Getting Started:
Setting up Your eCommerce Site

Last Updated: February 2, 2017

Last Updated by: Kathy Pepple
# Table of Contents

**Introduction**.................................................................................................................................................. 3
**Access Your Site**............................................................................................................................................. 4
  - Logging In .................................................................................................................................................. 4
**List a Product to Sell**...................................................................................................................................... 5
  - Create a Category ..................................................................................................................................... 5
  - Add a Picture............................................................................................................................................. 9
  - Add a Featured Product to your Home Page ............................................................................................. 11
**Create a Product Template** .......................................................................................................................... 12
**Set up a Discount** ......................................................................................................................................... 17
**Set Up a Coupon Code** ................................................................................................................................... 19
**Monitor Sales**.................................................................................................................................................. 22
  - Dashboard Quick View Charts .................................................................................................................. 22
  - Reports...................................................................................................................................................... 25
  - Report Examples....................................................................................................................................... 26
**Edit Your Store’s Settings** ............................................................................................................................ 28
  - Change Your Password .............................................................................................................................. 28
  - Change the Content of the Home Page ..................................................................................................... 29
  - Add an “About Us” Region.......................................................................................................................... 30
  - Navigate the Configure Tab ...................................................................................................................... 31
  - Set up the TimeZone .................................................................................................................................... 32
  - Create an Email Template for Credit Card Failure ................................................................................. 33
**Set Up a Digital Good** .................................................................................................................................. 35
  - Step Three: Create an email with a link to the pdf location ................................................................. 36
  - Step Four: Create a digital good. ............................................................................................................... 38
  - Step Five: Associate a Product with the Digital Good ......................................................................... 40
  - What the Customer Sees .......................................................................................................................... 41
**Refund Customers**.......................................................................................................................................... 44
**Maintenance and Troubleshooting** ............................................................................................................... 44
Introduction

Welcome to ecommerce! Your online store enables you to sell products or services with funds deposited to a General Ledger account. After viewing this getting started guide, you will know how to perform the following:

- Access your ecommerce site
- Create a category of product or services to be sold
- List a product within the category
- Add a product to be featured on the store’s Home page
- Attach a product template to a category
- Monitor sales
- Set up your time zone
- Set up an email template for a credit card failure

While WVU ultimately owns every eCommerce store, each eCommerce site must designate a site owner and a store manager.

- The site owner is the individual who assumes fiscal responsibility for the store.
- The store manager manages the store’s day-to-day operations and reports to the site owner.

To ensure proper oversight, the same individual cannot perform both roles.

While you are in the eCommerce software, if you do not know what an icon or field represents, hover the mouse pointer over the icon or field to view the speech bubble description.

Follow these instructions exactly. The protocol this manual establishes will prevent you from corrupting data, violating privacy rules, and causing unplanned outages. If you need help at any time while using this guide, contact ITS support.
Access Your Site

Logging In

1. Go to your department’s eCommerce website:
2. Click the Login icon at the top right.
3. Log in under Returning Customers.
   a. When the CAPTCHA screen appears, type in the CAPTCHA and click SIGN IN.
   b. Although the window says ‘Customers,’ you can still perform administrative functions when you log in.
4. On the next page, click the ADMIN icon in the top right corner.

You should now see the Dashboard screen with a different top menu.

Do not click the Customize button. Customizing the settings could alter the website or user information.
If you want to adjust the settings, submit a request to Information Technology Services (ITS) by emailing itshelp@mail.wvu.edu.
List a Product to Sell

