



Version 5.7.0

StoreSense.

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Step 1: Meet StoreSense

Welcome to StoreSense Quick Start! This tutorial is designed to get your store open for business and selling over the Internet as soon as possible.

It is recommended that you follow each of the steps in the order they are presented.

Additional Documents

Before you begin, download and print the StoreSense Store Administration User Guide and Designer's Reference. These are available by clicking the **Online Guide** link in Store Administration, and then clicking one of the user guide links.

The Online Guide will provide you with the information you need to quickly learn and use StoreSense. In addition, clicking will bring up a window with help on entering information in the fields just below it.

Working in Store Administration

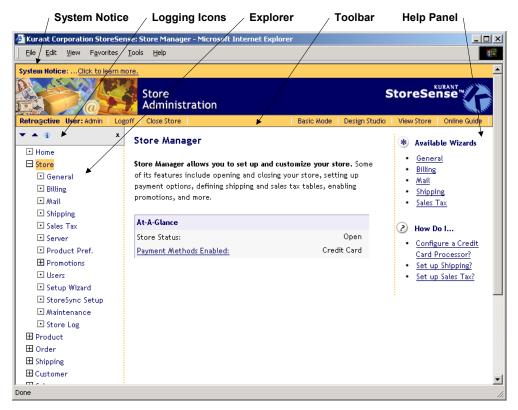
The Store Administration workspace contains the following areas:

The **StoreSense Explorer**, which allows you to browse to the different parts of the application.

The **Toolbar**, which provides access to your store and the Online Guide. In addition, the toolbar allows you to open and close your store, and set the mode in which you wish to work.

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

Your Site Administrator may send you messages notifying you of updates, etc. These messages will appear at the top of the screen, and will start with "System Notice:". To view the message, click the link.



The Store Administration Workspace

Navigating Store Administration

The StoreSense Explorer uses "collapsible" navigation that allows you to quickly access the different parts of the application. The navigation works as follows:

Click \pm to expand a list.

Click

☐ to hide a list.

indicates that an item cannot be expanded or collapsed.

Click the name of the manager to go that page, and expand the list for that manager.

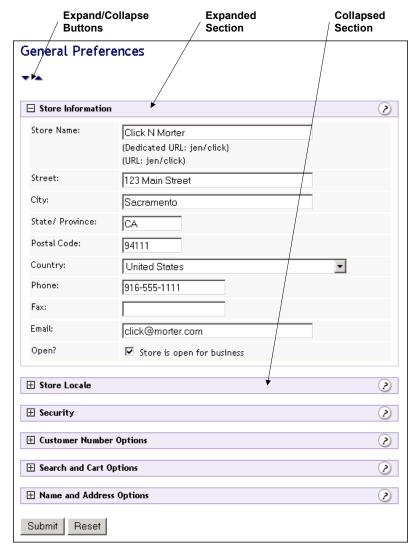
The Explorer toolbar contains several buttons that also affect the list.

- collapses the entire list.
- expands the entire list.
- 🗷 hides the entire Explorer. To show the Explorer again, click on the StoreSense toolbar.

Some of the forms in Store Administration can be expanded and collapsed. This allows you to quickly work with the most important fields on the form, without having to scroll through a long page.

- collapses all sections of the form.
- expands all sections of the form.

- \boxplus expands a form section.
- □ hides a form section.



Collapsible Forms

Advanced/Basic Modes

StoreSense provides you with two different "modes": an **Advanced** mode which includes all application functionality, and a **Basic** mode that provides access to only the most important functionality.

You can choose between these modes, depending on how you want to use StoreSense. To change modes, click the **Advanced/Basic Mode** button on the toolbar (it will say **Advanced Mode** if you are currently in Basic Mode, and will say **Basic Mode** if you are currently in Advanced Mode).

If you are working in basic mode, you can access the advanced mode functions in the StoreSense Explorer by clicking ♥.

These settings will only affect the logged in user.

