Intelliworks Openstore User Guide

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1. OVERVIEW

Openstores is made up of two parts. The Storefront, which is what a visitor will see when they visit your store, and the Admin Panel area, which is created for the owners of the store only. No one else can access this admin panel unless you provide them with your access details.

This document aims to explain how to configure and use your Openstores as the owner. It is based on Openstores version 6.1

Due to rapid deployment of the new features, this document might not reflect the latest change of the system. In this case, please contact our support team at freeonlinestore@intelliworks.com.au if you have any questions about this document or any other functions not listed here.

Alternatively, you are welcome to find out answers or post questions on http://forum.intelliworks.com.au.

1.1. SYSTEM REQUIREMENTS

- You have installed Mozilla Firefox 4+, Chrome or Microsoft Internet Explorer 8.0+ on your PC although the css3 features supported from Openstores version 6.1 do not appear in IE.
- JavaScript is enabled on your browser
- Screen resolution for Admin Panel is better set to1280*1024 or higher

1.2. IMPORTANT NOTES

- It's assumed that you have logged in the admin panel in this document.
- Your logged in session will be closed after the window is idle for a certain period (typically 30 min)
- When you use your hotmail/yahoo email, make sure you check your Junk/Bulk folder. Try not to use hotmail/yahoo email address if you have one from other ISP
- Any time when you get the "internal system error", right click your mouse on the browser and select view source, copy the source when reporting the error.
- Do NOT delete the default user until you set up your own super admin user and have received the password via email.

1.3. DASHBOARD

After you login into the system, you'll notice the following information on your home page

1. The change history of the system
2. Some useful tips
3. New customer/order/ stock notification requests since your last login.

You can always visit this page by clicking the link "Home" located at the top right corner of your admin panel.

2. ADMIN USER

When your Openstores is set up, it has a default super admin user with user name/password: openstores/openstores.

Once you have configured your own admin user, delete this default user.

2.1. LOGIN FIRST TIME

When logging in the system first time:

Use IE to browse to admin panel URL as advised. Normally it's

http://<yourSubdomainName>.openstores.com.au/pms/login.html or

http://<yourDomainName>/pms/login.html for paid service

- Type in user name and password as openstores/openstores
- You will see the admin menus.
- Change the password immediately after you login. Refer to section [2.6] for how to change the password.

2.2. ADD ADMIN USER

To add a new admin user, follow this:

- Login into admin panel with proper privilege
- Go to menu "Admin" -> "Edit Admin User",
- Fill in the right hand side form and make sure you select/tick all the functions for at least one admin user.
- Make sure the email address exists and is correct.
- Click Add
- The Password will be sent to the email address specified. Mare sure you have received the password. Follow [2.6] to change the password.
- Now delete the default user to prevent unexpected logins.

Admin User Fields Explanation

Field	Mandatory	Comment
Login Name	Yes	Login Name of Admin User
Group	No	The Admin User's Group. E.g. sales, warehouse, dispatch, super user etc
Full Name	Yes	Admin User's Full Name
Email	Yes	Admin User's Email Address. This email address is used by the system to communicate with the admin user, eg, sending password etc
Roles	No	Define what the functionality this admin user can access in the admin panel. For the super user, you

		have to tick all roles.

2.3. MODIFY ADMIN USER

To modify an admin user:

- Login into admin panel with proper privilege
- Go to menu "Admin" -> "Edit Admin User",
- All existing admin users are displayed on the left hand side list
- Select the one you want to modify and click "modify" button.
- The existing information of the selected admin user is displayed in the right hand side form
- Modify them as required and click "Save", or click "Cancel" to abort the change.

2.4. DELETE ADMIN USER

To delete an admin user:

- Login into admin panel with proper privilege
- Go to menu "Admin" -> "Edit Admin User",
- All existing admin users are displayed on the left hand side list
- Select the one you want to delete and click "remove" button.
- Click "OK" if you want to delete the user or "Cancel" if you are not quite sure.

2.5. RESET PASSWORD

If an admin user lost his/her password, follow this to reset it:

- Login into admin panel with proper privilege
- Go to menu "Admin" -> Edit Admin User
- On the left hand side admin user list, find the user and click "Reset Password."
- Click OK if you want to reset the user's password or Cancel if you are not quite sure
- After the password is reset, the user will receive a new password via email, which he/she can change by following the steps specified below.

To reset password without logging in the admin panel:

- Go to the admin panel login page
- Enter the Username and click "Reset Password".
- If the Username matches the admin user, the reset password will be sent to the admin user's email box.

2.6. Change Password

To change the password:

- Login into admin panel.
- Go to menu “Admin” ->”Change password”
- Type the existing password into the Current Password field
- Enter your new password and repeat it
- Click Submit button

2.7. My Profile

An admin user can change his/her profile:

- Login into admin panel
- Go to menu “Admin” ->”My Profile”
- Change the details
- Click Submit button

2.8. Admin User Permissions

You can view all admin users’ access permissions in a report

- Login into admin panel with proper privilege
- Go to menu “Admin” -> “Admin User Permissions”
- System will show all admin users and their permissions.

3. STORE CONFIGURATION

3.1. SET UP COMPANY DETAILS

To set up your company details:

- Login admin panel with proper privilege
- Go to menu “Setup” -> “Company Details”
- Fill in the form with proper information
- Click Save

Company Details Fields Explanation

Field	Mandatory	Comment
Company Full Name	Yes	Company’s Full Name, eg, MyCompany Pty Ltd
Company Shot Name	Yes	Short Name of the company, eg MyCompany
Address1	No	The Address of your company
Address2	No	
City	No	
State	No	
Postcode	No	
Country	No	
ABN	No	Your Company’s ABN
ACN	No	Your Company’s ACN
Contact	No	Contact person
Phone	No	Phone number of the company
Mobile	No	Contact person’s mobile
Fax	No	Fax number of the company
Email	Yes	Your company’s email address, eg sales@yourcomapny.com.au
Storefront URL	Yes	Your company’s website address, http://<yourSubdomainName>.openstores.com.au
Admin Panel URL	Yes	Admin site of this system, eg http://<yourSubdomainName>.openstores.com.au/pms/login.html
Company Logo	No	Reserved for future use.

Invoice Terms and Conditions	No	The terms and conditions you want to display on the invoice, eg Payment, Delivery, Warranty
Currency Type	Yes	The name of the currency. This is the currency you use to set up your product price. This currency will be the original currency name in the storefront currency converter tool.
Currency Symbol	No	The Symbol of your currency displayed next to the price. You can use "$", "A$", "AUD" etc If you don't specify one. System will use "$"
Local Time Zone	Yes	Reserved for future use.

3.2. STORE CONFIGURATION PARAMETERS

Openstores has provided a range of configuration parameters allowing you to tune your store set-up. We have set up reasonable default values for most of the parameters.

However, you need to change some of them in order to best suit your business needs. In general, you can change the configuration parameter as:

- Login admin panel with proper privilege
- Go to "Setup" -> " Edit Configurations"
- Select the parameter you want to change and click Modify button
- Change the value as required and click save button.

This section lists some parameters you need to pay attention. For each of them, follow the above-mentioned steps to set up the correct values.

Important note:

1. If you are not clear what a parameter is for, don't change it. Write to us for more information.
2. Any parameters have type of Boolean requires to have the value of either "true" or "false".

3.2.1. Email

You need to set up correct emails to communicate with your customers. There are four email addresses you need to set up in the Email section of the configuration.

System Default Email Address	The Email address the system uses to send out emails, eg, Sales order notification etc. We suggest you NOT change the default email address. If you have to change it to your own email address, you need to contact you email provider to add the appropriate TXT record to the DNS zone of your email domain to authorise our email server as a mail sender for your email domain. Otherwise the email sent to your customers might be rejected. You can specify one email address ONLY.
Sales Email Address	The email address is used to receive order notification. You can set up more than one email addresses to receive order notifications. The email addresses are separated by Semi colon (;)
Feedback Email Address	When customers send feedback to you in the front end feedback form, it'll be sent to this email address You can set up more than one email addresses to receive customer feedback. The email addresses are separated by Semi colon (;)
Customer Registration Email Address	When there is a customer registers in your store, a notification mail will be sent to this email address. You can set up more than one email addresses to receive customer registration notification. The email addresses are separated by Semi colon (;)

3.2.2. Tax Rate

There are two parameters you can specify in Account section

Tax Rate (%)	The Tax Rate (GST in Australia). This value is mainly used to calculate tax for delivery charge. The product tax is specified when you create a product in the system, because some products might not include tax. The default value is 10 percent.

Whether local tax applies to overseas customers	This configuration indicates whether overseas customer needs to pay product tax. When the value is true, overseas customer is required to pay the tax for the products purchased. When the value is false, overseas customer is not required to pay the tax for the products purchased. In the front store checkout out summary form, you will see message "* Amount has been adjusted to remove tax for international purchases." Please note, this configuration only affect the tax of the products. Tax for the delivery charge is always required.
Whether the price includes Tax	This configuration indicates whether the prices you define in the delivery methods (postage fee) include the tax (GST in Australia).

3.2.3. Search engine Optimisation

You can set up search engine friendly Meta keywords and Meta descriptions in your storefront.

Front End Metadata description	In your store front source, you'll find <meta http-equiv="Description" content="The Value of this parameter">
Front End Metadata Keyword	In your store front source, you'll find <meta http-equiv="Keywords" content="The value Of this parameter">
Storefront Additional Meta Tags or Scripts in HTML Head	This value will appear in your store font html header. An example of the value is: <META name="verify-v1" content="String_we_ask_for"> You can also add java scripts here if you need to do so. These java scripts will be placed in the HTML head We strongly recommend you to add the java script to "Storefront External Javascript in HTML Body" to speed up your front store loading.

3.2.4. Free Delivery Fee Threshold

You can find this parameter in Sales Order Process section. It allows your customers to get the free delivery when the order amount is above this threshold.

Threshold of free delivery charge	The Default value is 10000.00
Free delivery threshold applied to overseas customers	If set to false, no free delivery for overseas customers

3.2.5. Bulk Discount with Special price

When a product is on sale, you can specify whether your customers can still have the bulk discount on this product.

Bulk discount with special price	When the value is false, the product price is the special price and the customer will not get bulk discount on this product. When the value is true, customer will get the bulk discount based on the special price. The default value is false.

3.2.6. Global Product Discount Rate

A discount rate by default applies to all products. If an individual product has been set to on sale, then it will use the product specific discount price.

Global Product Discount Rate (%)	By default the value is 0. Change the value to 10 if you would like to provide 10% discount for all your products.

3.2.7. Message for delivery method not found.

When the customers proceed to the order check out summary page, if there is no delivery method available to them, a message will be displayed. You can find it in “Sales Order Process” section and change this message.

Message for delivery method not found.	By default the value is “Please contact us for delivery charge”

3.2.8. Provide Postage Calculator on Product Page

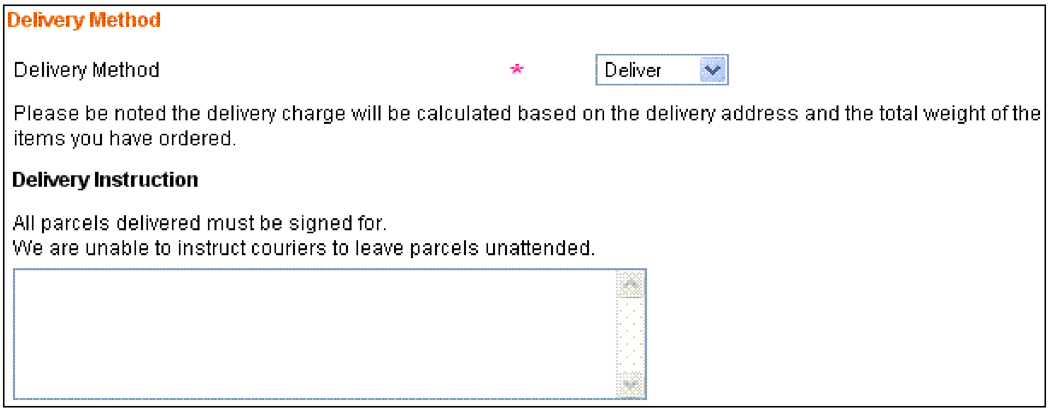
The text value specified in the configuration will become the link where your customers click to popup a postage calculator. The postage calculator will display a list of available delivery methods and the fees depending on the customer postcode/country and the number of items they would like to purchase.

If no value is specified for the configuration, there will be no link displayed on the product page.

Link name on product page to popup the postage calculator	The default value is empty, and no link is displayed on the product page.

3.2.9. Storefront Checkout Form Delivery Message

There is a delivery method section in the checkout form in the storefront as shown below.



The following two messages in this section can be changed or removed:

“Please be noted the delivery charge will be calculated based on the delivery address and the total weight of the items you have ordered.”

And

“All parcels delivered must be signed for. We are unable to instruct couriers to leave parcels unattended”

They both can be found in Sales Order Process section in the Configuration list.

Message for delivery charge calculation	The default value is Please be noted the delivery charge will be calculated based on the delivery address and the total weight of the items you have ordered. If you have more than one paragraph, use at the end of each paragraph
Message for delivery instruction	The default value is All parcels delivered must be signed for. We are unable to instruct couriers to leave parcels unattended If you have more than one paragraph, use at the end of each paragraph as shown in the default value

3.2.10. Additional Check out Confirmation Message

The text value specified for this configuration will appear on the check out confirmation page under the standard system message.

Customer Check Out Confirmation Page Additional Text	The default value is empty which means no additional text is displayed.

3.2.11. Display RPP in storefront Product Page

You can decide whether to display product's RRP on storefront product page. You can find the configuration parameter in "Product" section

Display RRP on storefront product pages	By default the value is "false" and the RRP won't appear in the storefront product page. If you set the value to "true", product RRP will be displayed on storefront product page.

3.2.12. Allow selling out-of-stock products

You can decide whether to sell out-of-stock products on your storefront. You can find the configuration parameter in "Product" section

Display RRP on storefront product pages	By default the value is "true" and you can sell Out-of-Stock products in the storefront If you set the value to "false", Out-of-Stock products cannot be added to the shopping cart in your storefront.

3.2.13. Specify when to reduce stock – when order submit or invoice

This is the configuration to allow you to decide whether to reduce stock at order submission or invoice. The precondition is that the stock control function has been turned on via the configuration "Enable Component Stock Control"

Timing when stock is reduced when stock control is enabled.	1 – stock will be reduced when invoice 2 – stock will be reduced when order is submitted The default value is 1.

3.2.14. Disable product reviews

By default, logged in customers can add product review and specify product rating. Product reviews and average rating are visible to all users.

You can turn it off if you do not want to have the product review feature.

Enable product review functionality	By default the value is "true". Set it to "false" to turn off the product review feature.

3.2.15. Send email to customer when adding payment and dispatch order

Emails will be sent to the customer and bcc to the Store Admin when adding payment into the order via *Orders->Pay/Refund Sales Orders*, and dispatch order via *Orders->Dispatch Sales Orders*. Operator Comment is appended in the email content if not empty.

Send customer email notification for sales order processing	By default the value is "false"

3.2.16. Conversion Counter

You can add Conversion counter script provided by a third party company into your store. You can cut and paste the code (only JavaScript is supported) from your provider in the configuration shown below.

Program (Java Script) for the conversion counter	Conversion Counter code from your supplier eg, Yahoo. Only JavaScript is supported. They will appear in the HTML source of the following pages: Check out confirmation page, Customer registration confirmation page, Newsletter signup confirm page. If you don't have the conversion counter, leave this configuration blank.

3.2.17. Enable newsletter function

OpenStore has built-in newsletter function allowing you to send regular newsletter to your customers or potential customers (subscribers). However, it is turned off by default. You need to enable it if you want to use this function.

Enable newsletter functionality	By default the value is "false"

3.2.18. Enable stock Control

When the stock control is enabled, you cannot issue the invoice for an order if one product in the order is out of stock.

In this case, you need to manage your stock carefully. You also need to enable the purchase order process. Refer to next section for details.

Enable Component Stock Control	By default the value is "false"

3.2.19. Enable Purchase order processing

When purchase order function is enabled, you will be able to manage the stock quantity. Refer to section [11] for how to use this function.

Enable purchase order functionality	By default the value is "false"

3.2.20. Enable Partial delivery

Sometimes due to the stock availability, you want to deliver part of products of an order to your customer first. To enable this functionality, you can change this configuration parameter to true.

Enable Partial Delivery	By default the value is "false"

3.2.21. Product Review Stars Wording

Define the meaning of each star in the product review.

Product review stars wording	By default the value is "1 star of 5;2 stars of 5;3 stars of 5;4 stars of 5;5 stars of 5"

3.2.22. Number of product new arrivals displayed on Home Page

Define the number of new arrivals displayed on the home page when one of the new arrival content boxes is added into the Home Page layout.

Number of New Arrivals	Number of product new arrivals displayed on the Home Page.

3.2.23. Accepted credit card types

Define the accepted credit card types for your customers on the check out page.

Accepted Credit Card Types	Comma delimited accepted credit card names

3.2.24. Terms & condition for purchase

By default the value of the setting is empty, no checkbox for terms and conditions agreement is displayed. If you set the value, it will be displayed on the check out summary page as a checkbox. Your customers must tick the checkbox before their orders can be submitted.

Accept Terms & Conditions When Checkout	The terms and conditions agreement text. Leave it empty if no agreement is required. Example value: **"You have read, understand and agree with our Terms & Conditions and our Returns Policy."**

3.2.25. Enable Payment Method Surcharge/discount

Set the configuration value to "true" if you would like to charge your customers for choosing some of the payment methods or give them discounts for using some payment methods.

When payment method surcharge is enabled, payment method surcharge/discount will be calculated and added (deducted) into the total order amount when customer submits a new order. Surcharge for each payment method can be defined via "Set up -> Edit Customer Payment Methods". Surcharge for different types of credit cards can be defined via "Set up -> Edit Credit Cards".

Enable Payment Method Surcharge	True – Payment method surcharge/discount will be calculated. False – Payment methods do not have surcharge/discount. The default value is false.

3.2.26. Java Script on Order confirmation page with variable.

You can add some javascripts to the order confirmation page for any external programming purpose. These javascripts can contain variables of the order details.

Confirmation Page JavaScript Place Holder	Supported Variables and meaning ${order.referenceNo} - order reference number ${order.stringTotalAmount} - order amount including freight charge ${order.stringOrderDateOnly} - order date ${order.deliveryDetails} - order delivery contact and address ${order.paymentMethodName} - order payment method ${order.additionalInfo} - customer additional instruction, specified at check out ${orderDetails} – order item details

3.2.27. Additional Java scripts in HTML body

You can add additional java scripts here if you need to do so. Most of javascripts should be placed here.

Storefront External Javascript in HTML Body	There is no default value

3.2.28. Related Product Section Title

When a product is displayed, the related products will also displayed on the same page. You can change the wording "Related Products" to something else, eg, "Accessory" by modifying this configuration parameter.

Related Product Title Text	Default value "Related Products"

3.2.29. Reward Program home page message.

If you enable the reward program, there is a link "reward program" on the storefront main menu. Clicking on the link will bring the logged in customers to the page allowing them to redeem the products.

You can customize the text displayed at the top of the page by changing this configuration parameter.

Front Store Reward Program Main Page Message	The default value is **The following products are available for redemption. Please select the products to redeem.**

3.2.30. Customer Registration form message.

The configuration parameter allows you to setup some additional messages in the front store customer registration page.

Front Store Customer Registration Message	By default, there is no additional message configured.

3.2.31. Manufacturer Title In Store Front Product Page

The product page in your storefront will display the manufacturer field of the product. If you would like to use other Text rather than the default value "Manufacturer", eg, Publisher, you can change this configuration parameter.

Front Store manufacturer field title in product page	Default value is "Manufacturer".

3.2.32. Store Front Product Display Order

This configuration parameter allows you to change the product display order in your storefront.

Product display order under a category	Default value is 1 **Supported values:** **1 -- Alphabetical order based on the product name.** **2 -- Order by product creation time (ascending).** **3 -- Order by product creation time (descending).** **4 -- Order by product code (ascending).** **5 -- Order by product code (descending).**

3.2.33. Remove Credit Card details from Sales order

This configuration parameter allows you to remove the credit card details from a sales order when it's marked as completed.

Remove Credit Card From Order Once Order is set to Complete	Default value is false. If this value is set to true, the credit card details (if any) in a sales order will be removed when the order has been marked as complete.

3.2.34. Buy button text

Name for the Buy button	The "buy" button text for the products that are in stock. Default text is "buy".

3.2.35. Pre-Order button Text

This configuration parameter allows you to change the buy button text in storefront when the product's quantity is zero and it's non-stock part.

Pre-order Buy Button Text	Default value is Buy.

3.2.36. Out of stock buy button

Name for the Buy button when Out of Stock	The "buy" button text for the out-of-stock products.

3.2.37. Storefront style customisation

This configuration can be used to replace the system default CSS style. The value must start with <style type="text/css">, and end with </style>.

Customized CSS Styles	For example, the following configuration value will change the table header background colour to black. <style type="text/css"> td.tableHeader { background-color:#000000;} </style>

3.2.38. Display product weight on storefront

This configuration can be used to enable/disable the display of the product weight on your storefront.

Display product weight on storefront product page	By default, the value is "true" – any non zero product weight will be displayed on your storefront.

3.2.39. Connecting to Openstores Network

Each individual Openstores automatically connects with Openstores networking site www.openstores.com.au. But you need to follow the steps to gain more points for your store on www.openstores.com.au.

1) Sign up a new account at http://www.openstores.com.au/join.html if you have not joined the network.

2) Login with your new account.

3) Select tab My Home -> My Managed Stores. Add your store.

4) You will see the Store ID when you select My Home -> My Managed Stores.

5) Login your Openstores Admin Panel, set the store ID for the configuration "Your Store ID on www.openstores.com.au".

When your customers register on your Openstores, they will also become the member on www.openstores.com.au and add your store into their favourite stores list. This will make your store gain more points and become more popular.

