Using Your StoreSense Online Store

Accentsetc.com

Getting Started

Your online store is made up of two parts:

- The Store Administrator, where you keep the product catalog updated and track orders and customers.
- The Design Studio, where you can change text on the non-product pages of your site (like the Home page or Wine Policy page).

For both parts, this guide explains the tasks you'll be doing most often. For other tasks, you can consult the *StoreSense Store Administration Reference* and the *StoreSense Designer's Reference*.

Logging On

To access Store Administration, you must log in using a valid user name and password.

To log on

1. Open your browser.
   - If you're logging on to check orders or update products in the Store Administrator, use your FireFox browser.
   - If you want to create or modify a page on your site, use your Internet Explorer browser.
2. Go to this address: https://store.estreet.com/accentsetc/Admin/StoreStatus.bok
3. Enter your user name and password.

If you leave your computer for an extended period, it is recommended that you log off by clicking **Logoff** (on the toolbar).

Troubleshooting Log-ons

If you're having trouble logging in, check the following:

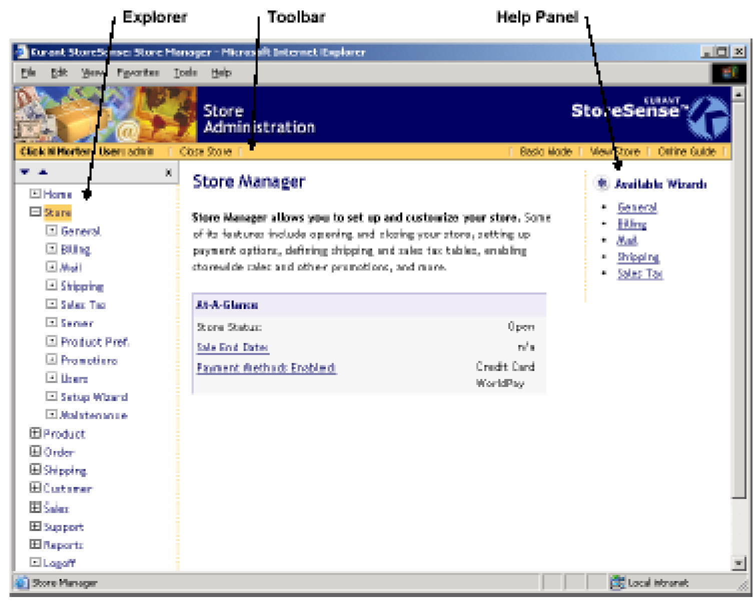
- Are you using the proper case for your user name and password? User name and passwords are case-sensitive.
- Verify that your PC's clock and time zone are correct. Your user name and password "lasts" for 8 hours, so an incorrect clock and/or time zone setting can cause an error even though the user name and password are correct.
- Check your browser settings to ensure that "cookies" are enabled.

Working in Store Administration

The Store Administration workspace contains the following areas:

- The **StoreSense Explorer**, which allows you to browse to the Products, Orders, Customers and other areas of your store.
- The **Toolbar**, which provides access to your store and the Online Guide. In addition, the toolbar allows you to open and close your store.

- The **Help Panel**, which contains access to the wizards available in the application, and/or help on using the current page.



The Store Administration Workspace

Viewing Store Activity

The Store Administration Home page provides a quick summary of your store activity. Click the links or icons to view more detailed information.

Here are the statistics you can view.

General

- **Carts Created Today**: The number of carts created since midnight.
- **Abandoned Carts**: The total number of carts where the cart expired within the period of time you specified.
- **Visitors**: The total number of visitors to the store.
- **Number of Searches Today**: The number of searches conducted since midnight.

Order Information

- **Pending Orders**: The number and dollar value of current pending orders.
- **Orders ready for shipping**: The number and dollar value of orders ready for shipping.
- **Orders going out today**: The number and dollar value of orders shipped today.

Customer information

- **New customer orders**: The number of customer orders since midnight.
- **Customers**: The number of customer profiles in the store.
- **Best Customer**: The customer with the greatest order total.