The "Managers"

Each "manager" in Store Administration focuses on a specific area of maintaining your store, and can be accessed by clicking the appropriate link on the StoreSense Explorer.

In addition, some managers offer wizards to help you with common tasks. These wizards appear on the main landing pages in the Help Panel.

The managers are as follows:

Manager	Description	Wizards
Store Manager	Preferences and settings that set up and customize your store.	General Preferences, Billing Preferences, Mail, Shipping, Sales Tax
Product Manager	Product line management.	Add Product
Order Manager	Orders, both pending and completed.	Issue Credits
Shipping Manager	Orders that are ready to be shipped.	n/a
Customer Manager	Customer profile information.	n/a
Sales Manager	Sales leads, sales people, sales managers, and sales reports.	n/a (Professional Edition, Sales Manager module only)
Support Manager	Template design, import/export, image upload and server file management.	Upload Images
Report Manager	Summary level and detailed reports that can be customized and used to analyze the success of your store.	n/a



Step 2: Designing Your Store

The design of your store is one of the most important pieces to ensuring a positive shopping experience for your customers. Credibility, ease of use, and overall impressions are largely driven by store design.

This section provides basic information for you to use in designing your StoreSense store. For more detailed and advanced information, please download the *Designer's Reference* from the Online Guide start page.

Running the Setup Wizard

The Setup Wizard is a tool that will help you design your store, and enter basic store information.

If You Want to Skip This Step

If you do not want to run the Setup Wizard at this time, you can:

Run the Setup Wizard later. However, doing so will overwrite any design work you may do to your store in the meantime. You can start it again by browsing to **Store | Setup Wizard**, or by selecting it from the Welcome page



Manually set up your store by using the StoreSense Design Studio (in Support Manager), and the tools in the Store Manager.

Before You Begin the Setup Wizard

Before you run the Setup Wizard, you should gather the following information:

For this section	Gather
Store Information	Store Name* URL Street* City* State/Province* Country* Phone* Email* Store Locale/ Time Zone* Payment Options
Custom Text	You should draft text to appear on the following storefront pages: Home, About Us, Customer Service, Policies
Optional Templates	StoreSense gives you three optional templates that you can add to your store: Store Locator, Frequently Asked Questions, and Privacy Statement. You should determine if you want to use any of these templates.
	For each product you wish to add at this time, gather the following information: Product Name SKU Number* Price

For this section	Gather
	Category
	Image File Name
	Description

^{*} indicates required fields.

Overview of the Setup Wizard

Design

This section allows you to choose a layout scheme for your overall design and individual pages. There are three choices you'll be making:

Themes: This is the overall look and feel for your site. Small images of each theme are presented on this page - for a larger view, click the image. To view additional themes, click **More**.

Layouts: The page layouts set the body layout for three key pages in your store: the Storefront, the Catalog List, and the Product Detail.

Fonts and Colors: This page allows you to choose fonts and colors for your store.

Settings

The Settings section allows you to enter basic information about your store, add products, and enter text that will appear in your store.

If you want to include either the Store Locator, Frequently Asked Questions, or Privacy Statement templates in your store, select the **Add and Customize Additional Pages** check box, and then on the next page, select the templates you want to include.

Build

This is the final step and officially opens your store. You have the following options:

Build and Open will create the design of your store, upload your products, save your store settings, and then open your store so that it's available to the general public.

Build will create the design of your store, upload your products and save your store settings, but will not open your store. This allows you more time to develop your store before making it available to the general public. You can open your store later.

Cancel ends the Setup Wizard.

Additional Design Options

While the Setup Wizard will implement most of your design, there may be other design changes you wish to make. You can read about these features in the following Online Guide or Store Administration Users Guide topics

If you need to	Then refer to this topic
	Store Administration User Guide, Using Template Edit Modes
Make changes to your store using your favorite HTML editor	Store Administration User Guide, Exporting Templates

If you need to	Then refer to this topic
Upload custom images	Store Administration User Guide, Uploading Images
Review instructions on designing your store	Designers Reference



Step 3: Integrating an Existing Site with StoreSense

While in many cases, StoreSense's pre-designed pages and extensive capabilities make maintaining a separate web site and web store unnecessary, you may prefer to keep your site. If so, you'll want to design your store so that it flows seamlessly with your existing site. This section provides design tips and instructions for linking your site with your store.

