All About Catalog

Contents

Browse ................................................................................................................................. 2

Add a Product ..................................................................................................................... 5

Basic Info ......................................................................................................................... 5

Display Options .................................................................................................................. 6

Taxes & Shipping ............................................................................................................... 6

Inventory Control .............................................................................................................. 7

Descriptions ..................................................................................................................... 8

Left Side Menu .................................................................................................................. 9

Product Details .................................................................................................................. 9

Images and Assets .............................................................................................................. 9

Options and Variants ......................................................................................................... 12

Digital Goods .................................................................................................................... 12

Kits/Bundles ..................................................................................................................... 13

Volume Discounts ........................................................................................................... 14

Pricing Rules ..................................................................................................................... 14

Similar Products ............................................................................................................... 15

Product Accessories ....................................................................................................... 17

Categories ........................................................................................................................ 18

Product Template ............................................................................................................ 18

Subscriptions ................................................................................................................... 19

Preview! .............................................................................................................................. 19

Search .............................................................................................................................. 19

Find Kits ........................................................................................................................... 20

Product Templates .......................................................................................................... 21

Product Reviews .............................................................................................................. 23

Gift Wrap .......................................................................................................................... 24
Browse
Clicking on “Browse” from the “Catalog” menu will open the categories of your catalog. Categories are broad descriptions of a group of products such as t-shirts, books, or conferences. From this page, you can add a new category or search the categories.

To search the category, enter the appropriate keyword in the “Keyword” field. You can also use an asterisk as a wildcard. You can search categories, webpages, links, and products within your catalog.

To sort the categories in the “Contents of Catalog” section, click the “Sort Category” button. Click on the “Quick Sort” drop-down menu to select alphabetized ascending or descending. You can also manually adjust the order by clicking on a category to highlight it and then using the “^” or “v” buttons to move the categories. Doing this will change how the categories appear in the “Contents of Catalog” section.
To add a new category, you can simply type the name of the category into the “New Category” field and click the “Add” button. You can also add a new category by pressing the “Category” icon under “Add Item.”

Adding a category by clicking the “Category” folder icon under “Add Item” gives you more options for the category like visibility, personalized thumbnail, summary, description, and HTML. Clicking on a category under the “Select Category” section allows you to create subcategories. To navigate back to the top category, simply click on “Browse” from the “Catalog” menu.
Visibility has three options: public, hidden, and private. Public categories are accessible and display when navigating the site and search results. Hidden categories are only accessible by direct link and will not appear in site navigation or search results. Private categories cannot be accessed by anyone and are not visible in the retail store – even with a direct link.

The thumbnail specifies which picture will display on some pages. You can leave this blank or use the binoculars to navigate to and Images and Assets (See “Images and Assets” from the “All About Manage Quick Guide” for more information). Alt Text is the text that displays when you mouse over the image and can be left blank.

The summary is used to provide a description of the category to the customer. The description is used by some display pages to show a detailed description or HTML content and can be left blank. HTML HEAD is used for keywords and metadata. As with many of these options, it can be left blank. Display page and theme should both be left on “Use Store Default.”

Click the “Finish” button when complete.

Once categories have been added, you can begin adding products.
Add a Product
To add a product, click on the appropriate category from the “Contents of Catalog” page. Once the category page comes up, the “Add Item” section will have more options than it did on the “Contents of Catalog” page.

Click the “Product” icon under the “Add Item” section. Currently, the options of “Webpage” and “Link” are unavailable to be utilized correctly.

Clicking the “Product” icon will bring up the “Add Product” to the “Category Name” page. The title of the page will vary due to the category it’s being added to, but it does allow you to double check that you’re adding the product to the appropriate category. There are five sections in which you will add information about your product.