Product Information

- **Best selling Product**: The product with the greatest number of orders.
- **Featured Product**: The current featured product.

Getting Help

StoreSense Store Administration offers easy access to help.

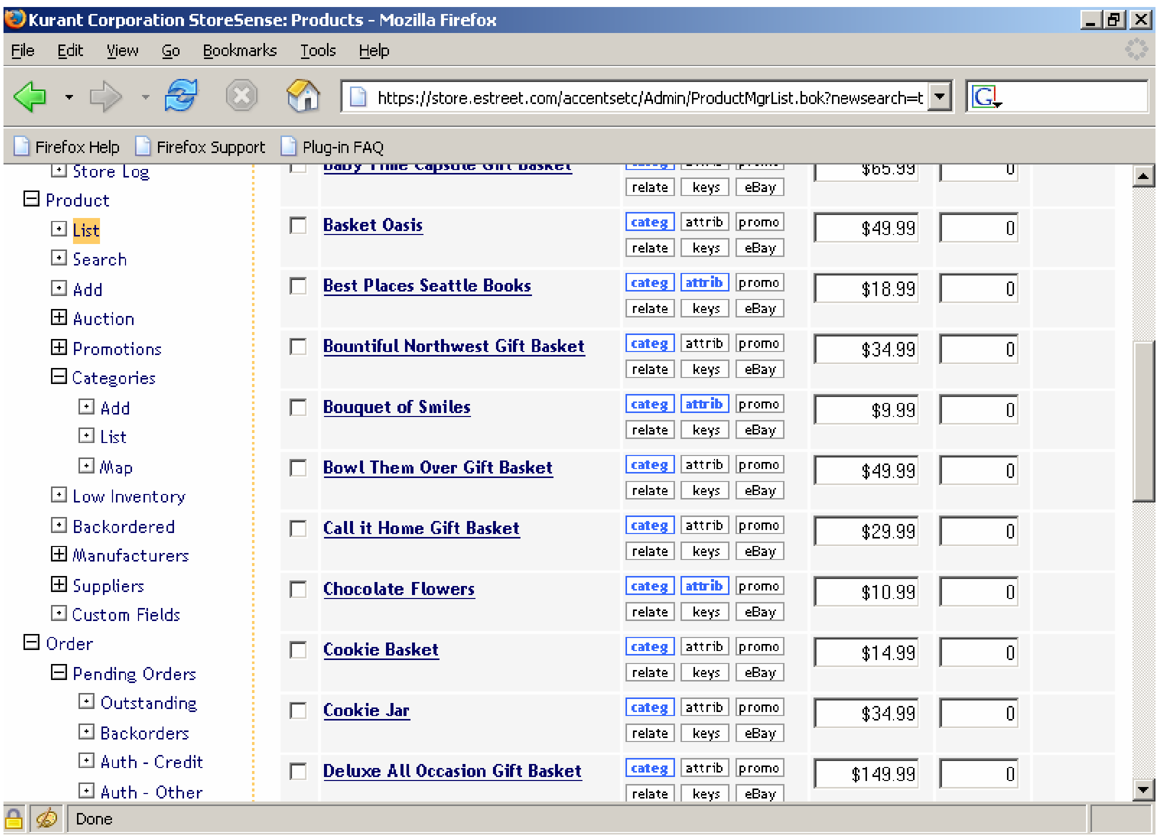
- The **Online Guide** button on the toolbar opens a full user guide with information on all the features of Store Administration. In addition, you can download printable user guides from the Online Guide Welcome page.
- Clicking the **question mark** on a form will bring up a window with help on entering information in the form fields.
- Some pages display help directly on the page in the Help Panel (on the right side of the page).

Working with Products

Understanding the Product Catalog

In the Explorer on the left side of the screen, click Products. You'll see a list of the things you can modify to keep your product catalog up-to-date. The parts you'll be using include:

- **List** – View a list of all your products
- **Search** – Search for specific products
- **Add** – Add a new product to your catalog
- **Categories** – Add, update, and delete product categories



Finding and Viewing Products

To view a list of products:

- Browse to **Product** | **List**. A list of all products will be displayed.