Transferring the Look and Feel of Your Existing Site to Your Storefront

The first step in transferring the look and feel of your existing site to your storefront is to identify those elements that make up your site's design.

Text Fonts and Colors: What fonts and colors are you using for your web page text? Make a note of these, and when you run the StoreSense Setup Wizard, make the selections that match your existing site.

Page Layout: How would you describe the layout of your store? Does your site's navigation run along the top or one side? If so, you'll want to modify your storefront's theme to use the same navigation.

Images: While you may have many images on your page, identify those that are consistent across most pages - those images are the ones to use in your store.

Once you've identified your design elements, you're ready to transfer that design to your storefront.

Choosing a Theme

If you have not already run the complete Setup Wizard and selected a theme, you can run it again by either:

Selecting the link on the Welcome page;

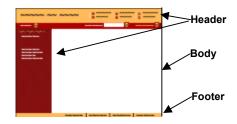
Browsing to **Store | Setup Wizard**, or;

Clicking the **Design Studio** button on the toolbar, selecting **InitialSet (Default)**, and then running the Template Assistant. This runs just the design portion of the Setup Wizard.

Customizing a Theme

StoreSense ships with dozens of pre-designed themes that you can use. You can browse these themes to see if there's one that matches the general design/colors of your site. If you can't find a perfect match, find one that comes the closest, and then modify the Header and Footer templates so that they match your existing site.

The Header and Footer templates are those portions of the your site design that appear on every template. Typically, the Header runs along the top and left portion of the page, and the Footer runs along the bottom, though there are some exceptions.



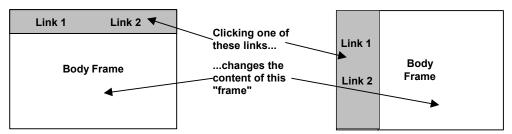
The Header and Footer Templates

To modify your Header or Footer templates:

- 1 Open Store Administration, and then open Design Studio by clicking the **Design Studio** button on the toolbar.
- 2 If you're not familiar with HTML, you'll want to work with these templates in Design Mode. To do so, browse to **InitialSet (Default)** | **Home Page**. Place your cursor in the Header or Footer area and make your edits.
- 3 If you want to work with the HTML code, browse to **InitialSet (Default)** | **Header Source** or **InitialSet (Default)** | **Footer Source** the template source code appears and is ready for editing.

If Your Existing Site Uses Frames

Some sites are designed using Frames. "Framed" sites divide your pages into separate regions (for example, to contain the navigation in one frame, and the content in another). Typically in a framed site, one region stays the same all the time, but another region will change based the selected links (and usually, these pages will "scroll" independently of each other).



Two examples of framed sites. One frame is shaded, the other is white.

If you created your existing site using frames, you'll want to modify your store's theme so that it works with your existing site's frames. For example, if you have a frameset made of a top banner and body, you'll want to remove or move the content in your store's top banner section. If your frameset is made up of a left and right column, you'll want to modify the theme to move or remove the content on the left side.

In most of the themes, the top and left content of the store is contained in the Header template - modifying this template will allow you to move and remove content so that it fits with your frame design.

To modify your Header or Footer templates:

- 1 Open Store Administration, and then open Design Studio by clicking the **Design Studio** button on the toolbar.
- If you're not familiar with HTML, you'll want to work with these templates in Design Mode. To do so, browse to **InitialSet (Default)** | **Home Page**. Place your cursor in the Header or Footer area and make your edits.

3 If you want to work with the HTML code, browse to **InitialSet (Default)** | **Header Source** or **InitialSet (Default)** | **Footer Source** - the template appears and is ready for editing.