Create a Category

1. Click *Catalog* in the upper right corner.

2. Enter the name of a category and then click the *Add* button.

3. The category will now be listed in the Contents of Catalog region.

4. Click on the category name. The category will be empty.

5. To add an item to sell within this category, click the Product icon.
6. Complete the fields that apply to your product.
| **1 Basic Info** | **Name**: Enter the product name as you want it to be displayed to the customer.  
**Price**: Enter the price per item or service.  
**Note**: The deposit to your GL account will appear the day after payment was made by a shopper. The state charges a 2.25% fee for each transaction. This fee is withdrawn once each month from the GL account. Price the item accordingly. |
| **2 Display Options** | **Featured**: The product will appear on the website’s front page when this is checked. |
| **3 Taxes and Shipping** | **Shippable**: For a product that will not be mailed, (for example, conference registration), change to **No**.  
**Tax Code**: If a product is taxable and the tax is not included in the Price field, change the Tax Code setting to **WV Sales Tax**. |
| **4 Inventory Control** | **Inventory Tracking**: Set to **Track Product** to limit the Max Qty in a basket to 1. This prevents overbooking for an event with strict upper limit on the number of attendees. Turning on Inventory Tracking displays the additional settings shown below.  
| | **In Stock**: Enter the maximum number to attend an event.  
**Low Stock**: Enter the number of remaining slots at which you want to be notified of a nearly-full event. |
| **5 Descriptions** | **Summary**: **Not** seen by the public  
**Description**: **Is** seen by the public |

7. Click **SAVE**, at either the top or bottom of the screen.
8. After clicking Save, the Product Details pane is available on the left. Click Images and Assets to add a picture.
Add a Picture

When an image needs to be resized, it is best to resize the image prior to uploading. If you resize the image within eCommerce, it will appear blurry on the web page.

1. In Images and Assets, click **UPLOAD IMAGE**.

2. Click **Browse** to locate the picture on your computer.

3. After locating the image on your computer, click **UPLOAD**.

4. You will see a preview.
5. Click **Preview!**, the bottom choice in the left pane. This brings up a new browser and shows the image and description as the shopper will see it.

![Preview screenshot](image)

6. Still within the newly-opened browser, click the **Music Lessons** link in the breadcrumbs area to see how the product is listed in the category.

![Music Lessons screenshot](image)

7. Close the newly-opened browser window containing the category and item preview.

8. Return to the product by clicking **Violin Lessons** in the breadcrumbs.

9. At the bottom of the screen showing the product, click **SAVE AND CLOSE**. You will be returned to the Contents region showing the product you have set up.

![Contents region screenshot](image)

10. Product icons enable you to preview the item in a browser, copy the item, hide the item from public view, edit, move, and delete. The pane on the right enables you to continue adding new products or categories.

![Product icons screenshot](image)
Add a Featured Product to your Home Page

1. In the Dashboard, hover the mouse pointer over *Marketing*.
2. From the drop-down menu, click *Featured Products*.

3. Go to the *Find Products* box to add a product:
   a. Provide the product’s name in the *Product Name* field.
   b. Check *Show Thumbnails* if the product has a picture.
   c. To restrict your search to either non-featured or featured items, select the appropriate option in the *Filter* dropdown menu. If left blank, a search will return both options.
   d. Click *SEARCH*. When your item appears, click *ADD*.
      (If the item is already featured, the [ADD] button will be shown here instead of [ADD].)
   e. After you finish adding products to the *Currently Featured* section, click *FINISH*.

4. To see your product, click the store icon in the top right menu. The item will appear in the *Featured Products* section.
Create a Product Template

A product template allows you to customize your order page to obtain information from the customer beyond standard payment data. The Violin Lessons order page contains four questions that were set up in the Product Template. The Product Template contains options allowing you to choose the type of input to obtain from the customer; in the image below, the input type is listed next to the question.

Only one product template can be applied to a product, so ensure that you add all the necessary customer fields to a single template.

1. In the Dashboard, go to Catalog → Product Templates.
2. To create a template, go to the Add Template section in the right panel, type a name in the Name box, and click Add.
3. After creating the Template, click ADD FIELD under the appropriate field type. Customer Fields enables you to collect data from customers who buy this product.
4. After clicking **Add Field**, the next screen will display empty fields for the input type, name, prompt (what the customer sees on the screen), columns (width of the box on the screen), and max length. Enter the necessary information.

![Add Customer Field to My Template](image1)

5. Click the **Input Type** dropdown to see the choices.

![Input Type dropdown](image2)

6. The subsequent fields to be completed may vary depending on the input type you choose.

7. Complete the following fields:

   - **Name**: This does not appear on the screen the shopper sees.
   - **Prompts**: This **does** appear on the screen the shopper sees.
   - **Columns**: This would typically be 1.