Or

1. Browse to **Product**. The Product Manager page appears.
2. Under **Search Options**, enter the first few characters of the product name in the **Product Name** field and click the > button.
   A list matching your search criteria appears.

You can update product price and other information directly on this list by entering the information in each field and clicking **Update**. However, clicking any other button on this page before clicking **Update** will cancel your changes.

Clicking any of the buttons underneath the product name will take you directly to that area to view and modify information.

Adding a New Product

To add a new product

1. Browse to **Product | Add Product**.
   The Add Product is displayed.
2. Fill out items in the Basic Information, Pricing, and Options section as shown below.
3. To see how this product will appear in the store, click **Preview**.
4. Click **Submit** to save your work. The Product Information page appears.
5. Assign the product to a category and add keywords (see the next sections).

Basic Information

Enter the product information for these items.

For this item	Enter this
Product	Enter the product name as you want it to appear to customers.
SKU/Item No	Leave blank.
OEM	Leave blank.
Brief	Leave blank
Description	Enter a description of the product. To make a word bold, you need to add special codes around it, like this: bold word = **bold** word Do not enter any hard returns (using your keyboard's Enter key) in this field.
Weight	Enter the shipping weight that is used to calculate shipping charges for the product.
Length	Leave blank.
Width	Leave blank.
Height	Leave blank.
Container	*Self*

Thumbnail Image	The small thumbnail image is used on the Catalog List page. The file type needs to be either .gif or .jpg, and the file name may not contain spaces. The thumbnail should be no larger than **144 pixels wide x 116 pixels high**. To use an image that has already been uploaded to the website, select it from the **Existing** list. To upload an image from your computer, click **Browse** and browse to the image file.
Photo Image	A larger product image for the Catalog Detail page. The file type needs to be either .gif or .jpg, and the file name may not contain spaces. The photo should be no larger than **360 pixels wide x 370 pixels high**. To use an image that has already been uploaded, select it from the **Existing** list To upload an image, click **Browse** and browse to the image file.
Catalog Detail Template	*Detail*
Product Type	*Normal*
Display	Select this check box to include the product in the storefront catalog search results. <and categories?>
Featured Product	Select this check box to make this the featured product for your store.
Subscription	Leave blank.
Authorization	Leave blank.
Order Extensions	Leave blank.

Pricing Information

For this item	Enter this
Sell Price	Enter the standard price you want to charge customers for the product (required).
Retail Price	Leave blank.
Surcharge	Leave blank.
Shipping	Leave blank.
Sales Information	Leave unchecked.
Sales Tax	Select the Taxable box if the item should include sales tax.

Options

Use this section to add the “Smart Delivery” checkbox. Here’s what the section should look like:

Options				
Product Services	Svc	Gather?	Title	Fee
	1:	✓	Smart Delivery	$0.00

Updating an Existing Product

Updating basic information

To change the basic information, pricing or options:

1. Browse to **Product** | **List.**
2. In the Product List, go to the product you want to update and click its name.
3. Click the **Update** button and make the changes.
4. To see how the changes will appear in the store, click **Preview.** Click **Submit** to save the changes.

Updating categories

To change the categories:

1. Browse to **Product** | **List.**
2. In the Product List, go to the product you want to update and click its name.
3. Click the **Categories** button.
4. To add a category, check the box next to the category name under **Add Categories** and click the **Assign** button
   Important: You *must* click the **Assign** button before you click **Next**; otherwise, the category is not added.
5. To delete a category, check the box next to the category name under **Current Categories** and click the **Remove** button.
6. Click **Return to Product** to go back to the product description.

Updating keywords

To add or delete keywords:

1. Browse to **Product** | **List.**
2. In the Product List, go to the product you want to update and click its name.
3. Click the **Keywords** button.
4. To add keywords, type them in the **Add Keywords** box and click the **Add** button.
5. To remove keywords, check the box next to the word under **Current User Entered Keywords** and click the **Delete** button.
6. Click **Return to Product** to go back to the product description.

