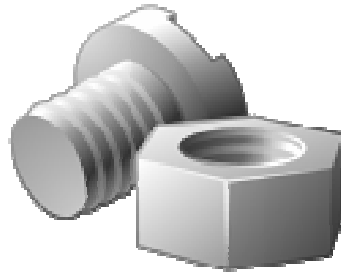




Modular Merchant

Administration Guide



Your guide to what all the buttons in your store's administration area do.

Administration Guide: Table of Contents

The purpose of this Administration Manual 7
 Prerequisites 7

Supported Web Browsers 8
 Administration Area – Supported Browsers: 8
 Shopping Area – Supported Browsers: 8
 Unsupported Browsers: 8

Potential Conflicts with Third-Party Applications 9
 Popup Blockers 9
 Internet Explorer 7.x, operating on Windows 9
 FireFox 2.x, operating on Windows 9
 A Note About Modular Merchant’s “Pop Up” Policy 9
 Norton Personal Firewall 9

Troubleshooting Common Issues with 3rd-Party Software 10
 Missing Navigation Menu in Administration Area10

Logging in to your account’s Administration Area 11
 What is my Modular Merchant Account Name?11
 What is my Administrator Login and Password?11
 Where do I access my Administration Area?11

Home 12
 Super Admin Home Page12
 A) Modular Merchant Bulletins13
 B) Order Fulfillment13
 C) Scheduled Orders13
 D) Recent Sales Statistics13
 E) Recent Orders13
 F) Today’s Best Sellers14
 G) Recent Discussion Topics14
 H) Traffic Summary14
 I) Billing History14
 J) Calendar14
 K) Order Search14
 L) Customer Search14
 M) Software Summary14
 Tech Admin Home Page15
 Fulfillment Admin Home Page15
 Manufacturer Admin Home Page15
 Call Center Admin Home Page15

Admin 17
 Admin Account Types17
 Super Admins17
 Tech Admins17

<i>Call Center Admins</i>	17
<i>Fulfillment Admins</i>	17
<i>Manufacturer Admins</i>	17
Add an Admin Account	18
Search Admin Accounts	19
<i>Admin Account Active Status</i>	19
Activate Account.....	19
Close Account.....	19
Billing History	19
Download Data Archives	19
"Place an Order" Script.....	19
System Settings	19
Log Out	20
Customers	21
Add a Customer.....	21
<i>Multiple Shipping Addresses</i>	21
Search Customers.....	21
Customer Details Page	22
A) <i>Customer Toolbox</i>	22
B) <i>Account Edit Information</i>	22
C) <i>Account Information</i>	23
D) <i>Billing Address</i>	23
E) <i>Shipping Address</i>	23
F) <i>Customer's Order History</i>	23
G) <i>Customer's Scheduled Orders</i>	23
H) <i>Customer Custom Fields & Notes</i>	23
Export Customer Data	24
Import Customer Data.....	24
Ban Tool	24
A) <i>Add a New Item: Banned Values</i>	25
B) <i>Add a New Item: Status</i>	25
C) <i>Add a New Item: Notes</i>	25
D) <i>Ban List: Keyword Search</i>	25
E) <i>Ban List: Banned Values</i>	25
F) <i>Ban List: Data for Banned Item</i>	25
G) <i>Ban List: Status</i>	25
H) <i>Ban List: Update My Ban List</i>	25
Place an Order.....	26
<i>Place an Order Step 1: Customer</i>	26
<i>Place an Order Step 2: Products</i>	27
<i>Place an Order Step 3: Ship & Pay Type</i>	28
<i>Place an Order Step 4: Payment Info</i>	29
<i>Place an Order Step 5: Feedback</i>	29
<i>Place an Order Online Receipt</i>	30

<i>Place an Order Error Message</i>	30
Design	31
QuickCode Tags.....	31
<i>QuickCode Tag Online Glossary</i>	31
Custom QuickCode Tags.....	31
Custom Web Pages.....	32
Email Messages.....	32
Shipping Label Editor.....	32
Logo Images.....	32
Store Graphics.....	33
Manage Design Packages.....	34
HTML Templates.....	34
CSS/JavaScript Files.....	34
Template Images.....	34
Groups & Zones	35
Bulk Discount Groups.....	35
<i>Bulk Discount Manager</i>	36
Discount Groups: Customer Groups & Discount Groups.....	36
<i>STEP 1: Create a Customer Group "Container"</i>	36
<i>STEP 2: Assign Customers to your Customer Group</i>	37
<i>STEP 3: Create a Discount Group</i>	37
<i>STEP 4: Associate a Customer Group to a Discount Group to tie it all together</i>	39
Product Modifier Groups.....	40
<i>Adding a Product Modifier Group</i>	40
<i>Example: Creating a Product Modifier and Applying it to a Product</i>	41
Tax Groups.....	44
Zone Fee Groups.....	45
Checkout Fields.....	48
Customer Fields.....	50
Product Fields.....	52
<i>Product Field Group Editor</i>	52
<i>Creating a Product Field Group</i>	53
Hosting	54
FTP Account Info.....	54
Hosting Setup Checklist.....	54
Hosting Control Panel.....	54
<i>Security warnings when logging in to Plesk</i>	55
Modules	56
Affiliate Marketing.....	56
Coupons & Gift Certificates.....	56
Cross Sell / Up Sell.....	56
Digital Delivery.....	56
Promotions & Giveaways.....	57

Simple Bulk Emailer	57
Subscription & Membership Products	57
3 rd -Party Service Integration	57
Orders	58
Export Order Data.....	58
Place an Order.....	59
Search Orders	59
Order Details.....	59
Schedule an Order	64
Edit a Scheduled Order.....	64
<i>Scheduled Billing options added to the Product Editor</i>	67
Search Scheduled Orders.....	68
Scheduled Order Details	71
Create a Shipping Method.....	76
Search Ship Methods.....	76
Items to Ship	77
Shipping Pick List.....	79
Products.....	80
Add a Category.....	80
Import Categories.....	80
Search Categories.....	80
Add a Manufacturer.....	82
Import Manufacturers.....	82
Search Manufacturers.....	82
Add a Product.....	84
Export Products	84
Import Products.....	84
Search Products	84
<i>Quick Basket™</i>	85
<i>Quick Checkout™</i>	86
<i>Quick Return™</i>	86
<i>Quick Location™</i>	86
Active Products.....	87
Manage Inventory.....	87
Fulfillment Manager.....	88
Home Page Products	88
Reports	89
Admin Activity	89
Best Sellers.....	89
Declined Orders.....	89
Manufacturer Stats	89
Open Baskets	89
Product Performance	90
Sales Statistics	90

Search Log.....90

Sales Tax.....90

Traffic Statistics.....90

Support 92

 ALL Manuals.....92

 Dev Schedule92

 Forums.....92

 Knowledge Base92

 QuickCode Tag Glossary92

 Spheres of Support92

 Contact Numbers.....93

 Support Tickets93

Contacting Technical Support..... 94

Modular Merchant Terms of Service 95

The purpose of this Administration Manual

Welcome to Modular Merchant! The purpose of this manual is to provide an overview of each of the sections of your store's administration area. Your store's administration area is web-based. The only software you need to have installed on your computer in order to access it is a web browser, such as *Internet Explorer* or *FireFox*. The administration area is where you can manage your products, inventory, customers, templates, orders, shipping... and more. **It's where everything gets done.**

This manual will review the sections of the administration area, listing the purpose and options available in each. This manual is meant to be an overview of the Modular Merchant system. Discussion on more philosophical topics, such as "what's the best way to create a subscription-based digital product?" is not provided here. For information on deep subjects such as this, refer to our other manuals, knowledge base or online forums.

More manuals: <http://www.modularmerchant.com/support.php>

Knowledge Base: <http://www.modularmerchant.com/kb/>

Forums (**Recommended Resource**): <http://forums.modularmerchant.com>

Prerequisites

No prior experience with Modular Merchant is required prior to reading this manual. However, this manual will assume that the reader has already started an account with us. All new accounts start with the following information:

- **Account Name.** When you create a Modular Merchant account, you create an account name. This account name is referenced when you contact Technical Support.
- **Admin Account: Login.** Every store has one or more Admin Accounts. New stores come with one "Super Admin" account, which has access to all of the areas of the store's administration area. Additional Admin Accounts can be created, each with its own permission levels.
- **Admin Account Password.** Each Admin Account has its own unique password.

Locate your **account name** and the **login** and **password** associated with your default Admin Account. These are provided when a new account is created both on-screen and in a "Welcome..." email. You'll need these in order to login in to your store's administration area!

Do I have to be a webmaster to use Modular Merchant?

The reader doesn't need to be an expert in HTML, JavaScript, CSS or PHP in order to manage your store or use this manual. In fact, it is possible to setup and run your Modular Merchant store without ever typing any HTML code.

However, since Modular Merchant is a web-based application, this manual will assume that the reader has a basic understanding of HTML, and is capable of editing HTML text, creating hyperlinks, creating tables and is comfortable in at least fumbling around with CSS (Cascading Style Sheets). But do you have to be an *Internet Wonderboy* to use Modular Merchant? Nope.

Supported Web Browsers

Since Modular Merchant is internet-based software, it has been designed to be compatible with the widest variety of web browser applications possible. However, due to the limitations of certain web browser applications, Modular Merchant cannot be compatible with all of them. Following is a list of the web browser applications that Modular Merchant supports:

Administration Area – Supported Browsers:

- Internet Explorer 7.x, operating on Windows.
- FireFox 2.x, operating on Windows and Mac OSX.

Shopping Area – Supported Browsers:

- Internet Explorer 7.x, operating on Windows.
- FireFox 2.x, operating on Windows and Mac OSX.
- Mozilla 1.7.3, operating on Windows and Mac OSX.
- Netscape 7.2, operating on Windows and Mac OSX.
- Opera 7.x, operating on Windows and Max OSX.
- Safari 1.x, operating on Mac OSX.

Unsupported Browsers:

- Internet Explorer 5.x, operating on Max OSX. (Multiple security & stability issues.)
- Microsoft MSN Browser, operating on Windows and Mac OSX. (File recognition & download issues.)
- Netscape 4.x, operating on Windows and Max OSX. (CSS, security, HTML display & JavaScript issues.)
- Any other web browsers not listed in the list of Supported Browsers above.

Potential Conflicts with Third-Party Applications

Popup Blockers

Modular Merchant uses popup windows within its Administration & Storefront areas for displaying definitions, details on a selected object, or for viewing a large version of an image. Some web browsers may be set to block this type of content by default. Following are examples on how to configure two common web browsers to allow the popups within your Modular Merchant account area:

Internet Explorer 7.x, operating on Windows

From Internet Explorer's menu, select [Tools > Popup Blocker > Popup Blocker Settings]. Ironically, a popup window will appear. In this window, enter "www.modularmerchant.com" (without the quotation marks) in the field titled Address of Web site to allow. Click the Add button. Click the Close button.

Firefox 2.x, operating on Windows

From Firefox's Tools menu, select Options. Select *Content* from the list along the top side of the Options popup menu that appears. In *Content*, click the *Exception* button to the right of the *Block Popup Windows* option. In this window, enter "www.modularmerchant.com" (without the quotation marks) in the field titled Address of web site. Click the Allow button. Click the OK button.

A Note About Modular Merchant's "Pop Up" Policy

Modular Merchant's Administration area and general website will never carry popup/popover/popunder advertisements of any kind. It is our intention that if our clients add "www.modularmerchant.com" to their list of "allowed sites" in their ad blocking and/or popup blocking settings, that we respect them by not bombarding them with the ads and popups they were previously attempting to block. All popups used within Modular Merchant's website & software are used for either definitions, object details, or viewing a large version of an image.

Norton Personal Firewall

Some versions of Norton Personal Firewall (NPFW) incorrectly treat several of the files in the Administration area as advertisements, because the file names begin with the prefix "ad_" (short for "administration").

If you experience blocked content in your account Administration area, and are running NPFW, we recommend updating your NPFW "ad blocking" options to set www.modularmerchant.com as an allowed, unblocked website.

We also recommend consulting the NPFW online knowledgebase, located at:

<http://www.symantec.com/techsupp/consumer.html>

On this page, you should be able to select your version of NPFW, and be directed to their knowledgebase for their product. If a solution isn't available in there, you may need to contact Norton directly for more information & instruction.

Troubleshooting Common Issues with 3rd-Party Software

Missing Navigation Menu in Administration Area

Once logged in to your Administration Area, the Navigation Menu in your Administration area is used to access the various tools you'll use to manage your online store. In some cases, other software can deactivate your Navigation Menu. This is easy to correct.



Example One: The Navigation Menu consists of yellow buttons near the top of the page.



Example Two: If your Navigation Menu is being blocked, the top of the page may look like this instead.

Potential Cause: Norton Personal Firewall

Some versions of Norton Personal Firewall (NPFW) incorrectly treat several of the files in the Administration area as advertisements, because the file names begin with the prefix "ad_" (short for "administration").

If you experience blocked content in your account Administration area, and are running NPFW, we recommend updating your NPFW "ad blocking" options to set www.modularmerchant.com as an allowed, unblocked website.

Instructions on how to update your NPFW "ad blocking" settings are available on the Modular Merchant message board, located at: <http://www.modularmerchant.com/forum/showthread.php?threadid=105>

If the problem persists, we also recommend consulting the NPFW online knowledgebase, located at: <http://www.symantec.com/techsupp/consumer.html>

On this page, you should be able to select your version of NPFW, and be directed to their knowledgebase for their product. If a solution isn't available in there, you may need to contact Norton directly for more information & instruction.

Logging in to your account's Administration Area

To log in to your Administrator Control panel, you will need three things:

- Your Modular Merchant **Account Name**
- Admin Account **Login** (User Name)
- Admin Account **Password**

What is my Modular Merchant Account Name?

Your Account Name is used to identify your online store. Your Account name was created when you purchased the Modular Merchant software. Your account name is also included in the "Welcome" email you receive when your account is created. Clients with multiple Modular Merchant stores will have a different account name for each store.

What is my Administrator Login and Password?

Your Administrator Login and Password are a unique login and password you create and use to access your store's Administration area. Brand new accounts start with a default Administrator Login and Password which you will use to access your account for the very first time. The default Administrator Login and Password are also included in the Welcome email you receive when your account is created.

Where do I access my Administration Area?

Access your Administration area by entering through the Login website, located at:

<http://www.modularmerchant.com/login/>



Bookmark the website address above in your web browser! You'll use this web page every time you log in to your store's administration area.

Logging in for the first time

To log in for the first time, enter your default Admin Login and Password on the login page listed above. Once logged in, you will be able to replace the default Administrator Login and Password with a new one you create. (Instructions provided in the *Admin* chapter of this manual.) Change them to something unique that you will be able to remember.

There are several different types of accounts you can create: **Super Admin**, **Tech Admin**, **Fulfillment Admin**, **Manufacturer Admin**, and **Call Center Admin**. See the *Admin Accounts* section of this manual for more information on creating accounts and account types.


Each type of admin account has its own home page in your store's administration area. Logging in to your account with a **Super Admin** account will load the Super Admin Home page, which is full of neat facts and figures, hand-crafted specifically for the store owners. More details on the various admin home pages are available in the *Admin* section of this manual.

Home


Modular Merchant provides five different Administrator account types: Super Admin, Tech Admin, Fulfillment Admin, Manufacturer Admin, and Call Center Admin. For more information on each Admin account type, refer to the *Admin Accounts* section of the *Admin* chapter of this manual. Each Admin account type has its own Home Page, which is the first page viewed after logging in to the account's administration area. Each Admin type can only view their own Home Page, with the exception of Super Admins, which can view any Home page.




Super Admin Home Page


[Log in to the forums](#)


Modular Merchant Bulletin **A**

Recent Modular Merchant Bulletins	Post Date
 Modular Merchant Update 1.59 Released	06/21/04


[Search Orders](#)

Order Fulfillment **B**

Open Orders	Items to Ship	Items Backorder	On Preorder	On Backorder
109	2	2	0	0


[Search Scheduled Orders](#)


Scheduled Orders **C**

Due	< 5 Days	On Hold	CC Pending	CC Expired
6	1	5	0	0


[Sales Statistics Report](#)


Recent Sales Statistics **D**

Date	Orders	Product	ADV	Gross	Net
Mar 11, 2005	1		\$0.25	\$0.25	\$0.25



Recent Orders **E**

Order	Value	Date
11239	\$5.10	us/08/05 08:26 pm




Today's Best Sellers **F**

Product	Units
MM Sales Mod Word Doc	1


[Log in to the Forums](#)


Recent Discussion Topics **G**

Discussion Subject	Replies	Latest By
Sticky Settings	1	Health_Science_Nutrition


[Complete Traffic Report](#)

Traffic Summary **H**

Current Term	Page	Bandwidth	Disk Space	Traffic Fees
Dec 1, 69 - Dec 31, 69	0	0 / 3.0 Gb	23.85 / 60 Mb	\$0.00



Billing History **I**

Modular Merchant Invoice History	Order ID	Amount	Bill Date
Does not use Shipping	123457053	\$1.00	October 19, 2004

<< March 2005 >>

Su	Mo	Tu	We	Th	Fr	Sa
		1	2	3	4	5
6	7	8	J	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

Order Search

Find orders where:

K

cc: s

Customer Search

Find customers where:

L

cc: s

Software Summary

Software	Ver.
Marketplace PLUS	2.001
Digital Products	.002
Affiliates	.003
Search Engine M	.005
Order Motion	.007
Coupons & Gift Certs	.011
Promos & Giveaways	.019

The Super Admin's Home Page contains an overview of account performance and links to major account areas.

A) Modular Merchant Bulletins

Modular Merchant Bulletins are important announcements posted by Modular Merchant Tech Support and Administration. Information about software updates, server maintenance and other important issues will be posted here. Each bulletin links to a page with complete details. Bulletins are also available on the Modular Merchant forums, located online at: <http://forums.modularmerchant.com>

B) Order Fulfillment

The Order Fulfillment table contains the following information:

Open Orders: Orders currently on file that have either have a credit card that has not been authorized to be billed, has not been paid, or contains items that have not yet been shipped.

Items to Ship: The total number of items that have been ordered but not yet shipped to the customer.

In Stock: Of the Items to Ship, the number of those items that have an In Stock status.

On Preorder: Of the Items to Ship, the number of those items that have an On Preorder status.

On Backorder: Of the Items to Ship, the number of those items that have an On Backorder status.



C) Scheduled Orders

The Scheduled Orders table is only displayed if the *Subscription Products* module has been activated.

This table contains the following information:

Due: The number of orders in the Scheduled Order Queue that are now due, and may be either billed automatically by the system, or manually in the Scheduled Order control panel.

< 5 Days: The number of orders in the Scheduled Order Queue that will become due within the next five days.

On Hold: The total number of scheduled items that are on hold. Items on hold will not be billed, even if they are due, until taken off hold.

CC Pending: The number orders in the Scheduled Order Queue that have a credit card associated with them that will expire at the end of this month.

CC Expired: The number orders in the Scheduled Order Queue that have a credit card associated with them that has expired.

D) Recent Sales Statistics

The Recent Sales Statistics table summarizes the last five days, and contains the following information:

Date: The date being summarized.

Orders: The number of orders placed in your Modular Merchant account on this date.

Products: The total number of products sold in your Modular Merchant account on this date.

AOV: The Average Order Value for this date. (Gross Sales/Number of Orders.)

Gross: The gross value of all orders placed on this date. The gross value of an order is the amount paid by the customer for the transaction.

Net: The net value of all orders placed on this date. The net value of an order is the amount paid by the customer, minus shipping, taxes and any other discounts, such as a coupon.

E) Recent Orders

The Recent Orders table lists the five most recent orders placed in your Modular Merchant account, their ID number, value and day & time. Click the Order ID link to view the selected order's details.