![Check Box List](image3)

8. Click **NEXT** to accept your entries.
9. Click **Add Choice** to set up the valid replies from which the shopper can choose.

![Add Choice](image)

10. Type over **Choice 1** to enter the text the shopper should see. Click **Add Choice** to add additional options for the shopper.

![Completed Choices](image)

11. Click **SAVE**.

12. Continue to add fields as desired. When you are done, click **SAVE**.

![Customer Fields](image)

13. To tie that template to a product, return to the Catalog and locate a product.
14. Click on the product.

15. In the menu on the left, click the **Product Template** link.

16. Select the Product Template from the drop-down choices and then click **SAVE**.

17. A preview appears.

18. If this is acceptable, click **SAVE**.
19. To test the d to the store and click the product. The extra fields should appear.

![Image](image.png)

**Note:** The only input type that the shopper is **required** to complete is the Text field.

![Image](image2.png)

The shopper will be able to skip questions of all other input types.
Set up a Discount

1. In the Dashboard, go to Marketing → Volume Discounts.
2. From the Marketing menu, choose **Volume Discounts**.
3. Click **Add Discount**.

   ![Image of Volume Discounts page](image)

4. Name the Discount and choose if you want the discount to be based on the quantity of the item or the total price.

   ![Image of Add Volume Discount page](image)

5. Choose whether you want a fixed amount or percentage.

   ![Image of Add Volume Discount page](image)

6. Enter the minimum and maximum number of items to be purchased in order to receive the discount, and the percentage or amount of the discount.

7. This discount will be based on the number of items purchased. If the shopper orders three items, the price will be marked down by ten percent.

   ![Image of Add Volume Discount page](image)
8. Choose whether this discount will apply to all purchases, or for only specific products. To choose a specific product, click change.

   ![Discount Scope](image)

9. To choose the product for which the discount applies, click Search.

   ![Find Products](image)

10. A list of all products on your site will appear. To choose the product for which the discount applies, click Add.

   ![Find Products](image)

11. Click Finish (bottom of screen).

   ![Assigned Products](image)

12. On the discount set-up page, click Save.

   ![Edit Kathy's Discount](image)
Set Up a Coupon Code

1. In the Dashboard, go to Marketing → Coupons.
2. Click Add Coupon.

3. Choose whether the coupon will apply to one product or one order.

4. Complete the fields.

   a. Provide a name.
   b. Make up a coupon number (for example, (54321).
   c. Enter the amount for the Percentage or Fixed Amount.
   d. Start Data and End Date when you want the coupon to apply only during a certain date range
e. Product Rule: choose whether this is valid for all products or just specific products.

This coupon gives a 25% discount through the end of November for a product which will be selected by clicking Next.

5. To choose the product to which the coupon should apply, click manage.

6. Click Search to see products.

7. Click Add for the product.
8. Click **Finish**.

9. Click **Save** or **Save and Close**.
Monitor Sales

Dashboard Quick View Charts

Note: These quick view charts can be minimized ( ), or closed ( ).

- **Product Popularity**
  - By Sales
  - Sales Data
  - By Views
  - View Data

- **Order Summary**
  - **Today** - Check to see if new orders have arrived.
  - Last Thirty Days
  - Last Ninety Days
  - Search Orders
  - View Order Number

  - Clicking any number displays list of orders. Then click **details** at the right side of the row.
- Clicking details provides information about the order.

Tasks menu:

- Cancel Order
- Print Invoice
- Print Packing Slip
- Print Full Sheet
- Change status to Payment Pending
- Change status to Shipment Pending
- Change status to Problem
- Change status to Cancelled
- Change status to Fraud
Sales Over Time
- Past Seven Days
- Past Six Months

Page Views Over Time
- Last 24 Hours
- By Hour
- By Day
- By Month

Popular Categories
- By Views
- Data
Reports

1. In the Dashboard, hover the mouse pointer over “Reports.”

2. Each type of report (Sales, Products, Customers, and Marketing) displays an extended menu.

3. When the drop-down menu appears, hover the pointer over an item on the menu, such as “Sales,” then select an item from the extended menu, such as “Daily Sales.”