Assigning a Product to Categories

Before a product can be found in your store, you must assign it to one or more categories.

Note: You must have already created a category *before* you can assign a product to it. See Adding a Category for more information.

To assign a product to a category:

1. View a listing of your products by browsing to **Product | List.**
2. Scroll to the product and click the **[categ]** button next to it.
   The Product Category List page appears.
3. Under **Add Categories**, check the box for the categories you want to add the product to and click **Assign**.

To remove a category from a product:

1. View a listing of your products by browsing to **Product | List.**
2. Scroll to the product and click the **[categ]** button next to it.
   The Product Category List page appears.
3. Under **Current Categories**, uncheck the box of the category you wish to remove and click **Remove**.

Adding Keywords to a Product

Keywords can be used by customers to search for products. StoreSense automatically generates keywords for a product using the product name, SKU, manufacturer and associated categories. However, you can also define additional keywords to help you customers find a product. For example, if you know that one of your product's names is commonly misspelled, you could add the misspelled version of the name to the keyword list to ensure that it will be found.

To add keywords:

1. View a listing of your products browsing to **Product | List.**
2. Scroll to the product and click the **[keys]** button next to it.
   The Product Keyword List page appears. The **Generated Keywords** list at the bottom of the page includes those keywords that have been automatically created by StoreSense.
3. Under **Add Keywords**, enter the custom keywords, separated by spaces.
4. Click **Add**.

To remove keywords:

1. View a listing of your products browsing to **Product | List.**
2. Scroll to the product and click the **[keys]** button next to it.
   The Product Keyword List page appears.
3. In the **Current User Entered Keywords** list, select the check boxes of the keywords you wish to remove and click **Delete**.

Creating Different Versions of a Product

To offer a product that comes in different versions—various colors or sizes, for example—you use StoreSense *attributes*. It's a two-step process. You first create the attributes when you originally create a product listing in the catalog. Then, after the product is created, you set the price of each version.

To create versions (attributes)

1. If the product isn't part of the catalog, start creating it. Fill out the Basic Information and Pricing sections.

   If the product is already created, go to its profile by browsing to Product > List. Click the name of the product in the list and click the **Update** button.

2. Scroll down to the Attributes section, and enter the following information.

For this item	Enter this
Label:	Type a name for the choice the customer must make. For example, if the product comes in different flavors, type "Flavor."
Value:	Type the first version and Click **Add to List**. For instance, if the product comes in grape, orange, and strawberry, you'd type "Grape" and click Add to List. Repeat this step to add each version to the list.

3. When you're finished adding versions, click the **Submit** button at the bottom of the page. The Product Information page is displayed.
4. On the Product Information page, click the **Attributes** button.
5. On the Add Attributes page for the product, scroll down to the Basic Information section. Find the box for the attribute you just created (for instance, "Flavor") and select the version you want to set the price for ("Orange") by clicking the arrow on the right side of the box.
6. Scroll down the page to the Pricing Information section, and enter the **total** price for the version (for example, you'd enter "14.99" if that's the cost for the orange version) and click the **Submit** button at the bottom of the page.
7. Repeat step 6 for each version.
8. When you've set all the prices, click the **Return to Product** button.

To add or delete versions (attributes)

You can add new versions to a product or delete existing versions.

Important: If you want to change the name of a version (for example, changing "Orange" to "Cran-orange"), you must treat the new name as a new version. After you add a new version, you must set its price.

1. Go to the information page for the product you want to modify by browsing to Product > List and clicking the name of the product.

2. Click the **Update** button.
3. On the Product Information page, scroll down to the Attributes section.
    - To delete a version, click the name of the version in the list and click the **Delete** button.
    - To add a new version, type its name in the Value box and click **Add to List**. (For instance, if the product now comes in lemon, you'd type "Lemon" in the Value box.)
4. Click the **Submit** button at the bottom of the page.
5. If you've added a version, set its price.