F) Today's Best Sellers

This table lists up to the five top selling products for the day, and the number of units sold.

G) Recent Discussion Topics

This table lists the five most recently updated discussion topics on the Modular Merchant message board and knowledge base. Click the title of any Discussion Subject to read it and optionally respond to it. On the forums, you can read posts by Modular Merchant staff and others, or posts your own questions, comments or insights.

H) Traffic Summary

The Traffic Summary table encapsulates your store traffic, bandwidth and disk space usage for the current billing term. The table contains the following information:

Current Term: The start and end dates of the current billing term for your Modular Merchant account. Monthly invoices are billed on the first day of an account's billing term.

Page Views: The number of account webpages that have been viewed in your account during the current billing term. This number includes pages in both the store and administration areas. This number is reset at the start of each new billing term.

Bandwidth: The total server bandwidth used during the current billing term. If more bandwidth is used during a billing term than is allocated, then the account will incur additional Traffic Fees for that billing term. The bandwidth usage is reset at the beginning of each billing term.

Disk Space: The total server disk space being used by the account files, images, etc. If more disk space is used than is allocated, then the account will incur additional Traffic Fees.

Traffic Fees: If any Traffic Fees have been incurred for the current billing term, they will be listed here. Any accumulated Traffic Fees will be included on the account renewal invoice at the beginning of the next billing term.

I) Billing History

Up to the five most recent invoices for hosted accounts are displayed in this table. The Billing History is itemized, listing the product, order ID number, value and bill date.

J) Calendar

A calendar with the current date highlighted is provided on the *Admin* Home page. Click the arrows in the top left and right corners of the calendar to browse different months.

K) Order Search

Use this form to search the orders on file in your account. Select the criteria to search by, and click the *Go* button.

L) Customer Search

Use this form to search the customers on file in your account. Select the criteria to search by, and click the *Go* button.

M) Software Summary

The software summary lists the Modular Merchant products activated in your account, and the version of each that you are using. If a newer version is available, then the version number will be displayed in red.



Tech Admin Home Page

Tech Admins view the Super Admin Home Page, with the following exception(s):

- The Recent Sales Statistics table is not displayed to Tech Admins.



Fulfillment Admin Home Page

Fulfillment Admins have their own Home Page. (Super Admins may also access this page.) The Fulfillment Admin Home Page contains links to the most commonly used sections of the Administration area by Fulfillment Admins.

The sections of the Administration area linked to from this page include:

- **Shipping Pick List:** Review or print an at-a-glance list of all the inventory items that needed to fulfill all pending orders.
- **Items to Ship:** Review and update the shipping status of the items in orders that have been received. Shipping labels and packing lists can also be printed.
- **Export Order Data:** Export an Excel spreadsheet containing the data for a range of orders. The items included in the spreadsheet can also automatically be marked as being shipped X hours from the report date.
- **Review Order History:** Browse or search the account order history. From this list, you can also view the complete details for a selected order.
- **Search Order History:** Locate an order or series of orders matching the supplied search criteria.
- **Unshipped Items Statistics:** This list contains a summary of the availability status of all items that have been ordered, but have not yet been shipped.



Manufacturer Admin Home Page

Manufacturer Admins have their own Home Page. (Super Admins may also access this page.) The Manufacturer Admin Home Page contains links to the most commonly used sections of the Administration area by Manufacturer Admins. The sections of the Administration area linked to from this page include:

- **Edit My Manufacturer Profile:** Edit the Manufacturer information that may be displayed in the store for your account.
- **Add a Product:** Add a product to the store records. If a Manufacturer Admin adds a product, they will be the Manufacturer associated with the product. They cannot change this association.
- **Search Products:** Browse a list of all products in the store records.
- **Add a Digital Object:** (Requires Digital Products add-on module.) Add a new Digital Object to your store records. One or more Digital Objects can be assigned to a product in your store. When that product is purchased, the customer may also download each of the Digital Objects assigned to it.
- **View Digital Objects:** (Requires Digital Products add-on module.) Browse a list of the Digital Objects in your store records.



Call Center Admin Home Page

Call Center Admins have their own Home Page. (Super Admins may also access this page.) The Call Center Admin Home Page contains links to the most commonly used sections of the Administration area by Call Center Admins.

The sections of the Administration area linked to from this page include:

- **Add a Customer:** Tools to add new customers to your store account records.
- **Search Customers:** Locate a customer account or series of accounts matching your search criteria.

- **Browse Customer List:** Browse or search the list of customer accounts. From this list, you can also place an order or view the complete details for a selected customer.
- **Place an Order:** Place an order for a customer. This section will allow you to locate or create a customer account, add products to their shopping basket, select a shipping method, and process the order.
- **Ban Customers:** Block customers with certain account criteria from placing an order in your store. Block customers based on email address, location, IP address and more.
- **Review Order History:** Browse or search the store order history. From this list, you can also view the complete details for a selected order.
- **Search Order History:** Locate an order or series of orders matching your search criteria.
- **Place a Scheduled Order:** (Requires Subscription Products add-on module.) Schedule a future order for a customer. This section will allow you to locate or create a customer account, add products to their shopping basket, select a shipping method, and set the future bill date.
- **Browse Scheduled Order Queue:** (Requires Subscription Products add-on module.) Browse or search the store scheduled order queue. From this list, you can also view the complete details for a selected scheduled order.

Admin

The Admin section contains options for adding/deleting Administrator accounts. The Admin section is split into several subsections: **Admin Accounts**, **Account Controls** and **Admin Tools**. Each of these subsections is explained in detail below.

Admin Account Types

There are several different types of Administrator accounts, from Super Admins who can view and change all the store's settings, to Fulfillment Admins, who can only view orders that need to be shipped to customers. There is no limit to the number of Admin Accounts that can be created in your store.

Modular Merchant Admin Account Types

Each Administration account type has access to different areas of your Administration area. You can create one of each account type, and share the accounts, or you may create a unique account for each member of your Administration team. When a customer or account record is edited, the system records which Administration account made the change.



Super Admins

Super Admin accounts are usually held by the store owner and business managers that may need access to sales, financial and customer data. Super Admins can edit all account settings and view all account data. **Your account must always have at least one Super Admin!**



Tech Admins

Tech Admins are useful for staff members that need access to many areas of the Modular Merchant Administration area, but don't need to view sales statistics or financial data. Tech Admins can place orders & edit products, shipping data and customer info. They cannot edit System Settings, modify Admin Accounts or view financial data.



Call Center Admins

Call Center Admins are recommended customer service representatives. They can view customer and order records, and can place new orders for customers. Call Center Admins have their own home page in the Administration Area with links to the tools they use most often. They cannot view System Settings, financial data, or change the shipping status of orders.



Fulfillment Admins

Fulfillment Admins concentrate on shipping the products that have been ordered. They can view products and order data, and can update the shipping status of items that have been ordered. Fulfillment Admins have their own home page in the Administration Area with links to the tools they use most often. They cannot view System Settings, financial data, or non-address customer account information.



Manufacturer Admins

If the products in your store are provided by a variety of vendors, you may want to consider creating a Manufacturer Admin account for each vendor. Manufacturer Admins may add products to your store, and may edit products that are associated with their account. Manufacturer Admins have their own home page in the

Administration Area with links to the tools they use most often. They cannot view System Settings, financial data, customer or order information, or products associated with other Manufacturer Admin accounts.

Add an Admin Account

To add a new Administrator Account to your store, select the “Add an Admin Account” from the Admin menu. This will load the Admin Editor screen. This screen contains several options for the Admin account. Some of these fields are required:

Login

When logging in to the store Administration Area, the login will be required. Each Admin account must have a unique login.

Password

When logging in to the store Administration Area, the password will be required. Only Super Admins can view the Admin accounts’ passwords.

Email Address

When Modular Merchant replies to a support ticket created by this admin account it will be sent to the email address specified here.

Security Question & Answer

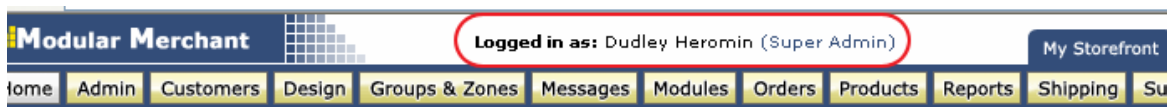
When contacting Modular Merchant tech support by phone, the friendly technician will verify your identity by asking you your secret question. Your secret question should be something unique to you.

Account Type

There are five account types available for Modular Merchant Administrators. For more information on each account type, see the Modular Merchant Account Types section of this manual.

Contact Information: First Name/Last Name

It is recommended that a first and last name be provided for the Admin account. When logged in, the Administrator’s name is displayed at the top of the screen. (See image below.) Additionally, the Admin account associated with any additions/changes made to account records is recorded and displayed throughout the Administration Area. Having a first and last name associated with each Admin account helps users keep track of who’s doing what.



The account a user is logged in with is displayed at the top of the Administration Area.



For information on the other options available when adding or editing an Admin account, click the question mark icons found along the right-side of the Admin Editor page. (Example at left.) Clicking the icon will open a definition and additional instruction in a popup window.

Search Admin Accounts

This page provides a list of your store's Administration accounts. Super Admins may change the Active Status, edit, delete, or create new Administration accounts. Clicking the column titles in the My Admin Accounts table will sort the list of Admin accounts by that column.

Admin Account Active Status

If an Admin account is deactivated, then nobody will be able to log in to the Administration area using that account's login and password. The Admin account may be reactivated at any time.

Activate Account

Some clients take advantage of the free trial period offered by Modular Merchant for new account. Several limitations are placed on an account during its free trial period. (For example, credit cards cannot be charged during the free trial period.) When the client is ready to "go live" with their store, they can remove the limitations by activating their account. Account activation lifts all restrictions, starts the account's billing cycle, and makes certain types of accounts eligible to be hosted under their own domain name.

Close Account



If it's time to throw in the towel, then this is the option you're looking for. The *Close Account* option loads a screen from which you can confirm and submit your account closure request. Only Super Admins can close an account. For security reasons, account closure requests **must** be submitted from the *Close Account* page. Account closure requests by phone or email **cannot** be accepted by Modular Merchant.

Billing History

The *Billing History* option loads your Modular Merchant customer account area. In this account area you can review your previous and upcoming Modular Merchant invoices, edit your contact information and change the credit card your invoices are billed to. Only Super Admins have access to this area.

Download Data Archives

This page contains links to download archives of your Modular Merchant account database. A backup copy of each account database is created every day. Archives for the last seven days are available here. Click the disk icon to download the archive. Archives contain both the data and MySQL database structure for maximum transportability. Archives are in "gz zip" file format.

"Place an Order" Script

The Place an Order script contains five message slots. Each message slot is displayed on the corresponding step of the Place an Order process. (More information on the Place an Order tool is available elsewhere in this manual.) These five messages are a good place to include conversation scripts, special instructions, or information on specials, or Administrative rules & guidelines.

System Settings



The System Settings are very important! They control the behavior of your Modular Merchant account. The System Settings control the behavior of your store: design, transaction processing, how the store sends you

updates, security options and much more. **The System Settings must be customized before your store can be opened for business.**



For information on a specific System Setting, click the question mark icons found along the right-side of the System Settings page. (Example at left.) Clicking the icon will open a definition and additional instruction in a popup window.

Log Out

To log out of the Administration Area, select the Log Out option from the Admin navigation button. Logging out will clear all cookies associated with your Admin account. The next time you return to the Administration area, it will be necessary to log back in, using your Admin account's Login and Password.

If several Administrators share the same Admin account, logging out will not affect any other users currently logged in with the same Admin account.

Customers

The Customers section contains options for adding and editing your store customers, and setting the behavior of their customer accounts. The Customers section is split into several subsections: **Manage Customers**, **Import / Export** and **Related Tools**.

Add a Customer

Use this page to add a new customer account to your store. (This *Customer Editor* page can also be used to edit an existing customer account.) When adding a new customer account, some of the information is required. Required information is highlighted on this page.

Multiple Shipping Addresses

You may optionally allow multiple shipping addresses for customers. Some options in the Customer Editor related to multiple shipping addresses include:

Select a shipping address to view

A customer's very first shipping address can be created as usual. It is not necessary to do anything special. To create more shipping addresses for a customer additional their first, select *New...* from this dropdown menu and click the *Go* button. This will reload the Customer Editor page with blank shipping address fields. Enter the new shipping address information and click the *Submit* button at the bottom of the page to save your changes.

If a customer's account contains multiple shipping addresses, a specific shipping address can be edited by selecting it from the dropdown menu and clicking the *Go* button. This will load the selected shipping address, and it can be modified as necessary.



For information on a specific Customer option, click the question mark icons found along the right-side of the Customer Editor page. (Example at left.) Clicking the icon will open a definition and additional instruction in a popup window.

Search Customers

View & sort lists of your store's customer accounts here. This page also includes links to tools to view a customer's details, the orders made by a customer, place new orders for a customer, and edit a customer's account information.



Clicking the magnifying glass icon for a customer will open the Customer Details page for that customer. The Customer Details page includes the contact information and order history information for the customer's account. The Customer Details page is explained in detail below.

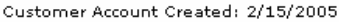
Customer Details Page

The Customer Details page provides a list of the customer's contact information, order history, and any notes that have been written by Admins for this customer. The Customer Toolbox at the top of the page includes tools to email the customer, log into their Customer Account area, edit their account, etc.

Sections of the Customer Details Page

Location: [Admin Home](#) > Customers > [Search Customers](#) > Customer Details

Customer Details
 The Customer Details page provides a list of the customer's contact information, order history, and any notes that have been written by Admins for this customer. The Customer Toolbox at the top of the page includes tools to email the customer, log into their Customer Account area, edit their account, etc.

A Customer Toolbox 
 Customer Account edited on 2/15/2005 **B** by Dudley Heromin ([dudley](#))

C **Account Information**
 Dudley Heromin
dudley@modularmerchant.com
 dudley
 (987) 555-1234

D **Billing Address**
 Dudley Heromin
 123 Paved Road
 Anytown, OR 97101
 United States

E **Shipping Address**
 Dudley Heromin
 123 Paved Road
 Anytown, OR 97101
 United States

F **Customer's Order History**

	Order ID	Date	Value
	11152	2/15/2005	\$1.00
	11151	2/15/2005	\$29.89

Rows in red are orders with open status items.

G **Customer's Scheduled Orders**

Qty	Product	Bill Date	Hold
1	Easter Egg	3/11/2005	
1	Free Promo Product	3/11/2005	
1	Import Product One	3/11/2005	

Yellow rows are due within 5 days. Red rows are due now.

H **Customer Custom Fields & Notes**
 Subscription mailing list?
 Customer Notes

The Customer Details page displays the customer's account information and order history.

A) Customer Toolbox

The customer toolbox contains several commonly used customer functions, represented by a series of icons. These functions are: email this customer, log in to this customer's account area, edit this customer's account information, place an order for this customer, create a scheduled order for this customer*, activate/deactivate this customer's account, and delete this customer's account.

*Scheduled Order functionality available if the Subscription Products module has been activated.

B) Account Edit Information

Directly below the Customer Toolbox is information on the most recent date the customer's account information was modified, and any Admin account associated with the modification. If no edit date is available, this information will be excluded from the page.

C) Account Information

This table includes general contact information for the customer's account, including their name, email address, customer account password and phone number.

D) Billing Address

This table includes the billing information for the customer's account. The Billing Address will be used to validate any credit card orders placed by the customer's account. If this address doesn't match what is on file with the credit card being used to make the purchase, it may result in transaction failure when placing an order.

E) Shipping Address

The shipping address associated with the customer's account is displayed here.

If the customer has multiple shipping addresses on file, then the first shipping address that was created will be displayed here.

F) Customer's Order History

The customer's order history contains a list of the ten most recent orders placed by this customer's account. Click the magnifying glass icon to open the Order Details page for that order. In this table, the Order ID number, date and value of each order is displayed.

Incomplete orders are highlighted in red. Incomplete orders require the attention of an Administrator. An order is incomplete if the credit card funds have not been authorized, the order has not been paid, or any item in the order has not yet been shipped. *In the above image, order 11151 is incomplete.*

G) Customer's Scheduled Orders

The customer's scheduled order table lists all the upcoming orders queued for this customer's account. The list includes The quantity of the product scheduled, the product name, the scheduled bill date, and whether the product is on hold. *In the above image, Free Promo Product, originally scheduled to be billed on 3/11/2005, is on hold. (Note the yellow diamond "attention" icon.)*

If a scheduled order is due in less than five days, its table row will be displayed in yellow. If a scheduled order is due today, or overdue, its table row will be displayed in red.



Click the round "e" button in the Customer's Scheduled Orders table to edit this customer's scheduled orders.

H) Customer Custom Fields & Notes

Any Custom Customer Fields or Customer Notes associated with this customer account will be displayed here. More information on creating Custom Customer Fields is available in the Groups & Zones section of this manual. Customer notes are displayed to Admins only; customers cannot view them.

Related [Customer] Tools

The Related Tools in the Customers navigation button provide options for further managing your store's customer accounts.

Export Customer Data

Use this form to download an Excel spreadsheet containing the customer account data you specify. The Export button will open an option window that will allow you to open or save the spreadsheet. To save the Excel spreadsheet on your computer, click Save, and give the file a unique name. Excel spreadsheets have a ".xls" file extension by default.

Import Customer Data

Use this form to add multiple new customer accounts to your store by importing a list from a spreadsheet file. Follow the instructions on the screen to complete the customer import process. A template of the spreadsheet to use when importing your customers is provided on this screen.

Ban Tool

Prevent those pesky thieves, hackers and internet ne'er-do-wells from flooding your store with fraudulent orders. The Ban Tool allows you to specify certain email and IP addresses, credit cards, or Countries, which will be prohibited from placing orders in your store. You may also record notes as to the reason for the banning, and "unban" or "reban" specific entries in the future.

If a customer attempts to place an order using a banned value, two things will happen:

1. When attempting to process the order, the customer will be directed to a page in your store with a message stating that the order could not be placed, and if they feel they have received this message in error, or contact your customer support department. The fact that their order was banned is not revealed to the customer.
2. A notification will be sent to any email addresses set to receive notifications of declined orders. The notification email will contain information about the attempted order and the reason why the order was banned. Selecting which email addresses receive a notification of declined orders is located in the System Settings, available from the Admin navigation button.

The screenshot shows the 'Ban Tool' interface. At the top, there is a form titled 'Add a new item to your Ban List:' with a '+ Add to Ban List' button. The form has three columns: 'Banned Values', 'Status', and 'Notes'. A red letter 'A' is placed over the 'Banned Values' input field, 'B' is over the 'Status' dropdown menu, and 'C' is over the 'Notes' text area. Below the form is a green message: 'Your ban list has been updated.' with 'Previous 30' and 'Next 30' links. Below that is a 'Ban List' section with a 'Keyword Search' field (containing 'D') and a 'Go' button. The 'Ban List' section contains a table with columns for 'Banned Values', 'Edit Date & Edited By', and 'Status'. The table has four rows of ban list items. Red letters 'E', 'F', and 'G' are placed over the 'Banned Values', 'Edit Date & Edited By', and 'Status' columns respectively. At the bottom of the table are 'Previous 30', 'Show All', and 'Next 30' links, and a red letter 'H' is placed over the '+ Update my Ban List' button.

The Ban Tool prevents "problem individuals" from placing orders in your store.

A) Add a New Item: Banned Values

To add a new item to your Ban List, enter the desired values to ban in this field. Values that can be banned include: email addresses, credit card numbers, countries or IP addresses. In order for the ban to work, the values must match exactly. For example: Banning the email address "user@email" will not prevent the email address "user@email.com" from placing an order. If banning a country, the country name must be spelled out in its entirety.

