible box. Use the 'product preview' link in sidebar menu to have a preview of your product definition. |
| One time price | Base product price |
| Product name | Product name to be displayed at large in your online boutique. Since the system creates SEO friendly links, make sure to have **UNIQUE** product names. |
| Short product highlight | A colored highlight that will be displayed beside the product in product details page. |
| Product description | The complete product description to be displayed in product detail page. HTML can be used inside of this field. |
| Metadata description | Will be displayed in <meta name="description".. HTML tag. |
| Product Image | The product image to be displayed in your boutique listing page, detail page and in the shopping cart. The system will take care of resizing the image appropriatly and do many copies according to areas wher the image will be displayed. For best practices, load a large |

| | compressed image of approximatly 600 to 800 pixels of width. The table `MODULE_CONFIGURATION` contains fields describing the image size to be produced (`largeimageheight,largeimagewidth,smallimagewidth,smallimageheight`) another good practice would be to initialy size your image to an appropriate proportion. A CROP link on the left menu allow to crop the image uploaded if the image size uploaded is large enough to permit CROP. |
|---|---|
| Weight, Height, Length, Width | Those are mandatory fields for describing the physical dimensions of your item. Those need to fit your size and weight units defined in 'STORE' configuration panel. Those fields are important to calculate shipping quotes. Those fileds are even mandatory for virtual products, just key in 0. |
| Quantity available | This is a treshold field that will be used for inventory management. When the inventory gets low and the product is purchased, a low inventory email will be sent to the store owner. When the quantity is set to 0, an out of stock item status is displayed. |
| Quantity order max | Will impact the selectable quantity in the catalogue and shopping cart. |
| Product order | Display order in product listing pages |
| Tax class | Sales tax rate associated to a product |
| | |

## One Time Price Discount

A discount price can be configured to a one time price. Discounts can be created from product item left menu or from sm-central product list page. A discount is time based.

## Product prices

It is possible to configure multiple prices per item. For instance, it is possible to configure an 'activation price' and / or a 'monthly price' or whatever the price type, may it be one-time or recuring price. Each price configured can be set as the default price meaning the price that will be displayed in the product catalogue. Each price can also have a time based discount.

# Digital download

A virtual product can be configured as a downloadable product. The virtual product will only be downloadable at the end of order flow when the order status is 'DELIVERED'. This means that any order being paid with 'money order' or credit card pre-authorization won't allow product download. It is possible to allow prodcut download for an order by setting the status to 'DELIVERED' and sending prodcut download url to the customer again from the order details panel.

# Attributes

Product attributes can be configured from the menu **Catalogue – Product Options** item. Options such as color and dimensions are good examples of product attributes. Those attributes are displayed in product details page and may affect the price if the item. Attributes can be order specific or read only.

### Defining options

Those are attributes that a user can select when he purchases an item. Order specific attributes can affect the price and the width of an item which will impact the order total and shipping quotes. Order specific attributes can be displayed as 'Select box' items, 'Radio buttons' items 'Check box items (multiple selections)' or 'Free text' items. It is possible from the sm-central administration panel to assign a default value, a required attribute and price variation per attribute.

From sm-central Product Options menu, we have created a new option called 'Blinds color' which will be displayed in a **radio** button group.

The options values are defined by clicking on 'Edit option values' allowing to create values to be displayed in the option group which in our case is a radio button group. An option value can also have an image displayed beside (images are not possible for 'select' options types).



Once the product options are defined, it is possible to assign the options as product attributes.

**Defining attributes**

From the product details left menu, select 'Edit Product Attributes' to attach options to an attribute. As mentioned earlier, attributes can be order specific, meaning that the price can vary per option and the weight also. Attributes can also be read only, for example to delare attributes of an item which are not part of product's core attributes defined above. Read only attributes will be displayed in product details specification tab menu and won't be selectable neither they will affect product price and weight.

The following attributes will be defined ind 'Blinds size' group. Those order specific attributes will in certain case increase the price and the weight according to user selection.

### Blinds size

| Option value name | Price | Option value is free | Display order | Option weight | Default option | Option required | Option is read only | | |
|---|---|---|---|---|---|---|---|---|---|
| 28 ' X 38 ' | $ 0.00 | ☐ | 0 | 0.0 | ☑ | ☐ | ☐ | Modify | Delete |
| 36 ' x 42 ' | $ 4.00 | ☐ | 1 | 0.0 | ☐ | ☐ | ☐ | Modify | Delete |
| 42 ' X 52 ' | $ 8.00 | ☐ | 2 | 2.0 | ☐ | ☐ | ☐ | Modify | Delete |
| 48 ' x 66 ' | $ 12.00 | ☐ | 3 | 4.0 | ☐ | ☐ | ☐ | Modify | Delete |
| 28 ' X 38 ' | $ 16.00 | ☐ | 4 | 4.0 | ☐ | ☐ | ☐ | Modify | Delete |

The final result will be displayed as the following in the product details page

Window blinds

**$51.99**

**Blinds color:**

   Honey

   Brown

   Dark brown

**Blinds size:**

48 ' x 66 ' +$12.00

Qty: 1  ADD TO CART

In stock and ready to ship!
Delivery estimate to Canada
5 - 7 day(s)

**Product description**  Product reviews

Simili wood blinds are an affordable way to add woodgrain beauty to your environment. Can be installed also in high humidity environment such as a bathroom or a kitchen.