Your Store ID on www.openstores.com.au	Your Store ID on www.openstores.com.au See above description on how to set this up.
Enable the connection to Openstores platform	Turn on/off the connection between your store and www.openstores.com.au Only Paid Service User has the option.

3.3. EMAIL TEMPLATES

The email templates are used to send emails to your customers. The following table lists the email templates that can be customized from the Admin Panel.

Email Template	When Email will be Sent to Customer
New customer register confirmation to customer	Email will be sent to the customer when he/she registers on your website.
Send customer password to customer	Email will be sent to the customer when he/she retrieves password via the Forgot Password function.
New sales order confirmation to customer	Email will be sent to the customer when he/she submits an order from your website.
Modify sales order confirmation to customer	Email will be sent to the customer when the store admin modifies the customer order.

Cancel sales order confirmation to customer	Email will be sent to the customer when Store admin cancel the customer order, or the customer cancels the order from the Storefront.
Order payment received notification to customer	Email will be sent to the customer when the store admin adds payment into the order via Orders -> Pay/Refund Sales Orders.
Order shipped notification to customer	Email will be sent to the customer when the store admin process the order via Orders -> Dispatch Sales Orders.
Order partially shipped notification to customer	Email will be sent to the customer when the store admin process the order via Orders -> Dispatch Sales Orders and deliver only part of the goods ordered.
Packing Slip	This template is not actually for email. It’s used to print the packing slip. You can design the packing slip by changing this template.
Sales order payment reminder	Email will be manually sent to customer.
New Stock Notification	The admin user will send email to customers when the stock is arrived. Refer to New Stock Notification for details
Removal of New Stock Notification	An email will be sent to customers when admin user removes the New stock notification, eg, due to stock is discontinued.
Order invoice	This template is not really for email. It’s used when generating the sales order invoice.

3.3.1. Edit email templates

To edit the email templates:

- Login into admin panel with proper privilege
- Go to menu “Set up” -> “Edit Email Templates”, you’ll find the email templates listed in the above table.
- Click “edit” to edit the email template.
- Please be careful when you edit the templates. Always check the result by creating a test customer and order. You can restore the system default email template at anytime by clicking the “Reset” button. Don’t forget to save your change.
- The variables used in the templates are showing under the template list.

4. INVENTORY MANAGEMENT

4.1. SUPPLIERS

The suppliers are the wholesalers who you buy the products from. It is NOT mandatory to enter suppliers into the system.

To set up suppliers of the products:

- Login into admin panel with proper privilege
- Go to menu “Product” -> “Edit Supplier”, you’ll find a list of existing suppliers
- Add/Modify/Remove Supplier. A supplier can be removed only when no products or purchase orders referencing it.

Supplier Fields Explanation

Field	Mandatory	Comment
Supplier Code	Yes	A meaningful code to represent the supplier, eg EASYTECH for **Easy Tech Pty Ltd**
Supplier Name	Yes	The Supplier’s full company Name
Address1	Yes	The address of the supplier
Address2	No	
City	Yes	
State	Yes	
Country	Yes	
Postcode	Yes	
ABN	Yes	The supplier’s ABN
CAN	Yes	The supplier’s ACN
Contact	No	Contact person
Phone	Yes	Phone number of the supplier
Mobile	No	Contact person’s mobile
Fax	No	Fax number of the supplier
Email	Yes	Email of the supplier
Web Site	No	The supplier’s website
Comment	No	Some comments on this supplier

4.2. MANUFACTURERS

To set up the manufacturers list,

- Login into admin panel with proper privilege
- Go to menu “Product” -> “Edit Manufacturers”, you’ll find a list of existing manufacturers

- Add/Modify/Remove Manufacturer. A manufacturer can be removed only when no product reference it.

Manufacturer Fields Explanation

Field	Mandatory	Comment
Manufacturer Short Name	Yes	A meaningful code to represent the manufacturer, eg HP for HEWLETT-PACKARD
Manufacturer Name	Yes	The Manufacturer's name
Address1	No	The address of the Manufacturer
Address2	No	
City	No	
State	No	
Country	No	
Postcode	No	
Phone	No	Phone number of the Manufacturer
Fax	No	Fax number of the Manufacturer
Email	No	Email of the Manufacturer
Website	No	The Manufacturer's website
Comment	No	Some comments on this Manufacturer

4.3. CATEGORIES

You can set up as many categories as you want and as many levels as you need. To set up Product Categories

- Login into admin panel with proper privilege
- Go to "Product" -> "Edit Categories / Products", you'll find a list of existing categories
- Add/Modify/Delete Category.
- To set up subcategories of a category, find the category and click "Sub-categories" button next to it. (The number here indicates how many sub-categories are directly under this category), you can then set up the sub-categories as step 3
- Repeat step 3 and 4 until all categories/sub-categories are created
- To review the complete categories list and hierarchy, refer to section [4.6]

Category Fields Explanation

Field	Mandatory	Comment

Category Name	Yes	Category's Name
Description	No	Some descriptions about this category. This is for internal use.
Category Image	No	Used when category with thumbnails templates are selected
Number of New Arrivals Display	No	Number of products displayed in the New Arrival content box for this category. By default, the value is 0. No new arrivals of this category will be displayed even though one of the Category New Arrival boxes has been added to the theme.
Discount Rate	No	The discount rate applied to all products in the category. By default, no discount applied (0%)
Discount Starts On	No	The date when the discount starts. If not specified, the discount will start to take effect immediately.
Discount Ends On	No	The date when the discount ends. If not specified, the discount will not expire.
Discount Apply to Sub-Categories	No	Whether the above discount applies to the products under the sub-categories. By default, the value is false. The discount does not apply to the sub-category products.
Publish	No	True – the category will be shown in the Storefront. False – the category and its sub-categories will not be displayed in the Storefront. Also, the products direct under this category will not be shown when searching product in the storefront.
Sort Order	Yes	Category Display Order
Additional Information	No	The additional content displayed on the category page.

4.4. PRODUCT BULK DISCOUNT

OpenStore allows you to set up bulk (quantity based) discount for a product. That is, once a customer purchases more than one item of the same product in the same order, he/she will get the pre-defined discount of this product.

To do this, you need to set up bulk discount templates and in your product edit form, select one of the templates for the product. Refer to section [4.5] for product editing details.

To set up Bulk Discount Template:

- Login into admin panel with proper privilege
- Go to menu “Product” -> “Product Bulk Discount”, you’ll find a list of existing product bulk discount templates.
- Add/Modify/Remove templates.
- For a template, you need to give it a meaningful name,
- For each template, you can add as many patterns as you want. Make sure you cover all the quantity range.

Bulk Discount Fields Explanation

Field	Mandatory	Comment
Discount Template Name	Yes	A meaning full name for this discount name
Discount Details	No	Discount pattern s
Discount Pattern		
Display Name		The name display on the storefront product page, eg, “2+”, or “buy 2 or more”
Min Qty		Minimum purchased product quantity in one order to get the discount.
Max Qty		Maximum purchased product quantity in one order to get the discount.
Discount		Discount rate in percentage

4.4.1. Sample Bulk Discount Template

An example of bulk discount template as

Display Name	Min Qty	Max Qty	Discount %
2+	2	3	5
4+	4	9999	10

In this example, you tell the system that when the customers buy 2 or 3 of a product which has set up to use the discount template in one order, they will get 5% discount on this product. If they buy 4 or more, they will get 10% off.

Once you link the product to this template, you will see this in your storefront product page (example):

Online Price: $419.00

2+: $398.05

4+: $377.10

4.5. PRODUCTS

To set up products:

- Login admin panel with proper privilege
- Go to menu "Product" -> "Edit Categories / Products"
- To add a product into a category, navigate to the category and click "Products (xxx)". (xxx is the number to indicate how many existing products are directly under this category),
- Add/modify product as required. When adding/modifying a product, if you want a product belongs to more than one category, put Category Ids in category field. Refer to section [4.6] for the category Ids.
- Click Purge if you want to delete a product completely from system
- Click Discontinue if you want to keep the product in the system without showing it to your customers. You also need this when you do not want to sell this product and it's referenced by some orders.
- Click image if you would like to add more image for the product. When modifying a product, you can "remove all images". See below table for more information about product image set up.
- Click variants if you would like to set up different options for the product.
- Click relate to set up relate product. Refer to section [4.5.1] for details.
- Click reviews to view the customer reviews.

Product Fields Explanation

Field	Mandatory	Comment
Product Categories	Yes	Product's Category ID(s). You can manually set this value to make the product belong to more than one category, in this case, all category IDS should be separated by comma (,). Category ID can be obtains from "Product" ->"Display All Categories". Refer to section [4.6] for details
Product Name	Yes	The Name of the product.
Product Code (SKU)	No	Product code should be unique in the entire system. If not provided, system will automatically generate one, in the format of <Vendor (code)>+an unique number obtained from database
Manufacture Code	No	Manufacturer's code of this product. Sometimes it's called vendor code
Supplier Code	No	The product code (SKU) used by the

		supplier
Description	Yes	Description of the product, such as features etc. You can use the tool provided to edit the description.
Plain Text Description (Not more than 300 characters) and it's used on www.openstores.com.au	No	When the product is posted onto www.openstores.com.au, the plain text description will be used as the description for the posted product.
Warranty info	No	Warranty information
Manufacturer	Yes	The manufacturer of this product
Supplier	No	The supplier of this product
Quantity In Stock	N/A	Product quantity in the stock. This field is not editable. When you enable stock control, you can input stock qty via purchase order stock in or stock adjustment.
Min stock level	No	The stock alerts report will be available when stock control has been turned on. When the product quantity is less than the min stock level, the product will appear in the stock alerts report where you can view the product details and export the list. The stock alert report is available from menu Products -> Product report -> Product stock alerts. The default min stock level is 0 which means no stock alert has been turned on for the product.
Max stock level	No	
Product Image	No	Browse the product image in your local disk and select. When click save, the image is uploaded to system. When Modifying product, if product image has been uploaded, you do not need to specify this again. If you do, it'll be uploaded twice. If you want to delete the unwanted images when modifying the product, scroll to the bottom of this page, tick the checkboxes of those images then save. If you want to delete all images of a

		product, you can click on “Remove all images” button on the top of the product edit page.
Weight	Yes	Product’s weight. This value is used to calculate the freight charge
Dimension	No	Product’s dimension
Delivery Level	No	The product delivery level. Refer to chapter 7 on how to set up multiple delivery levels.
Product URL	No	The URL of the product in manufacturer’s website or any URL you want to show. By default, the URL will be shown as a link “more product information” on your storefront. However, you can change the text to something else, eg, “vendor product information” by changing the configuration parameter “More Product Information Text”
Dispatched/Posted In	No	Product shipping days
Estimated Time of Arrival	No	The product ETA. Will display on the product page if specified.
BIN Location	No	The location where the product is stored. The value does not show on the storefront.
Publish to Storefront?	No	Whether the product is available on the storefront.
Pricing		
Ref Cost	No	The current unit cost of the product. If you have Pricing Level feature, this value is used to calculate the price.
Actual Cost	No	The actual cost is the average cost of the product in the stock. This will be calculated dynamically at stock in if you have Purchase Order feature enabled. The calculation is based on this: (Number of existing product in stock) * (existing unit cost) **è** stock value

		(Number of incoming product) * (new unit cost) -> total new cost Actual cost = (stock value + total new cost)/(existing product number + new product number) Eg. If you have 1 printer in stock, it costs $120, and you have purchased 2 new printers from your supplier at the cost of $90. The actual cost this printer is (1*120 + 2*90)/(1+2) = $100. The Ref cost is $90 If you sell one of these printers (now you have 2 printer at the actual cost of $100) then purchase another printer at the cost of $70 from your supplier. The actual cost will be ($100*2 + $70*1)/(2+1) = $90. The Ref Cost is $70
RRP	Yes	Recommend Retail Price of this product. If the Product price is greater than RRP, the storefront will use RRP
Product Margin	No	This field indicates what the margin of this product is. If it is 10%, specify 1.1 here. This field will not be shown when you are not using pricing level feature.
Normal Price	Yes if does not have pricing level feature	The online price displayed on the Storefront If pricing level is enabled, this field will be calculated automatically and is not editable.
Tax Rate	Yes	The Tax Rate of this product in percentage. The default value is taken from configuration. Refer to Section [3.2.2] for details
Price Incl. Tax?	No	Whether the prices (costs) you have entered in this form include tax (GST in Australia).
Non Stock Part	No	Whether you want to disable the stock control for the product. When the value is set to true, the stock of

		this product is not recorded and tracked. When the value is set to false, the global setting of stock control will take effect.
Bulk Discount Template	No	The bulk discount template that applies to this product. Refer to section [4.4] for bulk discount template. Note: If in the configuration {3.2.5] you have specified that bulk discount does not apply to product on sale. The bulk discount will not take effect when this product is on sale. See below for the setting of special price.
Use Global Discount	No	Indicates whether the global discount (refer to section [3.2.6] for global discount rate) will apply to this product. Important: this discount will be overwritten by the following special price setup when the product itself is on sale – that is, when "Is On Special" is set to true and the start time and end time are valid.
Is On Special	No	Is this product on sale? The next three parameters will take effect only when this value is set to "true". When current date is out of the period between start date and end date, this on sales is stopped
Special Price	Yes when on special	The on sale price
Special Starts on	No	You can schedule the start date (inclusive) of this special offer If this is not specified, the On Sale will start immediately when you set the "Is On special" to "true".
Special Ends On	No	You can set what the End Date (inclusive) is of this special offer If this is not specified, the On Sale will last forever
Digital Product		
Digital Product	No	Whether this product is a digital product.

Digital Product URL	No	Where you can download this digital product.
Reward Points		
Bonus Point	No	This field will not be shown when the Reward Program is disabled Apart from the normal reward points of this product, you can specify extra bonus reward points here.
Redeemable	No	This field will not be shown when the Reward Program is disabled Customer can redeem this product using the reward points he/she has when this is set to “true”.
Redeem Point	No	This field will not be shown when the Reward Program is disabled How many reward point will cost to redeem this product
Shipping Charge (for Feeds only)	No	This field is used for product feed only. It tells the system what you want to put in the shipping fee column in the product feed.

4.5.1. Product Variants

Some products have different options, e.g. different size of shoes, different colour of clothes. A product can have more than one option group/template.

Variant Templates

To set up product variants, you need to create global variant templates first. To do this,

- Login admin panel with proper privilege
- Select Products -> Product Variant Templates
- Add new product variant template by entering the name into the “Add Product Variant Template” form. E.g. Size.
- After a template is created, click “add value” button next to the template to add variant values. E.g. Size 7.
- Add more templates or values until finish.
- If click remove button next to a template, the template and all of its values will be removed.

Set up Product Variants

After variant templates are created, you can then set up the product variants.

To do this,

- Login admin panel with proper privilege
- Navigate the categories to the product or use search function to find the product you want to add variants for.
- Click button variants
- All variant templates will be displayed as drop down lists.
- Select the related variant values; enter the variant description, which will be displayed on the storefront; Specify the variant surcharge.
- Click Add button to add the variant.
- Click Modify to update the variant. You cannot change the variant values after a product variant is created. You need to delete and create a new one.
- If you don't want a product variant shown in the storefront, set the Published to false.

4.5.2. Relate Products

You can display a product's related products in your storefront to attract your customer's to buy more. For example, if you have a product "printer", you can show your customers the related products of the printer such as ink, paper etc in the printer product page.

To do this,

- Login admin panel with proper privilege
- Navigate the categories to the product or use search function to find the product you want to add as the related products
- Click button relate products
- You'll see a list of existing products related to this product
- You can remove the related product by clicking unrelated button
- To add related products, search the products in the right hand side form and tick the products you want to add and click relate button

Note: Related products are displayed in the way you set up. It does not create the bi-directional relationships. Eg, when product A has related product B, it is on A's product page, you'll see B. However, in the product B page, you will NOT see related product A.

4.5.3. Duplicate Product

A duplicate product is a copy of the selected product. When a product is duplicated, all fields including categories, product variants, related products, and product images are copied. Only the product code (SKU) is set to empty.

To duplicate a product,

- Login admin panel with proper privilege

- Navigate the categories to the product you want to duplicate.
- Click button modify to open the product form.
- Then click the Duplicate button on the form.
- Change the values of the fields and remove the original image if necessary,
- Click the Add button to save the duplicated product.

4.5.4. Post Product to Openstores Networking Site

If your Openstores has connected to the Openstores Networking site www.openstores.com.au, you can post the product onto the site by clicking the icon.

Refer to 3.2.39 for how to connect your Openstores to www.openstores.com.au

4.6. List All Product Categories/Sub-Categories

You can list all your product categories in a report. To do this

- Login admin panel with proper privilege
- Go to menu “Product” -> “Display All Categories”
- You will see all your categories
- Click on a Category ID, it’ll display all products directly under that category

Here is a sample of category list:

Category ID	Category Name
248	Entertainment
485	Entertainment -> Games Entertainment
486	Entertainment -> Games Entertainment -> Sony Play Station 2
490	Entertainment -> Games Entertainment -> Sony Play Station 2 -> Play Station 2 Accessory
488	Entertainment -> Games Entertainment -> Sony Play Station 2 -> Play Station 2 Consoles
489	Entertainment -> Games Entertainment -> Sony Play Station 2 -> Play Station Games
322	Entertainment -> Home Theatre
324	Entertainment -> Home Theatre -> DVD Player
495	Entertainment -> Home Theatre -> Speakers
323	Entertainment -> Home Theatre -> TV
1	Hardware
8	Hardware -> Cameras
149	Hardware -> Cameras -> Digital Camera
152	Hardware -> Cameras -> Digital Camera -> Canon Digital Camera
340	Hardware -> Cameras -> Digital Camera -> Canon Digital Camera -> Canon Digital Camera Optional
153	Hardware -> Cameras -> Digital Camera -> HP Digital Camera
338	Hardware -> Cameras -> Digital Camera -> HP Digital Camera -> HP Digital Camera Optional
154	Hardware -> Cameras -> Digital Camera -> Kodak Digital Camera

4.7. Product Import and Export

You can bulk import/update products from a file on your local computer. You can also export all products into a file.

To import or export products:

- Login into admin panel with proper privilege
- Go to menu "Product" -> "Import/Export Products".
- To import products from a file, browse your local computer for the file, and select the delimiter used to separate the fields in the file. Click Import button. Refer to next section for product file format. Please make sure your data file is correct. Any error in the data file will cause product import failed.
- "Bulk Update Product" allows you to update product details based on the product code (SKU) if product id is not provided.
- To export products into a file, select the delimiter you would like to use to separate the fields. Click Export button.

Note: Product Import is available to paid service user due to the big resource consumption.

4.7.1. Import File Format

The first line of the file must be the field header. The delimiter can be comma, or semicolon, or tab. Below is an example of the file. If you have to compile the file from scratch, you can copy the first line of the example into a text editor. Save the text file into a CSV file. Then open the file from Excel to enter product data.

"ID","CATEGORY","DISCONTINUED","CODE","NAME","DESCRIPTION","WARRANTY","RRP","PRICE","COST","DIMENSION","WEIGHT","QTY","TAX_RATE","MANUFACTURER","FOR_SALE","FOR_SALE_START","FOR_SALE_END","FOR_SALE_PRICE","GLOBAL_DISCOUNT","PRICE_INCLUDE_TAX","IMAGE"

"8215","225","N","TOS0008215","SATELLITE A10 C2.4GHz BUNDLE OFFER","SATELLITE A10 C2.4GHz BUNDLE OFFER
","","2100.00","2249.10","0.00","","0.000","1000","10.0","34","N","01/01/0020","12/12/2006","0.00","Y","N","sample.jpg"

"8216","224","N","TOS0008216","SATELLITE A10 P4 2.4GHz 15""TFT,60GB","SATELLITE A10 P4 2.4GHz 15""TFT,60GB
, 1 year warranty","","2600.00","2784.60","0.00","","5.000","1000","10.0","34","N","","","0.00","Y","N","sample.gif"

4.7.2. Import Fields

All field headers must be in capitals.

You can leave the values empty for the optional fields. Refer to section 4.5 for mandatory/optional fields.

The field descriptions are listed in the table.

Header	Description
ID	Product Id If empty, a new product will be created for this row; If id matches an existed product, values in this row will be used to update the product.
CATEGORY	The product category id(s). Find the category ids from section 4.6. If the product belongs to more than one category, separate the categories by comma. E.g. 15,16 Note: Product Category should be created prior to the product import
DISCONTINUED	Whether the product is discontinued. Values can be only Y or

	N. Y – yes N - no
PUBLISHED	Whether the product is published on the storefront. Y – yes N – no
CODE	Unique product code (SKU)
NAME	Product name
DESCRIPTION	Product description
PLAIN DESCRIPTION	The plain description used in product feed. Maximum 300 characters.
WARRANTY	Product warranty info
RRP	Product RRP. E.g. 99.95. Do not specify currency symbol.
PRICE	Product price. E.g. 99.95 Do not specify currency symbol.
COST	Product cost. E.g. 99.95 Do not specify currency symbol.
ETA	Estimated time of arrival
BIN	BIN location
DISPATCHED_IN	When product will be dispatched or posted.
DIMENSION	Product dimension
WEIGHT	Product weight in kg. E.g. 100 Only number is required, do not follow by kg.
QTY	Product quantity
MIN_STOCK	Minimum stock level (quantity)
MAX_STOCK	Maximum stock level (quantity)
DELIVERY LEVEL	The delivery level
TAX_RATE	Product tax rate in percentage. E.g. 10 Do not follow by %.
MANUFACTURER	Manufacturer id. If enter, need to match existed manufacture id. Note: MANUFACTURER needs to be created prior to product import
SUPPLIER	The supplier id. If enter, need to match existed supplier id.