Linking to and from Your Storefront

Once you have finalized the design of your storefront, you'll want to add links from your site to your store, and from your store back to your site.

Using Link Builder

The Link Builder helps you to create the code you need to create links to your storefront from another web site (or e-mail), or add forms to a static site that add products to a cart. You can then copy this link and paste it into your external site.

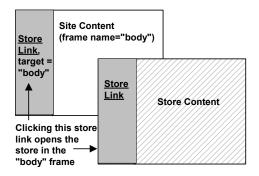
Do not use this tool to create links for use within your storefront.

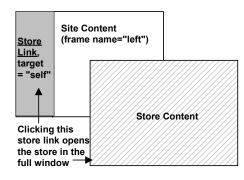
To create a link to your storefront:

- 1 Click the **Design Studio** button on the toolbar. The StoreSense Design Studio appears.
- 2 Under Global Tasks, select Link Builder. The Link Builder page appears.
- 3 Select the type of link or form you wish to create from the **Type** list.
- 4 Some link types support the use of or require additional information. For example, if you've selected a **Add Product To Shopping Cart** link, you'll want to specify the product by selecting it from the drop-down list. However, a **Lost Password** link does not require any additional information.
- 5 Enter the text to appear in the link, and if necessary, enter a target for the link.

If your existing site uses frames and you want the link to your store to appear within your framed site (for example, the link is in the navigation frame, and you want it to open in the frame named "body"), be sure to add a "target" attribute to the link.

If your existing site uses frames and you do *not* want your store to appear in your framed site, but instead want it to replace your site in the same browser window, use the "self" target.





Understanding Frames and Targets

- 6 Once you have created the link, you can test it by clicking the **Test Your Link** link.
- 7 When done, if you are using Internet Explorer version 5.5 or higher, click **Copy to Clipboard** to copy this link to the clipboard. If you are using another browser, select the link code and use your browser's Copy tool. You can now paste this link into an external web site or e-mail.

Connecting to Other Sites

The Site Connector allows you to point links on your StoreSense storefront to another site you may have. For example, if you have another web site that contains your home page, the "Home" link on your storefront can point to that page. This gives your visitors a seamless transition between your web site and your store.

If you have modified the header or footer templates and deleted the code that creates these links, these links will not be created. The code that creates these links appears similar to the following:

```
<ss:if test="$templateSet.templateExists('about')">
   <ss:link source="$templateSet.aboutUs">About Us</ss:link>
   </ss:if>
```

To point a storefront link to another web site:

- 1 Click the **Design Studio** button on the toolbar. The StoreSense Design Studio appears.
- **2** Select **Initial Set**. The Templates page appears.

If you are using multiple template sets, select the appropriate template set.

- 3 Under **Template Design**, click **Site Connector**. The Site Connector page appears.
- 4 For each page in your *other* site that you would like to add as a link to your *store*, select **Use My Other Site's Page** and enter the full URL (for example, http://www.mysite.com/page.html).
- 5 Click **Submit**. The links will be added to your header or footer template.

In addition, the Site Connector allows you to *add* templates to your store that you did not select when using the Setup Wizard. To do so, select the check box of the templates you wish to add and click **Submit**. The templates are added to your store.

Copying Content From Another Web Site

If you want to copy portions of another web site (such as a site you already maintain) to your storefront, StoreSense provides a tool to help you. The Copy Center tool allows you to view both your storefront and another web site at the same time, and then "drag and drop" pieces of the web site into your storefront.

This tool is only available if you are using Internet Explorer version 5.5 or higher.

To copy content from another site to your store:

- 1 Click the Design Studio button on the toolbar. The StoreSense Design Studio appears.
- 2 Browse to the template to which you wish to copy content. Most likely, this will be **InitialSet** (**Default**) | **Home Page**.