To modify version pricing

1. Go to the information page for the product you want to modify by browsing to Product > List and clicking the name of the product.
2. Click the **Attributes** button.
3. Scroll down to the Basic Information section. Find the box for the attribute you want to change (for instance, "Flavor") and select the version you want to set the price for ("Orange").
4. In the Pricing Information section, enter the **total** price for the version.
5. Click the **Submit** button at the bottom of the page.

Working with Categories

Categories are essential to the organization of your product catalog because they assist your customers in finding your products.

Viewing Categories

To view a list of categories:

- Browse to **Product** | **Categories** | **List**. A list of all categories will be displayed.

  Or...

1. Browse to **Product** | **Categories**. The Categories page appears.
2. **Under Search Options**, in the **Categories** field, type the starting characters of the category's name and click the > button.
   A list matching your search criteria appears.

Adding a Category

To add a category:

1. Browse to **Product** | **Categories** | **Add**. The Add Category page appears.
2. Enter the category information as follows:

For this item	Enter this
Category	The name of the category.
Description	a description for the category
Photo	Leave blank.
Sort Priority	

3. Click **Submit**. The Category Information page appears.

Updating a Category

To update a category:

1. Browse to **Product** | **Categories**. The Categories page appears.
2. View a listing of your categories.
3. Select the category you wish to edit by clicking its link. The Category Information page appears.
4. Click **Update**. The Category Update page appears.
5. Edit the information in each field.
6. Click **Submit**. You are returned to the Category Information page.
7. To add a subcategory to this category:
   - On the Category Information page, click **Subcategories**.
   - Under **Add Subcategory**, enter the name and sort priority of the subcategory.

    - Click **Submit**. The subcategory will appear in the **Current Subcategories** list.
    - Repeat for each subcategory.
8. To edit a subcategory:
    - On the Category Information page, click **Subcategories**.
    - Under **Current Subcategory**, click the name of the subcategory you wish to edit.
    - Edit the subcategory name and sort priority and click **Submit**.
    - Repeat for each subcategory.
9. To remove a subcategory from this category:
    - On the Category Information page, click **Subcategories**.
    - Under **Current Subcategory**, click the name of the subcategory you wish to remove.
    - Click **Delete**. The subcategory is removed from the **Current Subcategories** list.
    - Repeat for each subcategory.

Deleting a Category

1. Browse to **Product | Categories**. The Categories page appears.
2. View a listing of your categories.
3. Select the category you wish to delete by selecting its check box.
4. Click **Delete**.

Working with Orders

Once a customer purchases a product from your store, it moves through an authorization process.

1. You authorize the credit card or other payment for the order.
2. If necessary, you can adjust or cancel the orders.
3. You approve the order for shipping.

Authorizing Credit Card Payment

If you are processing credit card transactions offline, you will need to indicate if a customer's credit card has been verified using this feature.

To manually authorize an order requiring credit card authorization:

1. Browse to **Order** | **Pending Orders** | **Auth - Credit**. Shown is a list of all customer orders that require authorization.
2. You can perform the following tasks on this page:
   - To review an invoice, click the order date.
   - To review the customer profile, click the customer's name. You must have user access to the Customer Manager to access this feature.
   - To cancel any of these orders, select the appropriate check box and click **Cancel**.
3. When credit card authorization has been received, authorize shipment by checking the box next to the customer's name and clicking **Authorize**. The order(s) will then move to the Orders Ready for Shipping list.

Shipping Orders

Once the payment method for an order has been authorized, it is ready for shipping. When you have prepared an order for shipping, you will need to tell StoreSense that it has been shipped, so that the order can be marked as completed.