	Note: SUPPLIERS need to be created prior to product import
FOR_SALE	Whether the product is on sale. Values can be only Y or N. Y – yes N – no
FOR_SALE_START	Sale start date. In the format of dd/mm/yyyy
FOR_SALE_END	Sale end date. In the format of dd/mm/yyyy
FOR_SALE_PRICE	On sale price. E.g. 99.95 Do not specify currency symbol.
GLOBAL_DISCOUNT	Whether global discount affects this product. Values can be only Y or N. Y – yes N – no
PRICE_INCLUDE_TAX	Whether prices include tax. Values can be only Y or N. Y – yes N – no
NON_STOCK_PART	Whether the stock will be tracked Y – stock will be tracked for the product N – stock will not be tracked.
REDEEMABLE	Whether the product can be redeemed. Y – yes N - no
BONUS_POINT	Extra points the customers earn for purchasing the product.
REDEEM_POINT	Points required to redeem the product
IMAGE	Product Images, If more than one image, separate the image names by comma. Product images need to be loaded to the server before product import.
PRODUCT_URL	The product URL

4.8. SEARCH PRODUCT

You can search you online products and then modify them. To do this,

- Login admin panel with proper privilege
- Go to menu "Product" -> "Search Product"
- Input the search criteria. The search is based on product's code (SKU), name, manufacturer's code, supplier's code, descriptions, and manufacturer's name.

- You can key in more than one keyword. The more keywords you have entered the more accurate results you will get. The search is using AND logic. For example, if you type in two keywords, eg, keyword1 and keyword2, only products contain both keyword1 and keyword2 will be returned.
- You can modify/discontinue/purge/add image/relate product on the returned products

4.9. SEARCH DISCONTINUED PRODUCT

Similar to Search Product function, you can search you discontinued products and then modify them. To do this,

- Login admin panel with proper privilege
- Go to menu “Product” -> “Offline Products” -> “Search Discontinued Product”
- Input the search criteria. All discontinued products matching the search criteria will be returned
- You can undo discontinue/purge the discontinued products

4.10. NEW STOCK NOTIFICATION

When you run out of the stock of a product, your customer can register with you for the notification when stock is arrived.

To view your stock notification request or to send emails to your customers when the stock is arrived:

- Login into admin panel with proper privilege
- Go to menu “Product” -> “New Stock Notification”
- All the new stock notification requests will be displayed.
- For each product, you can find button “view”, “remove” next to it.
- If the stock is available (eg, stock qty great than zero), you’ll also find “notify” button.
- Click on the “view” button, a list of customers (email addresses) who are interested on this product will be displayed.
- Click on the “remove”, the notification will be removed, eg, due to the product is discontinued. An email will be sent to customers notifying them that the product is no long available. You can customise the email content. Refer to section [3.3.1] for details.
- Click on the “notify”, you’ll send email to your customers notifying them that the product is available. You can customise the email content. Refer to section [3.3.1] for details.

4.11. STOCK ALERT REPORT

To enable the stock alerts you will need to set up the following:

- Enable the Stock Control from menu “Set up” -> “Edit Configuration”.

- Edit the products you would like to watch the stock. Update the min stock level and max stock level. The default min stock level is 0 which means no stock alert has been turned on for the product.
- When the product quantity is less than the min stock level, the product will appear in the stock alerts report where you can view the product details and export the list

To access the stock alert report, login the admin panel. Select menu “Products” -> “Product report” -> “Product stock alerts”.

4.12. PRODUCT SALES REPORT

The product sales report shows the best and worst sellers. You can also drill down from the report for the associated orders.

To access the product sales report, select menu “Products” -> “Product Report” -> “Product sales report”.

4.13. MANAGE PRODUCT REVIEWS

If you have enabled Product Review features (this is enabled by default store settings), your customers are able to add their reviews on your products. This feature allows you to modify or delete the customer reviews.

You can find the reviews by product via menu Products -> Edit Categories/Products, or Products -> Search Products.

You can also view all the reviews via menu Products -> All Product Reviews. This will display the most recently added reviews at the beginning of the list.

Product Review Fields Explanation

Field	Mandatory	Comment
Title	No	Title of the review
Review	No	Content of the review
Rating	No	Product review rating (1 to 5)
Published?	No	Flag to show or not to show the review on the Storefront

5. STOREFRONT DESIGN

Openstores provides you a powerful and yet easy to use tool to customize your storefront to meet your business requirement.

You can add/remove content, change the look and feel (colour, font, and font size, re-arrange the content etc), or create your own content.

Furthermore, you can even completely redefine your own storefront if you are good at html programming.

5.1. OVERVIEW

The following is a screen shot of a “computer shop” storefront configured by using the design tool.

As you can see, a typical storefront contains the top area, the bottom area, and the content table. Although the default themes provided have three columns (left column, middle column, and the right column) within the content table, you can remove the left and/or right column to create the one/two columns storefront themes.

Top area		
Left column	Middle column	Right column
Bottom area		

- Top area – The top area of your storefront. This may contain one or more horizontal menu bars, and/or one or more custom boxes (defined in Section [5.3] to show logos, banners etc.

- Bottom area – The bottom area can have the similar content as the top area, i.e. the horizontal menu bars and custom boxes.
- Left column – A collection of content boxes (system pre-defined box or your own box defined in Section [5.3])
- Right column – A collection of content boxes (system pre-defined box or your own box defined in Section [5.3])
- Middle column - You can configure your own home page/product category page /product details page/product search page/brand page by using system pre-defined boxes or your own custom boxes defined in Section [5.3].

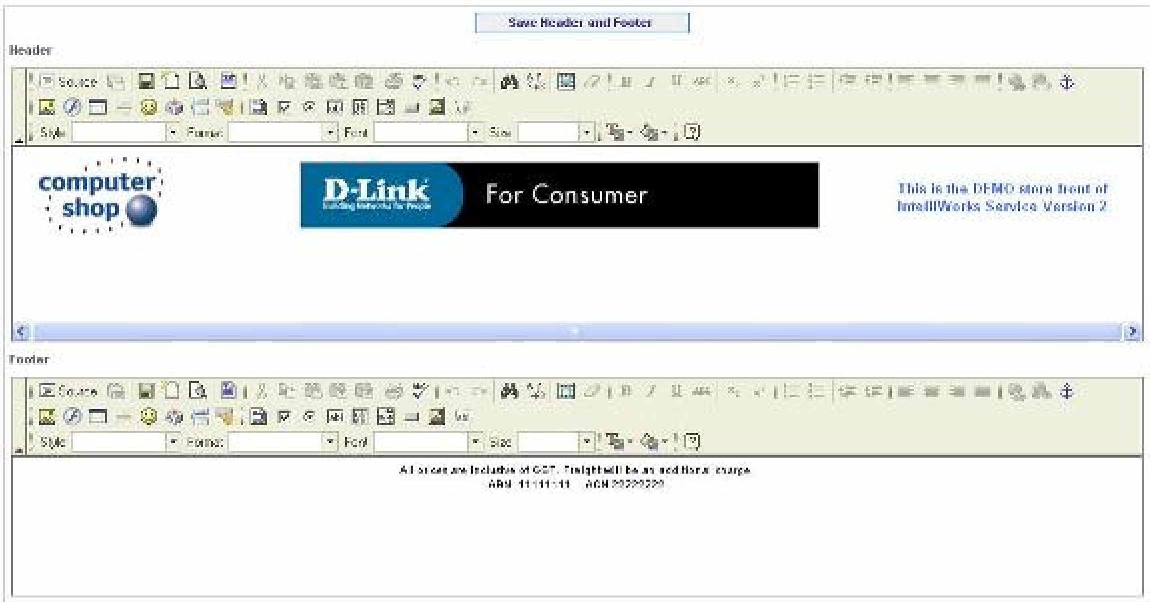
5.2. HEADER/FOOTER

From Openstores version 6 the system does not require the page header and footer. However, it is still supported if you prefer to use the previous layout.

For setting up storefront header/footer

- Login to admin panel with proper privileges
- Go to “Theme-Layout” -> “Page Header and Footer”
- Set up your header and footer using the tool provided. Refer to [14] for the usage of tool)

Don’t worry about the background colour of your header and footer yet at this stage. This can be modified when you design the storefront.



5.3. CUSTOM BOX

Apart from system pre-defined content box, you can create your own custom boxes to display on the top area, bottom area, or left/middle/right columns. We'll show you how to add the custom box into the layout in the later sections.

To create/modify/delete a custom box,

- Login to admin panel with proper privileges
- Go to "Theme-Layout" -> "Custom Boxes"
- Add/Modify/Delete Custom Box. Refer to WYSWYG editor section [12.2] for the usage of the html tool.
- Before removing any custom boxes, make sure this custom box is not used in any of your themes.

Custom Box Fields

Field	Mandatory	Comment
Name used in selection box	Yes	The name of this custom box. This name should be meaningful. It'll be used when you design your storefront
Title	No	The Title of this custom box
Page Content	Yes	The content of this box

5.4. STATIC PAGES

There are pre-defined content boxes (Static Page List) in the theme design window, which allows you to display a list of links to the pages created by you on the Storefront menu or left/right column.

The pages created by you are called Static Page. There are two types of static pages: Custom designed pages and System pre-defined pages.

This section explains how to create the static pages.

- Login admin panel with proper privilege
- Go to menu "Setup" -> "Website Static pages "
- All existing static pages are listed. You can remove/modify them, or add a new static page.
- For each static page, you have the option to either design your own,use one of the system pre-defined pages, or link to an external page.
- You can also set the display order of each page and decide how to access the static page in your storefront – from the static page links on the left/right column, or from the top static page menus.

Static Page Fields Explanation

Field	Mandatory	Comment
Link Name	Yes	Link name displayed on front store static page list
Page Type	Yes	Radio Buttons. There are three types of static pages: Self-defined static HTML content: Custom design pages System pre-defined page: System pre-defined pages Link to an external page.
Page Content	Yes* (only available when self-defined page radio button is selected)	Content of static page. You can use tool provided to edit the content.
Pre-defined page	Yes* (only available when system pre-defined ration button is selected)	System pre-define page. You can use Preview button to preview the page.
External Link	Yes* (only available when Link to an external page radio button is selected)	The external page link
Sort Order	No	The Display order of the Static page in storefront
Display On Column	Yes	When set to “yes”, this static page link is displayed in the Static Page List on the left/right column of the storefront. When set to “no”, this static page is not going to be displayed in the left/right column.
Display On Menu	Yes	When set to “yes”, this static page link is displayed in the horizontal Static Page Menu of the storefront. When set to “no”, this static page is not going to be displayed in the top static page menus.
Popup New Window	Yes	Select “yes” or “no” to specify whether the page should appear in a new window.

5.5. THEME

A theme is a design of your storefront. You can create multiple themes. However, you can have only one activated (published) theme. If you don't specify an activated theme, a system default theme will be used.

5.5.1. Setup Theme

Openstores system provides one or more default theme(s) as templates. To set up a theme

- Log in to admin panel with proper privileges
- Go to "Theme-Layout" -> "Theme and Layouts"
- To create a new theme, select an existing theme (you can preview it by click preview or design button) and click "duplicate" button. A new theme will be created with the name of "Copy of ..."
- Click the "Modify" button to change the name and description of the theme, or to publish the theme. Save the changes.
- Once you finish this, click "Design" button to design your storefront to best suite your business need. Refer to next section for details.

Theme and Layout Fields

Field	Mandatory	Comment
Name	Yes	The name of this Theme. This name should be meaningful.
Description	Yes	The description of the theme. Describe the theme here
To Publish	Yes	Once you select "Yes", this theme will be displayed on your storefront. If none of the themes is set to "yes". System will use a default one

5.6. THEME DESIGN

After you duplicate a theme and click the design button on your new theme, the theme design window will pop up.

The theme design window consists of two parts.

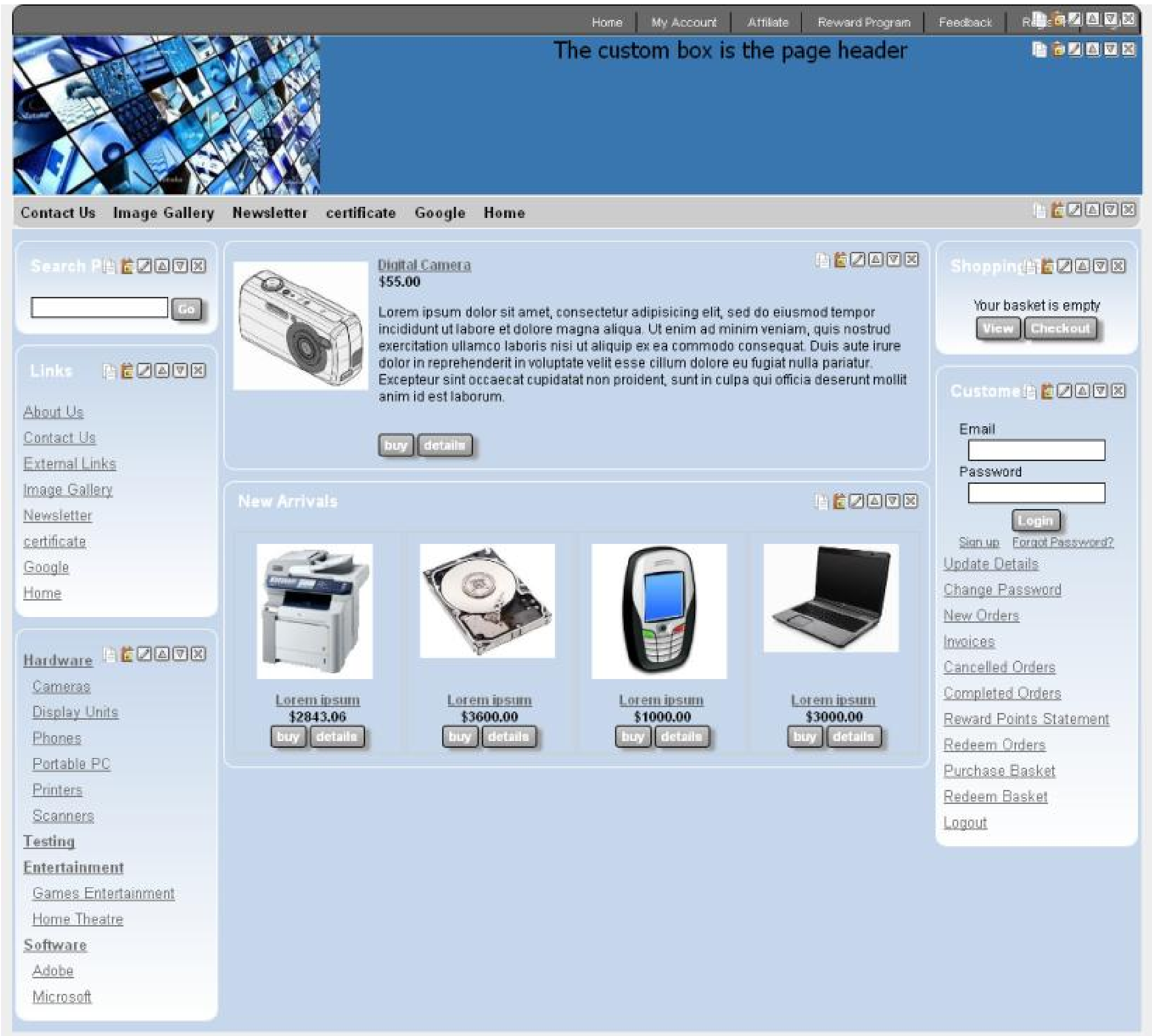
The first part is the *preview table*. The only difference between the preview table and the real storefront is that each content box in the table has the small buttons on the top right corner. These small buttons are used to edit the look and feel of the content boxes.

The second part is *layout edit form* where you can decide what content to add into the menu and columns. The styles of the header, footer and the columns can also be changed here.

5.6.1. Preview Table

The following screenshot is the design window preview table for the "Computer shop" mentioned above.

Comparing to the storefront screen shot, each content box in the preview table has six small buttons on the top right corner.



 - *Copy button*

Click this button to copy the box styles. The copied styles can be pasted to another box. (See the Paste button below).

 - *Paste button*

Click this button to paste the previously copied styles to the box.

Note: menu box styles can not be copied to the custom boxes.

 - *Edit button*

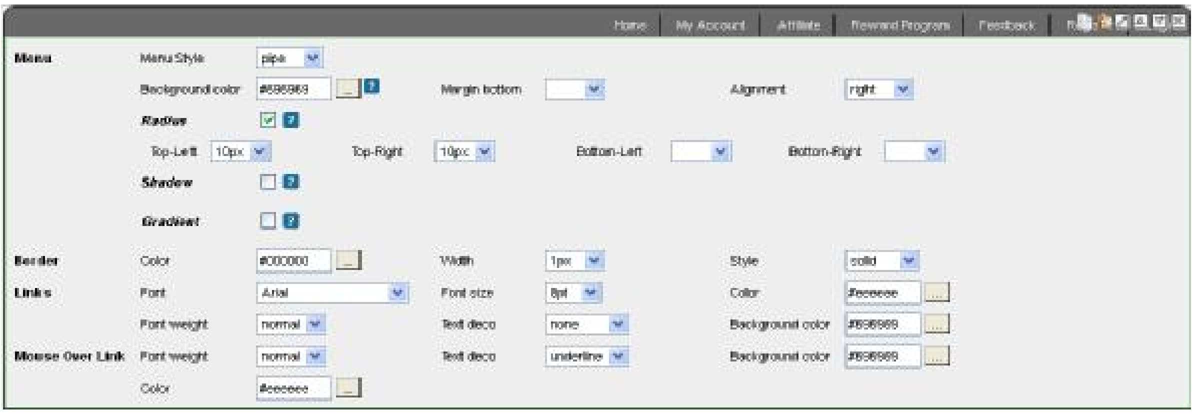
Click this button to expand or collapse the box edit form. A box edit form contains the style attributes which define the look and feel of the box. In general, there are two types of boxes - the horizontal menu box and the content box. The edit form for each type of the boxes will be discussed below.

Menu box edit form

Clicking the Edit button on a horizontal menu box will expand the menu edit form under the menu box (see below screenshot). You can change the menu type (bits, pipe, button, or list), menu styles, and the link styles in the menu edit form. Right after every single attribute is changed in the form, the menu above the form will reflect the change immediately.

Note There is a button on each colour field to open a colour picker window. You can select a colour from the existing colours. If you prefer other colour values, you can enter the value into the attribute box. For example, you can enter colour value “#6699cc”. All colour values have to start with “#”.

Note The updated styles will not be showing on the storefront until the styles are saved and the edited theme becomes active. If you do not see the design changes on your storefront, press the Refresh button on your browser.



Content box edit form

A content box can be placed in any part of the page. The look and feel of each content box can be defined by using the content box edit form which is expanded by clicking the Edit button on the top right corner of the box.

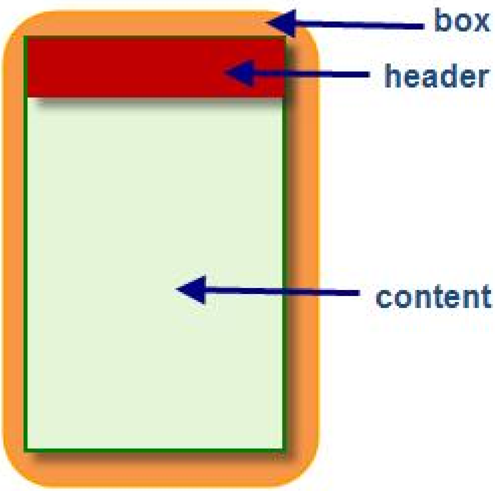
The style attributes in the edit form contain the box styles, header bar title / styles, and box content styles. The edit forms for the content boxes that have the rollover effect (such as Categories, Static Links) have some additional fields for editing the rollover menu styles.

The first dropdown list under the box style is used to define the box layout.

Content Box layout

Content Box layout	Description
Solid border, header bar	A content box with solid border and header bar
Solid border, no header bar	A content box with solid border but no header bar
Dotted border, header bar	A content box with dotted border and header bar
No border, header bar	A content box with no border but has header bar
No border, header Separator	A content box with no border but has the title and a separator.

No border, no header bar	A content box with no border and no header bar
No border/header/padding	A content box with no border, no header, and no padding on the top of the content. This can be used to attach the content box to a customized image header.

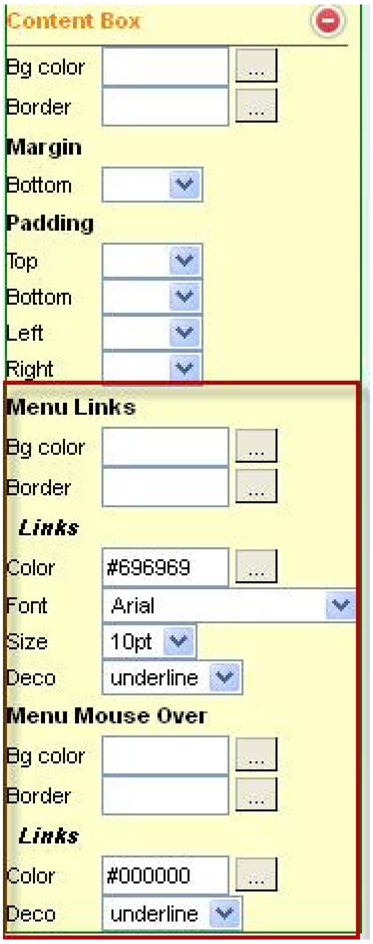


A typical content box contains three parts: the box, the header and the content. The styles for each part of the content box are defined by their corresponding section in the content box edit form, i.e. box style section, header bar section, and the content box section.

The header bar is optional. If you have selected no header bar box layout the header bar styles will not be effective.

The Minus button  on each edit form section is used when you need to collapse the attributes.

When a content box supports the rollover effects, for instance the Categories box, the Customer login box, there will be some additional attributes in the content box edit section.



- Move up *button*

Move the box one level up within the column/menu.

- Move *Down button*

Move the box one level down within the column/menu.

- *Remove button*

Remove the box from the layout.

5.6.2. Layout Edit Form

The Layout Edit Form is located at the lower part of the design window. It contains four sections: the global styles, the button styles, header and Footer section, and the page and layout section.