Basic Info

<table>
<thead>
<tr>
<th>BASIC INFO</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Name:</td>
<td></td>
</tr>
<tr>
<td>Price:</td>
<td>0.00</td>
</tr>
<tr>
<td>Manufacturer:</td>
<td>new</td>
</tr>
<tr>
<td>Gift Certificate:</td>
<td></td>
</tr>
<tr>
<td>Prohibited:</td>
<td></td>
</tr>
<tr>
<td>SKU:</td>
<td></td>
</tr>
<tr>
<td>MSRP:</td>
<td></td>
</tr>
<tr>
<td>Manufact. Part No.:</td>
<td></td>
</tr>
<tr>
<td>Variable Price:</td>
<td></td>
</tr>
<tr>
<td>Hide Price:</td>
<td></td>
</tr>
</tbody>
</table>

In the “Name” field, enter the name of the product as you would like to see it displayed to your customer. In the “Price” field, enter the price of the product prior to any modifications or adjustments. In the “Manufacturer” field, you may enter the manufacturer’s name or press “new” to enter a new manufacturer. This field is not required. Check the “Gift Certificate” box if you would like for this product to be a gift certificate for purchase by a customer.

Do not check “Prohibited” as it is not available since eCommerce uses the State’s pay gate.
In the “SKU” field, enter a stock keeping unit number or a unique identifier. In the “MSRP” field, enter the manufacturer’s suggested retail price. In the “Manuf. Part No.” field, enter the manufacturer’s part number. These three fields are not required. Check the “Variable Price” box if you would like customers to specify how much they will pay for a product. If checked, two fields for minimum and maximum prices will appear and must be filled in. Check the “Hide Price” box if you would like the customer to have to click on the product to view the price.

**Display Options**

<table>
<thead>
<tr>
<th>DISPLAY OPTIONS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visibility:</td>
</tr>
<tr>
<td>Display Page:</td>
</tr>
<tr>
<td>Disable Purchase:</td>
</tr>
<tr>
<td>Featured:</td>
</tr>
<tr>
<td>Theme:</td>
</tr>
<tr>
<td>Exclude From Feeds:</td>
</tr>
</tbody>
</table>

“Visibility,” as with “Category,” has three options: public, hidden, and private. “Public” products are accessible and display when navigating the site and search results. “Hidden” products are only accessible by direct link and will not appear in site navigation or search results. “Private” products cannot be accessed by anyone and are not visible in the retail store – even with a direct link.

“Display Page” and “Theme” should always be set to “Inherit.”

The “Disable Purchase” box should not be checked unless you are disabling a customer’s ability to add this product to their cart. The “Featured” box should be checked if you would like the product to be highlighted on the “Featured Products” page.

The “Exclude From Feeds” box should not be checked unless the product should not be included in eCommerce generated shopping feeds. However, this option is currently not available in eCommerce.

**Taxes & Shipping**

<table>
<thead>
<tr>
<th>TAXES &amp; SHIPPING</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shippable:</td>
</tr>
<tr>
<td>Weight:</td>
</tr>
<tr>
<td>Dimensions:</td>
</tr>
<tr>
<td>Warehouse:</td>
</tr>
<tr>
<td>Gift Wrap:</td>
</tr>
<tr>
<td>Tax Code:</td>
</tr>
<tr>
<td>Cost of Goods:</td>
</tr>
<tr>
<td>Vendor:</td>
</tr>
</tbody>
</table>

“Shippable” should always be set to “Yes” as eCommerce will not produce a Pay Now button on the Checkout page without a shipping option. “Dimensions” can be entered, but are not required. If “Gift Wrap” is configured as seen the “Gift Wrap” section on page 24, you can add it as an option from the drop-down box.
here. In the “Cost of Goods” field, you can enter the cost of your product so that you can better calculate your profits in “Reports.”

“Weight” can be entered, but it is not required. “Warehouse” should default to your configured warehouse as set up by the State when the site is provisioned. “Tax Code” should ALWAYS be set to WV Sales Tax. If you have questions about tax codes and rules, call the WVU Tax Services office at 304-293-0467. “Vendor” can be entered, but it is not required.