4. To scroll through the monthly sales reports, click “Previous” or “Next,” or select the month and/or year from the appropriate drop-down menu.

5. To see the details of a particular day’s report, click “Details” beside the date.

Note: To protect customer identities, the eCommerce system does not store credit card numbers. Reports will not show credit card numbers.
Report Examples

Sales > Daily Sales

![Daily Sales Report for 12/4/2014]

Sales > Monthly Sales

![Monthly Sales Report for December 2014]

Sales > Details

![Detail Report]

Order ID | Product | Variant | Price | Order Date | User | Payment Status | Inventory
---|---|---|---|---|---|---|---
268 | $5 Donation | | $5.00 | 12/1/2014 7:39:46 PM | | Paid | 0
269 | $5 Donation | | $5.00 | 12/1/2014 4:30:29 PM | | Paid | 0
262 | $10 Donation | | $10.00 | 12/1/2014 4:30:29 PM | | Paid | 0
262 | $50 Donation | | $50.00 | 12/1/2014 4:30:29 PM | | Paid | 0
269 | Merry Christmas | | $15.00 | 12/1/2014 9:52:22 PM | | Paid | 1
263 | Merry Christmas | | $15.00 | 12/1/2014 4:59:49 PM | | Paid | 1
Sales > Summary Report

Summary Report

<table>
<thead>
<tr>
<th>Product</th>
<th>Variant</th>
<th>Price</th>
<th>Sold</th>
</tr>
</thead>
<tbody>
<tr>
<td>$10 Donation</td>
<td></td>
<td>$10.00</td>
<td>3</td>
</tr>
<tr>
<td>$25 Donation</td>
<td></td>
<td>$25.00</td>
<td>1</td>
</tr>
<tr>
<td>$5 Donation</td>
<td></td>
<td>$5.00</td>
<td>2</td>
</tr>
<tr>
<td>$50 Donation</td>
<td></td>
<td>$50.00</td>
<td>1</td>
</tr>
<tr>
<td>All Occasion Card Butterfly</td>
<td></td>
<td>$15.00</td>
<td>1</td>
</tr>
<tr>
<td>Cherish</td>
<td></td>
<td>$15.00</td>
<td>1</td>
</tr>
<tr>
<td>Frozen</td>
<td></td>
<td>$45.00</td>
<td>3</td>
</tr>
<tr>
<td>Holiday Collection</td>
<td></td>
<td>$270.00</td>
<td>18</td>
</tr>
<tr>
<td>Let It Snow</td>
<td></td>
<td>$45.00</td>
<td>3</td>
</tr>
<tr>
<td>Merry Christmas</td>
<td></td>
<td>$150.00</td>
<td>10</td>
</tr>
<tr>
<td>The Reindeer</td>
<td></td>
<td>$100.00</td>
<td>4</td>
</tr>
<tr>
<td>The Snowman</td>
<td></td>
<td>$75.00</td>
<td>5</td>
</tr>
<tr>
<td>The Tree</td>
<td></td>
<td>$15.00</td>
<td>1</td>
</tr>
<tr>
<td>Touched with Love</td>
<td></td>
<td>$90.00</td>
<td>6</td>
</tr>
</tbody>
</table>

Products > Top Products

Sales by Product 2/4/2015 to 2/4/2015

<table>
<thead>
<tr>
<th>Name</th>
<th>Total Quantity</th>
<th>Total Sales</th>
</tr>
</thead>
<tbody>
<tr>
<td>Holiday Collection</td>
<td>601</td>
<td>$5415.00</td>
</tr>
<tr>
<td>Merry Christmas</td>
<td>83</td>
<td>$1249.00</td>
</tr>
<tr>
<td>Let It Snow</td>
<td>37</td>
<td>$655.00</td>
</tr>
<tr>
<td>The Snowman</td>
<td>34</td>
<td>$516.00</td>
</tr>
</tbody>
</table>