B) Add a New Item: Status

The status menu has two options: Banned and Allowed. Banned items will be included in the list of banned values that are checked when an order is placed. Allowed items will be temporarily removed from the list of values that are checked when an order is placed. Changing a banned value to the Allowed status is an easy way to temporarily allow a banned customer to place an order, without deleting the value from your Ban List and losing your notes.

C) Add a New Item: Notes

The notes field is a good place to record why the entered values are being banned, or any other internal notes your organization finds useful.

D) Ban List: Keyword Search

The keyword search will locate banned values based on matches to the Values or Notes. Partial searches are allowed. For example: Searching for "dud" would locate the banned value "dudley@modularmerchant.com".

E) Ban List: Banned Values

This field contains the values entered when this item was banned. The banned item can be modified by editing the text in this field and clicking the Update My Ban List button.

F) Ban List: Data for Banned Item

This section contains the notes associated with the banned values, the date in which it was created or last edited, and the Admin account that created or edited the banned value.

G) Ban List: Status

The status menu has two options: Banned and Allowed. Banned items will be included in the list of banned values that are checked when an order is placed. Allowed items will be temporarily removed from the list of values that are checked when an order is placed. Changing a banned value to the Allowed status is an easy way to temporarily allow a banned customer to place an order, without deleting the value from your Ban List and losing your notes. The banned item can be modified by editing the text in this field and clicking the Update My Ban List button.

H) Ban List: Update My Ban List

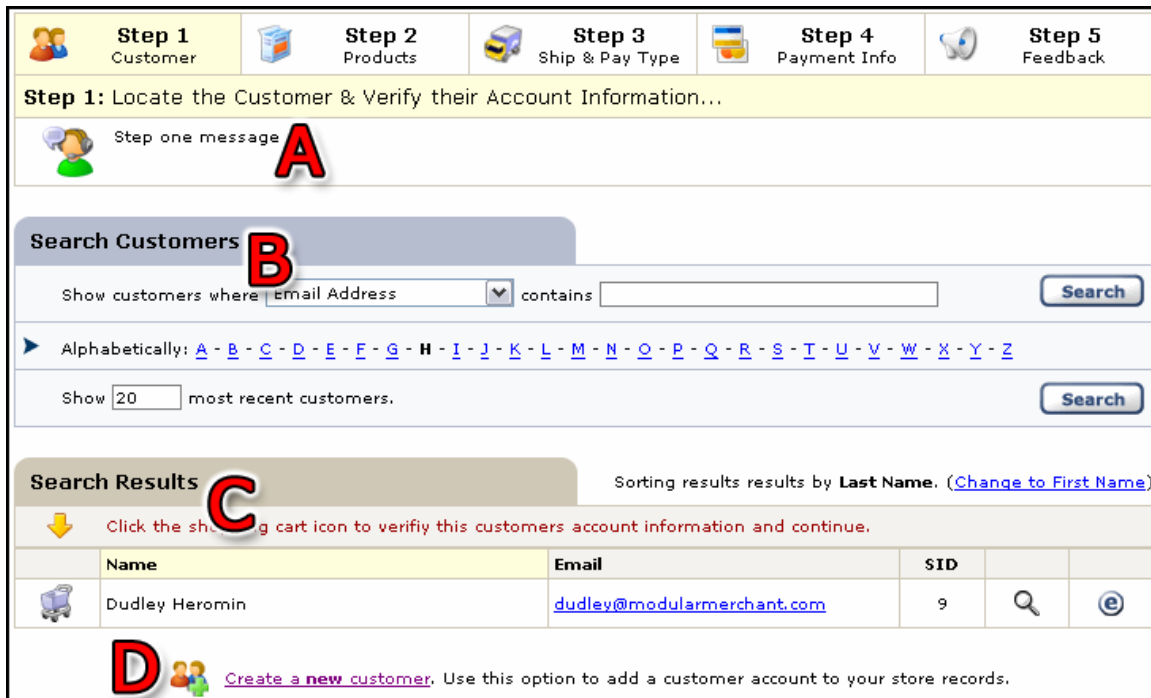
This button will update any changes that have been made to the Ban List. (It will not add a new item the Ban List.)

Place an Order

This control panel allows your store Administrators to select a customer and place an order for them. The entire order process is contained within this control panel. The Place an Order control panel is split into five steps:

Place an Order Step 1: Customer

In step one of the Place an Order process, locate the desired customer using a variety of search tools. When the customer is located, click the shopping cart icon to the left of their name to start their order.



In step 1 of the Place an Order process, search for the desired customer account.

A) Call Center Script

This section displays an optional script for the Administrator. This script can include special instructions or information to read to the customer while the order is being placed. To editor for the Call Center script is located under the Messages navigation button, in the Call Center: Place an Order section. Refer to that section of this manual for more details on using the Call Center Script.

B) Search Customers

The Search Customers table contains several tools to assist in locating the desired customer account quickly, including a keyword search, alphabetical search, and the option to show the most recently added customers. The customers located using these search tools are displayed in the Search Results table below.

C) Search Results



This section displays the results of your search. Click one of the column titles (Name, Email, SID) to sort the list by that column. Click the shopping cart icon to start an order for a customer. (Shown at left.) Click the their email address link to send them an email. Click the magnifying glass to open their Customer Details page. Click the round "e" button to edit their account information.

D) Create a New Customer

If the customer does not yet have an account in your store, click this link to create a new customer account. For more information, see the Add a Customer section of the Customers chapter of this manual.

Place an Order Step 2: Products

In step two of the Place an Order process, locate the desired products using a variety of search tools and add them to the customer’s basket.

Step 2: Add products to the customer's basket...

Customer's Basket Contents

Qty	Product Name	SKU	Gift Wrap	Price	Total
1	Default Product	PROD001		1.00	\$1.00
					ORDER TOTAL: \$1.00

Search Products (Search Results Below...)

Basket Image URL contains **Search**

Show Products in the Category: All Categories **Search**

By Letter: [A](#) [B](#) [C](#) [D](#) [E](#) [F](#) [G](#) [H](#) [I](#) [J](#) [K](#) [L](#) [M](#) [N](#) [O](#) [P](#) [Q](#) [R](#) [S](#) [T](#) [U](#) [V](#) [W](#) [X](#) [Y](#) [Z](#)

Show the 20 most recently created products. **Search**

Search Results

Add	Product	Price	SKU	Stock	Status
	Default Product	1.00	PROD001	∞	In Stock
	Digital Product	\$1.00	DIGDEL001	∞	In Stock

Customer Data

Billing Information

Dudley Heromin
123 Paved Road
Anytown, OR 97001
United States

Shipping Information

Dudley Heromin
123 Paved Road
Anytown, OR 97001
United States

When customer's basket is full, **Update & Continue**

When the customer's basket is full, **Update & Continue**

In step 2 of the Place an Order process, add selected products to the customer’s shopping basket.

A) Customer’s Basket Contents

Products that have been added to the customer’s basket will be displayed here. The quantity and unit price for each item in the basket can be edited. Any unit price entered here will override the default product price for the selected product. For example, if a product has a price of \$5.00, and 2.50 is entered in the Price field, then the product price in this order will be changed to \$2.50 per unit. This allows you to easily provide discounts (or increases) to customers on-the-fly. Remove an item from the customer’s basket by changing the quantity to zero, or clicking the red removal icon in the rightmost column of the basket table.

B) Search Products

The Search Products table contains several tools to assist in locating the products your customer would like to purchase. The products located using these search tools are displayed in the Search Results table below.



C) Search Results

This section displays the results of your search. Click one of the column titles (Product, Price, SKU, Stock, Status) to sort the list by that column. Click the "add" icon to add a product to the customer's basket. (Shown at left.) If the notes icon is highlighted, clicking it will open a popup window with the product notes. Clicking the "webpage" icon will open the product details page from your online store's shopping area.

D) Update & Continue

The Update & Continue button will save your changes and load step 3 of the Place an Order process.

E) Customer Data

This section displays the customer's billing address and primary shipping address. Click the round "e" button to edit this customer's address information. After editing the address information, you will automatically be returned to this page of the Place an Order process.

If the multiple shipping address option is enabled in your store, then the customer's primary shipping address will be displayed here.

The primary shipping address is the address that will be used by default when adding products to this customer's basket while placing an order. If a customer has multiple shipping addresses on file, those addresses will be displayed in the Customer's Basket Contents table. Each item in the basket will include a dropdown menu containing all of the customer's available shipping addresses. Select the preferred shipping address for each item in the customer's basket, and click the Update Basket Quantities & Values to save your changes.

Place an Order Step 3: Ship & Pay Type

In step three of the Place an Order process, several options will be available, including: shipping method, optional additional order information and the preferred payment gateway.

Select a Shipping Method...

The available shipping options for the customer's order will be displayed below their basket contents. Select corresponding radio button for the preferred shipping method for the order. This price of each shipping method is display in an editable text field. This field can be edited with a new shipping price, which will replace the original. This allows Admins to easily provide customers a discount (or increase) on their shipping expenses.

Additional Information for Customer (Optional)

If Custom Checkout Fields have been set up in your store, they will be displayed here. For details on setting up Custom Checkout Fields, refer to the Checkout Fields section of the Groups & Zones chapter of this manual.

Select a Payment Method...

If the customer's order needs to be placed using a Payment Gateway other than the one selected in the account's System Settings, select it here. This is often used if the Admin is using the Place an Order tool to place a check or money order transaction. If a Payment Gateway that requires a login and password is selected, the login and

password can be entered in the provided fields. That login and password will be used just for this order; it will not be saved or replace the Payment Gateway information in your System Settings.

Place an Order Step 4: Payment Info

In step four of the Place an Order process, the customer’s payment information is entered.

Enter Customer Payment Information...

Pay with Credit Card...

➔	<input type="radio"/>	Use a previous credit card?
	Choose previous credit card:	My credit cards on file... ▼
➔	<input checked="" type="radio"/>	Use a new credit card?
	Name on Credit Card*	Dudley Heromin
	Credit Card Number*	1111 2222 3333 4444
	Expiration Date*	09 ▼ 2015 ▼
	Card Security Code*	123 What is my credit card security code?

In step 4 of the Place an Order process, enter the customer’s payment information.

Use a previous credit card?

If the customer has placed any orders in your online store in the past, a list of the credit cards they have previously used will be displayed here. (For security reasons, only the last four digits of the previously used credit cards are displayed in the menu.) To use one of these credit cards for this order, select the radio button, and select the preferred credit card from the dropdown menu.


Use a new credit card?

To use a new credit card for this order, select the radio button, and enter the customer’s credit card information in the appropriate fields.

Place an Order Step 5: Feedback

Step five of the Place an Order control panel attempts to process the customer’s order, and returns either a receipt or an error message. (See sample images below.)

Transaction Feedback...




Success!

This transaction is completed!

- The order(s) has been entered into your store records.
- Order receipt(s) has been emailed to the customer(s).
- Sale notification(s) has been emailed to your store Administrator(s).

Order ID:
[11153](#)



Billing Address: Dudley Heromin
123 Paved Road
Anytown, OR 97001
United States
dudley@modularmerchant.com
(987) 555-1234

Shipping Address: Dudley Heromin
123 Paved Road
Anytown, OR 97001
United States

Qty	Product Name	SKU	Gift Wrap	Price	Total
1	Default Product	PROD001	N	\$1.00	\$1.00
Shipping: USPS PRIORITY					\$3.85

Order Total:	\$4.85
---------------------	---------------

A sample of an order receipt in step 5 of the Place an Order process.

Place an Order Online Receipt

The online receipt contains a link to the Order Details page for this order. (In the sample image above, the link is to the Order Details page for order 11153.) The order is added to your account records just like an order that is placed from your online shopping area.

Transaction Feedback...



Warning!

This transaction could not yet be processed.

Possible reasons include:

No payment gateway is currently selected.

This is usually caused by one of the following reasons:

1. You have accidentally reloaded this page after placing an order for a customer. As a safety precaution, after an order is placed, the connection to the gateway file is severed until a new order is started. This prevents accidentally duplicating the previous order by clicking your web browser's "back" button or "reloading" this webpage.
2. If you receive this error after starting a new order, the software may having difficulty resetting the connection to your payment gateway. If this problem persists, please contact Modular Merchant technical support.

A sample of an error message in step 5 of the Place an Order process.

Place an Order Error Message

An error message encountered when trying to place an order for a customer will usually include the reason for the order failure. The text in red immediately after "Possible reasons include:" is the direct response from the system, web server or payment gateway. Be sure to include this message when contacting tech support.

Design

The Design section contains options for customizing the design and layout of your storefront, or customer shopping area. The Design section contains several subsections: **Customize** and **Design Packages**.



Prerequisite: Read the Design Guide.

http://www.modularmerchant.com/docs/Design_Guide_MMv3.pdf

Modular Merchant's design tools have so many options that an entire manual could be written about them. In fact, an entire manual *has* been written about them. The *Design Guide* covers the store's design options in detail, including **design packages, templates, QuickCode Tags** and customizing your store's **colors, fonts** and **styles**.

This manual will provide a clinical overview of the store's *Design* section. However, for a tutorial on using each of the design tools, refer to the *Design Guide*.

QuickCode Tags

QuickCode Tags, what are they, and what can they for you? A QuickCode Tag is a pseudo HTML tag developed by Modular Merchant, for use in your store templates. A QuickCode Tag is formatted like this: {SAMPLE-QUICKCODE-TAG}. When viewed in a web browser, QuickCode Tags will be translated into the appropriate content. For example, {COMPANY-NAME} will display as your company's name. Many QuickCode Tags are available for displaying such things as product prices, customer information, the contents of the shopping basket, etc.



QuickCode Tag Online Glossary

Modular Merchant has published an online glossary of the 650+ QuickCode Tags we've created for use in your store templates. The online QuickCode Tag glossary is available at:

<http://www.modularmerchant.com/quickcode/>

Custom QuickCode Tags

If the library of existing QuickCode Tags isn't enough, you can create your own custom QuickCode Tags to meet your needs. For example, what if you want to create a QuickCode Tag that displays something that's not already available, such as your company's lengthy mission statement? You can accomplish this by using the Custom QuickCode Tag Editor.

The custom QuickCode Tag editor allows you to enter your lengthy mission statement, and it will generate a tag that you can place in your store templates. The custom QuickCode Tag will look something like {CUSTOM:1}. Any place that {CUSTOM:1} appears in your store templates, it will be translated into your lengthy mission statement when the web page is viewed.

The custom QuickCode Tag can be used on any number of pages in your store. You can now edit your lengthy mission statement in one central location, in the Custom QuickCode Tag Editor, and it will automatically be updated on all of the pages in your store that use the {CUSTOM:1} tag.

Custom Web Pages

The Modular Merchant software will automatically build all of your store web pages (products, categories, checkout, etc.). But what if you want to create additional, non-store pages, such as an "about us" or a "frequently asked questions" page? You can accomplish this by using the Custom Web Pages Editor.

The Custom Web Page Editor provides a tool to input your web page content. HTML, JavaScript, CSS and PHP can be used. The store will create a page in the store with this content. A search-engine-friendly web address will even be made available for the custom web page, to encourage Google and other search engines to add the page to their indexes.

Email Messages

This page contains forms for the Receipt Email Messages, which are displayed in the email receipt sent to the customer after a sale. There are two fields for the receipt message. The first field contains the text that is displayed before the order data in the email, the second contains the text that is displayed after the order data.

Shipping Label Editor

Prerequisite: Read the Label Editor manual.

http://www.modularmerchant.com/docs/Label_Editor_Manual.pdf



The Modular Merchant Label Editor is a tool that allows you to design your own custom shipping labels; with your own text, fonts and images. Your shipping labels can then be used to print shipping labels for your orders in PDF format. The Label Editor is a stand-alone application that can be downloaded and run on your own computer.

Since it is a separate program that runs on your computer, we've written a manual specifically for it. Refer to this manual for all the details on using the Label Editor. The *Shipping Label Editor* section of your store's administration area includes a link to download the Label Editor's manual and the application.

Logo Images

The forms on this page allow you to upload a variety of company logos that will be used in various places in your store, on both web pages and printable forms.

To upload a logo file, first create an image file for each of the logos in your store. The image file may have any name you wish. The print logos must be in .jpg or .png format. (The PDFs cannot use .gif files.) After the image files have been created, use the Browse buttons below to locate each file on your computer. After the files have been located, click the Submit button. This will start the image upload process. After clicking Submit, you will receive a confirmation or error message.

After a logo image has been uploaded, click the magnifying glass icon to view the image in a popup window. Logo images can be changed at any time by simply uploading a new image file for a selected logo. The new image will replace the previous one.

The Logo Name column includes the path to the image, which can also be used in any standard HTML tag, allowing store designers to display any button within any HTML page they create.

Store Graphics

The Store Graphics page can be used to upload images used in your storefront. Product images, images to be used in Skins, and other graphics can be uploaded directly to your account using the tools on this page.

Active Graphics Directory

All accounts begin with a graphics directory titled "default". Images can be uploaded to this directory, or new graphics directories can be created. The graphics directory selected as the Active Graphics Directory on this page will be the directory to which new image files are uploaded to. The Active Graphics Directory can be changed at any time. Changing it will not move uploaded files to the new directory; instead, new images will be uploaded to the new directory.

Searching/Browsing Graphics Directories

To review the images contained in a graphics directory in your account, use the "Search Graphics" tool on the page to select the graphics directory to search. The images contained in the selected directory will be listed in the Search Results table on the page. The Search Results table contains several columns:

View: Click the magnifying glass in the view column to view the image file in a popup window.

Image Name: This is the name of the image file.

Image Path: This is the path to the image file. This image path can be used in any HTML tag throughout your store to display this image.

Delete: Select this checkbox to remove the selected file(s) from the web server.

Uploading Graphics

There are two options available when uploading new image files:

Option 1: Upload a single image. Only image files ending with .gif and .jpg suffixes may be uploaded.

Option 2: Upload a zip file containing images. Image files must be contained in a zip file with a .zip extension. Only image files ending with .gif or .jpg suffixes may be included in the zip file.

To upload new store graphics, follow these steps:

1. Select the image directory you will upload images to from the "Upload to" option in the Upload Graphics section of the page.
2. Decide how you will handle the upload of any image files with the same file name as an existing file in the target directory by setting the "Choose how to handle duplicate file names" option.
3. Locate the image file or zip file containing the series of images using the browse tool on the page.
4. Click the "Go" button to begin uploading images into your selected image directory.

Manage Design Packages

A Design Package is a set of files that control the look and feel of your store. Design Packages typically include: a set of HTML templates, plus the images, buttons, Cascading Style Sheets (CSS) and JavaScript files used in the template. Your store's administration area includes tools to manage your store's Design Packages.



Detailed instructions on using Design Packages are available in the *Design Guide*:

http://www.modularmerchant.com/docs/Design_Guide_MMv3.pdf

HTML Templates

The term template refers to the set of HTML template files contained in a Design Package. A Design Package will contain a template for each page of your storefront. Templates can be designed like a web page, using HTML, PHP, JavaScript, CSS and Modular Merchant's QuickCode Tags.



Detailed instructions on using templates are available in the *Design Guide*:

http://www.modularmerchant.com/docs/Design_Guide_MMv3.pdf

CSS/JavaScript Files

This page will display a list of all of the .css and .js files contained in a selected Design Package. The page also contains a field in which you can edit these files directly.



Detailed instructions on using templates are available in the *Design Guide*:

http://www.modularmerchant.com/docs/Design_Guide_MMv3.pdf

Template Images

This page will display a list of all of the image files contained in a selected Design Package. The page includes options to view and delete selected images.