**Inventory Control**

<table>
<thead>
<tr>
<th>INVENTORY CONTROL</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Min Quantity:</strong> 0</td>
</tr>
<tr>
<td><strong>Inventory Tracking:</strong> Disabled</td>
</tr>
</tbody>
</table>

“Min Quantity” is the minimum quantity of a product that must be purchased for an order, so typically this is left at zero. “Max Quantity” is the opposite—it’s the maximum quantity of a product that can be purchased for an order. “Inventory Tracking” is disabled by default, but when enabled, it can be very useful.

```
Inventory Tracking: Track Product

In Stock: Low Stock: Allow Backorder:
```

When set to “Track Product,” as chosen from the drop-down box, it can track the product at a product level or even at a variant level (e.g. the same t-shirt but different sizes). “In Stock” is the number of total products in your inventory. “Low Stock” is the number of products at which you would like to be notified that stock is getting low. “Allow Backorder” should only be checked if you continually receive more inventory because this allows customers to continue to add this product to their cart even if you have no products left in stock. “Allow Backorder” should not be checked for finite products like class or conference seats.
The “Summary” is a brief description of the product that is used by the category listing and featured product scriptlets, but it is not required. The “Description” is the description that actually displays on the product page. The “More Details” is any additional details you’d like the customer to have but not see right away, like an itinerary or contact information. Utilizing “More Details” creates a link on the product page that says “More Details.” HTML can be used in the “Description” and in “More Details” for page breaks and other desired looks.
“HTML HEAD” and “Search Keywords” are space for metadata, but because eCommerce is not documented on search engines, it is not necessary to fill out either section.

As always, when you’ve completed filling out the appropriate and needed information, click the “Save” button at the top or bottom of the page.

**Left Side Menu**
The left side menu gives you access to other parts of creating a product.

---

**Product Details**
“Product Details” is the default landing for creating a product. See “Adding a Product” on page 5 for more information regarding “Product Details.”

**Images and Assets**

![Example Image](image.png)

Clicking on the “Upload Image” button allows you to upload an image of your choice. That image should be at least 500x500 pixels, and eCommerce will automatically resize it to a thumbnail, icon, and normal sized image.
Click the “Browse” button to navigate to the appropriate image on your computer. In the “Save As” field, type the name you wish the image would have. Press the “Upload” button when complete.

Clicking on the “Pick or Edit Images” button opens the “Basic Images” pages.

Click on the binoculars icon to pick images from your asset manager, which lists all of the images for Catalog. “ProductImages” is the default folder.
You may upload an image from here in the “Upload” section, press the “Choose File” or “Browse” button. You may rename the image using the “Save As” field. In the “Image Options” section, you may choose to resize the image to the original size, standard image sizes, or a custom size. Once you’ve made your selection, press the “Upload” button to complete.

Once the upload is completed, you can then apply the image to your product. Select the image from the “Folder Contents” section, and once selected, click the “Pick Image” button. You will be returned to the “Basic Images” pages. You will need to select icon, thumbnail, and standard image from the asset manager. When complete, click the “Save Changes” button.
Options and Variants

“Options and Variants” is most typically utilized for clothing items. As directed, fill in the option like size or color. Then fill in the choices like “Small, Medium, Large, Extra Large” or “Red, Blue, Green.” When complete, click the “Add” button.

Digital Goods

A digital good is a file delivered electronically via a secure login to the customer’s order page. To attach an already created digital good, click the “Attach Digital Good to Product” button.

Clicking the “Attach Digital Good to Product” button brings up a search. Enter your search criteria and click the “Search” button.
A list of available digital goods appears. Check the checkbox next to the digital good you’d like to select and click the “Attach Selected” to attach the selected digital good to your product. You can also click the gray and green icon on the far right to download the digital good in order to check that it’s the digital good you’d like before attaching it to a product.

Once attached, it will appear on the “Digital Goods” page.

**Kits/Bundles**

Any product sold within eCommerce can be changed into a kit. A kit is really just a group of products sold together as a package. There are many configurations you can do for kits, and while not many of our end users
use the kits option, that doesn’t mean you shouldn’t. You can create a bundle of products for a single price or use different options and pricing.

