Getting Started:
Setting up Your eCommerce Site
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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
- **Activate** your store (Your store is not yet live!)

Site Owners vs. Store Manager

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.**

Software Help

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.

This **Getting Started** guide contains some sections that most WVU store managers do not use. **The following are the most commonly used features at WVU:**

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<thead>
<tr>
<th>Task</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Logging In</td>
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</tbody>
</table>
Access Your Site

Logging In

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.
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.
<p>| | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
</table>
| **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. A fee is charged to your GL account for each transaction (approximately 2.25%). This fee is withdrawn once each month from the GL account. |   |
| **Display Options** | **Featured:** The product will appear on the website’s front page when this is checked. (Maximum of six products can be featured.) |   |
| **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.** |   |
| **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. |   |
| **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.

![Image of Violin Lessons](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.

![Image of Breadcrumbs](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.

![Image of Contents Region](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.
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 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 in the Customer Fields region. 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, and maximum length. Enter the necessary information.

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

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.

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**.

![Template 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 template, go to the store and click the product. The extra fields should appear.

![Image of Violin Lessons template]

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

![Image of Text field with prompt: If you took lessons here previously, who was your teacher?]

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. Click Add Discount.

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

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

5. 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 (or leave blank).

6. 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.
7. Choose whether this discount will apply to all purchases, or for only specific products. To choose a specific product, click **change**.

![Discount Scope](image)

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

![Search](image)

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

![Add](image)

10. Click Finish (bottom of screen).
11. On the discount set-up page, click **Save**.

![Discount Setup Page](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: Quick view charts can be minimized ( ), or closed ( ).

- **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.
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 and 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.

6. To see the responses from customers from a Product Template, choose Reports > Products > Attendees. The Attendee(s) column contains responses.

Products > Attendees (with template responses)
Edit Your Store’s Settings

Change Your Password

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

2. Complete the fields.
Change the Content of the Home Page

1. From the **ADMIN** area, click **STORE** in the upper right corner.

![ADMIN area](image)

2. After your store has been created, the Home Page will have default text.

![Home Page default text](image)

3. Within the Home Page, click the **Mode** drop-down arrow in the lower left corner and change to **Edit**.

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

5. Add your own text and content using HTML.

6. Save your work.

![Editor Zone](image)

- Adds picture named “buy.jpg” previously uploaded to the Asset Manager.
- Changed “Test” to “Training”

Result:

![Result](image)
TimeZone Offset

The Configure menu allows the Store Managers to set the proper time for the store.

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

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

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

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.

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

**NOTE**: You will need to manually change this setting seasonally.
Managing Your Email Templates

Email templates have been set up to notify the shoppers of successful purchases and unsuccessful attempts.

Thank you for your order Kathy Peppe!

If you would like to check the status of your order, manage addresses, update your email, or customize many other options, please visit your personal My Account page.

Thank you for shopping with us.
WVU Testing

Order Summary

<table>
<thead>
<tr>
<th>Field</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email Address</td>
<td><a href="mailto:Kathy.pepple@mail.wvu.edu">Kathy.pepple@mail.wvu.edu</a></td>
</tr>
<tr>
<td>Order Number</td>
<td>116</td>
</tr>
<tr>
<td>Ordered on</td>
<td>12/9/2015 9:49:27 AM</td>
</tr>
<tr>
<td>Ordered by</td>
<td>Kathy Peppe</td>
</tr>
<tr>
<td>Order Total</td>
<td>$25.00</td>
</tr>
<tr>
<td>Order Status</td>
<td>View Online</td>
</tr>
</tbody>
</table>

Billing Address: WVU
Kathy Peppe
One Waterfront Place
Morgantown, WV 26505
UNITED STATES

Payment Method: Visa x1111

Non-Shipping Items

<table>
<thead>
<tr>
<th>SKU</th>
<th>Name</th>
<th>Price</th>
<th>Quantity</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>French Horn lessons</td>
<td>$25.00</td>
<td>1</td>
<td>$25.00</td>
</tr>
</tbody>
</table>

Order Totals

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Subtotal</td>
<td>$25.00</td>
</tr>
<tr>
<td>Tax</td>
<td>$0.00</td>
</tr>
<tr>
<td>Shipping and Handling</td>
<td>$0.00</td>
</tr>
</tbody>
</table>

Thanks again for shopping with us!

However, the store manager needs to change the “From Address” field, add an email address to the CC or BCC fields, and change any desired wording in the email. The same email goes to all shoppers within your store, regardless of the item purchased. (To have customized emails for different products, you will need to set up a digital good as described on page 31.)
1. Within the Dashboard > Configure menu, click Email and then Templates from the expanded menu.