Detailed instructions on using templates are available in the *Design Guide*:

http://www.modularmerchant.com/docs/Design_Guide_MMv3.pdf

Groups & Zones

The Groups & Zones section contains advanced options for modifying the behavior of selected products or customers in your storefront. Oddly enough, the Groups & Zones section is split into two areas: **Groups** and **Zones**.

Groups & Zones are an advanced, but very helpful, concept that allow the store Administrator to set up a series of rules in your storefront. *For example*, Groups can be used to provide certain customers with wholesale pricing, add options to products (such as sizes or colors) without requiring the creation of a unique product for each variation, automatically add additional shipping fees for customers in specific geographic locations, and much, much more.

Groups & Zones provide the means to greatly personalize the shopping experience for individual customers.

Bulk Discount Groups

Automatically modify a product's price when multiple quantities are purchased by using Bulk Discount Groups. Applying a Bulk Discount to a product is a two-part process:

Create the Bulk Discount

Create Bulk Discount Groups clicking the Add a Bulk Discount button. This will load the Create a New Bulk Discount tool. This tool has a field to record the name of the Bulk Discount Group, and five "tiers".

The tiers allow you to stagger the discount up to five times. For example, using the bulk discounts tool, you could set up the following pricing structure:

Product A, regular price \$100.00

Tier 1 Bulk Discount: 10-25 Units, \$1.00 off per unit (Adjusted price, \$99.00 per unit.)

Tier 2 Bulk Discount: 26-50 Units, \$5.00 off per unit (Adjusted price, \$95.00 per unit.)

Tier 3 Bulk Discount: 50-100 Units, \$10.00 off per unit (Adjusted price, \$90.00 per unit.)

Tier 4 Bulk Discount: 101-500 Units, \$15.00 off per unit (Adjusted price, \$85.00 per unit.)

Tier 5 Bulk Discount: 501-999,9999 Units, \$30.00 off per unit (Adjusted price, \$70.00 per unit.)

The range of units and the value of the discount are completely customizable. The discount can also be set as a dollar value or percentage discount per unit, and can be mixed. (Example: Tier 1 may be a dollar discount, while Tier 2 may be a percentage discount.) You do not need to use all 5 tiers.

Assign the Bulk Discount to a Product

Then, assign your Bulk Discount to many products at once with the Bulk Discount Manager tool. Bulk Discounts can also be applied to products on the Product Editor page. More information on using the Bulk Discount Manager tool is below. More information on the Product Editor page is available in the Products chapter of this manual.

Bulk Discount Manager

Use this tool to quickly assign Bulk Discounts to the products in your store catalog. Use the search and browse options to find the family of products you want, and then use the Bulk Discount dropdown menu to assign a Bulk Discount to each product. Click the Update Bulk Discounts button to record your changes.

Bulk Discount Manager Interface

Bulk Discount Assignments									
SKU	Product Name	Price	Stock	Bulk Discount	SID	Act.			
TWOBUCKS	Two Bucks	\$2.00	1	No Bulk Discount Selected	3				
WOM_1	Wine of the Month	\$12.00	∞	Five Dollar Discounts	326				

The Bulk Discount Manager tool allows you quickly assign bulk discounts to a series of products.

Discount Groups: Customer Groups & Discount Groups

A Discount Group is a list that contains a list of product discounts.

For example: A Discount Group could contain Product A with a \$1.23 discount.

Creating this Discount Group does not automatically reduce the price of Product A in my storefront shopping area. By itself, the Discount Group is just a list. Discount Groups work in tandem with Customer Groups. In order for a customer to receive the discount I have created for Product A, a Customer Group must first be created. The Discount Group is then assigned to one or more Customer Groups. If no Customer Groups are available, then the Discount Group is not used in your storefront.

Setting up a Discount Group, containing the discount’s rules, and the Customer Group, which receives the discount, is a four-step process. Following are instructions on setting up the process.

STEP 1: Create a Customer Group “Container”

First, we want to create a Customer Group. A Customer Group is a "container" that we will assign selected customers to later. To create a Customer Group, go to: "Groups & Zones > Customer Groups".

The first time you come to this page, the "My Customer Groups" list should be empty. Click the "New" button on the right-side of the page.

On the "Create a New Customer Group" page, you will find a form with the following options:

- A) Display Name (The name of the Customer Group that will be displayed in your Admin area.)
- B) Is this group active? (Inactive Customer Groups will be hidden by default.)
- C) Description (This is a description that only appears in your Admin area.)

After you complete these options, click "submit" to record this Customer Group.

STEP 2: Assign Customers to your Customer Group

Now that you have created a Customer Group, it should be listed in your list of "My Customer Groups" on the "Groups & Zones > Customer Groups" page. (See sample image below.)

My Customer Groups					+ New
Name	Description	#			
My First Customer Group	This is a customer group, which will contain a list of all of the left-handed customers in my store.	0			 


+ New

The My Customer Groups table displays your Customer Groups and the number of customers assigned to them.

The Customer Group list will have a column with the title "#". This column shows the number of customers assigned to this group. A brand new Customer Group will have zero customers assigned to it, and this column will read "0". A Customer Group can have any number of customers assigned to it.



To assign customers to a Customer Group, click the "Add Customers" icon, which looks like "two people and a little green plus sign". (Example of the icon is at left.) Clicking this icon will load the "Customer Group Manager" page, where you can search for customers and assign them to this Customer Group.

Search Results				Submit
Include	Name	Email	SID	
<input checked="" type="checkbox"/>	Dudley Heromin	dudley@modularmerchant.com	9	

Submit

The My Customer Group Manager tool allows you to search for specific customers and add them to the Group.

To add a customer to this group, first locate them by using the search tools on the page. The customers that match your search criteria will be displayed in the Search Results table. (See sample image above.) To assign customers to this Customer Group, select the checkbox in the Include column of the Search Results table, and click the Submit button. The selected customer(s) are then assigned to the Customer Group.

STEP 3: Create a Discount Group

Let's put the Customer Group we just created containing Dudley Heromin aside for a moment. (We'll come back to it in a moment.) In steps 1 and 2 we made a Customer Group containing customers we want to use. The next step is to create a group of products we want to apply discounts to. We will accomplish this by creating a Discount Group. Go to the "Discount Groups" editor, located at: "Groups & Zones > Discount Groups".

The first time you come to this page, the My Discount Groups list will be empty. Click the New button on the right-side of the page to create a new Discount Group.

On the "Create a New Discount Group" page, you will find a form with the following options:

- A) Display Name (The name of the Discount Group that will be displayed in your Admin area.)
- B) Is this group active? (Inactive Discount Groups will be hidden by default.)

C) Value (This is the value of the discount that will be applied to the products assigned to this discount group. For example, if you want to create a Discount Group that provides a \$1.00 discount to all products contained within it, then enter 1 in the value field and select the "US Dollars" radio button.)

D) Description (This is a description that only appears in your Admin area.)

After you complete these options, click "submit" to record this Customer Group.

Edit this Discount Group

Discount Group Statistics

Display Name	<input type="text" value="My First Discount Group"/>
Is this Discount Group active?	<input checked="" type="checkbox"/> Yes
Value	<input type="text" value="1.23"/> <input checked="" type="radio"/> US Dollars <input type="radio"/> Percent
Notes	<input type="text" value="This is my first Discount Group. It provides a \$1.23 discount on the products I have selected below."/>

Search Products

Show Products in the Category: Go

Select Products below to be included in this Discount Group

Include	Product Name	Price	SKU	Stock	SID	
<input checked="" type="checkbox"/>	Default Product	1.000	PROD001	∞	1	
<input checked="" type="checkbox"/>	Two Bucks	2.000	TWOBUCKS	1	3	
<input type="checkbox"/>	Digital Product	1.000	DIGDEL001	∞	321	
<input checked="" type="checkbox"/>	Wine of the Month	12.000	WOM_1	∞	326	

The Discount Group Editor tool allows you to search for specific products and add them to the Group.

After completing the Discount Group Statistics fields, assign products to this Discount Group by selecting a category from the Show Products in the Category... dropdown menu, and clicking the "Go" button. To add new products to this Discount Group, select the checkbox in the Include column, and click the Submit button.

Clicking Submit will reload the page, with the Discount Group listed, in yellow, in the My Discount Groups list below the search results list. (See image below.) Your new Discount Group has been created, and the selected products have been assigned to it.

My Discount Groups + New

Name	Value	Notes				
My First Discount Group	\$1.23	This is my first Discount Group. It provides a \$1.23 discount on the products I have selected below.	●			

The My Discount Groups table displays the Discount Groups available in created in account.

STEP 4: Associate a Customer Group to a Discount Group to tie it all together

We now have a Customer Group containing a list of customers, and a Discount Group containing a list of products and their discount value. The next step is to associate the Customer and Discount groups with each other, so that they will work together in the storefront shopping area.



To associate a Customer Group to a Discount Group, return to the Discount Groups page in the Admin area, located at: "Groups & Zones > Discount Groups". Click the "Add a Customer Group" icon, which looks like "two people and a little yellow folder". (Example of the icon is at left.) This loads the Discount Group Manager page.

Use the Alphabetical links in the Search Customer Groups section of this page to search for the desired Customer Group(s). For example, if we named our customer group "My First Customer Group", it would appear in the Search Results when we click the "M" link.

To assign this Customer Group to this Discount Group, select the checkbox in the Include column in the Search Results section of the page and click the Submit button. This Customer Group is now assigned to this Discount Group!

Okay, my Customer & Discount Groups are created & assigned to each other... now what happens? Now, when a customer assigned to the Customer Group places a product contained in the associated Discount Group in their shopping basket, the product price will automatically be adjusted to match the specified value in the Discount Group.

For example:

- I have a product in my store named Product A. It has a price of \$10.00 per unit.
- I have created a Customer Group titled My First Discount Group, containing the customer named Dudley Heromin.
- I have created a Discount Group titled My First Discount Group containing the product Product A, with a discount of \$1.23.
- I have assigned My First Customer Group to My First Discount Group.
- When the customer Dudley Heromin is shopping in my online store and adds Product A to his basket, the product price will automatically be adjusted to \$8.77 per unit. (A \$1.23 discount.) All other customers not in My First Customer Group will see and pay the regular product price.

Product Modifier Groups

Product Modifiers allow you to create variations of your products in your store without requiring you to create a separate product for each version. For example, if you sell shirts in a variety of colors, Product Modifiers allow you to add one "Shirt" product to your store with several color modifiers available. This can help keep larger product catalogs manageable.

Adding a Product Modifier Group

To add a product modifier to your store, first go to the Product Modifier Groups page, under the Groups & Zones button in the navigation menu. This page lists the Product Modifier Groups available in your account. Click the Add a Product Modifier button to create a new one. The Product Modifier Editor has several options, including:

Modifier Name

This is the administrative name of the Product Modifier. This name is only seen by Admins. This name should be descriptive. Examples would be "Hat Colors", "Wholesale Fabric Options", or "Shoe sizes".

Display Name

The display name is the name the customer is shown in your store. Examples of display names may be "Colors", "Sizes" or "Options".

Display Order

This is the order in which the Product Modifiers will be displayed on the Product Details page in your store.

Admin-Only Notes

These notes are only seen by Administrators. They are not displayed in your store.

New Product Modifiers provide five Product Modifier Option slots. To add more Product Modifier Options, fill the five slots, create the Product Modifier, and then edit it. When you edit a Product Modifier all previous options are listed in addition to five more empty slots for additional options. The Product Modifier options include:

Display Order (DO)

This is the order in which the Product Modifier Options will appear in its menu on the Product Details page.

Option Name

This is the name of the Product Modifier Option that will appear in the dropdown menu. Examples: "Red", "X-Large".

Value

Product Modifiers can optionally affect the price of the product it is associated with. This value can be positive (1.23) to increase the product price, or negative (-1.23) to reduce the product price. Enter this value in US dollars. Leave this field blank to have the option not alter the product price.

Admin-Only Notes

Notes about the Product Modifier Option. These notes are only seen by Administrators. They are not displayed in your store.

Example: Creating a Product Modifier and Applying it to a Product

Adding a product to our store that uses product modifiers requires several steps:

1. Determine the product variations you want to create.

Simply determine what variations of the product you want to be made available in your store. For this example I will be adding T-Shirts to my store, and I want them to be available in different colors (red, white, blue) and sizes (small, medium, large)

2. Create the Product Modifiers

On the Product Modifiers screen, I'll click the Add a Product Modifier button. This will load the Product Modifier Editor tool. Since I am making two variations for my product, colors and sizes, I will need to complete this screen twice, first for the colors and second for the sizes.

Starting with the Colors modifier, in the General Information section I'll input the following:

Modifier Name: T-Shirt Colors

Display Name: Select a color...

Display Order: 1

Admin-Only Notes: These are the colors for the new T-Shirts. These colors could also be applied to other products, too.

Then in the Append new options to the Product Modifier... section, I'll input the following:

DO: 1

Name: Red

Value: 0

Admin-Only Notes: None

DO: 2

Name: White

Value: -.25

Admin-Only Notes: White T-Shirts deduct twenty five cents from the base price of the product.

DO: 3

Name: Blue

Value: 0

Admin-Only Notes: None

I will then click the Create this Product Modifier button, and my Colors product modifier will be created and added to my list of Current Product Modifiers at the top of the page.

To create the Sizes modifier, I again click the Add a Product Modifier button. This time, I input the following:

Modifier Name: T-Shirt sizes

Display Name: Select a size...

Display Order: 2

Admin-Only Notes: These are the sizes for the new T-Shirts. These sizes are specific to T-Shirts, so don't apply them to other products!

Then in the Append new options to the Product Modifier... section, I'll input the following:

DO: 1

Name: Small

Value: 0

Admin-Only Notes: None

DO: 2

Name: Medium

Value: 0

Admin-Only Notes: None

DO: 3

Name: Large

Value: 1.00

Admin-Only Notes: Large T-Shirts add one dollar to the base price of the product.

I will then click the Create this Product Modifier button, and my Sizes product modifier will be created and added to my list of Current Product Modifiers at the top of the page. I now have modifiers for colors and sizes, and I'm ready to create a product to apply them to.

3. Create the product and apply the product modifiers to it.

Next, I'll create a new product by selecting Add a Product from the Product button in the navigation menu. This loads the Product Editor page. When I am entering my product information, I will want to keep the following things in mind:

SKU / Custom ID: When a product with Product Modifiers is created, all of the variations of the product will be given derivatives of the base SKU I entered on the Product Editor page. For example, if I create a product with a Product Modifier containing three options, then three versions of the product will be added to my store, one for each option. If I enter a SKU of 123ABC in the Product Editor, then the three versions of the product may have the following SKUs: 123ABC-1, 123ABC-2, and 123ABC-3. These SKU numbers can be changed later in the Inventory Manager section of the Administration area. For more information, see the Inventory Manager section of this manual.

Product Name: Provide the "base name" of the product line. For my T-Shirt example, I will enter a product name of "Super-Amazing T-Shirt". When a Super-Amazing T-Shirt is purchased, the color and size (and any other modifier I apply to the product) will be appended to the product name.

Example: Super-Amazing T-Shirt – Red, Large.

Number in Stock: All variations of the product will start with the same number in stock that is entered on the Product Editor page. Product variations can have their stock numbers adjusted individually in the Inventory Manager section of the Administration area. (Example: Red Medium T-Shirts could be changed to have 10,000

units in stock and Blue Medium T-Shirts could be changed to only have 3,000 units in stock.) The stock of each version of the product version is tracked individually as they are sold. (Example: When a Blue Medium T-Shirt is sold, a Blue Medium T-Shirt will be deducted from my store inventory. Red Small T-Shirt inventory will not be altered.)

Price: Input the base price of this product line. The base price can be adjusted by the product modifier's options. In this example, I will enter a base price of 10.00 for my T-Shirts. An example of price modifications based on the product modifiers I created in step two would be:

T-Shirt – Red, Small: \$10.00 (Red and Small modifiers do not affect the base price value.)

T-Shirt – White, Medium: \$9.75 (The "white" modifier is set to reduce the base price value by \$0.25)

T-Shirt – Blue, Large: \$11.00 (The "blue" modifier is set to increase the base price value by \$1.00)

T-Shirt – White, Large: \$10.75 ("blue" increases the price by \$1.00 AND "white" decreases that by \$0.25)

Product Modifiers: This field will contain a list of all active Product Modifiers. In my store, this menu will now contain "Colors" and "Sizes". I'll select both of these Product Modifiers by holding down the "CTRL" key and clicking on both the names.

4. Review and customize the product family

I will then click the Submit button on the page. And with that, Presto! Instead of just having one Super-Amazing T-Shirt product available in my storefront shopping area, I have nine different Super-Amazing T-Shirt products. (3 color versions x 3 size versions.)

Customizing the SKUs of Product Variations

Product variations are not listed on the Search Products page. Only the base product in a product family is listed on this page. A list of all the product variations can be found in the Inventory Manager section of the Administration area. The Inventory Manager allows you to search product families, adjust SKU numbers and stock levels of each version of the product. For more information, see the Inventory Manager section of this guide.

The same Product Modifier Group can be applied to multiple products.

Once a Product Modifier Group is created, it can be assigned to more than one product. For example, if I wanted to add a \$20.00 "Jacket" product to my online store and have it be available in a variety of sizes, I could create a "Jacket" base product using the Product Editor. When creating the product, I could assign the "Sizes" Product Modifier Group to it. When the new "Jacket" product is saved, a series of product variations will be created using the "Jacket" as the base product and the "Sizes" modifier to create the variations. The products that would be created include:

Jacket – Small: \$20.00 (The "small" Size Product Modifier does not affect the product's base price.)

Jacket – Medium: \$20.00 (The "medium" Size Product Modifier does not affect the product's base price.)

Jacket – Large: \$21.00 (The "large" Size Product Modifier increases the product's base price by \$1.00.)

Tax Groups

Tax Groups allow you to calculate and collect taxes from your customers during the checkout process based on the customer's zip code, state or country of origin. Refer to your account's System Settings to determine whether taxes are charged based on the customer's billing address, shipping address, or both. Use the Sales Tax in the Reports section of the Administration area to review the taxes you have collected.

My Taxes & Charges					
Name	Value	Zones			
2.9% Sales Tax	2.900%	States: Colorado			
3.5% Sales Tax	3.500%	States: Virginia			

The Tax Groups page displays the taxes that have been set up in your store.

The Tax Groups page displays a list of all the Tax Groups that are available in your account. By default, new Modular Merchant accounts come with all US State taxes setup and deactivated. A US State Tax will be used in your storefront shopping area if it is active.

Edit this Tax or Fee

Tax/Charge Statistics

Display Name:

Is this tax active? Yes

Value: US Dollars Percent

Notes:

Tax/Charge Zones

Zip Codes	States	Countries
Separate zip codes with commas. (Example: 12345,12789,12998)	Hold the CTRL key to select multiple States from the menu below.	Hold the CTRL key to select multiple Countries from the menu below.
<input type="text"/>	<ul style="list-style-type: none"> West Virginia Wyoming Alberta British Columbia Manitoba New Brunswick Newfndnd & Labrador Nova Scotia Northwest Ter. Nunavut Ontario Prince Edward Is. Quebec Saskatchewan Yukon Australian Capital Ter. New South Wales Northern Territory Queensland South Australia Tasmania Victoria Western Australia Aguascalientes Baja California Norte 	<ul style="list-style-type: none"> Cambodia Cameroon Canada Cape Verde Cayman Islands Central African Rep. Chad Chile China Christmas Island Cocos (Keeling) Is. Colombia Comoros Congo Cook Islands Costa Rica Cote D'Ivoire Croatia Cuba Cyprus Czech Republic Denmark Djibouti Dominica Dominican Republic

The Tax Editor tool allows you to add or modify a tax's value and zones.