3 Click $\boxed{\mathbb{Z}}$ (Copy Center). The Copy Center pane appears at the bottom of the Design Mode.

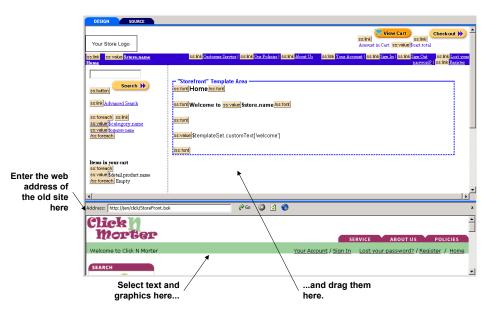
You can quickly access this tool by clicking the **Copy Center** link on the Design Studio Home page, or from the **Make my store look like my existing site** link on the Store Administration Welcome page.

- 4 In the Copy Center pane, enter the full HTTP address of the site from which you wish to copy content, and click **Go**. That site appears in the Copy Center pane.
- Select the content you wish to copy in the Copy Center pane with your mouse, and then drag it to the appropriate location in the Template pane. If the content contains an image, you will have two choices:

Leave the Source URL inserts the image, but continues to point to the original source file (instead of uploading the image to your store).

Copy the image uploads the image to your store's directory on the server, and then points to that uploaded image.

6 When done, click to close the Copy Center pane.



Using the Copy Center Tool



Step 4: Store Setup

Once you have designed your store, you'll need to complete a few more steps before you open your store for business.

If you	Then review these sections
Ran the setup wizard	Shipping Setup (page 15)
	Sales Tax Setup (page 16)
Did not run the setup wizard	General Preferences (page 14)
	Billing Preferences (page 15)
	Shipping Setup (page 15)
	Sales Tax Setup (page 16)
Are using the Professional Edition, and want to track inventory	Managing Inventory (in the Store Administration User Guide)
Are using the Professional Edition, and want to create a members-only area of your store	Creating a Members-Only Area (in the Store Administration User Guide)
Want to add users who can access the Store Administration area	Managing Users (in the Store Administration User Guide)

General Preferences

General Preferences allow you to define your store information and options.

If you did not run the Setup Wizard, you'll need to enter your store address and contact information. If you selected a Catalog List layout that displays search results using an odd number of columns, you should update the **Max Per Page** field so that the number of items displayed on a page is a multiple of the number of columns you are using.

You can access this page by browsing to the Store Manager | General Preferences page.



Refer to the General Preferences topic in the Online Guide or Store Administration User Guide, and the Field Help on the page, for more information.

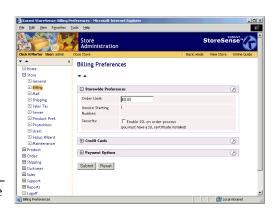
Billing Preferences

Billing Preferences allow you to enable credit cards, payment options and other ordering options.

If you did not run the Setup Wizard, you'll need to select the payment options you wish to offer. If you will be using an online payment processor, you'll need to enter the processor configuration from this page as well.

You can access this page by browsing to the Store Manager | Billing Preferences page.

You can also use the Billing Preferences wizard, available on the Store Manager home page, to set up your billing preferences.



Refer to the Setting Billing and Payment Information topic in the Online Guide or Store Administration User Guide, and the Field Help on the page, for more information. In addition, the Online Guide and Store Administration User Guide contain detailed information to aid in understanding payment processors and merchant accounts.

Shipping Setup

Shipping tables define how your store will calculate shipping charges to the customer.

If you plan on charging for shipping, you'll need to set up your shipping tables. In addition, your Site Administrator may offer custom shipping tools to help you with this part of your business.

You can access this page by browsing to the Store Manager | Shipping page.

Refer to the Shipping Information in the Online Guide or Store Administration User Guide, and the Field Help on the page, for more information.



You can also use the Shipping wizard, available on the Store Manager home page, to set up your shipping tables.

Sales Tax Setup

The Sales Tax Preferences page allows you to define sales tax tables that apply to your country and region.

You can access this page by browsing to the Store Manager | Sales Tax page.