<table>
<thead>
<tr>
<th>Kitting: GHLO Application Fee</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Price Range:</strong> $300.00 - $300.00</td>
</tr>
<tr>
<td><strong>Weight Range:</strong> 0.00 - 0.00</td>
</tr>
</tbody>
</table>

Once your component has been set up, simply click the “Save” button and it will appear as an option on the product page as well as on the Kits/Bundles page. See “Find Kits” on page 21 for more information.

**Volume Discounts**
If volume discounts have been set up in the Marketing menu, they will be available to add to your product by attaching the discount to the product and clicking the “Finish” button.

**Pricing Rules**
Pricing rules are typically used by our end users for early bird registration fees or for a selected group of users. To add a pricing rule, begin by clicking the “Add Pricing Rule” button.

<table>
<thead>
<tr>
<th>Pricing Rules for GHLO Application Fee</th>
</tr>
</thead>
<tbody>
<tr>
<td>There are no price rules defined for this product.</td>
</tr>
</tbody>
</table>

Enter your “Special Price,” set up the start and end dates, and select your groups. Click the “Save” button to complete.
**Similar Products**

Similar products are used for cross-selling. If, for example, you’re selling two kinds of apples, you could make both of your apple products “similar products,” so that when your customer purchases one kind of apple, the customer will see a section at the bottom of the product page for similar products.

To add a similar product, enter the product’s name in the search field and click the “Search” button. You can use an asterisk as a wildcard. Depending on your search, other products will show up in the “Item” area.
Click the Related green + button to add it as a similar product. Click the red X under “Related” to remove an item as a similar product.

When you’ve added all the similar products and you can see them in the “Assigned Products” area, click the “Finish” button.
**Product Accessories**

While similar products are used for cross-selling, product accessories are used for up-selling. If, for example, you’re selling apples and knives, when a customer purchases an apple, the customer will see a section at the bottom of the product page for product accessories with your knife product.

To add a product accessory, enter the product’s name in the search field and click the “Search” button. You can use an asterisk as a wildcard. Depending on your search, other products will show up in the “Item” area.
Click the green + button under “Upsell” to add it as a product accessory. Click the red X button under “Upsell” to remove an item as a product accessory.

When you’ve added all the product accessories and you can see them in the “Assigned Products” area, click the “Finish” button.

**Categories**
Categories are broad descriptions of a group of products such as t-shirts, books, or conferences. From this page, you can change the category to which your category belongs. To change the category, simply click on the checkbox of the category to which you’d like your product to belong and unclick the checkbox of the other category. A product may belong to more than one category, so you could click both checkboxes if applicable. Click “Save” when complete.

**Product Template**
A product template is a group of prompts a customer must fill out in order to add the product to his basket. See “Product Templates” on page 21 for more information about how to build a product template. If you’ve already got a product template set up, this is where it would be “applied” to your product.
Click on the drop-down box to select your template. The customer prompts appear so if you have more than one template, you can verify the correct one is being applied without opening it separately.

Click “Save” when complete.

**Subscriptions**
Subscriptions are used for products that need a recurring billing plan. Because eCommerce does not save credit card information, this option is currently unavailable to be utilized correctly.

**Preview!**
Clicking on the “Preview!” button will open your product in your store in a new window to view it as a customer would.

**Search**
Clicking on “Search” from the Catalog menu will open “Search Catalog” page. As with the “Search This Category” section of the “Browse” page, this allows you to search categories, webpages, links, and products within your catalog. You can search by entering a keyword in the “Keyword” field as seen below or you can use...
an asterisk as a wildcard. The results of your search will be displayed in the “Search Results” section located to the right of the “Search Criteria” section.

Find Kits

Clicking on “Find Kits” from the Catalog menu will open the “Find Kits” page. Any product within eCommerce can be changed into a kit as it is just a group of products that are sold together in a package. There are many configurations you can use when setting up a kit. Perhaps you want to create a bundle of products with a single price for all, or maybe you want to give your customer different options and pricing.

