



EZ Merchant Solutions

***Business Tools for the Online
Merchant***

EZ-cart Getting Started Guide

***Simply the Easiest Way
to Manage a Web Based Business...***

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Getting Started With EZ Merchant Solutions

Version 2.0

This guide will help you to quickly get started using our products. The guide is geared toward our hosted solution (Bronze, Silver, Gold or Platinum Packages) but is applicable to stand-alone versions as well. Differences are noted where necessary.

1.0 Introduction

This section briefly describes the products and services you receive as part of our offering. What you have purchased is a hosted site that provides you with an online storefront (EZ-cart), email mailboxes, storage area for other web-based applications and a "site management" console for managing all the resources you now control.

Your hosted solution is pre-installed and ready to go. Even things like your company name, address, email, etc. are already filled in for you. An email address has been created for you as the administrator of your new site.

If you have purchased a stand-alone version then you will have to fill out this administrative information after you install the product. Please see the User's Guide for installation instructions.

1.1 First steps

Obviously, the first thing for you to do is to login to the administrative interface of your new store. "yourdomain" is used as an example of a domain name and you should replace it with the domain name you gave us for creating your store. To login, type "www.yourdomain.com/admin.php" into the address bar of your browser. This will take you to the login screen of the Admin Panel. Enter the username and password that was emailed to you when your store was created.

We discuss briefly each of the settings area (and there are a lot of them). We will highlight those that we believe you should pay special attention to or review before your store goes live.

2.0 Administration Tab

2.1 Administration->Settings tab

After you login we recommed that you take the following steps to ensure that the initial setup we did for you was correct.

1. Click on the Administration tab. A series of links will then be shown below the tabs. Click on the Settings link. The page will redraw with the Settings General page displayed and lots of other settings for various sections shown on the right.
2. Update the page to reflect your preferences. The Default Location section is used when calculating shipping costs to your customers. Shipping origin is assumed to be this location.
3. You don't need anything in the Proxy Server section. No proxy is used in our environment, you are connected directly to the internet.
4. Click Save if you have made any changes.
5. Click through and check the other Settings listed on the right side of the page and verify the information and your prefernces. These can all be re-adjusted later and you can play with the various settings to see how they affect your store.
6. On the E-mails settings page you can use the SMTP information provided in your signup email. It is the most secure method of keeping your email from being seen as spam by your customers and suppliers email servers.

2.1.1 Shipping Settings

Shipping settings determine if shipping is available to your customer's location and what "methods" should be displayed for the customer to choose from. If you do NOT ship products (like in selling services or exclusively donwloadable products) then you can just check the Disable shipping checkbox and Save and be done with shipping.

However, if you use one or more of the shipping providers listed, you will need to set them up. For most of these, a separate user account and password is required by the provider. You will enter the specifics for each shipping provider that you use.

2.1.2 Upgrade Center

You will need to enter your License Number on this screen. Please either cut/paste or copy exactly as was sent to you. Also please ensure that the Updates

server input box contains "http://helpdesk.ez-ms.com". You do not need anything in the Send options section though it will auto-fill your username and password. Then click Save.

2.2 Administration->Addons tab

2.2.1 EZ Order Manager addon

Addons are a way to enable/disable whole chunks of functionality within the store. Please see the Addons section in the User Guide for details about each.

Setup of the EZ Order Manager addon is important for your integrated site. Please be sure that the following fields are defined and have appropriate values.

Company ID - Your valid company ID from EZom.

EZom Generic Cart Username - The matching username you have setup in EZom (initially it is set to your store's admin username).

EZom Generic Cart Password - The matching password you have setup in EZom (initially it is your store's admin password).

The remaining fields can be left alone but we describe them here for your information.

Automatic/Silent patch installation - when this box is checked, installation of updates is silent other than a notification box indicating what actions were done. It is recommended that this remain checked so we can get patches/upgrades to you without delay. Unchecking the box will require you to go through a manual patch process.

Item document directory - This path specifies where any item documents may be stored. This directory is where you can access documents for inclusion in your orders such as installation instructions. This directory can also be accessed by your customers for online documents per links you provide. Many stores see their documentation as a competitive advantage. So instead of having documents associated with the attachments area of a product (available to anyone), we provide this directory for more privacy. There are naming conventions used to associate these documents with products in EZom. Contact Support for further information.