Creating a new Tax Group

To create a new Tax Group, click the Add a Tax or Charge button. This will load the Tax Editor screen. On this screen, the attributes of the Tax Group can be assigned. For example, I will set up a new Tax Group to charge a 3.11% sales tax to customers in Canadian Provinces.

Display Name: If this sales tax is applied to a customer, the Display Name will be displayed in the customer’s basket next to the value of the tax.

Is this tax active? Only active Tax Groups will be used in your storefront. Deactivating a Tax Group allows you to temporarily turn off a Tax Group without deleting it from your store records.

Value: The value of the Tax Group. This may be either a dollar value or a percentage of the order subtotal.

Notes: The notes are only displayed in the Administration area. The customer never sees these notes.

Tax/Charge Zones: The Tax Group will be applied to orders placed by customers with shipping and/or billing addresses in the selected zones. For example, to apply my new Tax Group to customers in Canadian Provinces, I can select either all the Canadian Provinces from the States menu, or select Canada from the Countries menu. Since I am including all Canadian Provinces, either selection will have the same affect.

Zone Fee Groups

Zone Fees Groups allow you to create additional shipping charges for products based on the shipping destination. Zone Fee Groups are attached to products on the Product Editor page. Any Zone Fee charges applied to a product in an order are seamlessly added to the shipping fees during the checkout process.

My Zone Fees						
Name	Value	Zones				
Alaska & Hawaii Zone Fee	\$4.56	States: Alaska, Hawaii				
Australia Zone Fee	\$1.23	Countries: Austria				

The Zone Fee Groups page displays the Zone Fees that have been set up in your store.

The Zone Fee Groups page displays a list of all the Zone Fee Groups that are available in your account. A Zone Fee Group will be used in your storefront shopping area if it is active.

Create a Zone Fee

Zone Fee Statistics

Display Name	<input type="text" value="3.11 Percent Zone Fee"/>
Is this Zone Fee active?	<input checked="" type="checkbox"/> Yes
Value	<input type="text" value="3.11"/> <input type="radio"/> US Dollars <input checked="" type="radio"/> Percent
Notes	<input type="text" value="This is a 3.11% zone fee I will apply to products when they are shipped to Canadian Provinces."/>

Active Zones

Zip Codes	States	Countries
Separate zip codes with commas. (Example: 12345,12789,12998)	Hold the CTRL key to select multiple States from the menu below.	Hold the CTRL key to select multiple Countries from the menu below.
<input type="text"/>	<ul style="list-style-type: none"> Utah Virginia Virgin Islands Vermont Washington Wisconsin West Virginia Wyoming Alberta British Columbia Manitoba New Brunswick Newfoundland & Labrador Nova Scotia Northwest Ter. Nunavut Ontario Prince Edward Is. Quebec Saskatchewan Yukon Australian Capital Ter. New South Wales Northern Territory Queensland 	<ul style="list-style-type: none"> Bhutan Bolivia Bosnia/Herzegovina Botswana Bouvet Island Brazil British Indian Ocean Brunei Darussalam Bulgaria Burkina Faso Burundi Cambodia Cameroon Canada Cape Verde Cayman Islands Central African Rep. Chad Chile China Christmas Island Cocos (Keeling) Is. Colombia Comoros Congo

The Zone Fee Editor tool allows you to add or modify a Zone Fee's value and zones.

Creating a new Zone Fee Group

To create a new Zone Fee Group, click the Add a Zone Fee button. This will load the Zone Fee Editor screen. On this screen, the attributes of the Zone Fee Group can be assigned. For example, I will set up a new Zone Fee Group to charge an additional 3.11% of a product's price to customers in Canadian Provinces.

Display Name: A Zone Fee's Display Name is only displayed in the Administration area. Customers are never shown the Display Names of the Zone Fees in your store.

Is this Zone Fee active? Only active Zone Fee Groups will be used in your storefront. Deactivating a Zone Fee Group allows you to temporarily turn it off without deleting it from your store records.

Value: The value of the Zone Fee Group. This may be either a dollar value or a percentage of the order subtotal.

Notes: The notes are only displayed in the Administration area. The customer never sees these notes.

Active Zones: The Zone Fee Group will be applied to selected products in orders being shipped to the selected zones. For example, to apply my new Zone Fee Group to products being shipped to addresses in Canadian Provinces, I can select either all the Canadian Provinces from the States menu, or select Canada from the Countries menu. Since I am including all Canadian Provinces, either selection will have the same affect.

Assigning a Zone Fee to a Product

Zone fees are assigned to individual products. When a product with a Zone Fee is included in an order with a Shipping Address that matches any of the "Active Zones" listed in the Zone Fee, then the Zone Fee's additional charges are automatically and seamlessly added to the order's shipping fees.



The Zone Fee Groups you create will be listed in the Shipping & Fees section of the Product Editor page.

To assign a Zone Fee to a product, open the Product Editor screen for the selected product. A list of all active Zone Fees will be listed in the Shipping & Fees section of the Product Editor page. Select the checkbox for each Zone Fee you would like to assign to the product. *For example*, in the sample image above, the Australia Zone fee is selected, and will be assigned to the product.

Zone Fees are calculated per unit. *For example*, if 1 unit of the product is included in an order being shipped to Australia, then \$1.23 will be added to the shipping fees. If 20 units of the product are included in the order, then \$24.60 will be added to the shipping fees.

A Zone Fee Manager page is in development, which will allow store Administrators to assign Zone Fees to a series of products at once.

Checkout Fields

You may add up to ten custom Checkout Fields to your store's checkout page. These fields are included on the page in which the customer selects their shipping options. They are recorded with each individual order, not with the customer's account information. Checkout Fields are best used to record responses that are unique for each individual order placed, such as "Special delivery instructions".

These fields can be single-line text, multi-line text or dropdown menus. You can also specify these fields as being required or unique. The custom Checkout Fields editor is located in the Checkout Fields area, found under the Groups & Zones button in the navigation menu.

The Checkout Fields Editor can contain up to ten custom-made fields that will be displayed during the checkout process in your store. These fields can be used to collect additional information from your customers, such as how they heard about your website, or special delivery instructions for their order. The editor starts with ten empty slots, each of which can contain one Checkout Field. Empty slots will contain the following message: Custom checkout field [ID Number] not found. Create it. Click this link to make a custom Checkout Field.

	This is a sample Checkout Field I created to demonstrate how it will look in my store. This is the description.
My Sample Checkout Field	<input type="text"/>

[Sample custom Checkout Field in the store checkout area.](#)

Creating a custom Checkout Field

There are several different formats available for each Checkout Field. The first choice when creating a Checkout Field is to determine which format it should take. Each format is optimized for a specific purpose:

Dropdown Menu Format: Dropdown menus can contain up to 50 options, one of which is selected by the customer. Dropdown menus are useful for Yes/No questions, ("Would you like to join our mailing list?") or a question with a series of potential responses. ("Which of these choices is your hat size?")

Text (Any Text) Format: This field type may contain any text. There are no restrictions on its contents. The field is displayed in your store checkout area as single-line text form field.

Text (Restricted Text) Format: This field type may only contain letters, numbers and underscores. (For example: some_sample_text_123) This field is useful for generating content that must be read by a web browser or other application that may have problems reading spaces or punctuation. The field is displayed in your store checkout area as single-line text form field.

Text (Multiline) Format: This field type may contain any text. There are no restrictions on its contents. The field is displayed in your store checkout area as multiple-line text form field. The number of lines is customizable.

Checkout Field Options

Each Custom Checkout field can be customized with a series of options, which include:

Field Title: This is the title that will be displayed to the left of the field on the checkout page. In the sample image, the Field Title is My Sample Checkout Field.

Description: This optional text will be displayed above the field. It is a good place for special instructions. (Limit: 225 characters.) In the sample image, the Description is This is a sample Checkout Field I created to demonstrate how it will look in my store. This is the description.

Menu Values (Dropdown menus only): Each menu item contains two parts: the Display item and the Value item. The Display item is what the customer sees in the menu during the checkout process. The Value item is the text that is recorded when that menu item is selected. For example, if my store contains a dropdown Checkout Field asking for the customer to select a color for their product, it could contain a Display item of Red, and a Value item of Color R31-A. In the checkout area, the customer would see Red listed in the dropdown menu. When the order is placed, R31-A would be recorded in the order database.

Dropdown menus may have up to 50 menu items. If you need less, leave the remaining fields blank, and they will not be included. For example: To create a dropdown menu with only five items, complete the Display and Value fields 1-5 only. The remaining blank fields will not be included in the dropdown menu.

Unique?: If a field is set to be unique, then every order that is placed must contain a distinct value for this field. An example may be if customers needed to provide specific identification information. The unique setting should be used judiciously, since it can often slow down the checkout process and lead to order abandonment.

Required?: If a field is set to be required, a colored asterisk will be appended to the Field Title. The customer will not be allowed to complete their order unless this field is completed. The required setting should be used judiciously, since it can often slow down the checkout process and lead to order abandonment.

Include in Invoice?: If this option is selected, then the customer's response to the Checkout Field will be included on any PDF order invoices/packing slips that are generated in the Administration area.

Number of Lines (Multiline menus only): This option determines the number of rows displayed for a Multiline Text field. The available options are 1-20.

Customer Fields

You may add up to ten custom Customer Fields to your store's checkout page. These fields are included on the same page on which the customer provides their billing and shipping address. They are recorded with the customer's account data, not with a specific order. Customer Fields are best used to record responses that are unique to a customer's account, such as "Create an Account PIN for Extra Security".

These fields can be single-line text, multi-line text or dropdown menus. You can also specify these fields as being required or unique. The custom Customer Fields editor is located in the Customer Fields area, found under the Groups & Zones button in the navigation menu.

The Customer Fields Editor can contain up to ten custom-made fields that will be displayed during the Customer process in your store. These fields can be used to collect additional information from your customers, such as whether they are a residential or commercial address. The editor starts with ten empty slots, each of which can contain one Customer Field. Empty slots will contain the following message: Custom Customer field [ID Number] not found. Create it. Click this link to make a custom Customer Field.

	This is the description for my sample customer field.
My Sample Customer Field	<input type="text"/>

[Sample custom Customer Field in the store Customer area](#)

Creating a custom Customer Field

There are several different formats available for each Customer Field. The first choice when creating a Customer Field is to determine which format it should take. Each format is optimized for a specific purpose:

Dropdown Menu Format: Dropdown menus can contain up to 50 options, one of which is selected by the customer. Dropdown menus are useful for Yes/No questions, ("Are you left-handed?") or a question with a series of potential responses. ("Which of these choices is your hat size?")

Text (Any Text) Format: This field type may contain any text. There are no restrictions on its contents. The field is displayed in your store Customer area as single-line text form field.

Text (Restricted Text) Format: This field type may only contains letters, numbers and underscores. (For example: some_sample_text_123) This field is useful for generating content that must be read by a web browser or other application that may have problems reading spaces or punctuation. The field is displayed in your store Customer area as single-line text form field.

Text (Multiline) Format: This field type may contain any text. There are no restrictions on its contents. The field is displayed in your store Customer area as multiple-line text form field. The number of lines is customizable.

Customer Field Options

Each Custom Customer field can be customized with a series of options, which include:

Field Title: This is the title that will be displayed to the left of the field on the Customer page. In the sample image, the Field Title is My Sample Customer Field.

Description: This optional text will be displayed above the field. It is a good place for special instructions. (Limit: 225 characters.) In the sample image, the Description is This is a sample Customer Field I created to demonstrate how it will look in my store. This is the description.

Menu Values (Dropdown menus only): Each menu item contains two parts: the Display item and the Value item. The Display item is what the customer sees in the menu during the Customer process. The Value item is the text that is recorded when that menu item is selected. For example, if my store contains a dropdown Customer Field asking for the customer to select a color for their product, it could contain a Display item of Red, and a Value item of Color R31-A. In the Customer area, the customer would see Red listed in the dropdown menu. When the order is placed, R31-A would be recorded in the order database.

Dropdown menus may have up to 50 menu items. If you need less, leave the remaining fields blank, and they will not be included. For example: To create a dropdown menu with only five items, complete the Display and Value fields 1-5 only. The remaining blank fields will not be included in the dropdown menu.

Unique?: If a field is set to be unique, then every order that is placed must contain a distinct value for this field. An example may be if customers needed to provide specific identification information. The unique setting should be used judiciously, since it can often slow down the Customer process and lead to order abandonment.

Required?: If a field is set to be required, a colored asterisk will be appended to the Field Title. The customer will not be allowed to complete their order unless this field is completed. The required setting should be used judiciously, since it can often slow down the Customer process and lead to order abandonment.

Include in Invoice?: If this option is selected, then the customer's response to the Customer Field will be included on any PDF order invoices/packing slips that are generated in the Administration area.

Number of Lines (Multiline menus only): This option determines the number of rows displayed for a Multiline Text field. The available options are 1-20.

Product Fields

Product Field Groups allow you to add custom text input fields to the Product Details pages in your store. For example, if you sell customizable bumper stickers, you could allow your customers to submit the text to print on their bumper sticker. To do so, you would create a Product Field Group and assign it to the Bumper Sticker Product in your store. Then, the field you created would be displayed in your store on the Bumper Sticker Product's Details page. Submitted responses to the Product Field groups are recorded with the order data in your store records.

Sample store Product Details page using a custom Product Field



The Product Fields you create will be displayed on the store page(s) of the product(s) they are assigned to.

Product Field Group Editor

Add this Product Field Group

Group Settings

Field Group Name: (Name seen only by Administrators.)

Admin-Only Notes: (250 character limit.)

Append new Fields to this Group...

DO	Field Title (250 character limit.)	Strict	Required	Lines	Active
<input type="text" value="1"/>	<input type="text" value="Custom Greeting"/>	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> Yes	<input type="text" value="3"/>	<input checked="" type="checkbox"/> Yes
<input type="text" value="2"/>	<input type="text" value="Recipient's Address"/>	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes	<input type="text" value="1"/>	<input checked="" type="checkbox"/> Yes
<input type="text" value="3"/>	<input type="text" value="Identification PIN Number"/>	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> Yes	<input type="text" value="1"/>	<input checked="" type="checkbox"/> Yes
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes	<input type="text" value="1"/>	<input checked="" type="checkbox"/> Yes
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes	<input type="text" value="1"/>	<input checked="" type="checkbox"/> Yes

The Product Field Editor allows you to create a series of input fields that can be included on a Product's store page.

Creating a Product Field Group

To create a new Product Field Group, click the New button on the Product Fields page. This will load the Product Field Group editor. The editor includes several options:

Field Group Name: This is the name of the series of fields. The Field Group Name is only displayed in the Administration area. It is used to help Admins keep track of multiple Product Field Groups.

Admin-Only Notes: These notes appear only in the Administration area. Store customers are never shown the Admin-Only Notes.

DO: Display Order of the Product Field. This determines the order in which the Product Fields are listed on the product's Details page in your store.

Title: Title of the Product Field. This is displayed in your store above the field. In the sample image, the Title of field 1 is Custom Greeting.

Strict: If set to strict, the field will only accept letters, numbers and underscores. For example, "Hello_World_123" would be accepted, but "Hello, Word! 123" would not.

Required: If required, an asterisk* will appear next to the field in the store. The customer must complete any required fields before being allowed to check out.

Lines: The number of rows the input field will be when displayed in the store.

Active: If this field is set to inactive, it will not be displayed in your store. This is a simple way to temporarily turn off a Product Field without completely removing it from you store.

(Trash Can Icon): Delete this Product Field. This will permanently remove the product from your store records.

Adding more than just five options to your Product Field Group:

If you save your Product Field Group and then edit it again, five more slots will be appended to it. Using this method, you can add an unlimited number of fields to your Product Field Group, five at a time.

Hosting

Some Modular Merchant account plans include an optional hosting account to host your store and non-store websites under your domain name. The *Hosting* section of the administration area includes tools to manage this hosting account.



Prerequisite: Accounts in "free trial" mode must be activated for the hosting options to become available. Hosting options are not available during the free trial period.

FTP Account Info

If your account plan is eligible for hosting, your account's hosting and FTP information will be available on this page after the account has been activated. In addition to your FTP access information, this page also lists your login information to your Plesk control panel, where you can set up email accounts and do other hosting account administration tasks.

Hosting Setup Checklist

Marketplace STANDARD accounts include a hosting account to host your domain name and website in addition to your store! This page contains a checklist for setting up your website hosting account. Complete and submit this form to start the process of setting up your hosting account.

Hosting Control Panel

If your account plan is eligible for hosting and has been activated, then this option will load the login screen to your account's Plesk control panel. Within Plesk you can set up email accounts and do other hosting account administration tasks.

Security warnings when logging in to Plesk

When you log in to Plesk, your browser may display a security warning window. (See sample images below.) You **may** safely ignore these security warning messages. Your Plesk control panel is secure.



SSL warning in FireFox 2.x



SSL warning in Internet Explorer 7.x

What causes these warning messages? Plesk must be installed under an IP address. However, Plesk uses a secure "https" URL for its login page. SSL certificates cannot be installed under an IP address. So, when attempting to view Plesk's "https" login page under an IP address, most web browsers will display a security warning message.

Modules

Modules add specific functionalities to Modular Merchant accounts. Since not every Module is needed by every customer, some advanced Modules need to be activated before they can be used. Activating these modules adds new options to various parts of the store and administration areas. Not all modules are included with every Modular Merchant account plan. Following is an overview of the various modules:

Affiliate Marketing



The Modular Merchant Affiliate Marketing module adds many capabilities to your Modular Merchant Marketplace: the ability to track affiliate-generated website traffic and sales, keep in touch with your Affiliates, make and track payments to your Affiliates, and more. What's more, the Affiliate Marketing module integrates seamlessly with your existing product catalog.

The Affiliate Marketing module needs to be activated before its options become available in your store.

More details on using the Affiliate Marketing module can be found in its own manual, available at:

http://www.modularmerchant.com/docs/Affiliate_Module_Admin_Guide.pdf

Coupons & Gift Certificates



A Gift Certificate is a product purchased by your store's customers. When a customer purchases a Gift Certificate, the system generates a random Coupon code which looks something like "A1234567BC". The Gift Certificate is the product in your store that a customer can purchase in order to create a redeemable discount. The Coupon is the code number they will use in order to redeem the discount.

The Coupons & Gift Certificates module needs to be activated before its options become available in your store.

More details on using the Coupons & Gift Certificates module can be found in its own manual, available at:

http://www.modularmerchant.com/docs/Coupon_Module_Admin_Guide.pdf

Cross Sell / Up Sell



The Cross-Sell/Up-Sell module allows you to create relationships between products. A list of related products can then be displayed on various pages of your store by using {XSELL:...} QuickCode™ Tags.

More details on using the Cross Sell / Up Sell module can be found in its own manual, available at:

http://www.modularmerchant.com/docs/xsell_manual_MMv3.pdf

Digital Delivery



Modular Merchant's Digital Delivery module adds the ability to manage & track sales of digital products in your store. Use the Digital Delivery module to sell zip files, documents, access to private websites and more! The Digital Delivery module also restricts access to the digital products you sell, preventing theft.

The Digital Delivery module needs to be activated before its options become available in your store.

More details on using the Digital Delivery module can be found in its own manual, available at:

http://www.modularmerchant.com/docs/Digital_Delivery_Module_Admin_Guide.pdf



Promotions & Giveaways

The Promotions & Giveaways Module gives you the ability to offer special deals and gratis products to your customers, when they purchase certain groups of products. Promotions can be structured to offer free shipping, product discounts or free gifts.

The Promotions & Giveaways module needs to be activated before its options become available in your store.

More details on using the Promotions & Giveaways module can be found in its own manual, available at:

http://www.modularmerchant.com/docs/Promotions_Module_Admin_Guide.pdf

Simple Bulk Emailer



This tool allows you to email a message to a selection of customers. An individual copy of the email will be sent to each recipient. If you are emailing a large group of people, please be patient after submitting the form. If the page loads slowly, do not stop the page halfway through. It is normal for a mass emailing to take a long time and you will be notified when the email delivery has completed.