You can also use the Sales Tax wizard, available on the Store Manager home page, to set up your sales tax tables.

Refer to the Defining Sales Tax Rates topic, in the Online Guide or Store Administration User Guide, and the Field Help on the page, for more information.



About Tax Laws and Internet Purchases

Many countries are still developing official positions on how taxes should be levied for purchases made on the Internet. The Internet introduces several complexities related to sales tax calculation, primarily surrounding the physical location of the customer, you, your physical store, your supplier(s), and the server facilitating the purchase. It is not uncommon for all of these locations to be in regions governed by different tax laws and/or tax rates. The challenge is to determine the appropriate tax rate, if any, to apply to each purchase.

It is therefore your responsibility to determine the appropriate tax rate to be used for each purchase. StoreSense only matches the customer's location against the sales tax tables you have defined to determine the tax rate to be used.



Step 5: Getting Your Products Online

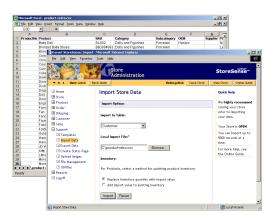
Even if you entered your product information using the Setup Wizard, review this section to ensure that your catalog is set up the way you want it.

If you	Then review these sections
Entered all your products using the Setup Wizard	Shipping Based on Product Weight (page 18)
	Product Images (page 18)
	Updating Products (page 17)
Need to enter all your products, or more products than you entered in the Setup Wizard	Importing Product Information (page 17)
products that you entered in the comp white	Product Images (page 18)
Update product information	Refer to the "Maintaining Products" topic in the Online Guide, or the Store Administration Users Guide

Importing Product Information

You can import product information using a spreadsheet file. Doing so allows you to quickly add or update a large number of products at one time.

To do so, you'll need to export the product table using the Support Manager | Export feature, add or update new product information, and then import the file. For more information, see the Exporting Tables and Importing Tables topics in the Online Guide or Store Administration User Guide.



Updating Products

Once you've entered all your products, you can update them using the Product Manager (see the Maintaining Product Profiles topic in the Online Guide or Store Administration User Guide for more information), or by exporting and importing your product information. See *Importing Product Information* (page 17) for more information.



Product Images

There are two types of images you can display with your product. The "thumbnail image" is the small image that will most likely appear in the product search results and product detail page. The "photo image" is a larger image that can provide more details to your customer.

These images can be uploaded using the Upload Images feature in the Support Manager. See the Uploading Images topic in the Online Guide or Store Administration User Guide for more information.

Shipping Based on Product Weight

If you are calculating your shipping costs based on product weight, you will need to enter the weight for all products. You can do this by updating each product manually (see the Maintaining Product Profiles topic in the Online Guide or Store Administration User Guide), or by exporting and importing your product information. See *Importing Product Information* (page 17) for more information.

Before doing so, you should enter the unit of measure you will be using on the General Preferences page in the Store Manager. This will help ensure that the same unit of measure is used for all products, which is necessary in order for shipping based on weight to work.



Step 6: Testing Your Design

Once you've designed and configured your store, it's time to test.

This chapter makes testing recommendations, and provides instructions to help you test your store.

Equipment and Software to Test

To ensure that your store can be viewed and easily used by the maximum number of customers, we recommend that you test your system using a variety of software and platforms, including (but not limited to), the following:

Operating Systems: such as Windows XP, Windows ME, and Macintosh. Don't assume that if your design works on one operating system, it will work in all versions of that system.

Browsers: at a minimum, you should test using Internet Explorer versions 5 and 6, and Netscape versions 4 and 6. However, there are still customers with older browsers that you may want to consider testing.

Monitor Resolution: the most common monitor resolution is 800x600, but there are still significant numbers of customers with smaller monitor resolutions, such as 640x480. We recommend setting your monitor resolution to the minimum you want to require of your customers when testing - refer to the software that comes with your operating system for more information on setting monitor resolution.