No specification tab (usualy displayed beside product reviews) is displayed when no read only attributes are defined.

## Related Items

Related items are items in association to other items. Related items can be configured from Product details left menu and will appear in your online boutique precisely in the product details page.

# 7 Order Management

Orders are automaticaly processed, but some additional tasks may be required in order to complete an order. Additional tasks may be:

- Capture a credit card transaction when the gateway is configured for pre-authorization only
- Update order status and communicate with the customer
- Send order download url when the payment is complete
- Roll back a transaction

Other tasks can be done from order details panel such as:
- Editing order information (Shipping / Billing Address)
- Verify transaction history
- Print invoices
- Print packing slip
- Communicate with customer
- Send an email order receipt to the customer (a receipt is also sent live after order completion)

Order details
Order id 12
Customer: John Doe
123 This street
Boucherville, J4B8J9
Quebec, Canada

Shipping address: John Doe
123 This street
Boucherville
J4B8J9
Quebec Canada

Billing address: John Doe
123 This street
Boucherville
J4B8J9
Quebec Canada

Telephone number: 444-555-6666
Email address: csamson777@yahoo.com
Ip address:

Date purchased: 2010-08-17
Payment method: Money Order
Shipping method: Priority Courier (2010-08-20)

| Quantity | Product name | Product options | Price |
|---|---|---|---|
| 1 X | Wooden vases pots | | $39.99 |

Total credits ($6.00)
Sub-total $33.99
Shipping $13.70
GST $1.70
Quebec PST $2.55

Total $51.94

Status: Processing

Order history:

Comments:

Update status

* A notification email will be sent to the customer

Send email invoice to the customer
Generate packing slip
Invoice

** When a transaction is only pre-authorized and requires to be captured, a red label message will be displayed beside the payment method. By clicking on the payment method URL, you will be able to capture the transaction (applies to gateway and PayPal transactions). Once a transaction is captured, it is also possible to refund partial or full order amount ( applies to gateway and PayPal transactions).

If an order contains digital download products, an additional section displays downlod counters as well as a url to send url download to customer. If your gateway / paypal account is configured to pre-authorize or the selected payment method is money order, the customer won't be able to download its prodcuts at the end of order flow. Make sur to capture the transaction and use the 'send download url' link in order details page to send to the customer download instructions. If your gateway / paypal is configured to capture the transaction live, the customer will be able to download the file at the end of the order flow.

# 8  Invoice Management

Invoices can be created from Shopizer and send to customer which can pay it through invoice payment flow. Invoices can be created from Invoice List – Create invoice link. In order to create an invoice, you need to select from the drop down list a Customer or a Company recipient. If no customer exist in the system, use Orders – Customer list – create new customer link to create a new customer. Once a customer is selected, you can add a product to your invoice. If any attribute exist for that product, you will see an 'Edit attributes' link under the product name that will let you choose an attribute. The invoice panel let you change at any time the product and attribute price. If the product is shippable, an edit shipping link let you select a shipping quote from shipping rates configured.

An invoice can be saved for future usage and a link 'Send invoice' will let you send the invoice to the selected customer. The customer can then open the invoice displayed as HTML, save a PDF copy and pay the invoice using payment methods configured.

An invoice will stay invoiced until the payment is received through the pay invoice flow. For other methods of payment, to record the payment and transform manualy an invoice to an order, there is an option ($) in the invoice list that will let you select a payment method and configure a reception date. Once this is done, the invoice will appear as an order in the order list.

# 9  Standalone Shopping cart

A standalone shopping cart can be attached to uour existing web site to process orders using url parameters. This cart can be used by adding individual items or to process many items.

## *Adding items individualy*

This url will invoke the shopping cart to add items individualy.

http://<YOUR HOST>/shop/cart/addToCart?
merchantId=<MERCHANTID>&productId=<PRODUCTID>&qty=<QUANTITY>&request_locale=
<LANG_COUNTRY-CODE>

examples of reqest locale

request_locale=fr_CA
request_locale=en_US

An http session is created when the shopping cart url is invoked. The items will be held in the shopping cart without activity for the duration of the http session (approx. 20 minutes)

## *Adding many items*

The shopping cart can also accept many items per request. This way of invoking the cart will remove any items that were added in any previous call in the same http session

http://<YOUR HOST>/shop/cart/checkoutRemote?
merchantId=<MERCHANTID>&productId_0=<PRODUCTID>&qty_0=<QUANTITY>&request_loc
ale=<LANG_COUNTRY-CODE>

additional items could be added using
productId_1=<PRODUCTID>&qty_1=<QUANTITY>&productId_2=<PRODUCTID>&qty_2=<QU
ANTITY>...

examples of reqest locale

request_locale=fr_CA
request_locale=en_US