Subscription & Membership Products

Modular Merchant's Scheduled Orders module adds the ability to create and edit a series of orders for future processing.

The Subscription & Membership Products module must be activated before its options are available in your store.

Details on using the Subscription & Membership Products module can be found in its own manual, available at:

http://www.modularmerchant.com/docs/Scheduled_Orders_Module_Admin_Guide.pdf



3rd-Party Service Integration

Modular Merchant provides compatible add-on modules to interface with the following 3rd-party services. Some of the 3rd-Party services available for integration are:

- FedEx
- Google Checkout
- Order Motion
- PayPal
- QuickBooks
- Stone Edge
- UPS
- USPS
- 2Checkout

View the webpage for each of these services in the *Modules* section of your administration area for instructions on using each one.

Orders

The Orders section of the Administration area provides tools to review, edit and export the orders that have been placed in your store. Whether an order is placed in the storefront shopping area, by using the Place an Order tool, or automatically by the server (in the case of a scheduled order), the information about it is recorded here.

Export Order Data

Use these tools to export a range of orders to an Excel spreadsheet. Clicking the Export button will load the spreadsheet, which can be opened or saved to your computer. By default, Fulfillment Admins view an advanced version of the Order Export Options on this page. To toggle between the views, use the Simple View | Advanced View links on the page.

Data Format

This is the format in which the data will be exported to the Excel spreadsheet. Comma delimited data is more compatible with the Excel .xls file format, but tab delimited data may produce more consistent results.

Include archived orders?

Orders can be archived on the Search Orders page. Orders are usually archived if they have been paid and shipped. Archiving an order is a simple way to “hide” the order from your searches, without deleting the order and removing its data from your store records.

Dates (Advanced View)

Orders can be extracted from a selected date range. The Dates option includes two sub options: Include orders from all dates, or Include orders with date range (Month, Day, Year, Hour).

Include incomplete orders? (Advanced View)

An “incomplete” order is any one that has not yet had its funds authorized, been paid, or contains any unshipped items. Incomplete orders are usually considered to be “in progress”, and their status may change.

Fulfillment Reports (Advanced View)

Modular Merchant can be set to automatically generate reports containing information on new orders, what needs to be shipped, and to whom, and email them to your store’s Fulfillment Administrators. These reports are called Fulfillment Reports. (More information on setting up Fulfillment Reports can be found in the Fulfillment Options section of your account’s System Settings page, located in the Admin area of the Administration area.)

To export only data from orders that have never been published in one of the automated Fulfillment Reports emailed to the Fulfillment Administrator’s, then select this option. This can be useful if your account publishes Fulfillment Reports at a specific time each day, and you need to review new orders that have been placed since that time.

Mark as Published (Advanced View)

Selecting this option will update the store records for any order that is included in the Excel spreadsheet generated by this page. The orders will be updated so that they will be considered to have been published in a Fulfillment

Report. This can be useful if the orders exported on this page need to be excluded from the next Fulfillment Report automatically generated by the system.

Set Ship Date (Advanced View)

If a value is provided in this field, then the system will update the “ship date” for all previously unshipped products contained in the orders exported by this page. The ship date will be updated to X hours from the time the report is exported.

For example, “3” is entered in to this field, then all previously unshipped products will be updated as being shipped three hours from now. When a customer reviews the shipping status of their orders, any ship date in the future is not displayed. Thus, a customer checking their order’s shipping status would see a shipping status of “Not Shipped” for the next three hours. After the three hours had passed, the shipping status the customer sees would automatically change to “Shipped”.

In the Administration, ship dates in the future are displayed. Thus, the order’s ship status would be displayed as being shipped, even if the ship time is still in the future. This allows Administrators to review estimated ship times, and adjust them if necessary, before the customer sees them as being marked as shipped.

Place an Order

For information on the Place an Order tool, see the Place an Order section of the Customers chapter of this manual.

Search Orders

This page allows you to search your order records. Search by keyword, find orders within a specified date range, with a certain status, or browse the most recent orders that have been placed. This page also allows you to toggle the Funds Authorized, Paid and Shipped status of your orders. Additionally, you can archive completed orders, which will exclude them from your search results.

Search Orders: Search Results Table

Search Results										
Order ID	Date	Customer	#	Total	Status					
 11183	2/26/05 10:54 am	Dudley Heromin  dudley@modularmerchant.com	2	\$52.04						

The Search Orders page displays a variety of information about the orders in your store records.

The Search Results table contains a variety of information about the orders in your store records. Many of the icons in the Search Results table can be interacted with. A description of each of the tools available in the Search Results table is available on the Search Orders page in the Order Icon Legend.

Order Details

This page lists the available information about a specific order. The Order Toolbox contains tools to change the order's Status, print labels, edit or delete the order, or resend a copy of the receipt email to addresses you specify. From this page, the Shipping Status of the individual items in the order can also be updated. To do so, select the desired Shipping Status from the menu in the Item Status column, and then click the Update Order Inventory button.

Order Details Page

A Order Toolbox

dudley@modularmerchant.com, sales@modularmerchant.com

B Shipping Address

Dudley Heromin
123 Paved Road
Anytown, OR 97001
United States

C Billing Address

Dudley Heromin
123 Paved Road
Anytown, OR 97001
United States

D Customer Contact

Dudley Heromin
dudley@modularmerchant.com
(987) 555-1234

E Order Inventory Update Order Inventory

Qty	Product	SKU	Price	COGS		Item Status	Ship Date
1	Easter Egg <small>Small</small>	001egg-1	\$24.99	\$0.00		Shipped	2/26/05 11:11am
1	Wine of the Month	WOM_1	\$12.00	\$4.00		Not Shipped	<i>Not shipped</i>

F Order Info

Order ID	11183
Order Date	2/26/05 10:54am
Funds Auth	2/26/05 10:54am
IP Address	67.171.224.99
Tracking ID	None assigned.
Ship Method	USPS Priority

G Order Tallies

Subtotal	\$36.99
All Taxes	\$0.00
Shipping	\$10.05
Gift Wrap	\$5.00
Grand Total	\$52.04
COGS	\$4.00
MSRP	\$14.00

H Payment Info

Date Paid	2/26/05 10:54am
Gateway	authnet
Pay Method	Credit Card
Card Name	TEST MODE
Card Number	1111222233334444
Exp Date	09/15
Card Security	123

I Order Custom Fields & Notes

How Did You Hear About Us?	Google Search
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The Order Details page displays the order information, and provides tools to update the shipping status of items.










Order Toolbox

The Order Toolbox contains a list of icons. Each of these icons can be clicked to perform a specific action on the order. Some icons have two states, a faded "complete" version, and a dark "incomplete" version. Each of the icons in the Order Toolbox is explained in greater below:

- The funds to pay for this order have been authorized. Funds authorization is usually associated with credit card orders. Authorized funds are approved for collection from the credit card company. Click this icon to change the funds associated with this order to unauthorized status.

- The funds to pay for this order are not authorized. Funds authorization is usually associated with credit card orders. Unauthorized funds are not approved for collection from the credit card company. Click this icon to change the funds associated with this order to authorized status.

- The funds to pay for this order have been collected. In short, this order has been paid for. Click this icon to change the status of the order to unpaid.

-  The funds to pay for this order have not been collected. This order has not been paid for. Click this icon to change the status of the order to paid.
-  All items associated with this order have been shipped. Click this icon to change the status of all items in this order to unshipped. Clicking this icon will not trigger a "shipping update" email to the customer.
-  This order contains at least one item that has not yet been shipped. Click this icon to change the status of all unshipped items in the order to shipped. This will not alter the status or ship date of any items that have already been marked as shipped. Clicking this icon will trigger a "shipping update" email to the customer, if the account is set to email shipping status updates to customers.
-  This order is "open". It will be displayed when browsing orders. Click this icon to archive the order.
-  This order is "archived". It will be hidden when browsing orders. Click this icon to reopen the order. Archiving orders is a simple way to hide the order, without permanently deleting it from your store records.
-  Click this icon to generate a PDF shipping label & packing slip for this order.
-  Click this icon to open the Order Editor screen to modify the contents of this order. More information on the Order Editor is available elsewhere in this chapter.
-  Click this icon to permanently delete this order from your store records. This cannot be undone!
-  Adjacent to this "receipt" icon is a text field. By default, this text field will contain the email address of the customer and your store administrator. The email addresses in this text field can be edited. If additional email addresses are added, separate each with a comma. Click the "receipt" icon to email a copy of the order receipt to each email address in the text field.

Shipping Address





This is the shipping address associated with this order. This is the address to which the items in the order will be delivered.

Billing Address

This is the billing address associated with this order. If a credit card was used to pay for this order, this is the address associated with the credit card.

Customer Tools/Contact

This table includes the name, email address and phone number of the customer associated with this order. There are also several icons available, each of which provided a unique customer-related function:

-  Click this icon to email the customer.
-  Click the magnifying glass icon to load the Customer Details page for this customer.
-  Click this icon to log in to this customer's Customer Account area in your online store.
-  Click this icon to edit this customer's account details.



Click the shopping cart icon to place a new order for this customer.

Order Inventory

The order inventory table contains a list of all the items included in this order. The Order Inventory table also provides a tool to alter the shipping status of the items in the order. Following is more information on each of the columns available in the Order Inventory table:

Qty

The number of units of the product that were ordered.

Product

The name of the product that was purchased. Click the small magnifying glass icon next to the product name to open the Product Editor page for this product.

SKU

The SKU number of the product.

Price

The Price column lists the unit price of the product multiplied by the quantity purchased.

COGS

The COGS column lists the Cost of Goods value of the product multiplied by the quantity purchased.



(Gift Wrap)

If this item needs to be gift wrapped, a checkbox will be displayed in this column.

Item Status

This column records the delivery status of the items in the order. To alter the Item Status of an item in the order, make a selection from the dropdown menu and click the Update Order Inventory button. Updating the shipping status of items in this table will trigger a "shipping update" email to the customer, if the account is set to email shipping status updates to customers. If an item is changed to Shipped status, the data and time will be recorded in the Ship Date column.

Ship Date

If the item status is Shipped, then the ship date and time will be displayed here. If the status of a shipped item is changed, (ie: returned, canceled, etc.) the date and time in the Ship Date column will be retained. The reason for this is because the purpose of the Ship Date column is to record when delivery to the customer was first attempted. If an item is returned, it was still delivered on the date recorded. The only exception to this rule is if the status of the item is ever returned to Not Shipped, then the ship date will also be reset to Not Shipped.



(Fulfillment Report Status)

If this item has been published in a Fulfillment Report, then a checkbox will be displayed in this column. Mouse-over the checkbox to view the date and time the Fulfillment Report was published. More information on Fulfillment

Reports can be found in the Export Order Data section of this chapter.

Order Info

This table includes some fundamental information about the order, such as the Order ID number, date and time the order was placed, the IP address of the customer, any shipping tracking ID number(s) that have been assigned to the order, and the shipping method used for the order.

Order Tallies

This table displays some of the order's financial totals.

Payment Info

This table displays information associated with the payment method of the order. The contents of this table will change, depending if the order has been paid for with a credit card, check, money order, PayPal, etc.

Order Custom Fields & Notes

Any notes or custom checkout fields that were submitted when the order was placed will be displayed here.

Edit an Order

This form allows you to edit the data on file for a specific order. Changes made to the order will update your account records, and the customer's order history in their account area. Products can also be added or removed from an order. The order product fees, shipping fees and taxes can also be changed. A notes field is also included to record any important messages regarding this order.



For information on a specific option, click the question mark icons found in column on the right-side of the page. (Example at left.) Clicking the icon will open a definition and additional instruction in a popup window.



Schedule an Order

The *Schedule an Order* tool requires the *Subscription & Membership Products* module to be activated prior to use. This control panel allows your store Administrators to select a customer and scheduled an order for them. The scheduled order will be added to your *Scheduled Order Queue* for future processing.

Place a Scheduled Order: Search for a Customer

Search Results

Click the calendar icon to verify this customer's account information and continue.

	Name	Email	SID		
	Dudley Heromin	dudley@modularmerchant.com	9		

The Place a Scheduled Order tool allows you to search for a customer and schedule a future order for them.



The first step in scheduling an order for a customer is to locate the desired customer account. Selecting Place a Scheduled Order from the Orders button in the navigation menu will begin the process. This will load a customer search tool. When the desired customer is located, click the calendar icon to open the Scheduled Order Editor. (Example of the calendar icon is at left.)

Edit a Scheduled Order

The Scheduled Order Editor allows you to add a new scheduled order or edit and existing one. The Editor contains fields for the customer’s contact info, billing and shipping addresses, in addition to several product options unique to the scheduled order process.



For information on a specific option, click the question mark icons found in column on the right-side of the page. (Example at left.) Clicking the icon will open a definition and additional instruction in a popup window.

Scheduled Order Editor: Add/Edit Products

Current Order Inventory

QTY	Product	SKU		Bill Date	Repeats	Rebill As	RS	Hold	
<input type="text" value="1"/>	Import Product One	<input type="text" value="IMPORT-1"/>	<input type="checkbox"/>	Mar 11 2005	<input type="text" value="0"/>	IMPORT-2	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
<input type="text" value="4"/>	Wine of the Month	<input type="text" value="WOM_1"/>	<input type="checkbox"/>	Mar 28 2005	<input type="text" value="12"/>		<input type="checkbox"/>	<input type="checkbox"/>	

Add Products to this Scheduled Order

QTY	SKU		Bill Date	Repeats	Rebill As	RS	Hold
<input type="text" value="2"/>	<input type="text" value="PROD-023"/>	<input checked="" type="checkbox"/>	March 28 2005	<input type="text" value="0"/>		<input type="checkbox"/>	<input type="checkbox"/>

The Scheduled Order Editor contains fields to edit or add products to the selected Scheduled Order.

The Scheduled Order Editor has two sections that deal with products: Current Order Inventory and Add Products to this Scheduled Order. These sections display any products that are assigned to this scheduled order. The behavior of each product can be customized with by modifying the available options:

QTY (Quantity)

This field defines how many units of the product will be included when the scheduled order is processed.

Product (Current Order Inventory Only)

This is the name of the product associated with the provided SKU. Provided for double-check purposes.

SKU

This field includes the SKU number of the selected product. When adding a new product to a scheduled order, provide the SKU number. The system will reference the SKU when selecting which products to add to the scheduled order when the order is processed. To change a product in a scheduled order, change the SKU to that of the new product.

**(Gift Wrap)**

If the product needs to be gift wrapped, select this checkbox. The “gift wrap” option for the product will be selected when the order is placed.

Bill Date

This is the date on which an order for this product will be processed. In the sample image, note that the two products currently assigned to the scheduled order have two different bill dates. (Import Product One will be billed on March 11, 2005 and Wine of the Month will be billed on March 28, 2005.) The result of this setting is that the customer will have two orders placed for them in March. The first on the 11th will contain just Import Product One, and the second on the 28th will contain just the Wine of the Month.

Multiple products within the same customer’s scheduled orders queue may each have different bill dates. This helps keep the scheduled order queue manageable. Instead of a separate entry for each individual product, the scheduled order queue is listed by customer. More information on the Scheduled Orders queue is available in the Search Scheduled Orders section of this chapter.

When a scheduled order becomes due and is processed, the Bill Date value will automatically update itself, based on the product’s settings. For example, if the Wine of the Month product in the sample image has been set up to rebill every 30 days, then the bill date will automatically be updated to April 27th, 2005 (30 days after March 28th) when the next order is processed on March 28th.

Repeats

Many times, products that are scheduled are also periodical, and need to be offered in a series. For example, the Wine of the Month product in the sample image is set up to renew itself once a month, and repeat twelve times (or repeat twelve months).

The repeat feature allows the store Administrator to create a 12 month series of Wines of the Month, without requiring the creation of twelve different Wine of the Month products in the store records. As far as the store software is concerned, the same Wine of the Month product simply repeats twelve times.

The Repeats value will automatically decrement itself as orders become due and are placed in the store. For example, on March 28th the Wine of the Month product will become due. On that date, an order for the product will automatically be generated in the store and the Repeats value will be reduced to 11.

Rebill As

When a scheduled product's Repeats value reaches zero, the system will then look to the Rebill As field to determine if a new product (or the same product) needs to be added to the customer's scheduled order queue.

If a product SKU number is present in the Rebill As field, the system will replace the existing SKU with this one when the Repeats value reaches zero. For example, the Wine of the Month product will repeat 12 times. Since there is no SKU present in the Rebill As field, after the twelfth order the Wine of the Month product will be removed from the customer's scheduled orders queue.

However, Import Product One, due on March 11th, has a Repeats value of zero, and a SKU of IMPORT-2 in the Repeats As field. On March 11th an order for Import Product One will be placed for this customer. Since Import Product One is not set to repeat, the product with the SKU IMPORT-2 will be added to the customer's scheduled orders queue in its place. When IMPORT-2 is added to the queue, it will inherit the Repeats value, billing date range and Rebill As value on file for the product. These values can be set using the Product Editor screen. More information on setting these values on the Product Editor screen are available elsewhere in this chapter.

RS (Reminder Sent)

On the Search Scheduled Orders screen, an optional Reminder Email can be configured, which is emailed to customers a few days before their scheduled orders take place. The Reminder Email is sent once before a scheduled order is processed. The date the Reminder Email is sent is recorded, and the RS checkbox for that product becomes selected. When the order is processed, the Reminder Sent date for that product is reset, and the RS checkbox is deselected.

Selecting the RS checkbox will tell the system that the Reminder Email has already been sent for this scheduled order. When the Reminder Email would become due, it will be ignored if this checkbox is already selected. The RS checkbox can thus be used to suppress the sending of the Reminder Email.

Additionally, the system will resend a new Reminder Email to the customer if this checkbox becomes deselected between the time the original Reminder Email is sent and the day the order is due. The system checks the status of the RS checkbox and sends Reminder Emails to customers once a day. The time of day that this takes place may vary from account to account, but the check always runs at the same time each day.

Hold

The Hold checkbox allows the Administrator to suppress the orders in a customer's Scheduled Orders Queue. Any product that is on Hold will be ignored when transactions are processed. In the sample image, since Import Product One is on Hold, the customer's order for it will not be processed on March 11th. The order, with a Bill Date of March 11th, will remain in the customer's queue as long as it is on hold. An order for the product will be processed after it is no longer on Hold, as long as it is due.

(Delete) (Current Order Inventory Only)

Click this icon to permanently remove the product from the scheduled order.

Scheduled Billing options added to the Product Editor

When the *Subscription & Membership Products* module is activated, a new "Scheduled Billing" tab will be added to the Product Editor screen. This tab includes options for assigning recurring billing rules to the product. The recurring billing rules will take affect when the product is purchased by a customer, and/or when an Admin places an order for the customer using the *Place an Order* control panel.

Scheduled Billing Options		
35	Product Billing Term	Re-schedule an order for this product every <input type="text" value="30"/> day(s).
36	Rebilling Cycles	This product rebills as itself <input type="text" value="12"/> time(s), then reschedules using the rule below.
37	Rescheduling Options	After this product finishes its Rebilling Cycle, it should do the following:
		<input type="radio"/> Remove itself from the Scheduled Orders queue.
		<input type="radio"/> Restart its cycle in the Scheduled Order queue. (Reschedule as itself.)
		<input checked="" type="radio"/> Add a new product to the Sheduled Order queue: <input type="text" value="PROD-002"/> (Enter SKU)
38	Billing cycle text	<input type="text" value="Monthly"/>

The Scheduled Billing Options on the Product Editor page allow you to edit the behavior of recurring products.