2.2.2 SEO addon

We strongly suggest enabling this addon. It makes your site much more search engine friendly and enables you to send or use links that are much more person friendly too.

2.3 Administration->Payment methods

Enable/disable the types of payments you want to offer your customers on this page. Within each type you can enter specific information related to that type.

2.4 Administration->Credit cards

Define which types of credit cards your payment methods support.

3.0 Catalog Tab

The *Catalog* tab is where you manage your products, categories and product options.

Your hosted shopping cart comes with the store pre-populated with demo products. We suggest that you leave these in place until you get your store settings working in the manner you want.

We can delete all the demo product info from your store for you. But please note that when this is done, all product, category and option information will be removed for all products, categories and options in the store.

3.1 Catalog->categories

Here is where you define the names and structure of your root-level categories as well as sub-categories. Each category has a *name* and a *parent*. To add a new category, click the *Add category* button and fill out the form. You can move categories around to your choosing. Products will later be assigned to one or more categories.

3.2 Catalog->products

Products are defined by a unique product-code as well as the product's name. You can add images to your products and setup the descriptions, weights, type, etc. on the product detail page.

3.3 Catalog->Product features

Product features differ from *product options* in that these "features" can be applied to products of varying types. For instance, you might offer a *Product feature* of an extended warranty that can be applied to many different products.

3.4 Catalog->Global options

This is where you setup options that you might choose to use from many different products. You might have options for 'size', 'color', 'finish', etc. These can then be applied to products keeping the 'values' of the options managed in one place.

3.5 Catalog->Promotions

This is where you setup coupon codes or other promotional offers that can be triggered by the coupon code, total quantity of an order, total price of an order or other criteria you establish.

4.0 Design Tab

4.1 Design->Site layout

On this page you enter the text (or html) of what you want in the 'Welcome' area which is the top of the main content of your home page.

4.2 Design->Logos

You can customize all the logos within your store and for communications. Select from files on your computer, the server or a URL on the internet.

4.3 Design->Design Mode

There are two modes within the system that give you a visual view of your information. One is for translations when more than one language is enabled. This will highlight where the translated values are on each page of your store. The other mode is *customization mode* which is used to highlight areas of the store that have been customized by you.

Note: we strongly encourage you to use the *Local Modifications addon* for local customizations to avoid conflicts during the upgrade process. Please see the document titled *Customizing The Look And Feel Of Your Store* for more details.

4.4 Design->Blocks

This is a visual drag-and-drop tool that allows you to place pre-defined "blocks" of information in various positions on pages within your store. Each block contains a certain type of content. Content items (products, categories, pages) can be filled automatically, randomly or manually. Blocks on this page can be dragged to a new position and placed there.

There are pages for 7 different page types in addition to "all pages". So each page can have it's own look and feel separate from the others while maintaining a consistent header area for site navigation.

4.5 Design->Appearance settings

This is actually a link to the Administration->Settings area in the first example above.

4.6 Design->Quick links

This defines the links listed in the header area of all pages.

4.7 Design->Top menu

This defines what tabs or buttons your customers see on customer pages.

4.8 Design->Site map

Allows you to define what the contents are of your sitemap.

4.9 Design->Template editor

This is a browser based template editor. It is used to import or edit files in the skins area of your system.

Note: we strongly encourage you to use the *Local Modifications addon* for local customizations to avoid conflicts during the upgrade process. Please see the document titled *Customizing The Look And Feel Of Your Store* for more details.

4.10 Design->Skin selector

This dialog allows you to choose which *skin* you want to use for your customer area and your admin area. There are many to choose from and a screenshot is shown for each.

Note: re-selecting a skin does NOT reload it from the skins repository if it has been previously loaded.

5.0 Content Tab

5.1 Content->Pages

This is where you create pages within your system that are not *product* or *category* pages. For instance, if you had a page developed that described your return policies and procedures, you would create it here and then place links to it throughtout your store.

This is also where you might create specific landing pages for your advertising campaigns that have a specific focus or highlight specific products not otherwise covered in the store.

5.2 Content->Languages

This place lists all the language variables and their translations. If your store only uses the English language (EN) then you will see one entry per language variable. Otherwise if you support multiple languages, a *language selector* appears at the top of the page and you can choose which translation to view each variable in.

5.3 Content->Tags

Tags are used to associate objects with each other. For instance you might want to mark certain products "kid friendly" while others are not where those products share the same general product *category*.