JavaScript: some customers disable JavaScript in their browsers for security reasons. If you have added JavaScript to your pages, or if you are using the columnar Catalog List layouts provided by StoreSense, we recommended disabling JavaScript in your test browser and testing your store to ensure that it is still usable.

How to Test

Following are recommendations on how to test your store.

Testing Store Information Templates

Store Information is typically contained on the following templates. To test the design of these templates, you can either navigate to them from the storefront, or use the following URL structure:

http://[storeurl]/Page.bok?template=[templatename]

...where [templatename] is the template short name.

About Us [about]

Policies [policy]

Store Locator [locator] (optional template)

FAQ [faq] (optional template)

Privacy Statement [privacy] (optional template)

Testing the Product Catalog Templates

Following are some scenarios to test your product catalog design:

Do a product search. Does the Catalog List appear as expected?

View the detail for any product. Does the page appear as expected?

View the detail for any product that has color or size attributes. Does the "add to cart" portion of the page appear as expected?

View the detail for any product that has related products. Does the "Related Products" portion of the page appear as expected? (*Professional Edition only*)

If applicable, search for a product that uses a custom Catalog Detail template. Does the page appear as expected?

Testing the Checkout Templates

Following are some scenarios to test your checkout-related pages.

Purchase a product and check out as a new customer. Do the templates appear as expected?

If applicable, purchase a product that uses an Order Extensions template, and check out. Does the Order Extensions template appear as expected? (*Professional Edition only*)

Purchase a product and check out, this time opting to ship this product as a gift. Does the Ship To - Gift template appear as expected? (*Professional Edition only*)

Testing Membership and Subscription Templates

(Professional Edition only)

Following are some scenarios to test your membership and subscription templates.

If you are setting up a store subscription program:

In the storefront, is the link to "Join Now" visible or easily accessible?

Click the "Join Now" link, and purchase the store subscription product. Do the templates appear as expected?

If you are setting up a membership area for your store:

In the storefront, are the "Logon" and "Logoff" links visible or easily accessible?

Register as a new customer. Do all the templates appear as expected?

Log in as the customer you just registered as. Do any "members-only" customizations you have made appear?

If you have customized your members-only templates, search for a product and view the Catalog List. Then, view the product detail. Do the templates appear as expected?

Testing Customer Service Templates

Your customer service templates are key to caring for your customers after they have purchased products. The following scenarios will help test the design of your customer service templates.

Go to the Service page, and click the **Account Information** link. Does the Customer History template appear as expected?

Go to the Service page, click the **Lost Passwords** link, and complete the form. You should receive your password via e-mail. Is the e-mail formatted as expected?

If you have selected any of the notification options in **Mail Preferences**:

Check out as a new customer, using your own e-mail address. You should receive an order confirmation e-mail. Is the e-mail formatted as expected?

In Store Administration, apply a credit to the order. You should receive a credit confirmation. Is the e-mail formatted as expected?

In Store Administration, ship the order. You should receive a shipping confirmation. Is the e-mail formatted as expected?



Step 7: Going Live

Once you have designed, configured and thoroughly tested your store, it's time to "go live," and start taking orders!

Before going live, you'll want to do the following:

Delete any test customers you created: You can do this by viewing each customer in the Customer Manager, and then clicking the **Delete** button at the bottom of the page. See the Maintaining Customer Profiles topic in the Online Guide or Store Administration User Guide.

Delete any test orders you created: You can either delete individual orders, or you can use the Store Manager | Maintenance to purge all orders. See the Maintaining Database Tables topic in the Online Guide or Store Administration User Guide.

Clean Database: Clean out your database tables of any test information, using the Store Manager | Maintenance feature. See the Maintaining Database Tables topic in the Online Guide or Store Administration User Guide.

The final step, if you haven't done so already, is to open your store. To do so, click the **Open Store** button on the toolbar.

You are now open for business!

Congratulations on completing the setup of your store. For more information on maintaining your store, refer to the documentation shipped with the application.

Thank you!