Save Theme and Layout
Cancel and Close
Global Styles
Body styles
Body background color #eeeeee
Page width
Text styles
Normal text font Arial
Page heading font Arial
Sub-heading font Arial
Normal text color
Page heading color
Sub-heading color #eb5f01
Link styles
Body link color #666666
Body link hover color #000000
Table styles
Table heading background color #3976af
Table heading text color #ffffff
Table body background color
Table body text color #000000
Table body border color #cccccc
Button Styles
Padding
Top 2px
Bottom 2px
Left 5px
Right 5px
Button text
Font Arial
Size 8pt
Weight bold
Radius
Top-Left 3px
Top-Right 3px
Bottom-Left 3px
Bottom-Right 3px
Shadow
Color #999999
Blur size 5px
X 3px
Y 2px
Gradient
Top color #cccccc
Bottom color #999999
Button normal colors
Bg color #9FABC2
Border color #000000
Text color #ffffff
Button hover colors
Bg color #696969
Border color #000000
Text color #ffffff
Button active colors
Bg color
Border color
Text color
Header and Footer section
It is recommended NOT to add the previous header and footer but use the custom boxes in the top area and bottom area. This provides more flexibility to mix header/footer with the menus. For example, the menu can be moved to the very top of the page. However, if you still prefer to use the previous header and footer, you can still do so by clicking the next button.
Add header and footer
Page Layout and Styles
The Top Area
Add Menus or Horizontal Custom Boxes
Standard Top Menu
Add
Left Column
Middle Column
Right Column
Home Page
Category Page (First category data will be presented)
Product Page (First product data will be presented)
Product Search Page (Dummy results will be presented)
Brand Page (optional) (First brand data will be presented)
Add content to the left column
My OpenStores
Add
Add content to the right column
My OpenStores
Add
Add content to the middle column of above selected page
Recommended Item
Add
Column Style
Column width 180 px
Background color #c6d7eb
Column Border
Top 0px
Bottom 0px
Left 0px
Right 0px
Color #000033
Style solid
Padding
Top 10px
Bottom
Left 3px
Right 5px
Column Style
Background color #c6d7eb
Column Border
Top 0px
Bottom 0px
Left 0px
Right 0px
Color
Style solid
Padding
Top 10px
Bottom
Left
Right 5px
Column Style
Column width 180 px
Background color #c6d7eb
Column Border
Top 0px
Bottom 0px
Left 0px
Right 0px
Color
Style solid
Padding
Top 10px
Bottom
Left 0px
Right 3px
The Bottom Area
Add Menus or Horizontal Custom Boxes
Standard Top Menu
Add
Save Theme and Layout
Cancel and Close

5.6.2.1. Global Styles Section

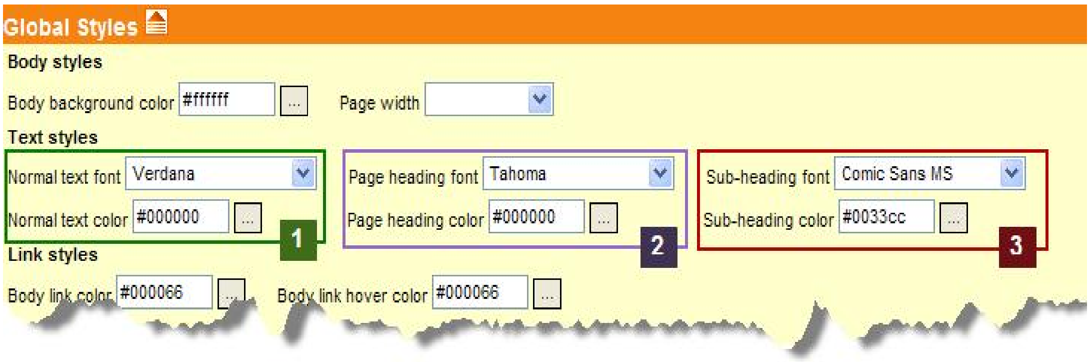
The global styles section allows the changes of the page body stylea, text styles, link styles, and the table styles.

Body Styles -

Body Background Colour – update this field to change the body background colour.

Page Width – You can change the page width depending on the screen resolutions of your target customers. The following resolutions are supported: 800x600, 1024x768, 1280x768 and full screen. The default value is 1024x768.

Text Styles

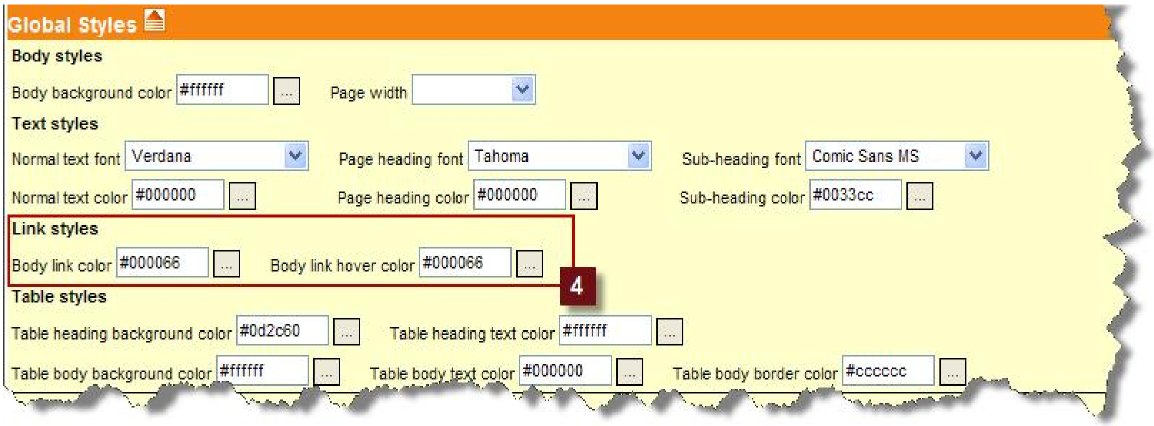


1.Changing the normal text styles will affect the body text.

2.Changing the page heading styles will affect the page titles, such as the 'Check Out', 'Shopping Basket', 'Customer Register', the product name on the product page, and the static page name etc.

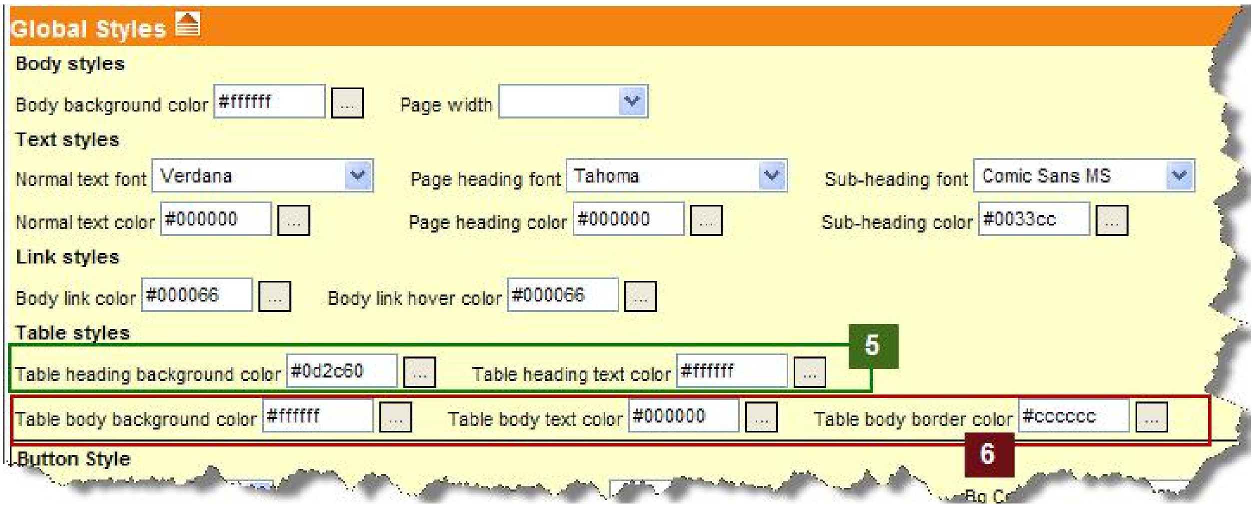
3.Changing the sub-heading styles will affect the page sub-titles.

Link Styles



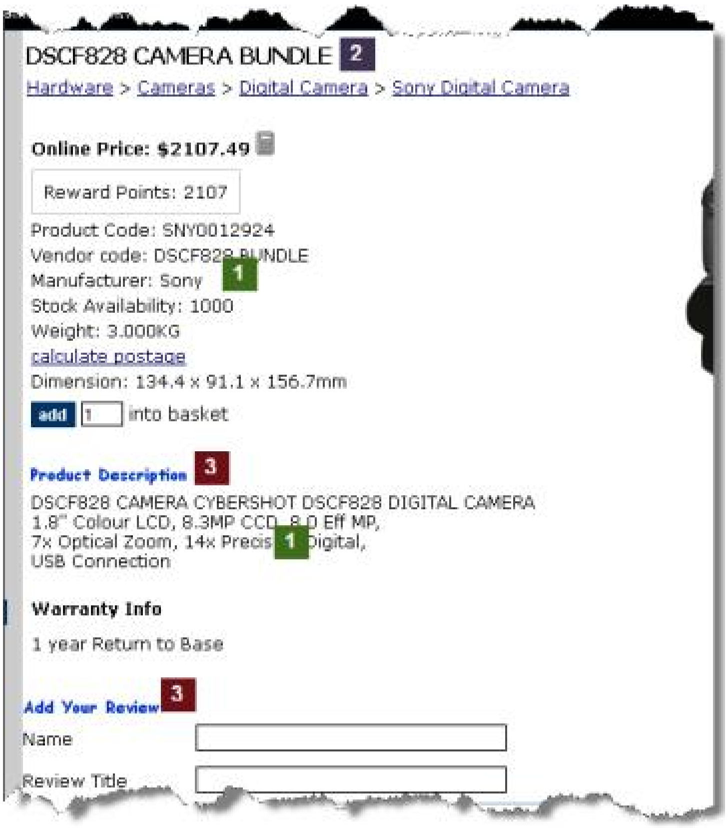
Changing the link colour or link hover colour will affect the global link colours in your storefront. Refer to the next section for affected storefront page examples.

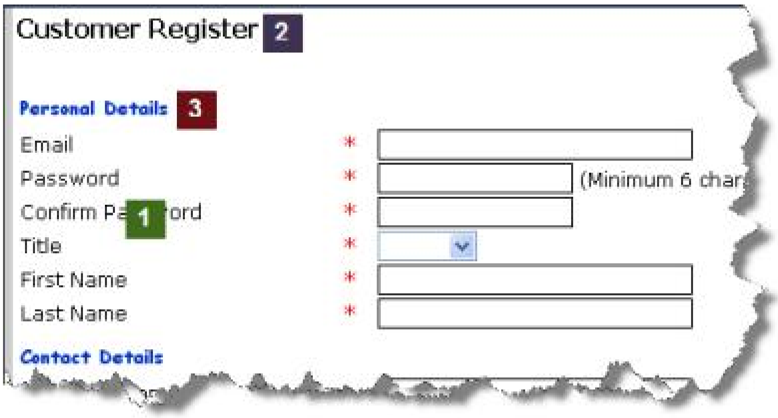
Table Styles



Updating the table heading styles will affect the tables with the header row. The table body styles will affect all system defined tables, including the tables with or without images.

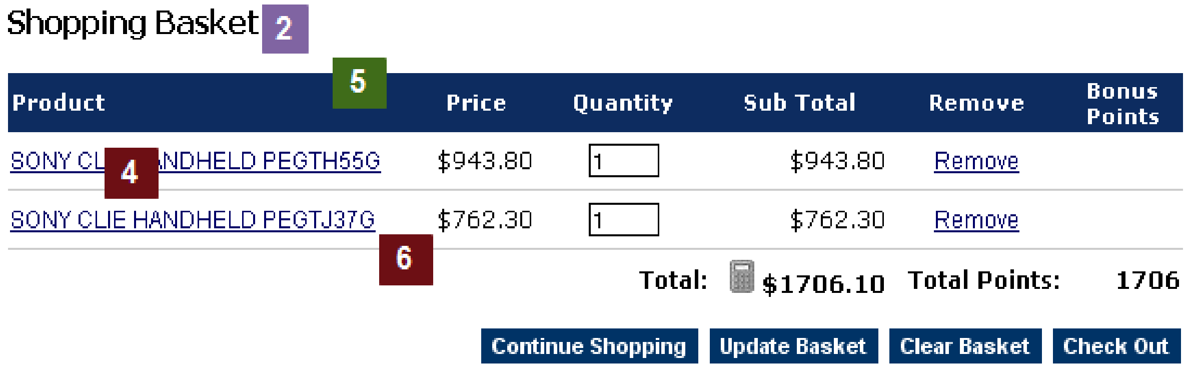
Here are some examples on how global style fields affect the storefront pages.




Customer Register 2
Personal Details 3
Email *
Password * (Minimum 6 chars
Confirm Password * 1
Title *
First Name *
Last Name *
Contact Details


Items 1 - 20 of Total 63
1 2 3 4 [Next]
Product
Code
5
Price
ACCESSORY KIT FOR CD MAVICA CAMERAS
Red,Classic
SNY0027189
$182.12
buy
Bluetooth wireless tech 4 gy
EPS0026692
$210.27
buy
CLIE PEGUX50G PDA ENGINE COL DISPLY
SNY0008312
6
$1466.78
buy
CX7300 DIGITAL CAMERA
KOD0027172
$55.00
buy


Items 41 - 60 of Total 63
[Prev] 1 2 3 4 [Next]
Image Not Available
SOFT CARRYING CASE FOR DSCT1 CAMERA
$109.89
buy details
6
SONY CLIE H 4 DHELD PEGTH55G
$943.80
buy details
SONY CLIE HANDHELD PEGTJ37G
$762.30
buy details
SONY DCRHC40W WHITE MINIDV HANDYCAM
$1538.46
buy details



5.6.2.2. Button Style Section–

The global button styles can be changed via the button styles section.

5.6.2.3. Header and Footer Section

Prior to version 6 the page header/footer will be always sitting at the top/bottom of the pages. Also, it's not possible to add menu above the header or below the footer. While the latest design tool still supports the header and footer, it has provided a more flexible way to design the pages. You can design a custom box for the header and footer respectively and mix the menus and the custom boxes on the page top and bottom areas. Here is an example:

To create a page top area as the above screenshot:

1. Remove the header and footer

2. Add the first menu into the top area from the drop down **Add Menus or Horizontal Custom Boxes**

3. Create a new custom box for the header content. (Copy the header source into the new custom box if reuse the previous header content.)
4. Add the new custom box into the top area from the same drop down **Add Menus or Horizontal Custom Boxes.**
5. Add the second menu into the top area.
6. Use the up and down icons to move the menus and custom box to the right position.

7.Style the menus and custom box by selecting the edit icon above.

5.6.2.4. The Page Layout and Styles Section

The page layout and styles section is used to construct the page content, as well as adjust the styles for the columns.

5.6.2.4.1.Edit the Top Area Content

You can add horizontal menus and custom boxes onto the top area. Select the content from the drop down list under the Top Area section and press the Add button.

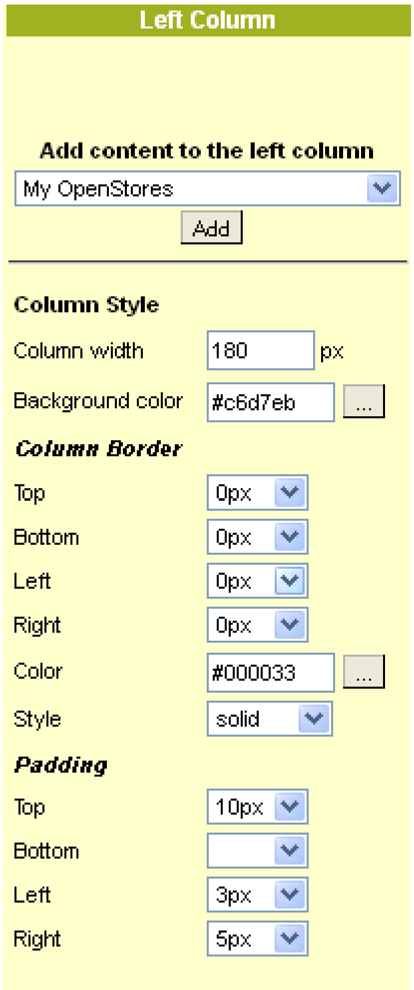
There are 3 pre-defined menu box templates in the Add Content drop down. You can choose one or more to add into the layout:

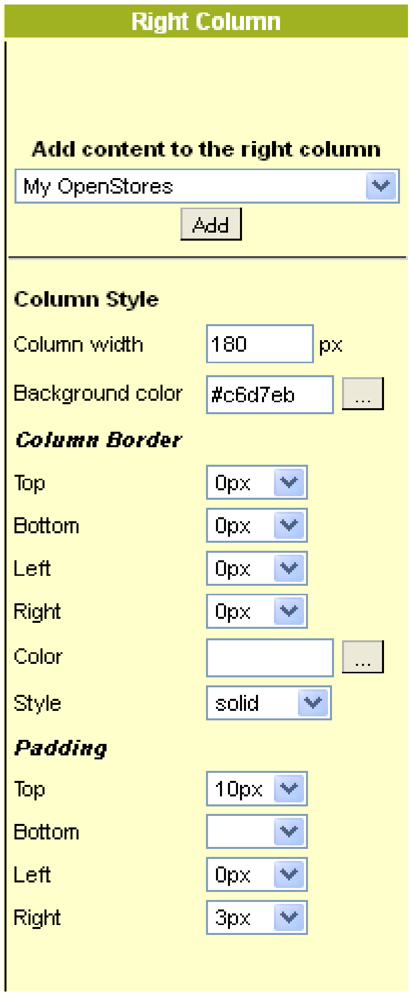
Pre-defined Menus	Description
Standard top menu	Contains the menu items of Home, My Account, Reward Program, Feedback, Register, Login
Category menu	Displays the root level product category links.
Static page menu	You can setup static page displayed as menu items.

5.6.2.4.2.Edit the Left/Right Column Section

In the left or right column edit form, you can:

- Use the Add Content drop down list to add more content into the left/right column.
- Change the column styles.





There are 16 pre-defined content boxes in the left/right column Add Content drop down.

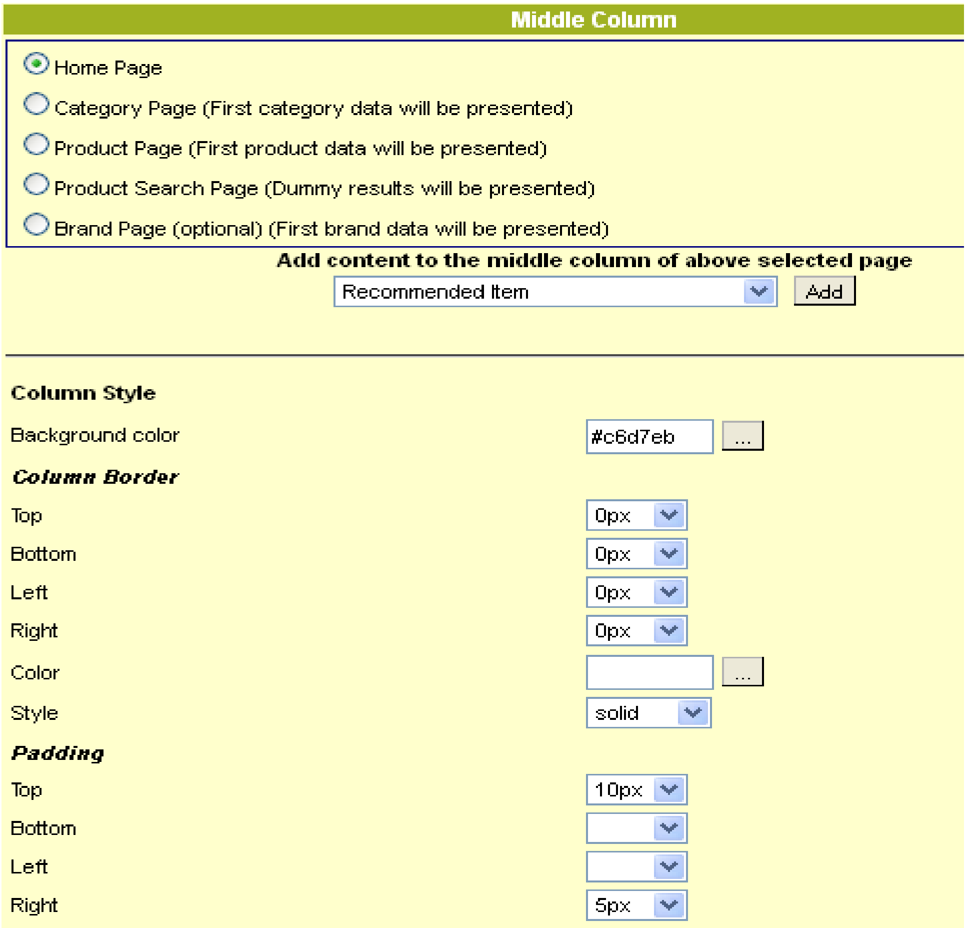
Pre-defined Content Boxes	Description
Customer Login / My Account links	Customer login box and my account
Static Page List	Your static page links will be displayed in a vertical manner.
One Level Category List	Shows the Top-level category links in a vertical manner.
Two Levels Category List	Shows the top two level category links in a vertical manner.
Shop by Brand	Shows the list of the brands. Middle column Brand Page will be displayed when one of the brands is selected.
Brand Drop Down List	Shows brands in a drop down list. Middle column Brand Page will be displayed when one of the brands is selected.