To ship an order:

1. Browse to **Order** | **Ready for Shipping**.
   The Orders Ready for Shipping page appears. Orders ready for shipping are listed in the order they were received.
2. Select those orders that are ready to ship.
3. Enter the **Ship Dates** and **Shipper Number** for each order being shipped.
4. If you are using a shipper other than/in addition to the StoreSense Shipper, click the **Method** link to configure and review your packing labels.
5. Click the order date to display a Packing List in a new window that you can print and send with your orders.
6. Click **Ship** to ship your orders.

Note: You may adjust the shipping date and shipper numbers after the order is completed processing by viewing the invoice and clicking the **Adjust Shipper Details** link.

Canceling Orders

StoreSense allows you to cancel orders while they are still pending. Once an order has been marked as shipped, you can only delete it, or issue a credit against it.

To cancel an order:

1. Review orders.
2. Select the check box of the order you wish to cancel.
3. Click **Cancel Orders**.

Working with Invoices

Searching for Invoices

To view a list of invoices that are pending:

- Browse to **Order** | **Pending: Credit (or Other)** or, browse to **Order** | **Ready for Shipping: Standard (or Priority)**.

To view a list of invoices that have been completed (shipped):

1. Browse to **Order** | **Completed Orders** link.
2. Select a search type of **Ship Date** or **Order Date**.
3. Select either **Pre-defined Date Ranges** or a **Custom Date Range**.
   - If you select **Pre-defined Date Range**, select a range from the list.
   - If you select **Custom Date Range**, enter the date range you wish to view.
4. Click **Go**. A list of completed orders fitting your criteria appears.
5. To view an order, click the invoice date.

To search for a specific invoice (pending *or* completed):

1. Browse to **Order**. The Order Manager page appears.
2. Under **Search Options**, in the **View Order by Tracking or Invoice Number** field, enter the tracking or invoice number and click the > button. The invoice appears.

Printing Invoices

If you like, you can print an invoice without any of the StoreSense Store Administration navigation and headings.

To print an invoice

1. View a listing of orders.
2. Click the number of the invoice that you wish to print. The invoice appears.
3. Select the **Printer Friendly Version** link.
   The invoice appears in a new browser window, using the format defined in the Invoice - Print template.

Working with Customers

Viewing Customers

To view a list of customers:

- Browse to **Customer** | **List**. A list of all customers will be displayed.
  Or...

1. Browse to **Customer**. The Customer Manager page appears.
2. Under **Search Options**, type any characters that StoreSense should look for *within* your selected search criteria (see below) and click the > button.
    - The default search criteria is to search using the **By Last Name** option.
    - To search by the customer's e-mail address, select **By E-mail**.
    - To search by the customer's company, select **By Company**.
    - To list all customers, click the > button without entering any characters.
3. A list matching your search criteria appears. For example:
    - If you entered "son", and searched by last name, customers with the last names of "John**son**", "Thoma**son**ville" and "**Son**tino" would be returned.
    - If you entered "adomain", and searched by e-mail, customers with e-mail addresses of "jane@**adomain**.com" and "joe@**adomain**.net" would be returned.

To search by customer number:

1. Browse to **Customer**. The Customer Manager page appears.
2. Under **Search Options**, enter the customer number in the **Go Direct** field and click the **>** button.
3. A list matching your search criteria appears.

Maintaining Customer Profiles

The customer profile is where customer information can be added and updated. You can also import information for multiple customers using the Import/Export feature.

To add a customer:

1. Browse to **Customer** | **Add**. The Add Customer page appears.
2. Enter the information in each field.
3. Click **Submit** to save your work.

To update a customer profile:

1. Browse to **Customer** | **List**. The Add Customer page appears.
2. Click the link of the customer you wish to update.
3. Edit the information in each field.
   You can only change the customer's password; you cannot view it. If left blank, the password is not changed.

4. If you made changes to the customer's billing information, and wish to apply those changes to all of the customer's active subscriptions, select the **Apply billing changes to the customer's active subscriptions** check box.
5. Click **Submit** to save your work.

To delete a customer:

1. Browse to **Customer** | **List**. The Add Customer page appears.
2. Click the customer link you wish to delete. The Customer Profile page appears.
3. Click **Delete**. A confirmation page is shown confirming that this is the customer you want to delete.
4. Click **Yes** to delete the profile. If you do not wish to delete this profile, click **No**.