The Scheduled Billing Options allow a product to be reschedule as a series. This series of products becomes a Scheduled Order Queue for the customer. For more information on the Scheduled Order queue, see the Search Scheduled Orders section of this chapter. Each of these product fields is optional. Following are details on how each of these options will augment the product’s behavior:

Product Billing Term

This is the billing term, in days. Enter a value in this field if this product is to be billed on a recurring basis. (For example, a subscription to a monthly ezine may have a Product Billing Term of 30 days.) If a number is entered here, then, when purchased, the product will automatically schedule itself to be re-invoiced this many days later.

Rebilling Cycle

This is the number of times this product will schedule itself for re-invoicing. If blank or set to zero, this product will not schedule itself for re-invoicing. After a product completes is Rebilling Cycle (or if the Rebilling Cycle is zero) it will look to the Rescheduling Options to determine what to do next.

Rescheduling Options

This option will determine what happens when the product's Rebilling Cycle reaches zero:

Remove Itself: If this option is selected, then the product will be completely removed from your Scheduled Orders queue when its Rebilling Cycle reaches zero.

Restart Its Cycle: This option will cause the product to reschedule itself from scratch once its Rebilling Cycle is completed. This is a convenient way to create a never-ending scheduled product.

Add a New Product: When the product's Rebilling Cycle reaches zero it will be replaced by a new product you specify. The new product's Billing Term and Rebilling Cycle will be used. Using this method, it is possible to "daisy chain" a series of products together as a series.










Billing Cycle Text

Any text entered here is appended after this product's price throughout your store. For Example: "per month" would be appended to the product price in the storefront as "Price: \$12.34 per month".

Search Scheduled Orders

This page allows you to search your Scheduled Order Queue. Search your scheduled orders by keyword, or browse the most recent orders that are due. Additionally, you can complete the transaction for any scheduled orders that are now due, edit a scheduled order, log into the account of a customer with a scheduled order, and more.

Scheduled Orders Queue

Scheduled Orders:						Viewing 1 - 5 of 5 results.									
	Due Date	Customer Name	# Items	# Due	Pay By										
	03/11/05	Dudley Heromin	5	0	authnet										

The Search Scheduled Orders page lets you search your Scheduled Orders Queue by a variety of methods.

The Scheduled Orders Queue lists some helpful information about each customer account listed in the Queue. This information includes:

 **(Magnifying Glass)**

Click this icon to view the Details Page for this Scheduled Order.

Due Date

This is the due date of the products in the order. If the customer's Scheduled Order Queue contains several products, each with a different due date, then the earliest due date is displayed here.

Customer Name

The name of the customer. Each customer has their own listing in the Scheduled Orders Queue. Each customer's listing may contain multiple products with multiple due dates.

Items

This column lists the total number of products in this customer's Scheduled Orders Queue. Mouse-over this table cell to view a popup list of the names of all the items in this list.

Due

This column lists the total number of items in this customer's Scheduled Orders Queue that are now due. If the customer has items that are due, an order for these items will automatically be processed next time the system processes your scheduled orders. An order for all due items can also be processed manually by clicking the "shopping cart" icon elsewhere in the table row.

Pay By

This column lists the Payment Gateway that will be used to process the order. If the Payment Gateway is something other than the one selected in your account's System Settings, then it may be necessary to process this scheduled order manually.

 **(Shipping Method)**

Mouse-over the truck icon to view the name of the shipping method that will be used for this order.

 **(Hold Status)**

If the hand icon is displayed in this table cell, then this scheduled order contains items that are on Hold. An order will not be generated for items that are on Hold, even if they are past due.

 **(Credit Card Expiration Status)**

If this table cell contains a credit card icon, then the credit card associated with this scheduled order is nearing its expiration date. If the background color of the table cell containing this credit card icon is yellow, then the credit card is going to expire at the end of this month. If the background color of the table cell containing this credit card icon is red, then the credit card has expired.

 **(Scheduled Order Notes)**

If this table cell contains a non-faded version of the notes icon (pictured above) then this order contains administrative notes. Click the notes icon to view the notes in a popup window.

 **(Customer Email)**

Click this icon to send an email to the customer.

 **(Customer Account)**

Click this icon to log in to the customer's account area in your storefront.

 **(Edit this Scheduled Order)**

Click this icon to load the Scheduled Order Editor screen. More details on using this Editor are available elsewhere in this chapter.

 **(Process the Due Items in this Scheduled Order)**

If a Scheduled Order contains any items that are now due, then a shopping cart icon will be displayed in the Scheduled Orders Queue. Clicking this icon will open a window that will manually process the order.



IMPORTANT: If you click the shopping cart icon to manually process scheduled orders that are due, open one transaction popup window at a time. In order to process an order, the web server must transmit customer & order data to the script running in the popup window. Web servers can only work with one set of data from a user at a time. Thus, if another transaction popup window is open on the same computer while another one is still processing, then the new data may be merged with the order that is still being processed. This can result in transactions containing the wrong products and billing information, or possibly multiple orders being charged to the wrong customer's credit card!

(Delete this Scheduled Order)

Click this icon to permanently remove all of this customer's scheduled orders from your store records.

Scheduled Order Options

Beneath the Scheduled Orders Queue is a list of options in blue. These options modify the behavior of the Scheduled Orders Queue and the processing of scheduled orders in your store. The following options are available on this page:

Hide Items "on hold"?

If this option is selected, scheduled product orders that are on Hold will not be displayed in the Scheduled Orders Queue.

Browse Scheduled Orders in Groups of...

This value determines how many scheduled orders are displayed per page. Recommended value for this field is between 25 and 50. If more results are available, links to additional pages will be added below the Scheduled Orders Queue.

Email a sales receipt to the customer when a scheduled order is placed?

This option can be selected to suppress the delivery of the usual email receipt to the customer when a scheduled order is processed.

Auto-refresh scheduled orders queue when an order is placed manually?

If this option is selected, then the Scheduled Orders Queue will automatically reload when a due scheduled order is manually placed by clicking the order's shopping cart icon. This can be useful for keeping track of which due scheduled orders have been processed. However, the constant reloading of the page as orders are manually processed can become tedious for accounts with a large number of scheduled orders on file.

Process due scheduled orders at the following time(s)?

This menu determines the hour(s) of the day when the Modular Merchant software will scan the account, looking for any scheduled orders that are due and are not on Hold. Multiple hours can be selected from this menu. This can be useful if you want the system to automatically retry to process orders that may have been declined earlier in the day.

Notification Email Settings

Beneath the Scheduled Order Options are a series of options that will set the behavior of the optional Reminder Emails your account sends to customers prior to the processing of their scheduled orders:

Send a Notification Email

Enter a value in this field to specify how many days prior to their due date the customer should receive a notification email of the pending transaction. If zero is entered in this field, or it is left blank, no notification email will be sent to the customers.

Email a copy of the notification email to...

If an email address is entered here, a copy of the notification emails will be delivered to it.

Subject of notification email

Enter the subject line you would like to have used in the Notification Emails sent to your customers.

Custom email message

The Notification Emails will contain a list of all the pending products and the estimated bill date for the products on file for the customer. Any custom email message entered in this field will be appended to the email before the list of pending products. This message must be text only, no HTML is allowed.

Scheduled Order Details

This page lists the available information about a specific scheduled order. The Scheduled Order Toolbox contains tools to edit or delete the order. Other information available on this page includes:

Scheduled Order Toolbox

A

Shipping Address

Dudley Heromin
 123 Paved Ro
 Anytown, OR
 United States
 B

Billing Address

Dudley Heromin
 123 Paved Road
 Anytown, OR 97
 United States
 C

Customer Tools / Contact

Dudley Heromin
dudley@modularmerchant.com
 (987) 555-1234
 D

Order Inventory

Qty	Product	SKU	Price	COGS	Bill Date	Repeats	Rebill As	RS	Hold
4	Wine of the Month	WOM_1	\$48.00	\$16.00	3/28/2005	58	Wine of the Month		
1	Import Product One	IMPORT-1	\$1.00	\$0.00	3/11/2005	3	Import Product One		

Estimated Order Tallies

Subtotal	\$49.00
Shipping	\$8.05 (USPS Priority)
Grand Total	\$57.05
COGS	\$16.00
MSRP	\$0.00

Payment Information

Gateway	authnet
Card Name	TEST MODE
Card Number	1111222233334444
Exp Date	09/11
Card Security	123

Order Custom Fields & Notes

Order Notes	
--------------------	--

The Scheduled Order Details page lists information about a selected customer's upcoming orders.

Scheduled Order Toolbox

The Scheduled Order Toolbox contains a list of icons. Each of these icons can be clicked to perform a specific action on the order. Each of the icons in the Order Toolbox is explained in greater below:

Click this icon to open the Scheduled Order Editor screen to modify the contents of this scheduled order. More information on the Scheduled Order Editor is available elsewhere in this chapter.

Click this icon to permanently delete this scheduled order from your store records. This cannot be undone!

Shipping Address

This is the shipping address associated with this scheduled order. This is the address to which the items in the order will be delivered when it is processed.






Billing Address

This is the billing address associated with this scheduled order. If a credit card will be used to pay for this order, this is the address associated with the credit card.

Customer Tools/Contact

This table includes the name, email address and phone number of the customer associated with this order. There

are also several icons available, each of which provided a unique customer-related function:

-  Click this icon to email the customer.
-  Click the magnifying glass icon to load the Customer Details page for this customer.
-  Click this icon to log in to this customer's Customer Account area in your online store.
-  Click this icon to edit this customer's account details.
-  Click the shopping cart icon to place a new order for this customer.

Order Inventory

The order inventory table contains a list of all the items included to be included in this customer's upcoming orders. Following is more information on each of the columns available in the Order Inventory table:

QTY (Quantity)

This field defines how many units of the product will be included when the scheduled order is processed.

Product

This is the name of the product associated with the provided SKU. Provided for double-check purposes.

SKU

This field includes the SKU number of the selected product.

Price

The Price column lists the unit price of the product multiplied by the quantity to be purchased.

COGS

The COGS column lists the Cost of Goods value of the product multiplied by the quantity to be purchased.

Bill Date

This field indicates the date on which a transaction will be made for the listed product. Each product included in a customer's Scheduled Orders Queue can have its own bill date.

Repeats

This field indicates the number of times the listed product will reschedule itself before it changes over to the product listed in the Rebill As column. If the value of the Repeats column is zero, then the product will change over to the product in the Rebill As column when the next scheduled order transaction is placed.

Rebill As

This field includes the name of the product that will the current product will reschedule itself as after its Repeats cycle is completed. If this field is blank, then the product will completely remove itself from the customer's scheduled order queue after it has completed its Repeats cycle. If a product rebills as itself, it will reschedule as itself after its Repeats cycle is completed, starting from scratch, and creating an endless loop.

RS (Reminder Sent)

This field indicates whether or not a Reminder Email has been sent to the customer for this upcoming transaction. If this field contains a checkmark icon, then the Reminder Email has been sent. The Reminder Email is reset to "not sent" after each transaction. For more information on the Reminder Email, see the Search Scheduled Orders section of this chapter.

Hold

If the hand icon is displayed in this table cell, then this scheduled order contains items that are on Hold. An order will not be generated for items that are on Hold, even if they are past due.

Estimated Order Tallies

The Estimated Order Tallies table displays the estimated combined totals for all of the products in the customer's Scheduled Order Queue, even if the products have different bill dates. The estimated order subtotal, shipping fees, grand total, cost of goods and manufacturer's suggested retail price are provided. These values are provided only for evaluation purposes. The tallies of the actual transaction may vary.

Payment Information

This table displays the information on file for the method of payment to be used for the orders in the customer's Scheduled Order Queue. If a credit card will be used for the scheduled transaction(s), then the complete credit card information will be displayed here to Administrators that have access to view it.

Order Custom Fields & Notes

Any notes or custom checkout fields that were submitted when the order was placed will be displayed here.

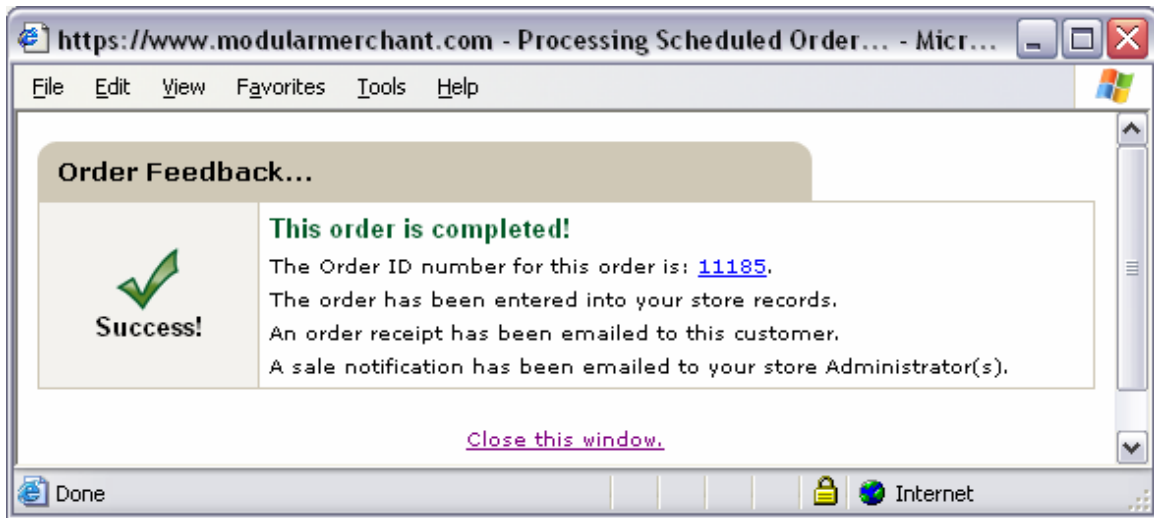


Scheduled Order Transaction Window

To manually process a scheduled order that is due, click the Shopping Cart icon associated with the order on the Search Scheduled Orders section of the Administration Area. (Example of this icon at left.) Clicking this icon will open a popup window in which the transaction will be processed. This popup window is called the Scheduled Order Transaction Window, since it is inside this window that the transaction is processed.

If several scheduled orders are due, a separate Scheduled Order Transaction Window will be opened for each one. If the transaction fails, a message with possible reasons for the failure will be displayed. If the transaction is successful, then a success message with a link to the new order's Order Details page will be displayed.

Scheduled Orders Transaction Window



The Scheduled Order Transaction Window handles the manual processing of a due Scheduled Order.



IMPORTANT: If you click the shopping cart icon to manually process scheduled orders that are due, open one transaction popup window at a time. In order to process an order, the web server must transmit customer & order data to the script running in the popup window. Web servers can only work with one set of data from a user at a time. Thus, if another transaction popup window is open on the same computer while another one is still processing, then the new data may be merged with the order that is still being processed. This can result in transactions containing the wrong products and billing information, or possibly multiple orders being charged to the wrong customer's credit card!

Automated Processing of Scheduled Orders

The Modular Merchant software has the ability to automatically attempt to process Scheduled Orders that are due. Any Scheduled Order that is processed automatically by the system is recorded in the account records as an order, any notification & receipt emails are sent to the store Administrator and customer, and the products are rescheduled as necessary in the customer's Scheduled Order Queue.

To set the time(s) at which due Scheduled Orders will be processed, use the Process due scheduled orders at the following time(s) menu in the Scheduled Order Options section on the Search Scheduled Orders page of the

Administration area. This menu determines the hour(s) of the day when the Modular Merchant software will scan the account, looking for any scheduled orders that are due and are not on Hold. Multiple hours can be selected from this menu. This can be useful if you want the system to automatically retry to process orders that may have been declined earlier in the day.

If a due Scheduled Order cannot be processed by the system, a Decline Email will be sent to the store Administrator, and the order will remain in the Scheduled Order Queue, unchanged. The next time the system attempts to process due orders it will be tried again, unless the store Administrator places the order on Hold, deletes it, or changes its Bill Date to a date in the future.

Create a Shipping Method

This tool allows you to edit an existing shipping rate, or create a new shipping rate from scratch. Custom shipping rates can calculate shipping fees based on the quantity of items in an order, order value, order weight, and more.



For information on a specific option, click the question mark icons found in column on the right-side of the page. (Example at left.) Clicking the icon will open a definition and additional instruction in a popup window.

Search Ship Methods

The View Rates page includes a table that lists the Shipping Methods available in your store. The table includes the following columns:

DO (Display Order)

Lists of shipping methods displayed in your store are sorted by their Display Order. If two shipping methods share the same Display Order, they are then sorted alphabetically by their name.

Name

This is the name of the shipping method that will be displayed throughout your storefront shopping area.

Type

Shipping methods can have several types. Generally, shipping rates for FedEx, UPS and USPS types are provided from those companies during the checkout process and Custom types are calculated using a custom-made formula created by the store Administrator.

Shipping Rate Calculation

The Shipping Rate Calculation field contains a simple version of the formula that will be used in calculating the shipping rate during the checkout process. To view the complete details for the shipping method, click the "e" edit icon to load the Shipping Method Editor screen.



Act. (Active Status)

If a green circle is displayed in this field, then the shipping method is active. If a red "X" is displayed in this field, then the shipping method is inactive. Inactive shipping methods are not displayed in your storefront. Click either of these icons to toggle the active status of the shipping method.

 **(Edit this Shipping Method)**


Click this icon to open the Shipping Method Editor, where the details for it can be modified.

 **(Delete this Shipping Method)**

Click this icon to delete the selected shipping method. This will permanently remove it from your store records. This cannot be undone! The shipping rates for standard shipping services, such as FedEx, UPS or USPS can only be deactivated, and not deleted.

Items to Ship

The page lists items that have not been marked as shipped in your store records. From this page, you can change the Availability Status of items within an order, change each item's shipping status, and print packing slips and shipping labels in PDF format. Orders are grouped by the Fulfillment account responsible for the items within them.

fulfillment Items to Ship							Mark all as Shipped Check All Uncheck All 	
Order # 11243								
Ship To	Qty	Product	SKU		Item Status	Ship Date		
Dudley Heromin 123 Paved Road Anytown, OR 97001 US	1	MM Sales Mod Word Doc	DOc001		Shipped 	3/11/05 10:04am	<input checked="" type="checkbox"/>	<input type="checkbox"/>

[Change the shipping status of orders, and print shipping labels on the Items to Ship page.](#)

The Items to Ship page contains the following options:

[Fulfillment Account Name] Items to Ship


Products to be fulfilled are grouped by the Fulfillment Admin accounts available. Also, a table for all products not associated with any Fulfillment Admin account is listed at the end of the list.

If a Fulfillment Admin views the Items to Ship page, the unfulfilled products associated with their account will be displayed on the page by default. This makes it easier for Fulfillment Admins to review the products they need to process and ship.

Mark all as Shipped

Clicking this link will update the page with the Item Status menu for all included products updated to "shipped". Clicking this link will not update your store records. To update the store records with the new shipped Item Status, click the Save Changes & Print Selected button at the bottom of the page.

Check All / Uncheck All

Clicking these links will either select or deselect all visible checkboxes in the  (Shipping Label) column. Clicking the Save Changes & Print Selected button at the bottom of the page will generate a PDF containing a separate page with a shipping label for each order selected. Only one shipping label checkbox will be displayed per order, even if an order contains multiple products.

Order #

A Fulfillment Admin's Items to Ship are grouped by Order #. Each item listed within the order is the responsibility of the Fulfillment Admin. Only the products associated with the specified Fulfillment Admin will be listed in their section. Thus, the items included in an order may be split among multiple Fulfillment Admin sections. To view a complete list of all the products within a specific order, view its Order Details page.

Ship To

This is the address to which the items in this order need to be shipped.

Qty (Quantity)

The quantity of the specified product that has been purchased.

Product

The name of the product that was purchased.