Product Search Box	Product search form
Shopping Basket	Shopping basket form
Wishlist	The customer wish list
Single Random Advertisement	Randomly shows one ad defined via Advertisement > Edit Ads by Group (8.2) -> Select the "Feature" group.
Marquee Ads (align left)	Marquee scroll Feature ads upward. Images and text are aligned left.
Marquee Ads (align middle)	Marquee scroll Feature ads upward. Images and text are aligned middle. > Edit Ads by Group (8.2) -> Select the "Feature" group.
All feature Ads	Display all features ads > Edit Ads by Group (8.2) -> Select the "Feature" group.
Top Selling Products	Display Top-selling products. Images and text are aligned middle. > Edit Ads by Group (8.2) -> Select the "Feature" group.
My Openstores	Content box showing the Openstores logo links to your store on www.openstores.com.au in a new window.
Newsletter subscription	Newsletter subscribe form

Note: all the custom boxes you have created will be appended to the above list and be available in the Add Content drop down list.

5.6.2.5. Middle Column Form

The page top/bottom areas and the left/right columns will remain unchanged while your customer browses your store. But the main content in the middle column will be different. The layout of the Home page, Category page, Product page, Product Search Results page, and Brand page are configurable in this window. The rest of the pages such as the Check Out page and the Customer Register page are pre-defined.



When you edit the middle column, make sure you have selected the radio button on the page you want to edit. By default, the radio button on the Home Page will be selected. When different radio button is selected, the pre-defined content boxes in the "Add Content" drop down list will be different. The following tables list the pre-defined content boxes for the configurable pages in the middle column.

Note: if you have created some custom boxes before, they will be appended to the "Add Content" drop down list. So you will have the option to add your custom boxes into any of the pages.

There are 10 pre-defined content box templates available for the Home Page layout:

Recommended Item	Template for the display of the advertisements defined via Advertisement -> Edit Ads By Group -> Select the Recommended group
New Arrivals with Thumbnails x 1	Display a number of most recently added products. Each row will display 1 product with thumbnail. The number of new arrivals is configured via Set up -> Edit Configurations -> Number of New Arrivals.

New Arrivals with Thumbnails x 2	Display a number of most recently added products. Each row will display 2 products with thumbnails. The number of new arrivals is configured via Set up -> Edit Configurations -> Number of New Arrivals.
New Arrivals with Thumbnails x 3	Display a number of most recently added products. Each row will display 3 products with thumbnails. The number of new arrivals is configured via Set up -> Edit Configurations -> Number of New Arrivals.
New Arrivals with Thumbnails x 4	Display a number of most recently added products. Each row will display 4 products with thumbnails. The number of new arrivals is configured via Set up -> Edit Configurations -> Number of New Arrivals.
Feature Items with Thumbnails x 1	Display the feature items defined via Advertisement -> Edit Ads By Group -> Select the Home Items group. Each row will display 1 product with thumbnail.
Feature Items with Thumbnails x 2	Display the feature items defined via Advertisement -> Edit Ads By Group -> Select the Home Items group. Each row will display 2 products with thumbnails.
Feature Items with Thumbnails x 3	Display the feature items defined via Advertisement -> Edit Ads By Group -> Select the Home Items group. Each row will display 3 products with thumbnails.
Feature Items with Thumbnails x 4	Display the feature items defined via Advertisement -> Edit Ads By Group -> Select the Home Items group. Each row will display 4 products with thumbnails.
Top Selling Products with Thumbnails x 1	Display the top selling products defined. Each row will display 1 product with thumbnail. The number of top selling products is configurable via changing the configuration parameter "Number of Top Selling Product".
Top Selling Products with Thumbnails x 2	Display the top selling products defined. Each row will display 2 products with thumbnail. The number of top selling products is configurable via changing the configuration parameter "Number of Top Selling Product".
Top Selling Products with Thumbnails x 3	Display the top selling products defined. Each row will display 3 products with thumbnail. The number of top selling products is configurable via changing the configuration parameter "Number of Top Selling Product".

Top Selling Products with Thumbnails x 4	Display the top selling products defined. Each row will display 4 products with thumbnail. The number of top selling products is configurable via changing the configuration parameter "Number of Top Selling Product".
Image Gallery – Horizontal Style	Box showed the Image Gallery
Image Gallery – with popup	Images are displayed in table, will pop up on mouse over.

There are 26 pre-defined content box templates available for the Category Page layout:

Category Title	Display category name only.
Category Additional Info	Display the additional info defined when creating categories.
Sub-category List – Vertical Text	Display the sub-categories of the selected category. Sub-categories are displayed as text in the vertical manner.
Sub-category List – Horizontal Text	Display the sub-categories of the selected category. Sub-categories are displayed as text in the horizontal manner.
Sub-category List with Thumbnails x 1	Display the sub-categories of the selected category. Each row will display 1 sub-category with thumbnail.
Sub-category List with Thumbnails x 2	Display the sub-categories of the selected category. Each row will display 2 sub-categories with thumbnails.
Sub-category List with Thumbnails x 3	Display the sub-categories of the selected category. Each row will display 3 sub-categories with thumbnails.
Sub-category List with Thumbnails x 4	Display the sub-categories of the selected category. Each row will display 4 sub-categories with thumbnails.
Product List – Text only	Display the products of the selected category. Products are displayed as text.
Product List with Thumbnails x 1	Display the products of the selected category. Each row will display 1 product with thumbnail.
Product List with Thumbnails x 2	Display the products of the selected category. Each row will display 2 products with thumbnails.
Product List with Thumbnails x 3	Display the products of the selected category. Each row will display 3 products with thumbnails.
Product List with Thumbnails x 4	Display the products of the selected category. Each row will display 4 products with thumbnails.
Sub-categories and Products with Text Only	Display the sub-categories and products of the selected category. No thumbnails are displayed.

Sub-categories Text and Products with Thumbnails x 1	Display the sub-categories and products of the selected category. Each row will display 1 product with thumbnail.
Sub-categories Text and Products with Thumbnails x 2	Display the sub-categories and products of the selected category. Each row will display 2 products with thumbnails.
Sub-categories Text and Products with Thumbnails x 3	Display the sub-categories and products of the selected category. Each row will display 3 products with thumbnails.
Sub-categories Text and Products with Thumbnails x 4	Display the sub-categories and products of the selected category. Each row will display 4 products with thumbnails.
Category New Arrivals with Thumbnails x 1	Display a number of most recently added products in the selected category. Each row will display 1 product with thumbnail.
Category New Arrivals with Thumbnails x 2	Display a number of most recently added products in the selected category. Each row will display 2 products with thumbnails.
Category New Arrivals with Thumbnails x 3	Display a number of most recently added products in the selected category. Each row will display 3 products with thumbnails.
Category New Arrivals with Thumbnails x 4	Display a number of most recently added products in the selected category. Each row will display 4 products with thumbnails.
Category Advertisements with Thumbnails x 1	Display the ads of the category defined via Advertisement -> Edit Category Ads. Each row will display 1 product with thumbnail.
Category Advertisements with Thumbnails x 2	Display the ads of the category defined via Advertisement -> Edit Category Ads. Each row will display 2 products with thumbnails.
Category Advertisements with Thumbnails x 3	Display the ads of the category defined via Advertisement -> Edit Category Ads. Each row will display 3 products with thumbnails.
Category Advertisements with Thumbnails x 4	Display the ads of the category defined via Advertisement -> Edit Category Ads. Each row will display 4 products with thumbnails.

There are 4 default content box templates available for the Product Page layout:

Product Details with Single	Template for displaying product details. Only one

Image	product image will be displayed next to product details
Product Details with Image Gallery	The product details template displays all images in gallery style.
Product Details with Multi Images	Template for displaying product details. Multiple product images will be displayed under the product description
Product Details with Multi Images(2)	Template for displaying product details. The first image will be displayed next to product details and the rest of product image(s) (if any) will be displayed under the product description.

There are 5 default content box templates available for Product Search Results layout:

Search Product Results Text Only	Display product search results as text only.
Search Product Results with Thumbnails x 1	Display product search results. Each row will display 1 product with thumbnail.
Search Product Results with Thumbnails x 2	Display product search results. Each row will display 2 products with thumbnails.
Search Product Results with Thumbnails x 3	Display product search results. Each row will display 3 products with thumbnails.
Search Product Results with Thumbnails x 4	Display product search results. Each row will display 4 products with thumbnails.

There are 5 default content box templates available for Brand Page layout.

Brand Products - Text Only	Display products in the selected brand as text only.
Brand Products with Thumbnails x 1	Display product in the selected brand. Each row will display 1 product with thumbnail.
Brand Products with Thumbnails x 2	Display product in the selected brand. Each row will display 2 products with thumbnails.
Brand Products with Thumbnails x 3	Display product in the selected brand. Each row will display 3 products with thumbnails.
Brand Products with Thumbnails x 4	Display product in the selected brand. Each row will display 4 products with thumbnails.

5.6.2.6. Buttons on the Screen

Save Theme and Layout - Save the designed theme and layout, refresh the Add Content drop down lists.

Remember to click the button to save your design before you close the window.

Cancel and Close - Close the window without saving your design.

5.7. COMMON QUESTIONS ON THEME DESIGN

5.7.1. How to Add Content into the Home Page Middle Column

You can create a custom box with your own welcome messages and images, and then add them into the Home page. To do this:

- Login the Admin Panel
- Select "Theme-Layout -> Custom Boxes" to create a new custom box containing the text and images.
- Go to "Theme-Layout -> Theme and Layouts". Click the "design" button on the theme you want to edit. The design window will pop up.
- In the "Middle Column Form" select the radio button on "Home Page". In the "Add Content" drop down list under the radio button, select the custom box you have created before.
- Press the "Add" button. You will see the custom box in the preview table.
- Press to change the style (font, colour etc)

You can also add some feature products onto the Home page. To do this:

- Login the Admin Panel if you have not logged in,
- Select "Advertisement->Edit Ads by Group", click “show” button next to the "Home Items".
- Find the products you would like to promote and add them into the group.
- Go to "Theme-Layout -> Theme and Layouts". Click the "design" button on the theme you want to edit. The design window will pop up.
- In the "Middle Column Form" select the radio button on "Home Page". In the "Add Content" drop down list under the radio button, select one from the following templates:

  Feature Items – 1 item in a row

  Feature Items – 2 items in a row

  Feature Items – 3 items in a row

  Feature Items – 4 items in a row
- Press the "Add" button. You will see your feature products in the preview table. All product images will be displayed as thumbnails.

You can display one recommended product on the Home page as well by following the steps:

- Login the Admin Panel if you have not logged in,
- Select "Advertisement->Edit Ads by Group", click “show” button next to the "Recommend Items".
- Find the products you would like to promote and add them into the group.
- Go to "Theme-Layout -> Theme and Layouts". Click the "design" button on the theme you want to edit. The design window will pop up.

- In the "Middle Column Form" select the radio button on "Home Page". In the "Add Content" drop down list under the radio button, select "Recommended Item".
- Press the "Add" button. You will see one recommended product in the preview table. If more than one product have been specified in the Recommended Items, a random product will be picked up every time. The product image will be displayed as large image.

5.7.2. How many templates can be used to display products in categories

You can list products in the categories in text only, or with text and thumbnails. To do this:

- Login in the Admin Panel
- Add categories and products by following the steps discussed in section 4
- Go to "Theme-Layout -> Theme and Layouts". Click the "design" button on the theme you want to edit. The design window will pop up.
- In the "Middle Column Form" select the radio button on "Category Page". In the "Add Content" drop down list under the radio button, select one from the following templates.

  Category and Products with Text Only

  Category and Products with Thumbnails – 1 item in a row

  Category and Products with Thumbnails – 2 items in a row

  Category and Products with Thumbnails – 3 items in a row

  Category and Products with Thumbnails – 4 items in a row
- Press the "Add" button. You will see a new content box added into the middle column of the preview table.

Note, in the design window the First category and its products you have created will be rendered. If no products in this category, you will not be able to see the products layout in the design window. However, after adding the content box, you will be able to see the layout in your Storefront.

5.7.3. Can I replace the content box title bar with an image

Yes. For example, if you would like to replace the Category content box title bar. You can:

- Login the Admin Panel
- Select "Theme-Layout -> Custom Boxes" to create a custom box containing the title bar image.
- Go to "Theme-Layout -> Theme and Layouts". Click the "design" button on the theme you want to edit. The design window will pop up.
- If the category list box has been displayed in the left column, select the custom box you just created from the drop down list in the "Left Column Form". Press the "Add" button to add the box in the left column.
- Press the "Move up button" on the right corner of the custom box to move it above the category list box.

- Change the box style of the image custom box to "no border/header/padding", also change the category custom box to be no header style.

6. CUSTOMER PAYMENT METHOD

6.1. EDIT PAYMENT METHODS

You need to set up your own payment methods for your customers to check out. The supported payment method templates are:

- Money Order - Direct Bank Deposit
- Paymate
- Paypal
- Paypal express
- eWay
- Cash On Delivery
- Pay By Phone
- Credit Card - Offline Processing

For each payment method, you can specify your own payment method display name (also called Title). You will need to enter values for the payment method specific fields. For example, if you add Paypal payment method, the paypal account name and mode are mandatory fields.

Refer to Paypal and Paymate website for how to obtain a Paypal, Paypal express or Paymate account.

6.1.1. Payment Method Surcharges/Discounts

You can add surcharges or offer discount for some of the payment methods. Surcharge/discount is calculated by “Base Charge + Percentage x Order Balance”. If you would like to offer discount, enter the Percentage value as the negative value. Order Balance is usually the total order amount (including the delivery charge and taxes). However if customer uses the gift certificate, Order Balance is the total order amount taking away the certificate balance. If the certificate balance is greater than the order amount, the Order Balance becomes 0 and no surcharge or discount will be added.

Note There is a global configuration setting to enable/disable surcharge. Refer to 3.2.25 for details.

If you select “Credit Card – Offline Processing”, the credit card types you allow to use on the store can be specified via Set up -> Edit Credit Cards. The surcharge/discount can be defined for each credit card type.

6.1.2. Edit Payment Methods

- Login admin panel with proper privilege
- Go to menu “Setup” -> “Edit Payment Methods”.
- Add/Modify/Remove a payment method. If you add a new payment method and want to make it available to your customer, make sure To Publish =”true” is selected before save.

Payment Method Fields Explanation

Field	Mandatory	Comment
Supported Payment Methods	Yes	System supported payment methods
Title	Yes	Payment method name displayed when checkout
Description	No	Write descriptions/remarks for internal use
Min Order Amount	No	The payment method is only available when the total order amount is in between the min and max values. The values are inclusive.
Max Order Amount	No	
Apply to Region		Select whether this payment method is available to • Both domestic and international; • Or domestic only; • Or international only
To Publish	Yes	Select “true” to make this payment method available to your customer
Sort Order	No	The display ordering
Surcharge fields (not available to credit card offline)		
Base Charge	No	Flat surcharge
Percentage	No	Percentage of the order balance. If value > 0, this is surcharge rate If value < 0, this is discount rate
Surcharge Description	No	The description for the surcharge/discount, which will be displayed to your customer at checkout.
Payment Method Specific Fields		
Bank Account (Money Order)	Yes	Money order specific field
Mode (Paymate or Paypal)	Yes	Value is “Live” or “Test” Need to be selected when Paymate or Paypal is used. Test mode is only useful for the store owner during store setup. Should always switch to Live mode when setup completes.
Paymate User Name (Paymate)	Yes	Your user name in Paymate website.
Paypal Account Name (Paypal)	Yes	Your Paypal account.

Phone Number (Pay by Phone)	Yes	Pay be phone specific field.

6.2. EDIT CREDIT CARDS

When “Credit Card - Offline Processing” is selected, the customers need to enter their credit card details. This is where you can define the allowed credit card types and their individual surcharge/discount.

Surcharge/discount is also calculated by “Base Charge + Percentage x Order Balance”.

Surcharge/discount of credit card will only take effect when the global configuration “Enable Payment Method Surcharge” is set to “true”.

To edit the credit cards

- Login admin panel with proper privilege
- Go to menu “Setup” -> “Edit Credit Cards”.
- Add/Modify/Remove credit card.

Credit Card Fields Explanation

Field	Mandatory	Comment
Card Type	Yes	Credit Card Type (e.g. Visa, MasterCard)
Base Charge	No	Flat surcharge
Percentage	No	Percentage of the order balance. If value > 0, this is surcharge rate If value < 0, this is discount rate
Surcharge Description	No	The description for the surcharge/discount, which will be displayed to your customer at checkout.
Ordering	No	The display ordering

Note: Credit card surcharges/discounts only apply to payment method “Credit Card – Offline Processing”. Although the credit card types configured here are also applicable to payment method “eWay”, surcharge/discount for eWay is set up from “Setup” -> “Edit Payment Methods”.

7. DELIVERY METHOD SETUP

7.1. HOW POSTAGE WORKS

The system supports two types of postage calculation.

Weight base – The postage is calculated based on the shipping address and the total weight of the order.

Amount base – The postage is calculated based on the shipping address and the total product amount of the order.

A delivery method can be set up for orders shipping to a number of shipping zones and within the upper and lower weight or amount range.

For example, if we have set up a weight base delivery method for orders shipping to all areas within Australia and weight between 1kg and 10kg. This delivery method is applicable to a customer order which has total order weight 5kg and the shipping address is in NSW. If the delivery method has a minimum base charge at $10, and for every kg unit there is a fee of $2. The customer order's postage will be $20 which is calculated from $10 + ($2 * 5kg).

You can set up a number of delivery methods for your customers. The system by default will select a delivery method with minimal freight charge for an order. However, customers can choose any other available delivery methods before submitting the order.

If there is no delivery method found. It'll display "Please contact us for delivery charge." This message can be changed. Refer to section [3.2.7] for details.

7.1.1. Domestic (Australian) Customer

Australia post has defined the parcel zone for every postcode. We need to define a set of delivery methods and link them to each Delivery Zone. During the customer check out process, the Openstores system will find out the Australia Post parcel zone based on the delivery address (postcode). From the parcel Zone and total weight/amount of the order, it then finds all available delivery methods associated with the zone that apply to the order.

7.1.2. International Customer

You can define delivery methods for your international customers. Openstores system will work out available delivery methods based on the country and the total weight/amount of the order.

7.2. CUSTOMER CHECKOUT DELIVERY OPTION

You can set up your customer's check out delivery options.

- Login admin panel with proper privilege
- Go to menu "Setup" -> "Customer Checkout Delivery Options"
- Add/Modify/Remove the Delivery options. If you add a new delivery option and want to show it to your customer, make sure To Publish ="true" is selected before save.

Only two options are supported: Delivery/Pick up, which is defined in the code. You cannot select same code more than once. However, you can change the display names of the delivery options.

Delivery Options Fields Explanation

Field	Mandatory	Comment

Code	Yes	System pre-defined code. Either “Deliver” or “Pick up”.
Display Name	Yes	Display Name of the option
Description	No	Write descriptions/remarks for internal use
To Publish	Yes	Select “true” to make this option available to your customer

If you don’t want your customers to pay the delivery charge, eg, email delivery, you can setup a delivery option with the code Pickup.

7.3. COURIERS

Couriers entered here will be displayed on the Dispatch Order page. One courier needs to be selected when order items are being delivered to the customer. You should specify Australia Post as one special courier.

You can set up all couriers used by your company:

- Login admin panel with proper privilege
- Go to “Setup” -> “Delivery” ->”Edit Couriers”
- Add/Modify/Delete Couriers

Couriers Fields Explanation

Field	Mandatory	Comment
Courier’s Code	Yes	A meaningful code to represent the courier company, eg FRF for **FRF Couriers** (This code is used in order process eg, dispatch etc)
Courier Name	Yes	Courier’s full company name
Address1	No	The address of the courier
Address2	No	
City	No	
State	No	
Country	No	
Postcode	No	
ABN	No	The Courier’s ABN
ACN	No	The Courier’s ACN
Contact	No	Contact person
Phone	No	Phone number of the courier

Mobile	No	Contact person's mobile
Fax	No	Fax number of the courier
Email	No	Email of the courier
Web Site	No	The courier's website, delivery tracking If you have input consignment number for an order and this field is not empty, consignment number will be displayed as a link and link to this URL.
Comment	No	Some comments on this courier

7.4. AUSTRALIA POSTCODE UPDATE

By default, the Australia postcode information has been pre-installed. However, you need to update them regularly, say, twice a year. To do so

- Go to Australia post website http://www1.auspost.com.au/postcodes/ and click "Download the Postcode Data file" then click "Download Full Postcode Database". Save the file in your local machine.
- Unzip the file to the same directory and use Microsoft Excel to open it.
- Click File ->Save as, when the Save As dialogue box pops up, select Save as type "Text (Tab delimited)" and then save.
- Login to admin panel with proper privilege.
- Go to menu "Setup" ->"Delivery" -> "Upload Postcode File".
- Click browse to select the file you just saved, then click OK
- Wait until finished.
- System will process the file and update your database in the background and you will receive an email once it's done.

7.5. ORIGIN AND TARGET COUNTRY

You can define which countries you want to sell your product to. To do this,

- Login admin panel with proper privilege
- Go to "Setup" -> "Delivery" ->"Edit Countries"
- Add/Modify/Delete Countries.

Country Fields Explanation

Field	Mandatory	Comment
Code	Yes	A 2 characters code to represent the Country eg, AU for Australia, US->Unite State etc

Name	Yes	Name of the Country
Sell to the Country (Target Country)	No	When you select “true”, you want to sell your products to this country When you select value “false”, this is not your target country.
Sell to the Country (Target Country)	No	Define the origin country of your business. You can only set one origin country.

7.6. Delivery Methods

To set up available delivery methods,

- Login admin panel with proper privilege
- Go to “Setup” -> “Delivery” ->”Edit Delivery Methods”
- Add/Modify/Delete Delivery Methods.