5.4 Content->Site news

Here you can add news articles that will be shown in the *News* block displayed on your pages. This is a handy way to keep customers informed of changes going on within your store, your company or your industry.

5.5 Content->Newsletters

Here you can create newsletters to send to your mailing lists. Note that this feature is closely tied to the *Content->Mailing lists* section below.

5.6 Content->Mailing lists

Here you create mailing lists of various types. These lists can be designated to be shown during customer registration, during checkout or shown in the *Mailing lists* block. Unfortunately there is no import mechanism for mailing lists. For *EZ Order Manager* clients, there is a full Customer Management System that includes managing customers by various criteria.

5.7 Content->Comments and reviews

Note: this link is only enabled if you have the *Comments and reviews* addon is enabled on the *Administration->addons* page.

This is where you manage comments and reviews that your customers have given. You can rate them delete them, disapprove them and otherwise manage whether they are included on your site or not.

5.8 Content->Banners

On this page you define text or graphic banners. Banners are used to advertise specific links, or other areas of your site in the *Banners* blocks defined on your pages.

5.9 Content->Store locator

You can show customers your store location(s) using Google Maps by adding locations on this page.

6.0 Orders Tab

6.1 Orders->EZom Orders

If your site is enabled with EZ Order Manager integration, clicking this link will take you to your EZom company. It is a quick way to go between the administration area of your storefront and the EZ Order Manager system.

6.2 Orders->View orders

Lists all the orders in your store. Orders can be searched on a variety of criteria.

Note: EZ Order Manager clients should ignore this page since after an order is placed in the storefront, management of the order takes place within the EZ Order Manager system.

6.3 Orders->Sales reports

This is a nice tool that will give a graphical or tabular analysis of your order characteristics. What was my top 3 selling items? Who are my top customers? What categories of products sell best? The list is endless.

6.4 Orders->Order statuses

Note: EZ Order Manager clients, please DO NOT make any modifications to the *Order Statuses* other than identifying whether email is to be sent to the customer/supplier and the email content. DO NOT change the status codes otherwise your EZ Order Manager integration will not work correctly.

Order status definitions can be changed and new statuses can be added.

6.5 Orders->Gift certificates

Note: this link is only enabled if you have the *Gift certificates* addon is enabled on the *Administration->addons* page.

This is the page where you manage gift certificates. Customers can purchase gift certificates for their friends or relatives for use in your store. You can add free products to certificates, manage the amounts, etc.

7.0 Shipping/taxes Tab

This is a complex tab that needs to be edited with care. You can define various *locations* for different *shipping methods*. However, if a location of a customer does not fit into any of the *locations* you have defined, then there will be no shipping availability for them at checkout. Please see the *EZ-cart Users Guide* for more detailed information.

8.0 Users Tab

The *Users Tab* is where you manage registered users on your system. Users can be *customers* or *administrators* or a user can be both. Users can also belong to different *membership groups* where you can set different discount levels, points earnings or a variety of other attributes.

8.1 Users->Users

The complete list of all types of users is given. You can search to narrow your selection. From here you can edit the user's information and/or see their activity level.

8.2 Users->Administrators

Similar to the *Users* link above, this view shows only those users who are designated as *administrators*.

8.3 Users->Customers

Also similar to the *Users* link above, this view shows only those users who are designated as *customers*.

8.4 Users->Profile fields

This link is where you edit what information you want to collect for users of the system. Standard fields are already setup for *Contact Information*, *Billing Information* and *Shipping Information*. You can add custom fields and identify which fields are shown on which screens as well as whether they are required or not.

8.5 Users->User carts

This screen lists the open carts on the system. An open cart is one that was created but where the checkout process has yet to complete. Anonymous user's carts expire after 2 weeks, but registered

user's carts will be held indefinitely so the user can return and complete their shopping.

8.6 Users->Memberships

You can create a variety of *memberships* (groups) with different attributes. For instance you might have wholesale customers that receive a deep discount or you might give a discount to registered users who are returning customers. The actual discounts are applied in the *Catalog->Promotions* area, but the creation of the group occurs here.

9.0 Additional Documentation

More detail on each of these areas is available in the *EZ-cart Users Guide* and information about customizing your system is available in the document titled *Customizing The Look And Feel Of Your Store*.

For the most current information, please visit <http://ez-ms.com/documentation/index.php?page=ez-cart-intro>.