Note: A customer profile cannot be deleted if there are any invoices associated with the customer. You must first cancel any pending orders or delete the completed orders before you can delete the customer. You can delete all orders using the Store Manager | Maintenance feature, or individually by searching for an invoice and deleting it.

Viewing Customer Order and Product History

You can view all orders placed by a selected customer by displaying the order history. The history shows the invoice date, activity (credit, sale), invoice number, invoice total and status (ordered, shipped, etc.).

To view a customer's order history:

1. Browse to **Customer**. The Customer Manager page appears.
2. Under **Search Options**, in the **Customer Name** field, type the starting characters of the customer's name and click the > button.
   To list all customers, click the > button without entering any characters. The Customer List appears.
3. Click the customer's **Order History** link. The Customer History page appears.
4. To view a list of all products ordered by the customer, click the **Customer Product History** link. The Customer Product History page appears.

Running Reports

To create a report:

1. Browse to **Report**. The Report Manager page appears.
2. Click one of the report links.
    - *Executive Reports*
    - *Product Statistics Report*
    - *Category Statistics Report*
    - *Sales Reports*
    - *Cost of Inventory Report*
3. Select the report from the list.
4. Some reports require you to choose a specific product or category. If so, select the item from the list.
5. Choose a pre-defined date range or enter a custom date range.

   You will only be able to report on the data contained in your store log. If your store log is set to only retain data for six months, you will only be able to generate reports on the past six months of data.

6. Click **Go** to generate the report.

Types of reports

Executive reports

- Best Sellers report – Lists top 20 selling products
- Customer Top 20 report -- Lists the top 20 customers in terms of purchases made.
- Least Visited Products report -- Highlights the top 20 least visited products in your store. In order to appear on the report, a product must have been visited at least once.
- Most Visited Product report -- Highlights the top 20 most visited products.
- Orders/Visits Ration report -- Details the order and visit activity for a store.
- Search Summary report -- Provides insight into your customer's searches and whether they were successful or not in finding the information they wanted. You can use these reports to identify the products for which your customers are searching, and also what they are *not* finding.
- Worst Sellers report -- Lists the bottom 20 selling products.

Product report

- Product Statistics report -- Shows individual product statistics.

Category report

- Category Statistics report -- Shows statistics for sales by category. If you have placed products in multiple categories, they are counted in each category.