> The total delivery charge = base charge + units * unit price. Where units = ceiling (total weight/unit)
>
> Example of units’ calculation:
>
> If total weight = 6 kg and unit is 3 kg, then units = 2
>
> If total weight = 7 kg and unit is 3 kg, then units = 3

Delivery Method Fields Explanation

Field	Mandatory	Comment
Internal Name	Yes	The internal name for your own reference
Display Name	Yes	This name will be displayed on the storefront.
Base Charge ($)	Yes	Base charge of using this delivery method.
Unit (kg)	Yes	The weight unit,
Unit Price	Yes	The freight charge per unit
Min Weight	Yes	Only when min. weight <= order’s total

Max Weight	Yes	weight <= max. Weight, this delivery method is available to your customers. However, the domestic customer delivery address needs to match the parcel zones associated to the delivery method, or the international customer delivery country matches the associated countries.
Domestic Parcel Zones	No	To which parcel zones this delivery method applies to. Refer to section [7.4] for Australia Post parcel zones
Countries	No	To which country this Delivery method applies.

7.7. DELIVERY LEVELS

There are times when a store has two products of the same weight (or amount) but one product can be posted by letter, the other can only be posted with parcel. In this case, the postage should be different for these two products. This is when you will need to use delivery levels.

We can create delivery levels "letter" and "parcel" and set the above two products to use these different delivery levels when editing the products. Then we create delivery method "letter method A" for 'letter' and "parcel method B' for 'parcel' levels, and both are applicable to the same weight range and zones. When the customer orders the product that can be posted by letter, the delivery method "letter method A" will be used. If the other product is ordered, the "parcel method B" will be chosen. However, since "parcel" level is higher than "letter" level, the parcel level is applied when the customer has ordered both products.

To set up multiple delivery levels

- Login admin panel with proper privilege
- Select menu Payment/delivery -> Edit delivery levels.
- Add new delivery level by entering the name, level, and set the published to 'true'. The lowest level should be the cheapest delivery method.
- By default all products are set to the "default" delivery level. Go to the product edit form and change to the new delivery level if it's applicable.
- Select menu Payment/Delivery -> Edit delivery methods. Create new delivery methods for the new delivery levels.

7.8. HOW TO SETUP FLAT DELIVERY RATE FOR DOMESTIC CUSTOMER

To set up a flat delivery rate for your domestic customer, you can follow the steps in the last section to add a delivery method. Details as below

Field	Sample Values
Internal Name	Flat Rate

Display Name	Australia Post
Base Charge ($)	5.50
Unit (kg)	1
Unit Price	0
Min Weight	0
Max Weight	9999.99
Domestic Parcel Zones	Select and add all the parcel zones to be the associated parcel zones
Countries	Do not add any countries here as you are specifying a delivery method for the domestic customers ONLY.

8. ADVERTISEMENTS/PROMOTIONS

Openstores provides the facility to create advertisement based on the pre-defined advertisement templates.

There are two templates supported:

1. Product Category Ads: You can set up advertising items for each top level Product Category. These ads items can be displayed when customer clicking on that category.
2. Group Ads: You can set up advertising items based on the pre-defined groups. These ads items can be displayed on the Home Page.

8.1. SET UP CATEGORY ADVERTISEMENTS

To Set up Advertisement for a TOP level category:

- Login admin panel with proper privilege
- Go to menu "Ads/Promotion" -> "Edit Category Ads", a list of top level categories are displayed
- To edit Ads for a category, click "show" button
- Add/Modify/Remove Advertisement items. Refer to section [8.3] on how to edit an ad.

8.2. CONFIGURATION GROUP CATEGORY

There are three advertisement groups to use for setting up your Advertisement content. Each group is associated with one or more templates. (Refer to the storefront design on how to add advertisement template into the layout.)

Group	Comment
Recommended Items	All Advertisement items under this group will be randomly picked up (one item at a time).

	This template is only available to Home Page design.
Home Items	All Advertisement items under this group will be displayed with thumbnails. Can choose to display 1 to 4 items a row. This template is only available to Home Page design.
Feature Items	All Advertisement items under this group will be randomly picked up (one at a time). Or display in the marquee scrolling style depending on the content box selected in the theme design window. This template can only be added to the left/right column.

To Set up Advertisement for a group:

- Login admin panel with proper privilege
- Go to menu "Ads/Promotion" -> "Edit Ads by Group", All three groups are displayed
- To edit Ads for a group, click "show" button
- Add/Modify/Remove Advertisement items. Refer to section [8.3] on how to edit an ad.

8.3. EDIT AN ADVERTISEMENT

There are two different types of Advertisement item.

- Product: a selected item from product database.
- Ad: any other non product related Ads

Advertisement Fields Explanation

Field	Mandatory	Comment
Advertise Type	Yes	A dropdown list contains option of "Ad" and "Product" Product: Product related Ad Ad: Other type ads The value cannot be changed when modifying the ad.
Product id	Yes (will only display when type=Product)	Product id. Use Find button to search the product and click "select". The Id Is automatically populated to the form.
Title	Yes	The title of the Ad eg Samsung X50 Notebook Pack
Sub-Title	No	The Sub-Title of the Ad
Description	Yes	Description of the Ad eg Intel Pentium M 740 1.7GHz, 512MB RAM, 60GB HDD (SATA).
Link URL	No (will only display when type=Ad)	The link to go to when clicking the Ad
Image	No (will only display when type=Ad)	To upload the image of this ad. For Product, it'll by default use product's image if there is no image uploaded here.
To Publish	Yes	Select "true" to show this ad in the storefront When Selecting "false", this ad will not appear in the storefront
Ordering	Yes	Ad displaying order

8.4. IMAGE GALLERY

You can promote your store and products using the image gallery feature.

8.4.1. Image gallery Management

- Login admin panel with proper privilege
- Go to menu "Ads/Promotion" -> "Image Gallery"

- All existing images and related information are displayed in the list.
- You can add/modify/remove images. Only Caption of an image can be modified. If you want to update the image, delete it and add a new one.
- Image display order can be re-arranged by changing the value of sort order.

8.4.2. Display Image gallery in storefront

There are two ways you can add image gallery to your storefront.

- Theme design – A system pre-defined box "Image Gallery – Horizontal Style" will appear in the theme design window's middle home page column drop down list. You can add it to your storefront and change the font style and background colour. Refer to section [5.6] for theme design.
- Static page – You can also add a link in your static page list, either showing on the left/right column or in the static page top menu. Or both. Refer to section [5.4] for static page setup.

8.5. PROMOTIONAL CODE AND GIFT CERTIFICATE

8.5.1. How does it work?

Openstores currently supports two types of promotions:

- Promotional code that offers percentage or fixed dollar amount to one or many customers
- Fixed amount gift certificate usually sent to individual customer. This can be a voucher you give away or a gift certificate customer have purchased.

By default, promotion features are disabled. You can change the configuration as described in the next section to enable them.

When gift certificate feature is enabled, customers can enter Gift Certificate Code and PIN when checking out. The certificate credit will be taken as a payment for the order. A payment entry will be automatically added into the payment list of the order.

If the customer does not have enough credit in the certificate, he/she will have to pay the order balance. If they have credit left in the certificate after paying the order, they can re-use the certificate for other orders.

You will have the option to allow your certificate recipient to check the certificate balance and purchase summary from your Storefront. You can go to "Theme-Layout"->"Website Static Pages" to add System pre-defined page "Check Gift Certificate Balance" to your static page list/self defined menu.

When promotional code feature is enabled, customers can enter the promotional code when checking out. The System will automatically re-calculate the total amount of the order based on the discount of the promotional code.

8.5.2. Promotion Configuration

You can enable/disable promotion/gift certificate features, set up certificate email template etc by changing the promotion configuration from "Ads/Promotion" -> "Promotion" -> "Promotion Configuration" in the Admin Panel.

Promotion Configuration Fields Explanation

Field	Mandatory	Comment
Enable Gift Certificate	Yes	Enable/Disable the Gift Certificate Feature
Enable Promotional Code	Yes	Enable/Disable the Promotional Code Feature
Gift Certificate Code Length	Yes	Gift Certificate code will be generated automatically if you do not specify one. This field indicates how long a gift certificate code will be. By default the length is 7.
Gift Certificate Code Prefix	No	You can define a prefix for the generated gift certificate code.
Gift Certificate PIN length	Yes	Gift certificate PIN can be generated randomly if you do not specify one. This field indicates how long the pin will be. By default, the length of pin is 8.

Certificate Email Template	No	Once customer purchase a gift certificate. You can send the certificate to its recipient via Email (E-Certificate)
		
		You can define the gift certificate template here.
		
		There are some supported variables with the templates. They will be dynamically replaced when email is sent:
		
		`${ToName}: Recipient’s Name`
		`${ToEmail}: Recipient’s Email Address`
		`${FromName}: Sender’s Name`
		`${FromEmail}: Sender’s Email`
		`${Code}: Certificate Code`
		`${Pin}: Certificate Pin`
		`${Amount}: Amount of the certificate`
		`${ExpiryDate}: Certificate’s Expiry Date`
		`${Message}: Special Message`

Additional Email Template	No	You can set up additional Email Template here, eg, Gift Voucher etc. The above-defined dynamical fields are supported here as well.

8.5.3. Promotional Codes

You can attract customers to your online store by providing them the promotional code to get the special discount. Before you send/broadcast the promotional code to your customers, you need to add it to the system.

You can edit promotional codes from “Ads/Promotion” -> “Promotion” -> “Edit Promotional Codes” in Admin Panel.

You can check the usage of the promotional code by clicking the “orders” button on an existing promotional code. All sales orders associated with the promotional code will be listed. You can also check each order’s details.

Promotional Code Fields Explanation

Field	Mandatory	Comment
Code	Yes	Promotional Code
Discount Type	Yes	Select from dropdown of the types which is either Percentage, or Amount
Discount	Yes	Discount rate of this promotion if Percentage type is selected; Or discount amount when Amount type is selected.
Min. Order Amount	Yes	The minimum order amount the discount can be applied to.
Max Usage Per Customer	Yes	How many times a customer can use this promotional code. Default value is unlimited (-1)
Comment	No	Internal description about this promotion
Expiry Date	No	Date when this promotion is expired. The blank value means this promotion will never expire.

8.5.4. Gift Certificate

Your customers can purchase a gift certificate from your online store and send it to a specified recipient. The recipient of the gift certificate can redeem the gift certificate for his/her next order at your online store.

You can also send your customers fixed amount vouchers. For example, when customers have purchased more than a certain amount products in one transaction, you may send them vouchers to use in the next orders.

You can edit Gift Certificate at “Ads/Promotion” -> “Promotion” -> “Edit Gift Certificate” in Admin Panel. By default, the system will display all valid certificates (balance greater than 0 and not expired). You can filter out the certificates using the search form. For example, enter the keywords to search certificates by customer, certificate code, or message.

After you add a certificate to the system, you can click the email button next to the certificate to send the gift certificate to the recipient via email. (E-Certificate). The email can be previewed before sending out.

You can check the usage of the gift certificate by clicking the “orders” button on an existing gift certificate. All sales orders associated with the gift certificate will be listed. You can also check each order’s details.

Gift Certificate Fields Explanation

Field	Mandatory	Comment
Sender Name	No	The name of the customer who purchase the certificate
Sender Email	No	The email address of the customer who purchase this certificate
Recipient Name	No	The name of the certificate’s recipient
Recipient Email	Yes	The email address of the certificate’s recipient
Certificate Code	No	Gift certificate Code. If you do not specify one, system will generate one automatically.
Certificate PIN	No	The PIN number of the gift certificate. If you do not specify one, system will generate one automatically.
Amount	No	The original amount of the certificate
Balance	No	Balance of the certificate. This field is only available when modifying a certificate
Expiry Date	No	Date when the certificate is expired. The blank value means the certificate will never expire.

8.6. REWARD PROGRAM

8.6.1. How does it work

If the reward program is enabled, customers are able to earn points when they purchase from your store. There are two types of reward program.

Point **Redemption - Customers can use their points to redeem selected products. The redemption can not be mixed with other purchases.**

Web Cash - Each point can be converted into dollar amount which the customers can use when they purchase any items from the store.

8.6.2. Set up reward program

To set up the reward program, login the admin panel. Select menu **'Ads/Promotion -> Promotion -> Set up reward program'.**

Select the Reward program type. Enter values into the top section of the form.

If Point Redemption is selected, enter into the “Point Redemption Setting” section. If Percentage is selected, enter into the “Web Cash Setting” section.

Field	Mandatory	Description
Reward program type	Yes	Select from options: None – Disable reward program Point Redemption – Customer points can be used to redeem selected products Wash Cash – Customer points will be converted to dollar amount and used in any purchases on the store.
Number of points for every dollar spent	Yes	For example, set to 1 will allow customers to earn 1 point for every dollar spent, set to 2 to allow 2 points for each dollar.
Number of points for referer	Yes	If an existing customer has referred a new customer to the store and the new customer has entered the existing customer’s email address in the referrer field on registration. When the new customer is approved, the existing customer can get the points specified.
Number of days between orders are completed and points are granted to customers	Yes	**You can setup the waiting period for a customer to get the reward points after the order has been set to complete in case credit card is denied or items are returned.** **When updating customers’ reward points from menu Customers -> Update Reward Points”, only orders passed the waiting period will be included.**
Web Cash Setting (when Web Cash has been selected as reward program type)		
Dollar amount for each point	Yes	For example, set to 0.5 to convert 1 point to 50 cents.
How customers spend web cash	Yes	You can choose to force customers to use web cash for the current checkout, or allow them to save for future purchase.
How to display web cash on the storefront	Yes	You can choose to display points or dollar amount on customer’s my account page.
Point Redemption Setting (When Point Redemption has been selected as the reward program type)		

Redeem order reference number prefix	Yes	The prefix for the redeem order reference.
Redeem order reference number digits	Yes	Number of digits for the redeem order reference number
Redeem order invoice prefix	Yes	The prefix for the redeem order invoice number.
Storefront reward program page message	No	The wording text for the reward program page.

9. CUSTOMER MANAGEMENT

Openstores admin panel provides you the ability to add/modify/delete/search customer.

You are also able to place orders on behalf of a customer. This is useful if some of the customers call up to order the products from your store.

Another feature needs to be mentioned is you can setup royalty discount for a customer.

There is a built-in newsletter allowing you to communicate with your customers/subscribers. However, you need to enable it before you can use this function. Refer section [3.2.12] for details on how to enable newsletter function.

9.1. CUSTOMER MANAGEMENT

You can add/delete/modify customer information of your store. To do this:

- Login admin panel with proper privilege
- Go to menu “Customer” -> “Edit Customers”
- Add/Modify/Remove customers. You cannot delete a customer if the customer has never placed orders unless you purge the order from the system.
- To view the orders from the customer, select the “orders” button next to the customer.
- Once you add the customer, your customer will receive an email for login name and password. Admin user will receive customer registration notification. This is similar to when your customer registers from your storefront.
- You can find out how the customer gets to your store by checking out the field “Customer was navigated from”.
- If you have set up the reward program, you can adjust the customer reward points in the form.

Customer Fields Explanation

Field	Mandatory	Comment
Email	Yes	Customer email address. This also is customer
Title	Yes	Customer's Title
First Name	Yes	Customer's first name
Last Name	Yes	Customer's last name
Company Name	No	Customer's company name
Telephone (Business Hours)	Yes	Customer's business hour contact number
Telephone (After hours)	No	Customer's after hour contact number
Telephone (Mobile)	No	Customer's mobile phone number
Fax	No	Customer's fax number
Postal Address1	Yes	Postal Address Of the customer
Postal Address2	No	
Suburb/Town	Yes	
State	Yes	
Postcode	Yes	
Country	Yes	
Same Address	No	When this is tick, customer's delivery address will be the same as the postal address
Delivery Address1	Yes	Delivery Address details
Delivery Address2	No	
Suburb/Town	Yes	
State	Yes	
Postcode	Yes	
Country	Yes	
Subscribe to newsletter	No	Whether this customer subscribes to newsletter. This field will be shown only when newsletter is enabled and a new customer is created. You are able to search subscribers and remove them in section [9.6].
Referrer Email	No	A registered customer who recommends this customer to you. If you have Reward program enabled, this referrer will receive the reward points once this customer is approved.

Customer Register Date	No	This shows the date when the customer registered.
Customer Status	No	There are three statuses: New/Approved/Suspended If a customer is suspended, he/she could not login in the storefront any more.
Customer was navigated from	No	System will auto detect how the registered customer got to the store.
Customer Reward Points	No	The customer's reward points. This field can be modified. The adjustment will appear in the customer's reward point statement.
Reward Points Adjustment Reason	No	It is recommended to specify the reason when the reward points are adjusted. The adjustment and reason will appear in the customer's reward point statement.
Customer Group	No	No Use at this stage
User level	No	
Credit Level	No	
Credit Limit	No	
Credit Term	No	
Purchase Limit	No	
Discount Rate	No	When This is set, this customer will get the discount in all orders she/he will place. Note: This discount only applies to products in the order. Delivery charge (if any) won't be discounted.

9.2. SEARCH CUSTOMER

You can search customer by:

- Login admin panel with proper privilege
- Go to menu "Customer" -> "Search Customer"
- Key in the search criteria and press Find button. You can search customers by keywords, and customer status. If you have reward program enabled, you can also search customer with minimum reward points.
- A list of customers matching the search criteria will be displayed. The search is based on customer's first-name, last-name, email address, company, ABN,

business hour phone, after hour phone, mobile phone etc. The more keywords you have entered the more accurate the results you will get. The search is using AND logic.

- You can then modify or delete a customer.

9.3. PLACE ORDER FOR CUSTOMER

You can place an order on behalf of your customer from the Admin Panel. This is useful if your customer calls up to place orders over the telephone and you want to record the orders in the system. You can then track the order processing status and generate invoice for your customer.

To do this,

- Login admin panel with proper privilege
- Go to menu "Customer" -> "Place Customer Order"
- Key in the search criteria and press Find button.
- A list of customers matching the search criteria will be displayed. The search is based on customer's first-name, last-name, email address, company, ABN, business hour phone, after hour phone, mobile phone etc.
- Click on the select button on the customer you want to place the order for. A new Window is popped up.
- In the new window, you will see Search product as well as Redeem link if you have Reward Program enabled.
- Click the Search Product link and Key in the key word to find the product the customer wants to order. Click Buy button. You should be able to see the product is added to shopping basket shown on left hand side.
- After you add all products, click view Basket and then follow the wizard to check out. You are also allowed to change the product price for this particular order. This is sometimes quite useful. However, you need to be aware that once the price is changed, the discount on the product will no long apply.
- You can follow the similar steps to place redeem orders for your customer if you have the reward program enabled.
- After you have completed the orders, click close window to return to the main window.

9.4. EXPORT CUSTOMER

You can export all customer details by:

- Login admin panel with proper privilege
- Go to menu "Customers" -> "Export Customers"
- To export customers into a file, select the delimiter you would like to use to separate the fields. Click Export button.

9.4.1. Exported Fields

The following are the fields exported for each customer in your store.

"ID", "EMAIL", "TITLE", "FIRST NAME", "LAST NAME", "COMPANY", "ABN", "BUSSINESS PHONE", "HOME PHONE", "MOBILE", "FAX", "ADDR1", "ADDR2", "SUBURB", "STATE", "POSTCODE", "COUNTRY", "SAME ADDRESS", "DELIVERY ADDR1", "DELIVERY ADDR2", "DELIVERY SUBURB", "DELIVERY STATE", "DELIVERY POSTCODE", "DELIVERY COUNTRY", "REGISTER DATE", "STATUS", "CUSTOMER GROUP", "DISCOUNT (%)"

9.5. NEWSLETTER MANAGEMENT

After enable newsletter function (refer to section [3.2.12]), you can add/delete/modify newsletter and send newsletters to your customers or subscribers.

Note: There are two types of subscribers used in this section: customers (subscriber also is a customer) and subscribers (non-customer subscribers).

- Login admin panel with proper privilege
- Go to menu “Customer” -> “Edit/Send Newsletter”
- Add/Modify/Remove newsletter.
- When adding a newsletter, you can select “Add” or “Add & Send” the newsletter. The difference is the later will send the newsletter to the subscribers after it is saved to the database.
- When modifying a newsletter, you can select “Save” or “Save and Send” the newsletter. The difference is the later will send the newsletter to the subscribers (if selected) after it is saved to the database.
- You can duplicate an existing newsletter then modify it.

Newsletter Fields Explanation

Field	Mandatory	Comment
Subject	Yes	The subject of the newsletter. This is shown on the newsletter email subject.
To	No	To whom this newsletter will send. There are four options: • Send to admin for test only – send this newsletter to admin for preview • Send to all subscribers • Send to subscribers who are customers • Send to subscribers who are not customers

Content	Yes	Newsletter contents. Use the HTML editor to edit the newsletter

9.6. SUBSCRIBER

9.6.1. Subscriber Management

You can search subscribers and remove them if required. To do this:

- Login admin panel with proper privilege
- Go to menu “Customer” -> “Search Subscribers”
- Key in the search keyword and select the subscribers’ type and click Find button. All matched subscribers will be listed. They can be deleted by clicking “remove” button.
- The search is based on the subscriber’s email only. If no keyword is keyed in. The full list of subscribers, based on the group selected, will be displayed.

9.6.2. Export Subscribers

You can export newsletter subscribers by selecting menu “Customers” -> “Export Subscribers”.

9.6.3. Enable newsletter in storefront

When the Newsletter feature is enabled, you will see the “subscribe to newsletter” options in the customer registration form.

If you allow your site visitor to subscribe to the newsletter without registering as your customer, you can add a separate subscription form into your storefront. You can either add the system pre-defined Newsletter subscription box into the left/right column from the design window, or create a static page with the Newsletter Subscription Template.

9.7. WISH LIST

Your customers can add items into their wish list which can later be transferred to basket items. As the store owner, you can view the wish list report from the admin panel.

9.7.1. Enable wish list feature

To enable the wish list feature

- Login admin panel with proper privilege
- Select menu “Set up “-> “Edit Configuration”. Update the value to true on “Enable wishlist feature”.
- Select menu “Theme-Layout” -> “Theme and Layouts”. Click the design button next to the active theme.