2. The list of templates is shown. To change the template, click the edit icon for Customer Order Notification.

3. Complete the required fields, circled below.
• **From Address**: change this to an email address within your own department.

• **CC Address(es) and/or BCC Address(es)**: Add your own email address to be notified when a purchase is made.

4. View the wording in the message area. This message incorporates placeholder text for the order number, and first and last names. You can change this default text, and then click **Save**.

   ![Image of message area]

   **Note**: You can also delete all the default HTML and enter plain text in the Message area, but it will not contain details of the order.

5. To view the credit card failure template, click the edit icon for the Cred Card Failure Notification template.

   ![Image of email templates]

6. As with the customer order notification template, enter a “From” email address, add your email in the CC Address(es) or BCC Address(es) fields, and change the message, if desired.
### Edit Template ‘Credit Card Failure Notification’

<table>
<thead>
<tr>
<th>Template Name:</th>
<th>Credit Card Failure Notification</th>
<th>From Address: <a href="mailto:ecommerce@mail.wvu.edu">ecommerce@mail.wvu.edu</a></th>
</tr>
</thead>
<tbody>
<tr>
<td>To Address(es):</td>
<td>Customer</td>
<td></td>
</tr>
<tr>
<td>CC Address(es):</td>
<td></td>
<td></td>
</tr>
<tr>
<td>BCC Address(es):</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

#### Select Triggers:
- If desired, select the events that will cause this message to be sent automatically. Messages can also be sent manually from the merchant admin.

- [ ] None
- [ ] Payment Authorization Failed
- [ ] Payment Capture Failed
- [ ] Order Placed
- [ ] Order Paid
- [ ] Order Paid Partial
- [ ] Order Shipped
- [ ] Order Shipped Partial
- [ ] Order Status Updated
- [ ] Order Cancelled
- [ ] Gift Certificate Validated
- [ ] Order Paid No Shipments
- [ ] Customer Password Request
- [ ] Low Inventory Item Purchased

#### Subject:
- Credit Card Problem: Order Number $orderNumber - $orderDate

#### Message:

```html
<p id="collapse-" class="Email">
  <p id="body">
    <table class="Email">
      <thead>
        <tr>
          <th>Email</th>
        </tr>
      </thead>
      <tbody>
        <tr>
          <td id="Email">$firstName $lastName, there was a problem with your recent order $orderNumber.</td>
        </tr>
      </tbody>
    </table>
  </p>
</p>
```

- Send HTML Mail
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

View Order #154

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

SHIPMENT INFORMATION

Status: Waiting to Ship
Shipping Method: Pick up

<table>
<thead>
<tr>
<th>Qty</th>
<th>SKU</th>
<th>Item</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td></td>
<td>Session Only</td>
</tr>
<tr>
<td></td>
<td>Name: Kathy</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Department: ITS</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Qty</th>
<th>SKU</th>
<th>Item</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>SHIPPING</td>
<td>Pick up</td>
</tr>
</tbody>
</table>

DIGITAL GOODS

Name          Download | Remaining
Conference     ![Download Link](image)

Remaining: (unlimited)

Within Email to Customer
PDF Example:

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.

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.

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

3. Click Add And Edit.
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 (beginning on page 32).

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**.

![Attach Digital Good to Session Only](image)

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

![Digital Goods: Session Only](image)

**What the Customer Sees**

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

![View Order](image)

2. The customer sees a prompt to **open** or **save**.

![Open or Save](image)
3. After choosing, the pdf can be opened:

![Conference.pdf - Adobe Acrobat Pro DC](image)

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.

![Download link](image)

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:

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

To issue a refund, email RevenueServices@mail.wvu.edu with the subject line “eCommerce Refund” and include the following information in the body of the email:

- 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.

**Note:** To protect customer identities, the eCommerce system does not store credit card numbers.

Activating Your Store, Maintenance and Troubleshooting

Your store will be in a test mode until you request that the store be activated. Request this after you have set up your store by filing a ticket at https://wvu.teamdynamix.com/TDClient/Requests/ServiceDet.aspx?ID=9160 (click on eCommerce Help). After you request that the site become live, the WVU AbleCommerce system administrator will contact the state treasurer’s office to activate the store. After WVU receives word from the state treasurer’s office that the store is live and revenue can be collected, you will be notified. Until then, no purchases should be made. Any accidental purchases made before the system is activated are not actually being processed.

If you need help at any point, submit a ticket for eCommerce support at https://wvu.teamdynamix.com/TDClient/Requests/ServiceDet.aspx?ID=9160 (click on eCommerce Help) or call (304) 293-4444 (toll free at 877-327-9260).

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.