Products > Attendees (with template responses)

Detail Report

<table>
<thead>
<tr>
<th>Name</th>
<th>Quantity</th>
<th>Payment Amount</th>
<th>Order Date</th>
<th>Billing</th>
</tr>
</thead>
<tbody>
<tr>
<td>James</td>
<td>1</td>
<td>431.00</td>
<td>2/3/2015 4:59:44 PM</td>
<td></td>
</tr>
<tr>
<td>James</td>
<td>4</td>
<td>431.00</td>
<td>2/3/2015 4:59:44 PM</td>
<td></td>
</tr>
<tr>
<td>James</td>
<td>4</td>
<td>431.00</td>
<td>2/3/2015 4:59:44 PM</td>
<td></td>
</tr>
</tbody>
</table>
Edit Your Store’s Settings

Change Your Password

1. In the Dashboard, User Status region, click **Change Password**.

   ![Change Password](image)

2. Complete the fields.

   ![Change Your Password](image)
Change the Content of the Home Page

1. Click **STORE** in the upper right corner.

2. Within the Store, click the **Mode** drop-down arrow in the lower left corner and change to **Edit**.

3. In the Editor Zone, click the Content edit icon.

4. Add your own text and content using HTML.

5. Save your work.

**Result:**

Add picture named "buy.jpg" previously uploaded to the Asset Manager.

Changed “Text” to “Training”
Add an “About Us” Region

1. In the Dashboard, go to Website and, click Content and Layout.
2. Click the Edit icon for About Us.
3. Use HTML to enter your own About Us content.
4. Click Save.
5. Click STORE in the upper right corner.
6. Change the Mode to Edit.
7. Change the Footer to Footer With Google Analytics.
8. Click Apply.
Navigate the Configure Tab

The “Configure” tab allows the Store Managers to change settings for their store. The “Store” menu has the general settings for the store front, including:

**Configure > Store**

- Store Name
- Locale Settings
  - Unit of Weight
  - TimeZone
- Inventory Tracking and messages
- Order Number Definition

**Configure > Email**

- Email Settings
- Email Templates
Set up the TimeZone

1. Within the Dashboard, click **Configure**.

![Configure button in the Dashboard](image)

2. From the **Configure** menu, choose **Store**.

![Configure Store menu](image)

3. In **Configure Store > Locale Settings**, click the drop-down arrow for **TimeZone Offset**.

![Locale Settings window](image)

4. In the list of time zones, choose **Eastern Standard Time** or **Eastern Daylight Time**, depending on the season during which you are setting up your store.

![List of time zones](image)

5. At the bottom of the page, choose **SAVE AND CLOSE**.

![Save and Close button](image)

**NOTE**: You will need to manually change this setting seasonally.
Create an Email Template for Credit Card Failure

The Store Manager can set up email templates to be sent to the customers during different triggers of the purchase. Email templates can be added by creating a new template and giving it the appropriate triggers for the emails to be sent out.

- **Customer Order Notification**: Notifies the customer that their order has been placed as soon as the order has been submitted.
- **Order Shipped**: Notifies the customer that their order has been shipped.
- **Customer Note**: Emails merchant (Store Manager) when a customer adds a note.

You must create an email template for eCommerce to notify customers that their orders did **not** go through if a payment capture or authorization fails.

1. Within the Dashboard > **Configure** menu, click **Email** and then **Templates** from the expanded menu.

2. In the Email template page, click **ADD EMAIL TEMPLATE** at the bottom of the page.

3. The Edit Template becomes available.

4. Complete the required fields, circled below.
5. To enter HTML code, you can copy the code from *Customer Order Notification* template and change the text to inform the user that the credit card was not accepted.

```html
&lt;p&gt;&lt;strong&gt;Thank you for your order, Bill!&lt;/strong&gt;&lt;/p&gt;
&lt;p&gt;You have completed the registration process and you will be notified by a separate email when your credit card payment has been authorized. You now should register for lodging and meals at the National Conservation Training Center by calling 304-876-7900 between 8:00-18:00 eastern U.S. time.&lt;/p&gt;
&lt;p&gt;Thank you for shopping with us.&lt;br&gt;&lt;/p&gt;
```