- The Wishlist box can be added to left or right column. If the Wishlist feature has been enabled, the Wishlist template will be available in the Add Content dropdown list. Add the Wishlist box to either the left or right column. Customise the box style. The Wishlist box will appear on the storefront after the customer has logged on your store.
- Once the Wishlist feature is enabled, 'Add to wishlist' button will automatically appear on the product details page. The Wishlist menu will appear as a link on 'My account' page.
- If the customer purchase an item from the wishlist, the item will be removed from the wishlist.

9.7.2. View Wishlist Report

You can view the wish list report by selecting menu "Customers" -> "Wishlist report" from your store admin panel.

10. ORDER PROCESSING

Openstores provides powerful yet easy to use order processing and tracking functionality. This section describes the processing of an order.

Any changes made on the order, eg, payment invoicing, dispatching etc will be recorded. You are able to track who had done what at what time.

10.1. PAY/REFUND FOR SALES ORDER

Once you receive the payment for your order, you need to key it into the system. Or if the customer has paid for the order and then cancel/modify the order, you might need to refund the payment to the customer. The system helps you keep track of all the changes.

Also the system allows your customer to make multiple payments to the same order.

To make a payment/refund:

- Login admin panel with proper privilege
- Go to menu “Orders” -> “Pay/Refund for Sales Order”
- A list of orders that require payment or refund is displayed. By default it will list all un-cancelled orders that are not balanced.
- Each order will have either “pay” or “refund” button associated depending on the order balance. If balance is less than zero (0), you need to refund the amount to your customer
- For each unpaid order, there is also a “Reminder” button next to it. This is used to send the payment reminder to customer. Details of payment reminder will be discussed in the next section.
- Click the pay/refund button, a payment form is shown on the right hand side. Enter the payment/refund details and click Add button.
- If the order is fully paid, it’ll disappear from the list.
- You cannot make the overpayment. Eg, the balance is $100, you cannot key in $120. If the balance is $-100, you cannot key in refund of $-110

Order Payment/Refund Fields Explanation

Field	Mandatory	Comment
Payment Method	Yes	The payment method customer has selected for this order
Description	No	Some details of the payment info, like cheque number, credit card details etc
Amount	Yes	The amount to pay/refund. When the amount is less than zero, it’s refund.
Operator comment	No	Any other comments for this payment. This will appear on the order process history.

Notify Customer	No	If true is selected, a payment received notification email will be sent to the customer.
Order details	N/A	Order details including order process tracking information

10.2. SALES ORDERS PAYMENT REMINDER

As stated in previous section, each unpaid sales order will have a "Reminder" button next to it. You can send a payment reminder to your customer by clicking on the "Reminder"

You can preview the email before you send it. The email template and subject is predefined in the email template as defined in section [3.3] and you are allowed to amend the email body and subject for this customer only.

10.3. INVOICE SALES ORDERS

You can send a printed invoice together with products when order is shipped. In the next release, you can send the invoice to your customer via email.

To generate invoice for the order:

- Login admin panel with proper privilege
- Go to menu "Orders" -> "Invoice Sales Order"
- A list of orders that can be invoiced is displayed. . By default it will list all un-cancelled orders that are not invoiced.
- Click on the invoice button next to the order you want to process.
- Add comments on right hand side form and click Generate Tax Invoice button
- A Tax Invoice is generated for the order. The Terms and conditions shown on the invoice come from Company Details. Refer to section [3.1] on how to set up company details.
- Click on the print invoice link. A print friendly window is popped up. You can then print the invoice and send it to your customer together with the goods.

(Tip: Some customers are using PDF printer that prints the invoice into PDF file. They can then attach it in an email to the customer.)

- You cannot generate the invoice more than once for the same order. But you can reprint the invoice later. Refer to section [10.9] for details.

Order Invoicing Fields Explanation

Field	Mandatory	Comment
Operator comment	No	Comments you want to add for generating this invoice. This will appear on the order process history.
Order details	N/A	Order details including order process

		tracking information

10.4. Dispatch Sales Orders

You can record the shipping information, eg, which courier you use for this order, how many boxes are shipped etc, when dispatching an order

- Login admin panel with proper privilege
- Go to menu “Orders” -> “Dispatch Sales Order”
- A list of orders that can be dispatched (including pick up) is displayed. By default it will list out all un-cancelled orders that are invoiced and not yet dispatched/picked up.
- Click on the “Pack Slip” button, you can view and print the packing slip for this order. The packing slip template is defined in section [3.3]
- Click on the dispatch button next to the order you want to process.
- Fill in the right hand side form and click Dispatch button
- The information is saved and the order status is changed to Shipped. This order is removed from the list.

Order Dispatching Fields Explanation

Field	Mandatory	Comment
Dispatch comment	No	Comments you want to add for dispatching this order. This will appear on the order process history.
Number of Boxes	Yes	How many boxes are picked/dispatched for this order
Customer Dispatch Instruction	N/A *	The instruction entered by the customer when the order was submitted.
Select a Courier	Yes *	Select a Courier you use to dispatch this order. See section [7.3] for how to set up couriers list. Australia Post is referred as a Courier
Consignment Number	No*	The Consignment Number from the courier
Notify Customer	No	If true is selected, a dispatch notification email will be sent to the customer.
Order details	N/A	Order details including order process tracking information

* These fields are displayed for delivery orders only

10.5. COMPLETE SALES ORDERS

After you dispatch the order and if everything is OK, you can set the order status to Complete

- Login admin panel with proper privilege
- Go to menu "Orders" -> "Complete Sales Order"
- A list of orders that can be set to complete status is displayed. By default it will list all un-cancelled orders that are dispatched and not yet set to complete
- Click on the complete button next to the order you want to process.
- Fill in the right hand side form and click Complete button
- The information is saved and the order status is changed to Completed. This order is removed from the list.
- If you have set the configuration "Remove Credit Card details from Sales order" to true, the credit card details will be removed from the order if any.

Order Completing Fields Explanation

Field	Mandatory	Comment
Operator comment	No	• omments you want to add for Order. This will appear on the order process history.
Order details	N/A	Order details including order process tracking information

10.6. CANCEL SALES ORDERS

You can cancel an order in some circumstances, eg, when the order has never been processed. To do this

- Login admin panel with proper privilege
- Go to menu "Orders" -> "Cancel Sales Order"
- A list of orders that can be cancelled is displayed. By default it will list out all un-cancelled orders that are not dispatched.
- Click on the cancel button next to the order you want to process.
- Fill in the right hand side form and click Complete button
- Order status is set to cancelled if this order has never been processed, ie, never been paid.
- If the order is paid or partly paid, when cancelling it, this order's status is set to Cancelled. However, there is a new order generated to remind you to do the refund.

Order Canceling Fields Explanation

Field	Mandatory	Comment

Operator comment	No	Any comments you want to add for Order, eg, the reason why it's cancelled. This will appear on the order process history.
Notify Customer	No	If true is selected, a cancelling notification email will be sent to the customer.
Order details	N/A	Order details including order process tracking information

You can undo the order cancellation. Refer to "Search Sales Order" for details.

10.7. MODIFY SALES ORDERS

You can modify an order to adjust the product quantity and price, remove the product from order, change delivery address, and to adjust the delivery charge.

- Login admin panel with proper privilege
- Go to "Orders" -> "Modify Sales Order"
- A list of orders that can be modified is displayed. By default it will list all un-cancelled orders that are not invoiced (thus, it's not dispatched)
- Click on the view button next to the order to view the order details.
- Click the Modify button to modify the order
- You can change delivery address, manually change the delivery charge, which was calculated by the system automatically.
- You can remove the product from order by setting the qty to zero. You can adjust qty or price of a product in the order.
- However you cannot add any new product to the order. This is the limitation

Order Modifying Fields Explanation

Field	Mandatory	Comment
Delivery Method	Yes	Pickup/Delivery You can switch between the two options if you allow both of them
Contact Person	No	The contact person's name. That is whom this order is delivered to
Company	No	The company name of the customer
Delivery Address1	Yes when delivery	Delivery Address details
Delivery Address2	No	

Suburb/Town	Yes when delivery	
State	Yes when delivery	
Postcode	Yes when delivery	
Country	Yes when delivery	
Adjust Delivery Fee	No	You can set up a delivery charge manually by put in a value greater than zero here, or select from the system calculated delivery options
Promotional Code	No	The promotional code for the order
Modify Order Comment	No	Any comments you want to add for Order, eg, the reason why it's cancelled. This will appear on the order process history.
Notify Customer	No	If true is selected, a notification email will be sent to the customer.
Price	No	The price of the product (tax included). Please note: this price will be the final price of a product. The system will not do the re-calculation of the discounts, including bulk discount, special, global discount etc.
Quantity	No	If you set a product's qty to zero. This product is removed from the order. You can adjust the quantity of a product in the order. However, you cannot add any new product into this order
Order details	N/A	Order details including order process tracking information
Add more items	N/A	You are allowed to add more items to an existing sales order

10.8. SEARCH SALES ORDER

You can search Sales orders in your database and also export those orders to excel file

- Login admin panel with proper privilege
- Go to menu "Orders" -> "Search Sales Order"

- Enter search criteria to search the orders. You can search the order based on order status as well. To do this, select the proper order status on the Order Status boxes. For example, if you want to search all un-cancelled full paid orders, select Balanced to Yes and Cancelled to No then click Find
- All Orders matching the searching criteria will be returned. You can then View the order, Modify the order, or Purge the order from the database
- If an order is cancelled, you can undo the cancellation, Please note there is no email sent to customer when you undo the order cancellation.

To export the orders, select an output format then click “export”. You will be asked to save the file locally.

There are two type of output currently supported.

“Basic” will export the order details in a generic form we have defined.

“MYOB (MISC)” will export the order details in the format required by MYOB.

10.9. REPRINT INVOICES

You can reprint the invoice for your customer.

- Login admin panel with proper privilege
- Go to menu “Orders” -> “Reprint Invoice”
- Enter search criteria to find the invoice you want to reprint
- A number of invoices matching the search criteria are displayed
- Click View to view the invoice. Then click Print Invoice to reprint the invoice
- The reprinted invoice will have a mark (REPRINT)

10.10. CUSTOMISE SALES ORDER PROCESSING

The system sets up the default order processing steps when the store is first created. However, the sales order processing steps can be customised to your needs. Select menu “Orders” -> “Order processing preferences” where you can choose what orders to appear at each order processing step.

Some custom order preference examples:

Example 1

When the following are selected for "Query orders to pay/refund", the system will display orders that have non-zero balance, not completed, and not cancelled orders under menu “Orders” -> “Pay/Refund sales orders”.

Balanced: No

Invoiced: N/A

Dispatched: N/A

Completed: No

Cancelled: No

Example 2

When the following are selected for "Query orders to invoice", the system will display orders that have zero balance, have not been invoiced, not completed, and not cancelled orders under menu “Orders” -> “Invoice sales orders”.

Balanced: Yes

Invoiced: No

Dispatched: N/A

Completed: No

Cancelled: No

Example 3

When the following are selected for "Query orders to dispatch", the system will display orders that have zero balance, have been invoiced, not dispatched, not completed, and not cancelled orders under menu “Orders” -> “Dispatch sales orders”.

Balanced: Yes

Invoiced: Yes

Dispatched: No

Completed: No

Cancelled: No

All orders can be found via the search orders function (Orders -> Search sales order)

11. PURCHASE ORDER

When you enable purchase order functionality, you will be able to see menu item "Purchase" in the menu bar. This will allow you to record your purchases from your suppliers. You can also adjust your stock here.

11.1. PLACE PURCHASE ORDER

You can create the purchase order and then send to your supplier. You can save the purchase order and modify it as many times as you want before submitting it.

- Login admin panel with proper privilege
- Go to menu "Purchase" -> "Place Purchase Order"
- All purchase orders created (before submitted to the suppliers) is displayed.
- You can Create/Modify/Remove purchase order. The remove will purge the order from database permanently.
- There are three tabs in each order,

Purchase Order Fields Explanation

Field	Mandatory	Comment
Details: In this section, you will key in all details of this order except for product items		
PO Number	N/A	An auto-generated purchase order number. The value is only available to Modify function and you cannot change the value.
Supplier	Yes	You can select the supplier to whom you want to place this order.
Description	No	Some additional information for this order
Payment Method	Yes	How you are going to pay your supplier
Delivery Method	Yes	You can select "Deliver" or "Pick up"
Delivery Charge	No	This price should include tax.
Contact Person	No	The person your supplier will contact to
Delivery Address1	No	Where your supplier should deliver this order to you
Delivery Address2	No	
Suburb/Town	No	
State	No	
Postcode	No	
Country	No	

Courier	No	The courier to deliver this order.
Consignment number	No	The consignment number from courier
Items: In this section, you will add in the product and qty you want to order.		
Keywords	Yes	The keywords used to search the products you want to purchase Click Find button will return all matching products except those already in the purchase item list. You can select the product you want to purchase and click the “Add to Purchase Order” button. Similar to the shopping cart, you can update the price and qty for each Item.
Summary: This tab will show you the summary of this purchase order		

11.2. SUBMIT PURCHASE ORDER

Once you have entered your order items and you are ready to send the order to your supplier, you need to submit the purchase order.

Once you submit the order, you cannot change the purchase order any more.

In future release, an order email will be sent to your supplier automatically once you submit the order.

- Login admin panel with proper privilege
- Go to menu “Purchase” -> “Submit Purchase Order”
- Lists of orders that are ready to be submitted are displayed.
- Click on the Submit button next to the order you want to process.
- Fill in the Comment and click Submit button
- The information is saved and the order status is changed. This order is removed from the list.

Order Completing Fields Explanation

Field	Mandatory	Comment
Comment	No	Comments you want to add for Order. This will appear on the order process

		history.

11.3. SEARCH PURCHASE ORDER

You can search Purchase orders in your database.

- Login admin panel with proper privilege
- Go to menu "Purchase" -> "Search Purchase Order"
- Enter search criteria to search the orders. At the moment, you can search the order based on order status only.
- All Purchase Orders matching the searching criteria will be returned. You can then view the order details

11.4. PURCHASE ORDER STOCK IN

When the ordered stock comes back from your supplier, you can update the stock qty in the system. Openstores allows you to process stock multiple times for the same order, in case your supplier has the back order.

Once you receive all the stock for the order, system will automatically mark the purchase order "completed".

- Login admin panel with proper privilege
- Go to menu "Purchase" -> "Purchase Order Stock In"
- All submitted orders that have not been set to "completed" status will display.
- Click "stock in" button next to the purchase order you want to update, the right side form is populated. You will see how many stock received previously under column "Received"
- Fill in the new arrived stock qty for each item and click "Save" button. If you have received all stock for this order, the order is removed from the list.

11.5. STOCK ADJUSTMENT

If a product's real stock qty does match the qty in the system and you want to correct them in the system. Or, simply you want to update the system for the stock you receive from your supplier without put in the purchase order, you can use Stock Adjustment.

- Login admin panel with proper privilege
- Go to menu "Purchase" -> "Stock Adjustment"
- Search the product you want to adjust stock qty

- All matching products are listed. Click on “adjust stock” button.
- Type in the qty of stock you want to adjust. If you type in negative number, the stock qty will be reduced from the system.

12. MARKETING

12.1. FEEDS AND SITEMAP

12.1.1. Sitemap

At this release, only Google sitemap is supported. To create google sitemap,

- Login admin panel with proper privilege
- Go to menu “Marketing” -> “Feeds and Sitemap”
- Click on “generate” button next to Good Sitemap. The sitemap file will be generated at http://yourURL/sitemap.xml.

12.1.2. Product Feed

We are supporting four Product Feeds: Shopping.com, GetPrice.com.au (AU only), MyShopping.com.au (AU only) and Shopbot.com.au (AU only).

To create the product feed:

- Login admin panel with proper privilege
- Go to menu “Marketing” -> “Feeds and Sitemap”
- Select a product feed type by selecting the radio button.
- Click on “generate” button next to Feed. The feed file will be generated. The feed file URL is listed next to each feed type.

12.2. AFFILIATE PROGRAM

12.2.1. What is Affiliate Program

Affiliate program, also called associate program, is arrangement in which an online merchant Web site pays affiliate Web sites a commission to send them traffic. These affiliate Web sites post links to the merchant site and are paid according to a particular agreement. This agreement is usually based on the number of people the affiliate sends to the merchant's site, or the number of people they send who buy something or perform some other action. Some arrangements pay according to the number of people who visit the page containing their merchant site's banner advertisement. Basically, if a link on an affiliate site brings the merchant site traffic or money, the merchant site pays the affiliate site according to their agreement. Recruiting affiliates is an excellent way to sell products online, but it can also be a cheap and effective marketing strategy; it's a good way to get the word out about your site.

12.2.2. How IntelliWorks affiliate program works

IntelliWorks affiliate program is based on pay-per-sale arrangements. Openstores owner pays the affiliates only when the customers they sent have done the purchases on the store website. The affiliates will not receive the commissions until the orders are set to Complete.

12.2.2.1. Commission Status

Affiliate commission has three statuses: Pending, Ready To Pay, and Paid. Affiliates are able to track the statuses of their commissions by logging onto the Affiliate Area.

Pending status: When the customers sent by the affiliate has placed orders on the store website. Commissions generated by the orders will be in the Pending status.

Ready To Pay status: Commissions will remain Pending until the order is set to complete. This is be done by going to the Admin Panel, selecting Orders -> Complete Sales Orders. Orders can only be set to complete after it has been invoiced.

Paid status: Store Admin selects Affiliates -> Commissions Ready To Pay from the Admin Panel. Then select to pay commissions to an affiliate. This will mark all associated commissions of the affiliate to Paid status. Note: The Store Owner should send the Payment (e.g. Cheque or Deposit) to the affiliate manually.

12.2.2.2. Affiliate Referrers

IntelliWorks affiliate program supports up to 2 levels referrer commissions. If Affiliate A is the referrer of Affiliate B who is the referrer of C, when Affiliate C gets the affiliate commission, Affiliate A and B will also receive the referrer commissions based on the amount of Affiliate C’s commission.

For example, if you specified the commissions as follows:

Affiliate Commission – 10%

Referrer Commission –10%

Level 2 Referrer Commission – 5%

If a customer sent by Affiliate C buys $100 products (not including the delivery charge) from the store, Affiliate C will receive $10 commission, Affiliate B gets $1, and Affiliate A gets $0.5.

The level of referrers supported and the commission rates are configurable in section [12.2.3.1]. The commission rate, including referrer commission rate, is totally based on your industry and your marketing strategy.

12.2.2.3. Affiliate Tracking Methods

IntelliWorks supports two tracking methods: Session based tracking, and Cookie based tracking. When cookie based tracking is selected, cookie age can be specified.

12.2.3. How to set up affiliate program

This section will provide the instructions on how to set up the Affiliate Program. Follow the three simple steps to set up your Affiliate Program.

12.2.3.1. Step 1, Affiliate Configuration

At this step, you will enable Affiliate Program, set up the global configurations for your Affiliate Program.

- Login into admin panel with proper privilege
- Go to menu “Marketing” -> “Affiliates” -> “Affiliate Configuration”
- Enter values into the form, and then click Save.

Affiliate Configuration Fields Explanation

Field	Mandatory	Comment
Enable Affiliate Program	Yes	true – Affiliate Program enabled false – Affiliate Program disabled
Affiliate Approval Required	Yes	true – Affiliates will need to be approved to be able to login the Affiliate Area after signing up. false – Affiliates are approved automatically after signing up. The default value is false.
Default Tracking Method	Yes	Affiliate’s default tracking method after signing up. Two tracking methods are available: Cookie based and Session based.
Default Cookie Age	Yes when Cookie based tracking is selected	Cookie age for Cookie based tracking method
Default Commission Type	Yes	Only one type is supported in this version – Total Amount of Basket Content. Affiliate commission is based on the total amount of basket amount.
Referrer Levels	Yes	Used to define how to pay the referrer

		commissions. 0 – Only pays commissions to affiliates who send customers directly. 1 – Pays affiliate who sends customers, as well as his/her referrer. 2 – Pays the affiliate who sends customers, also pays the affiliate's referrer, and the referrer's referrer.
Default Affiliate Commission	Yes	The default percentage of the Total purchase basket amount, pay to the Affiliates who send customers.
Default Referrer Commission Rate	Yes when Referrer Levels is 1	The default percentage of the commission pays to the referrer of the Affiliate who sends customers.
Default Level 2 Referrer Rate	Yes when Referrer Levels is 2	The default percentage of the commission pays to the referrer of the Affiliate's referrer.
Default Minimum Payment Amount	Yes	Default minimum payment amount. Your affiliate will see the amount from Affiliate Area, so they know they will not receive payment when their total commission amount is under this value.
Affiliate Admin Email	Yes	This email is used to: • Receive email notification when new affiliate signs up. • Be a test Affiliate account for you to test the affiliate program. IntelliWorks will not charge platform commission on the commissions belonging to this email account.
Affiliate Register Form Text	No	The text specified here will be displayed above the affiliate registration form when affiliate signs up.
Affiliate Feedback Page Text	No	The text specified here will be displayed after the affiliate has successfully signed up.
Welcome Email Template	No	You can pre-define the email template used to send welcome emails to your affiliates. There are some variables supported with the templates. They will be dynamically replaced as follows when email is sent. ${Title} – replaced with affiliate title ${FirstName} – replaced with affiliate first name

		${LastName} – replaced with affiliate last name ${Email} – replaced with affiliate email address ${Password} – replaced with affiliate's login password, this will NOT be replaced at preview.
Decline Email Template	No	Pre-defined email template for sending emails to the affiliates. Variables defined above can be used here.

12.2.3.2. Step 2, Edit Affiliate Payment Methods

You will need to specify your supported payment methods for the affiliate commission payment. The affiliates will be able to choose one of them as their preferred commission payment method after they login the Affiliate Area.