For each kit, you can create a group of products for the customer to select from, or you can select your own product specification that will be in the kit. Use with inventory control to make sure that all items in the kit are available before allowing purchase.

Build your own custom kit and choose from several display options, adjust pricing, weight, and more. Select how you want product lists to display within the kit, or include items that are hidden from the customer’s view. With the order fulfillment features, you can print out a list of each product required to be in the kit for easy assembly. As with the “Search This Category” section of the “Browse” page, this allows you to search categories, webpages, links, and products within your catalog.
Product Templates
Clicking on “Product Templates” from the Catalog menu will open the “Product Templates” page. Any product within eCommerce can be assigned a product template. It’s important to note that only ONE product template can be applied to a product at a time, so utilize as many customer fields as you need in a single template!

To create a template, go to the “Add a Template” section, type a name in the “Name” field, and click the “Add” button.

Once the template has been created, scroll down to “Customer Fields” and click the “Add Field” button. You will always want to add customer fields (and NOT merchant fields) because it’s information you want customers to fill out before they can add the product to their cart.

When you click the “Add Field” button, the “Add Field” page is displayed. Choose your input type from the drop-down menu. The types to choose from are text box, text area (a bigger text box), a drop-down list box (a drop-down menu like the one you’re using), a list box, a multiple list box, a radio button list, and a check box.
list. In the “Name” field, enter a generic name for the field. In the “Prompt” field, enter the prompt you’d like the customer to see. Don’t change the columns or max length. Click the “Finish” button when you’re done with this customer field.

You’ll repeat this until all of the fields you want the customer to fill out have been added. As more customer fields are added, they’ll appear in the “Edit Product Template” screen.

If you need to edit a customer field, click on the notepad icon. To delete a customer field, click the red X. When all of your fields have been added, click the “Save” button. To now apply that product template to your product, see “Product Templates” on page 21 for instructions. It’s important to note that for your new product
template to generate a correct “Attendees” report, you must submit a trouble ticket requesting fields be added to your attendees report.

**Product Reviews**

Clicking on “Product Reviews” from the Catalog menu will open the Product Reviews page. Any product within eCommerce can be reviewed by a customer. There is no approval process, so in order to search your reviews and moderate them, you’ll need to set your drop-down menu to “Any” in order to view the reviews. Click the “Search” button to see your reviews.

<table>
<thead>
<tr>
<th>Approval Status:</th>
<th>Any</th>
<th>SEARCH</th>
</tr>
</thead>
<tbody>
<tr>
<td>Approved</td>
<td>Date</td>
<td>Product</td>
</tr>
<tr>
<td>X</td>
<td>8/21/2014</td>
<td>test</td>
</tr>
</tbody>
</table>

If you check the checkbox in the header column (to the left of “Approved”), you can mass-approve, mass-disapprove, or mass-delete all of your reviews. If you check the checkbox in the first column next for multiple rows of selected reviews, you can mass-approve, mass-disapprove, or mass-delete the selected reviews. To do this, click on the drop-down menu next to “Selected Reviews” and click “Approve,” “Disapprove,” or “Delete.” To edit a review, click on the notepad icon.
Once you’ve finished editing the review as needed, click the “Save and Close” button.

**Gift Wrap**

Clicking on “Gift Wrap” from the Catalog menu will open the “Gift Wrap” page. Gift wrap allows you to create gift wrap groups for all of the major holidays or based on package sizes. For each product in your store, you can assign a gift wrap group, and that will automatically trigger the option at checkout for your customer to add gift wrap.

Enter a name in the “Name” field to add a new “Wrap Group.” Click the “Add” button when complete. After you press the “Add” button, the “Edit Wrap Group” page appears. Enter the appropriate information—the name and the price of the wrap style, and from the drop-down menu, select the tax code to use. In the
“Thumbnail” and “Image” fields, click on the binoculars icon, and as with the “Images and Assets,” section, you’ll be directed to the “Asset Manager” to select images of the gift wrap.

When complete, click the “Add” button. To add gift wrap to a product, see “Taxes & Shipping” on page 7.