*Change the highlighted text to a notification that the credit card was not accepted.*

**Note:** You can also enter plain text in the Message area, but it will not contain details of the order that had the credit card failure.
Set Up a Digital Good

A digital good can be either:

- A pdf delivered to the customer in AbleCommerce on the order screen and in the email confirmation to the customer
- A link to a website delivered to the customer’s email account, as identified in the Checkout screen

Within Order Screen

Order Date: 12/1/2016 3:33 PM
Status: Shipment Pending

**SHIPMENT INFORMATION**

Status: Waiting to Ship
Shipping Method: Pick up

**Digital Goods**

<table>
<thead>
<tr>
<th>SKU</th>
<th>Item</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Session Only Name: Kathy</td>
</tr>
<tr>
<td></td>
<td>Department: ITS</td>
</tr>
<tr>
<td>1</td>
<td>SHIPPING    Pick up</td>
</tr>
</tbody>
</table>

Within Email to Customer

[Image of email with link to Conference details]
Digital Good Steps:
1. Create a pdf with the information you want to deliver to the shopper after payment. (Not covered below.)
2. Place the pdf at a web address. (Not covered below.)
3. Create an email with a link to the pdf location.
4. Create a digital good.
5. Create the product and associate the product with the digital good.

PDF Example:

Step Three: Create an email with a link to the pdf location.
1. From the Dashboard > Configure menu, click Email and then Templates from the expanded menu.
2. Create a new template or copy an existing template and edit it.

3. Add text to the message body that includes the HTML link to the pdf.

4. Do not select any triggers.

5. Click Save.
Step Four: Create a digital good.

1. From the Dashboard Catalog menu, click Digital Goods and then Manage Digital Goods from the expanded menu.

![Diagram](image1.png)

2. In the Add Digital Good region, click Browse and locate your pdf.

![Diagram](image2.png)

3. Click Add And Edit.

![Diagram](image3.png)
4. The Digital Good opens.

5. Change **Activation Mode** to **Activate on Full Payment**.

6. Click the dropdown arrow in the **Activation Email** field to choose the email template you created in Step Three above.

7. Click **Finish**.
Step Five: Associate a Product with the Digital Good

1. Locate the Product by choosing the Catalog icon, correct Category, and Product.
2. Within the product, choose Digital Goods.

3. Click **Attach Digital Good to Product**.

4. Click **Search**.
5. Check the box for the digital good you created and then click **Attach Selected**.

6. After attaching the digital good to the product, you will see a verification:

What the Customer Sees

1. After the customer pays for the product, the order page contains a link to the pdf:

2. The customer sees a prompt to **open** or **save**.
3. After choosing, the pdf can be opened:

![Image of Adobe Acrobat Pro DC]

Here are instructions:
Conference will be held on January 31 from 9 to 5.
123 Main Street
Anytown, USA

4. The customer will also receive an email with the Subject line of Download link.

![Image of email content]

Greetings Kathy Pepple!
Download Link
Link to Conference Details
Thank you.
5. Clicking the link takes the customer to the URL identified in the email template:
Refund Customers

To issue a refund, the department must email the request to RevenueServices@mail.wvu.edu with the subject line “eCommerce Refund” and the following information:

- Customer’s name
- Original transaction date
- Original transaction amount
- Refund amount
- Order ID (Admin icon → Manage → Orders)

Use the same process to complete a tax refund for tax-exempt customers.

Maintenance and Troubleshooting

If you need help at any point, submit a trouble ticket to the ITS Service Desk by emailing ITSHelp@mail.wvu.edu or calling (304) 293-4444.

Scheduled maintenance occurs every Thursday at 10:00 PM and every night at 2:00 AM. The State Treasury Office reserves the right to run scheduled maintenance on any Thursday but normally only runs maintenance once a month. The Store Manager will receive notifications about any unplanned outages.