To edit the Affiliate Payment Methods,

- Login into admin panel with proper privilege
- Go to menu "Marketing" -> "Affiliates" -> "Affiliate Payment Methods"

Affiliate Payment Methods Fields Explanation

Field	Mandatory	Comment
Name	Yes	The name of the payment method which will be displayed in the drop down list in Edit Affiliate Form. E.g. Pay by cheque, Pay by Paypal, etc.
Description	Yes	Enter the details you need from your affiliate when this payment method is selected. For example, with Pay by Paypal, you will enter "Please provide your Paypal account."
To Publish?	Yes	true – this payment method is available to your affiliates. false – this payment method will not be showing in the Edit Affiliate Form.
Ordering	No	The display order of the payment method

12.2.3.3. Step 3, Create the Text and Image Banner

There are three types of banners your affiliates can place on their web site. They are: Text Banners, Image Banners, and Product Banners. You only need to pre-create the text banners and image banners.

Product banners are dynamically created by your affiliates. Refer to section [13.4] for details for creating Product banners.

To create a text or image banner,

- Login into admin panel with proper privilege
- Go to menu “Marketing” -> “Affiliates” -> “Edit Banners”
- In the Add Affiliate Banner form, select the Banner Type.
- Enter the Internal Name.
- If Image banner type is selected, you need to browse and select an image file. Enter the optional image alt tag, and optional text. Select the image position to the optional text.
- If Text banner type is selected, enter the banner title and text
- Press Add button to save the banner.
- You can preview a banner by selecting the view button.
- You can modify a banner by selecting the modify button.
- You can remove a banner by selecting the remove button.

Affiliate Banner Fields Explanation

Field	Mandatory	Comment
Banner Name	Yes	Name of the banner. Will appear in the banner name list when affiliates come to choose the banner at the Affiliate Area.
Banner Type	Yes	Type of the banner – text or image
To Publish	Yes	Indicates whether this banner will be available to the affiliates.
Banner Image	For image banner only	Image file you would like to show in the banner
Image Alt Tag	For image banner only	Tool tip text when mouse is moved over the banner image.
Text Optional	For image banner only	The additional text for the image banner
Image Position	For image banner only	Image position. Top – image will be displayed above the optional text. Bottom – image will be displayed beneath the optional text Left – Image will be displayed to the left of the optional text. Right – image will be displayed to the right of the optional text.
Title	For text banner only	Title of the text banner

Text	For text banner only	Text of the text banner

12.2.3.4. Edit the Affiliates

You will receive the email notification when a new affiliate signs up. If new affiliates require approval from the store admin (depending on the Affiliate Configuration setting), you will need to go to the Edit Affiliate form to approve the new affiliates and send the welcome email to them.

You can also change the individual affiliate commission rate and the affiliate's tracking method.

To create or edit an affiliate,

- Login into admin panel with proper privilege
- Go to menu "Marketing" -> "Affiliates" -> "Edit Affiliates"
- A list of existing affiliates will be displayed. You can filter the affiliate list by using the affiliate search form.
- To create a new affiliate from the Admin Panel, enter the values into the affiliate form, press Add to save the affiliate.
- To modify an existing affiliate, select the modify button.
- To reset password for an existing affiliate, select the "reset pwd" button.
- To send emails to an affiliate, select the email button.
- To remove the affiliate, select the remove button.

Edit Affiliate Fields Explanation

Field	Mandatory	Comment
Email	Yes	Affiliate email, also used as the Affiliate Area login name.
Password	Yes	Only appear when creating a new affiliate from Admin Panel.
Confirm Password	Yes	Only appear when creating a new affiliate from Admin Panel.
Title	Yes	Affiliate title
First Name	Yes	Affiliate first name
Last Name	Yes	Affiliate last name
Web Address	No	Affiliate's web address
Company Name	No	Affiliate's company name
Tax Number	No	Affiliate's ABN, or tax file number
Referring Affiliate ID	No	The affiliate's referrer ID, who has to be an existing affiliate.

Address 1	Yes	Affiliate's address line 1
Address 2	No	Affiliate's address line 2
Suburb/Town	Yes	Affiliate's address suburb
State	Yes	Affiliate's address state
Postcode	Yes	Affiliate's address postcode
Country	Yes	Affiliate's address country
Telephone	Yes	Affiliate's contact phone number
Mobile	No	Affiliate's mobile number
Fax	No	Affiliate's fax number
Payment Method	Yes	Affiliate's preferred commission payment method
Payment information	No	Details related to the selected payment method.
Status	No	Affiliate Status New – new affiliate, can not login Affiliate Area Approved – affiliate approved, can login Affiliate Area Declined – affiliated declined, can not login Affiliate Area Suspended – affiliate suspended, can not login Affiliate Area
Tracking Method	Yes	Tracking method for the customers sent by the affiliate. Cookie based tracking Session based tracking
Cookie Validity	Yes when cookie based tracking is selected	Cookie age for the cookie based tracking method
Commission Type	Yes	Only Total Amount of Basket Content is supported, which means commission is based on the total product purchased amount. Delivery charges are not included.
Commission Rate	Yes	The percentage of the total purchase product amount, as commission pay to the affiliate.
Commission Rate As Referrer	Yes when referrer level is 1 or 2	Commission rate when you are a referrer
Commission Rate as Level 2	Yes when referrer	Commission rate when you are a level 2 referrer

Referrer	level is 2	

Reset Affiliate Password Fields Explanation

Field	Mandatory	Comment
New Password	Yes	The new password
Confirm New Password	Yes	Confirm the new password

Note: You will need to inform your affiliate the new password after you reset it.

Send Affiliate Email Fields Explanation

Field	Mandatory	Comment
Email Template	No	The selected template will be displayed in the email body editor. Without Template – no template selected Welcome Affiliate Email Template – the welcome email template you have specified in Affiliate Configuration Decline Affiliate Email Template – the decline email template you have specified in Affiliate Configuration
Subject	No	Email subject
Body	No	The email body editor

Buttons:

Preview- click to preview the email body

Send – send the email to the affiliate

12.2.3.5. Affiliate Commissions

Openstores system has provided the facility for the store owner to –

- Track commissions of an order
- Track commissions by affiliates
- Track commissions based on the commission status
- Show ready-to-pay commission report
- Record commission payments
- Search payment history, drill down payment associated commissions and orders.

12.2.3.6. Commission Report

To view the commission report,

- Login into admin panel with proper privilege
- Go to menu "Marketing" -> "Affiliates" -> "Commission Report"
- Enter the search criteria and click Find button to show the commission report.

Search Criteria Fields Explanation

Field	Mandatory	Comment
Affiliate	No	Search commissions for all or one of the affiliates
Commission Status	No	Search commissions by status
Order Reference#	No	Enter the order reference number, or leave it blank.
Order From Date	No	Enter the order created date to search from, or leave it blank.
Order To Date	No	Enter the order created date to search to, or leave it blank.

12.2.3.7. Commissions Ready to Pay

This report shows the current ready to pay commissions for all affiliates. Only the commissions in Ready-to-Pay status will be aggregated for each affiliate. The "pay" button allows you to record the payment by adding it to the payment history.

Note: Payment to the affiliates should be done manually before adding the payment to the payment history.

To access the commissions ready to pay report,

- Login into admin panel with proper privilege
- Go to menu "Marketing" -> "Affiliates" -> "Commission Ready to Pay"
- The affiliate ready to pay commissions are listed. Pay button is displayed next to the affiliate commissions when it's greater than the minimum payment amount of the affiliate.
- Click the Pay button to see the Add Commission Payment form.
- In the Add Commission Payment form, select the payment method, and add any comment for your future reference.
- Select the Add button to save the payment into the payment history.

12.2.3.8. Payment History

To view the affiliate Payment History,

- Login into admin panel with proper privilege
- Go to menu "Marketing" -> "Affiliates" -> "Payment History"

- Select affiliate
- Enter the payment date range, or leave the date fields blank
- Click the Find button to view the payment list
- Select the “view” button on one of the payments to drill down to the details.

13. AFFILIATE AREA

Your affiliate can manage their profiles, create banners, and check their commissions and payments after logged into Affiliate Area.

13.1. UPDATE DETAILS

Affiliates can change their profiles after they have logged in the Affiliate Area

Affiliate Update Details Fields Explanation

Field	Mandatory	Comment
Email	Yes	Affiliate email, also used as the Affiliate Area login name.
Title	Yes	Affiliate title
First Name	Yes	Affiliate first name
Last Name	Yes	Affiliate last name
Web Address	No	Affiliate's web address
Company Name	No	Affiliate's company name
Tax Number	No	Affiliate's ABN, or tax file number
Referring Affiliate ID	No	The affiliate's referrer ID who has to be an existing affiliate.
Address 1	Yes	Affiliate's address line 1
Address 2	No	Affiliate's address line 2
Suburb/Town	Yes	Affiliate's address suburb
State	Yes	Affiliate's address state
Postcode	Yes	Affiliate's address postcode
Country	Yes	Affiliate's address country
Telephone	Yes	Affiliate's contact phone number
Mobile	No	Affiliate's mobile number
Fax	No	Affiliate's fax number
Payment Method	Yes	Affiliate's preferred commission payment method
Payment information	No	Details related to the selected payment method.

Tracking Method	N/A	Tracking method for the customers sent by the affiliate.
Cookie Validity	N/A	Cookie age for the cookie based tracking method
Commission Type	N/A	Only Total Amount of Basket Content is supported, which means commission is based on the total product purchased amount. Delivery charges are not included.
Commission Rate	N/A	The percentage of the total purchase product amount, as commission pay to the affiliate.
Commission Rate As Referrer	N/A Appears when referrer level is 1 or 2	Commission rate when you are a referrer
Commission Rate as Level 2 Referrer	N/A Appears when referrer level is 2	Commission rate when you are a level 2 referrer
Minimum Payment	N/A	Commission will not be paid to the Affiliate when it is under this amount.

13.2. CHANGE PASSWORD

Affiliates can change their passwords after they have logged in the Affiliate Area

13.3. GET TEXT/IMAGE BANNER

This is where affiliates get the store pre-created banners. Banners can be Text or Image type.

When this menu is selected, a list of pre-created banners will be displayed. Select one of the banners to view and get the banner code.

Affiliates can get the banner code as Javascript or Iframe. Click the Preview button to see the banner. Then click the “Get Code” button to refresh the source code. Copy the banner code and past it to the web pages you want to display the banner.

13.4. CREATE PRODUCT(S) BANNER

Apart from the pre-created text/image banner, Affiliates can create custom product banners by selecting this menu.

To create a product banner,

- Enter search keywords into the Banner Product Search Form. Click the Find button to get a list of search results.
- Click the product name to view the product details. Or click the Select button to add the product into the banner.
- Repeat last two steps until all products are added.
- Click the Up or Down buttons to change the order of the products in the banner. Or click the Remove button to remove a product from the Banner.
- Click Next button to go to the Get Source Code form
- In the Get Source Code form, you will have the options to –
  - Display or not to display product description in the banner;
  - Display or not to display product thumbnails in the banner;
  - Change thumbnail display position when it is displayed;
  - Select the number of products displayed in a row.
- Select banner code type – Javascript or Iframe.
- Click Preview button to see the banner display
- Click Previous button to go back to change the product selection
- Click Get Code to view the source code of the banner
- Copy and paste the banner source code into web pages where you want to place the banner.

13.5. COMMISSIONS

This report allows affiliates to –

- Search commissions by order number
- Search commissions by commission status
- Search commissions by order dates
- View the commissions and the associated orders

13.6. PAYMENTS

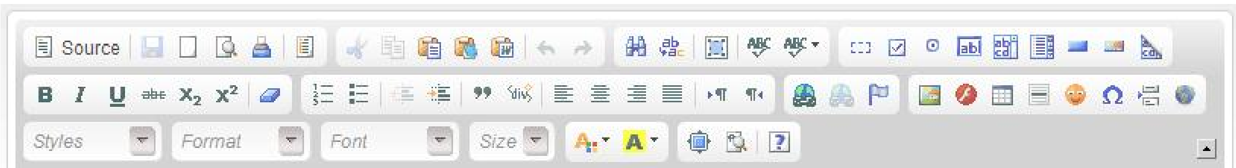
This report provides the facility to search the affiliate payment history, and view the associated commission details of a selected payment.

14. APPENDIX B: WYSIWYG EDITOR

We have adopted a third party WYSIWYG (What You See Is What You Get) html editor (ckEditor) in Openstores system to help you create your custom content.

This section gives the brief information of the tool. For more details, refer to http://docs.cksource.com/CKEditor_3.x/Users_Guide

14.1. TOOL OVERVIEW



14.2. INSTRUCTION OF TOOL BAR

Below you will find an overview of all features available in the default CKEditor toolbar.

Toolbar Button	Description
Source	View or edit the source code of the document (for advanced users). See Document Source.
	Save the contents of CKEditor and submit its data to the server, when CKEditor is placed inside an HTML form. See Saving Content.
	Clear the editing area and create a new page. See Creating a New Page.
	Show a preview of the document in the shape that will be displayed to end users. See Document Preview.
	Select a layout template. See Templates.
	Cut the selected text fragment to the clipboard. See Cut.
	Copy the selected text fragment to the clipboard. See Copy.
	Paste content copied to the clipboard along with formatting. See Paste.
	Paste content copied to the clipboard without formatting. See Paste as Plain Text.
	Paste content copied from Microsoft Word or similar applications along with formatting. See Paste from Word.

	Print document contents. See Printing.
	Insert a page break. This only impacts the printed version. See Page Breaks.
	Check spelling of the document text or turn on the Spell Check As You Type (SCAYT) feature. See Spell Checking.
	Undo or redo the most recent action performed. See Undo and Redo.
	Find a word or phrase in the document. See Find.
	Find and replace a word or phrase in the document. See Replace.
	Select all contents of the document. See Text Selection.
	Remove the formatting of the selected text. See Remove Format.
	Maximize the editor in the browser window. See Resizing and Maximizing CKEditor.
	Highlight all block-level elements in the document. See Show Blocks.
	Show information about CKEditor. See CKEditor Version.

Text Styling

Toolbar Button	Description
B I U abc	Apply **bold**, *italic*, underline or ~~strike-through~~ formatting to the text. See Bold, Italic, Underline, and Strike-through.
$X_2 X^2$	Apply superscript or subscript formatting to the text. See Subscript and Superscript.
Styles	Apply pre-defined combinations of various formatting options to block and inline elements. See Formatting Styles.
Format	Apply pre-defined block-level combinations of various formatting options. See Paragraph Format.
Font	Change the typeface of the text. See Font Name.
Size	Change the font size of the text. See Font Size.
	Change the color of the text. See Text Color.
A	Change the background color of the text. See Background Color.

Text Layout

Toolbar Button	Description
	Increase or decrease text indentation. See Text Indentation.
	Format a block of text as indented quotation. See Block Quote.
	Create a new `div` element in document source. See Creating Div Container.
	Set text alignment (left, centered, right or justified). See Text Alignment.
	Set text direction as from left to right (default value for most Western languages) or from right to left (languages like Arabic, Persian, Hebrew).
	Insert a divider line (horizontal rule) into the document. See Horizontal Line.

Rich Text

Toolbar Button	Description
	Create a numbered or bulleted list. See Creating Lists.
	Create or remove a hyperlink in the text. These features may also be used to manage file uploads and links to files on the web server. See Links, E-Mails and Anchors.
	Insert a link anchor to the text. See Anchors.
	Insert an image into the document. See Inserting Images.
	Insert an Adobe Flash object into the document. See Inserting Flash.
	Create a table with the defined number of columns and rows. See Creating Tables.
	Insert an emoticon image (smiley or icon). See Inserting Smileys.
	Insert a special character or symbol. See Inserting Special Characters.
	Insert an inline frame (`iframe`). See Inserting IFrames.

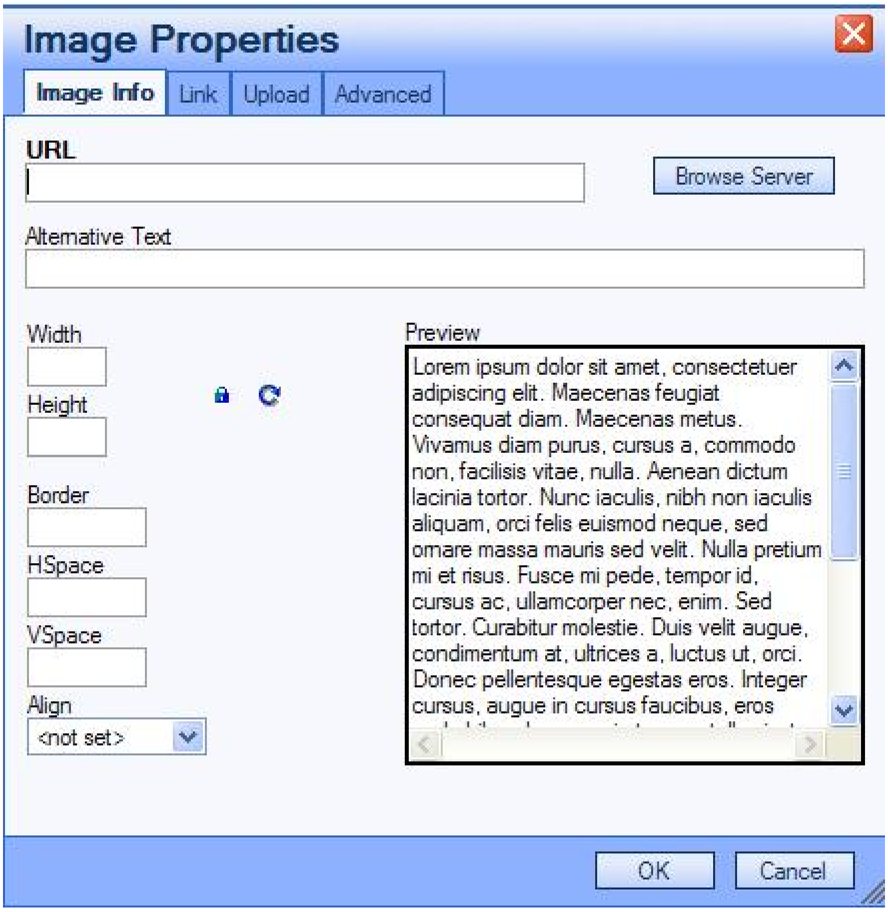
Form Elements

Toolbar Button	Description
	Insert a new form into the document. See Creating Forms.
	Insert a checkbox into the document form. See Checkbox.
	Insert a radio button into the document form. See Radio Button.
	Insert a text field into the document form. See Text Field.
	Insert a multi-line text area into the document form. See Textarea.

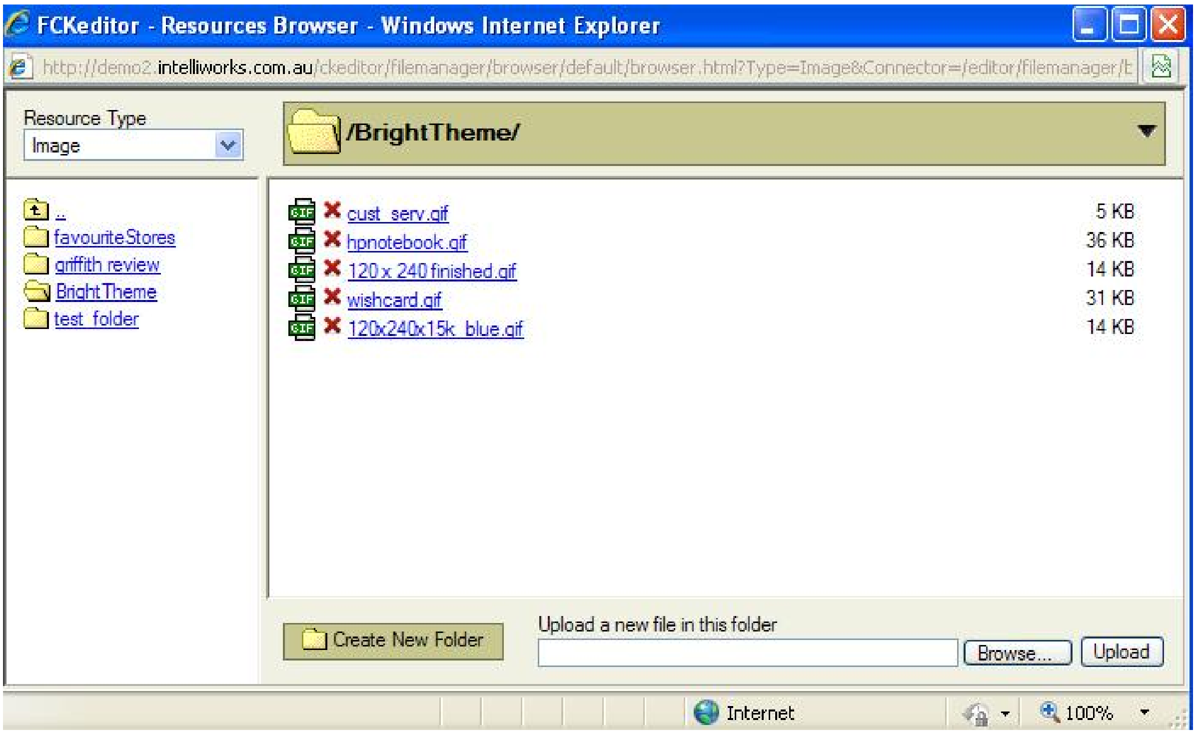
	Insert a selection field into the document form. See Selection Field.
	Insert a button into the document form. See Button.
	Insert an image button into the document form. See Image Button.
	Insert a hidden field into the document form. See Hidden Field.

14.3. INSERT/UPLOAD IMAGE

You can insert the image file into your html content. To do this, move the cursor to where you want to insert the image then click on the button. A new window is shown as



Click on "Browse Server" button, a new window is shown to allow you to select the image file you want.



If the image file is not in the list and you want to upload it from your PC to the web server, click “Browse” button and select the file from your PC then click “Upload” button.

You can also organize your images in different folders. To create a folder, click on the “Create New Folder” button and type in the folder name in the popup window then click “OK”.

To upload an image to a particular folder, navigate to the folder and upload.

To delete a file/folder, click icon.