Sales reports

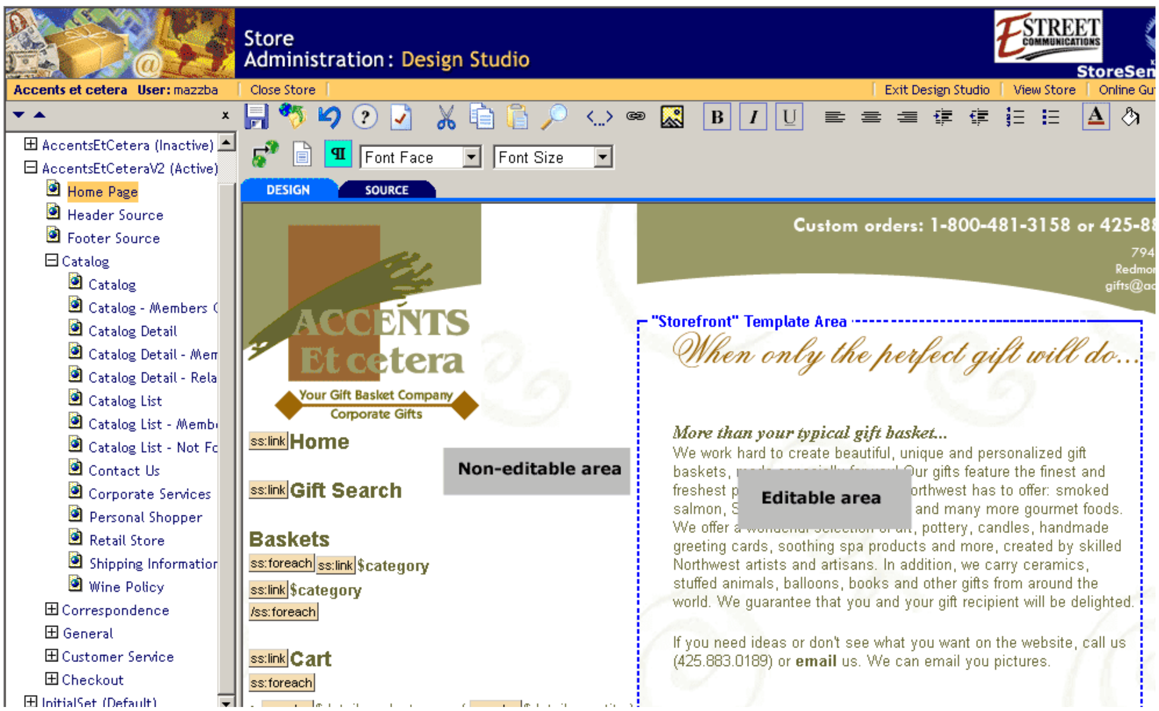
- Order Log report -- Displays detailed activity and information for an order, including any customer credit information.
- Sales by Category report -- Shows sales by category for the date range selected. If products are placed in multiple categories, they will be counted in each category.
- Sales by Customer report -- Displays sales by customer.
- Sales by Product report -- Shows sales by product for the date range selected.
- Sales Tax report -- Summary of the sales tax you have collected for the date range specified.

Working in Design Studio

Use the Design Studio to update the text on the non-product pages of your website (such as the Home page).

Opening Design Studio

1. If you haven't already done so, log onto your site using your Internet Explorer browser.
2. In the Store Administrator, click the **Design Studio** button on the upper right.
3. In the left pane of the Design Studio window, click **AccentsEtCeteraV2 (Active).**
   You'll see a list of all the pages on your website.



Updating Non-Product Pages

IMPORTANT: You can **only** change text and graphics within the blue square. This is called the Storefront Template Area. If you try to modify anything outside this square, it could change the entire page layout or interfere with the site's functionality. If this happens, click the Undo button at the top of the page. 

To change text

1. Under **AccentsEtCeteraV2 (Active)** in the left pane of the Design Studio window, click the page you want to update. You can change these pages:

- Home page
- Catalog > Contact Us
- Catalog > Corporate Services
- Catalog > Personal Shopper
- Catalog > Retail Store
- Catalog > Shipping Information
- Catalog > Wine Policy

2. Make sure the Design tab is selected.
3. Place the cursor in the location in which you want to add text. The cursor is indicated by the flashing bar (|).
4. Type the text you wish to add.
   You can make the text bold or italic by clicking the buttons above the editing area. Do not change the Font Face or Font Size items.
5. To save the changes, click the Save button .
   To undo the changes, click the Undo button..
6. To make the change to your online store, click the Publish button .

To add an image

1. Place the cursor in the location in which you want the image to appear. The cursor is indicated by the flashing bar (|).
2. Click  on the toolbar. The Image window appears.
3. At this point, you have two options:
   - **Specific Images**: you can point to a specific image that you've already uploaded to your store. This is recommended primarily when adding store design images. To do so, select the **Store Image** option, and select an image from the list.
   - **Dynamic Images**: if you wish to insert a "dynamic" image (for example, you want to display images in a list of search results, or you want to display a product image on a Catalog Detail page), select the **URL/Source/Shortcut** option. Then enter the appropriate URL, object expression or shortcut. For help on selecting an object expression or shortcut, click **Help**.
4. Enter text to describe the image in the **Alternate Text** field. This can be very helpful in making your site accessible to users with disabilities.
5. If necessary, select any other formatting options.
6. To save the changes, click the Save button .
7. To make the change to your online store, click the Publish button .