SKU

The SKU number of the product.

**(Gift Wrap)**

If this item needs to be gift wrapped, a checkbox will be displayed in this column.

Item Status

This column records the delivery status of the items in the order. To alter the Item Status of an item in the order, make a selection from the dropdown menu and click the Save Changes & Print Selected button. Updating the shipping status of items in this table will trigger a "shipping update" email to the customer, if the account is set to email shipping status updates to customers. If an item is changed to Shipped status, the data and time will be recorded in the Ship Date column.

Ship Date

If the item status is Shipped, then the ship date and time will be displayed here. If the status of a shipped item is changed, (ie: returned, canceled, etc.) the date and time in the Ship Date column will be retained. The reason for this is because the purpose of the Ship Date column is to record when delivery to the customer was first attempted. If an item is returned, it was still delivered on the date recorded. The only exception to this rule is if the status of the item is ever returned to Not Shipped, then the ship date will also be reset to Not Shipped.

**(Fulfillment Report Status)**

If this item has been published in a Fulfillment Report, then a checkbox will be displayed in this column. Mouse-over the checkbox to view the date and time the Fulfillment Report was published. More information on Fulfillment Reports can be found in the Export Order Data section of this manual.

**(Print Shipping Label)**

Each order includes a checkbox for printing a shipping label. To select an order for printing, select its checkbox. Clicking the Save Changes & Print Selected button at the bottom of the page will generate a PDF containing a

separate page with a shipping label for each order selected. Only one shipping label checkbox will be displayed per order, even if an order contains multiple products.

Shipping Pick List

The Shipping Pick List is a quick way to view, sort and print out a list of the products required to fulfill all your open orders. Products appear on this list if they are not marked as shipped in your order records. When a product is marked as shipped, it is automatically subtracted from the pick list. Click a column header to sort by that column.

Click the printer icon on the page to print a PDF version of the Shipping Pick List.

The Shipping Pick List can be a very convenient tool for warehouses or other scenarios in which the Fulfillment Admin needs a centralized list of all the products they need to retrieve before shipping out the completed orders.

The Shipping Pick List also displays the Status of each product listed, and the number of units in stock. Additionally, the combined weight of all products is also listed, to let you know if you're going to need a cardboard box or a forklift when retrieving all the items.

Products

The Products section of the Administration area contains tools for adding & modifying the sections of the online store directly related to products and product behavior. The Products section is split into four areas: Categories, Manufacturers, Products and Managers.



Categories

When setting up an online store, Categories should be created first. Each product that is added to the store must belong to at least one category, so categories should be created before products can be added. (However, the Product Editor screen also allows a category to be created at the same time a product is created.) The Categories section of the Administration area has three subsections: Add a Category, Import Categories, and Search Categories. Following is information on each of these subsections.

Categories and Subcategories

There are two types of categories: Parent Categories and Subcategories. A Parent Category does not have any products assigned to it, just other categories. Categories assigned to a parent category are subcategories. The complimentary Storefront: Categories Module adds a page to the storefront shopping area listing the products assigned to a selected category. If the selected category does not contain any products, then the category is considered to be a Parent category, and a list of the subcategories assigned to it are displayed instead. Thus, when viewing a category page in the storefront shopping area, one of two things will be displayed:

The category contains at least one product: A list of all products in the category will be displayed.

The category does not contain any products: The category is a Parent category. A list of all subcategories assigned to it will be displayed.

Add a Category

Categories help organize the products in your store catalog. Each product must be assigned to at least one category. The Add a Category page provides an easy-to-use form to add a new category to your online store.



For information on a specific option, click the question mark icons found in column on the right-side of the page. (Example at left.) Clicking the icon will open a definition and additional instruction in a popup window.

Import Categories

Use the import tools on this page to add multiple new categories to your store at once by importing a list from a spreadsheet file. Importing categories from a file bypasses the need to enter the categories one-by-one using the Add a Category page. The import tool includes step-by-step instructions, a link to a spreadsheet template to work from, and a form to upload, double-check and import your categories.

Search Categories

The Search Categories page displays a list of the categories in your store, their status, and additional information. The main component of this page is the Categories table, which contains several columns, each with a unique function. Following is information on each of the columns of this table:

DO (Display Order)

Lists of categories displayed in your store are sorted by their Display Order. If two categories share the same Display Order, those categories are then sorted alphabetically by their name.

Category Name

This is the name of the category as it will be displayed throughout your storefront. If a category is a subcategory of another, then this field will contain the full category path. For example: A category titled "Subcategory Two", which is a subcategory of another category, may be displayed like this:

Parent Category/Subcategory One/Subcategory Two

SID (System ID Number)

Category System ID number. This is the ID number generated by the Modular Merchant software for this category. Each category is assigned a unique SID by the system.

**Act. (Active Status)**

If a green circle is displayed in this field, then the category is active. If a red "X" is displayed in this field, then the category is inactive. Inactive categories are not displayed in your storefront. Click either of these icons to toggle the active status of the category.

If you have a seasonal category, you can change it to "inactive" status during it's off seasons. This allows you to remove the category from your storefront without requiring you to completely delete it from your account records.

**(Category Web Page)**

Click this icon to view the category's store webpage. (Shift + Click in Internet Explorer to open the category webpage in a new browser window.)

**(Products in this Category)**

Click this icon to load a list of all the products assigned to this category at the top of the page. The product list will include its own set of options.

**(Edit this Category)**

Click this icon to open the Category Editor, where the details for this category can be modified.

**(Delete this Category)**

Click this icon to delete the category. This will permanently remove the category from your store records. This cannot be undone!



Manufacturers

When setting up an online store, Manufacturers should be created after categories. Each product that is added to the store must be assigned to a Manufacturer, so Manufacturers should be created before products. (However, the Product Editor screen also allows a manufacturer to be created at the same time a product is created.) The Manufacturers section of the Administration area has three subsections: Add a Manufacturer, Import Manufacturers, and Search Manufacturers. Following is information on each of these subsections.

Add a Manufacturer

Manufacturers help organize the products in your store catalog. Each product must be assigned to a Manufacturer. The Add a Manufacturer page provides a simple form to add a new Manufacturer to your online store.



For information on a specific option, click the question mark icons found in column on the right-side of the page. (Example at left.) Clicking the icon will open a definition and additional instruction in a popup window.

Import Manufacturers

Use the import tools on this page to add multiple new Manufacturers to your store at once by importing a list from a spreadsheet file. Importing Manufacturers from a file bypasses the need to enter the Manufacturers one-by-one using the Add a Manufacturer page. The import tool includes step-by-step instructions, a link to a spreadsheet template to work from, and a form to upload, double-check and import your Manufacturers.

Search Manufacturers

The Search Manufacturers page displays a list of the Manufacturers in your store, their status, and additional information. The main component of this page is the Manufacturers table, which contains several columns, each with a unique function. Following is information on each of the columns of this table:

DO (Display Order)

Lists of Manufacturers displayed in your store are sorted by their Display Order. If two Manufacturers share the same Display Order, they are then sorted alphabetically by their name.

Manufacturer Name

This is the name of the Manufacturer as it will be displayed throughout your storefront.

SID (System ID Number)

Manufacturer System ID number. This is the ID number generated by the Modular Merchant software for this Manufacturer. Each Manufacturer is assigned a unique SID by the system.



X Act. (Active Status)

If a green circle is displayed in this field, then the Manufacturer is active. If a red "X" is displayed in this field, then the Manufacturer is inactive. Inactive Manufacturers are not displayed in your storefront. Click either of these icons to toggle the active status of the Manufacturer.

If you have a seasonal Manufacturer, you can change it to "inactive" status during it's off seasons. This allows you to remove the Manufacturer from your storefront without requiring you to completely delete it from your account records.

**(Manufacturer Web Page)**

Click this icon to view the Manufacturer's store webpage. (Shift + Click in Internet Explorer to open the Manufacturer webpage in a new browser window.)

**(Products by this Manufacturer)**

Click this icon to load a list of all the products assigned to this Manufacturer at the top of the page. The product list will include its own set of options.

**(Edit this Manufacturer)**

Click this icon to open the Manufacturer Editor, where the details for this Manufacturer can be modified.

**(Delete this Manufacturer)**

Click this icon to delete the Manufacturer. This will permanently remove the Manufacturer from your store records. This cannot be undone!



Products

Products are the heart of any online store. Modular Merchant offers a variety of tools to create, edit and manage the products in your online store catalog. The Products section of the Administration area has four subsections: Add a Product, Export Products, Import Products, and Search Products. Following is information on each of these subsections.

Add a Product

This page allows you to create a new product in your store catalog. The options selected on this page will determine the behavior of this product in your store. Fields in red are required. Certain add-on Modules and account types will add some new options to this page.



For information on a specific option, click the question mark icons found in column on the right-side of the page. (Example at left.) Clicking the icon will open a definition and additional instruction in a popup window.

Export Products

Use the forms on this page to download an Excel spreadsheet containing the data for the products you specify. The Export button will open an option window that will allow you to open or save the spreadsheet. To save the Excel spreadsheet on your computer, click Save, and give the file a unique name. Excel spreadsheets have a ".xls" file extension by default.

Import Products

Use the import tools on this page to add multiple new products to your store at once by importing a list from a spreadsheet file. Importing products from a file bypasses the need to enter them one-by-one using the Add a Product page. The import tool includes step-by-step instructions, a link to a spreadsheet template to work from, and a form to upload, double-check and import your products.

Search Products

The Search Products page displays a list of the products in your store, their status, and additional information. The main component of this page is the My Products table, which contains several columns, each with a unique function. Following is information on each of the columns of this table:

DO (Display Order)

Lists of products displayed in your store are sorted by their Display Order. If two products share the same Display Order, they are then sorted alphabetically by their name.

Product Name

This is the name of the product as it will be displayed throughout your storefront.

Price

This is the current price of the product in your storefront. If a product is on sale, the sale price will be listed here in red.

SKU

This is the SKU number associated with the product in your store. Each product should have its own SKU.

Stock

This is the number of units in stock for this product. If the product is set to "infinite stock", then an infinity symbol will be displayed here. Otherwise, if the number of units in stock is lower than the value of the "low stock warning" set in the account System Settings, then the Stock field will turn red. This offers an at-a-glance indicator of which products have low stock values that may need your attention.

SID (System ID Number)

Product System ID number. This is the ID number generated by the Modular Merchant software for this product. Each product is assigned a unique SID by the system.

**Act. (Active Status)**

If a green circle is displayed in this field, then the product is active. If a red "X" is displayed in this field, then the product is inactive. Inactive products are not displayed in your storefront. Click either of these icons to toggle the active status of the product.

If you have a seasonal product, you can change it to "inactive" status during its off seasons. This allows you to remove the product from your storefront without requiring you to completely delete it from your account records.



Tip: Inactive products will not be displayed in your storefront, and customers cannot purchase them. *However*, store Admins **can** place orders for inactive products. This can come in handy if your store stocks certain hidden products that are only sold directly as special offers by store Admins.

**(Notes)**

If this icon is present, the product contains notes. Click the notes icon to view the notes in a popup window.

**(Product Web Page)**

Click this icon to view the product's store webpage. (Shift + Click in Internet Explorer to open the product webpage in a new browser window.)

**(Product's Quick Links™)**

Click this icon to view the Quick Links™ for this product. Quick Links provide the functionality to add the product to the customer's shopping basket from remote locations, such as from a website hosted on another server. There are four types of Quick Links™, each with a unique purpose:

Quick Basket™

Use this link to automatically add Import Product Three to the customer's basket, and send them to their basket page. You can change the "1" in "qty=1" to add a different quantity to the customer's basket. Copy the link below to use it on your own website, or any other location.

Sample Quick Basket Link:

http://www.modularmerchant.com/clients/DEV2/quick_basket.php?id=12&qty=1

Quick Checkout™

Use this link to automatically add Import Product Three to the customer's basket, and send them to their checkout page. You can change the "1" in "qty=1" to add a different quantity to the customer's basket. Copy the link below to use it on your own website, or any other location.

Sample Quick Checkout Link:

http://www.modularmerchant.com/clients/DEV2/quick_checkout.php?id=12&qty=1

Quick Return™

Use this link to automatically add Import Product Three to the customer's basket, and return them to the webpage containing the link. You can change the "1" in "qty=1" to add a different quantity to the customer's basket. Copy the link below to use it on your own website, or any other location.

Sample Quick Return Link:

http://www.modularmerchant.com/clients/DEV2/quick_return.php?id=12&qty=1

Quick Location™

Use this link to automatically add Import Product Three to the customer's basket, and then send them to a webpage you specify. You can change the "1" in "qty=1" to add a different quantity to the customer's basket. Change "www.mylocation.com" to whatever location you like. Do not include "http://" in the location. Copy the link below to use it on your own website, or any other location.

Sample Quick Location Link:

http://www.modularmerchant.com/clients/DEV2/quick_location.php?id=12&qty=1&loc=www.mylocation.com

**(Use Product as Template)**

Click this icon to load the "Add a Product" screen, using this product's information as a template. The product will be saved as a new product in your store records.

**(Inventory Manager)**

Click this icon to open the Inventory Manager screen, with this product or product series loaded. For more information about the Inventory Manager, refer to its section elsewhere in this chapter.

**(Edit this Product)**

Click this icon to open the Product Editor, where the details for this product can be modified.

**(Delete this Product)**

Click this icon to delete the product. This will permanently remove the product from your store records. This cannot be undone!

Related Tools

The Product Managers are a series of tools to streamline the editing of large groups of products in your online store. The Managers section of the Administration area has four subsections: Active Products Manager, Inventory Manager, Fulfillment Manager, and Storefront Products Manager. Following is information on each of these subsections.

Active Products

This manager allows you change the "active" status of multiple products at once. Inactive products are not displayed in your storefront shopping area. The Active Products Manager provides tools to quickly locate specific groups of products. Search results can be sorted by clicking on the appropriate column header.

To change the "active" status of a product, use the checkbox in the Active column of the My Products table. If the product's checkbox is selected, then the product will be made active. If the product's checkbox is deselected, the product will be made inactive. Click the Save Changes button to update your product settings.

Manage Inventory

The Inventory Manager provides a list of products that are running low on inventory in your store. It also includes tools to update the inventory for your store products. Products can also be set to "infinite" stock, which means that the store will treat them as always being in stock. Product SKU numbers can also be edited here.

Product Inventory										
SKU	Product Name	Price	Stock	∞	Status	SID	Act.			
PROD001	Default Product	\$1.00	0	<input type="checkbox"/>	Back Order	1	<input type="checkbox"/>			
DIGDEL001	Digital Product	\$1.00	0	<input checked="" type="checkbox"/>	In Stock	321	<input type="checkbox"/>			
001egg	Easter Egg	\$24.99	500	<input type="checkbox"/>	In Stock	325	<input type="checkbox"/>			

The Inventory Manager includes tools to edit the SKU, stock and status of a series of products.

SKU

This is an original code you create. Each variation of a product usually has a unique SKU number. This number is usually determined by your company or your distributor.

Stock / Infinite Stock

This is the number of units of this product your online store has in stock. Products set to "infinite" stock may have either a number or a zero here. Either is fine for infinite stock products. To adjust the number in stock you have for a product, simply enter a number in this field and click Submit button at the bottom of the list.

If the product has an infinite number in stock, the "infinity" box should be checked. Products with infinite stock will not be hidden in your store if their stock value is zero.

Status

Each product's status is displayed in your store on the product's details page. The status dictates if new orders for this product are allowed, and how they are handled. If a product reaches zero in stock, its status will automatically

be changed to Back Order. Store options are available in the account System Settings area to specify whether or not Back Order products can be purchased.

Fulfillment Manager

Use this tool to quickly assign Fulfillment Accounts to the products in your store catalog. Use the search and browse options to find the family of products you want, and then use the "Fulfillment Account" dropdown menu to assign a Fulfillment Account to each product. Click the Submit button to record your changes.

For more information on the role of Fulfillment Accounts, refer to the Fulfillment Accounts section of the Admin chapter of this manual.

Home Page Products

This manager allows select which products are included in the Featured Products section on the home page of your storefront shopping area. The Storefront Products Manager provides tools to quickly locate specific groups of products. Search results can be sorted by clicking on the appropriate column header.

To select which products are included in your storefront homepage, use the checkbox in the Storefront column of the My Products table. If the product's checkbox is selected, then the product will be included on the store homepage. If the product's checkbox is deselected, the product will be excluded. Click the Save Changes button to update your product settings.

Reports

Modular Merchant provides a variety of reports to communicate the performance of the online store. Each report serves a specific purpose.

Admin Activity

This report lists the actions performed by your account's Admins. Every time a product, order, customer, etc., is created, edited or deleted, that action is recorded in this report. If you need to track down who did what to whom, then this is the place to find it.

Best Sellers

This report lists the best selling products in your store. You can also specify a certain date range, and only sales statistics within that date range will be considered for the report. The information provided in this report includes: the name of the product, the units sold, gross and net sales figures.

The net sales value is calculated as the gross value of the product minus the COG value, multiplied by the number of units sold during the specified date range. Where the gross column lists the amount the store customers paid for the products, the net column lists the adjusted profit margin.

Declined Orders

Every unsuccessful transaction is recorded in this report. Use this report to investigate fraud, or salvage legitimate orders that were improperly rejected by your merchant account.

Manufacturer Stats

This report lists the sales and revenue associated with your Manufacturers. You can also specify a certain date range, and only sales statistics within that date range will be considered for the report. This report includes information on the number of units sold, the gross sales, net sales, and royalties; grouped by each Manufacturer.

Open Baskets

This report contains a list of orders that have not been completed by your customers. For example, a customer placed items in their basket, but closed their browser before completing the checkout process. These unfinished orders are saved, along with any information collected, and displayed in this report. Use this report to follow-up with the customer and close the sale!

The Open Baskets report attempts to display the contact information of customers when it is available. Since customers may browse your online store anonymously, contact information may not be available for all open baskets.

If a customer's contact information is available, a small "magnifying glass" icon will also be displayed after their name. Click the magnifying glass icon to open that customer's Customer Details page. For more information on the Customer Details page, refer to its section of the Customers chapter of this manual.

Since Modular Merchant online stores are designed to be search engine friendly, it is common to develop a series of anonymous open baskets, each containing one item. This is usually caused when search engine spider programs follow the "add to basket" links throughout your website and storefront. After the spider crawls the website, it no longer refers to these open baskets, and they can safely be deleted without affecting your search engine ranking.

Product Performance

The Product Performance report displays the sales statistics for a selected product in a date range you specify. The number of orders containing this product, units sold and a comparison of the gross and net sales are included. The information provided in this report includes the number of orders, units sold, estimated value, gross and net sales figures.

The Net field displays the Gross value of the product minus the COG value, multiplied by the number of Units sold during the specified date range. Where the Gross column lists the amount the store customers paid for the products, the Net column lists the adjusted profit margin.

Sales Statistics

This report includes the total sales figures for your store for a date range you specify. A variety of different sales statistics are available in this report. The report data includes the number of items sold, the number of orders, the average order value, gross and net sales figures.

This net sales field displays the net sales total for all orders placed during the specified date range. The net sales total does not include shipping fees, taxes, or coupon discounts in its calculation.

Search Log

Every time a customer uses your store's search engine, their search is recorded in this report. If the customer's contact information is available, it is recorded as well. This report can display the list of search phrases used in a specific date range, or can display a detailed report for a selected search phrase.

Sales Tax

This report allows you to select certain zip code, state and country "zones", and then view an itemized list of all the taxes that have been collected for orders originating in each of these zones, with the grand total calculations at the bottom of the list.

Traffic Statistics

The traffic statistics for your account are generated by an automated script that regularly parses the traffic log file of the server hosting your Modular Merchant account. The data generated by this script is then recorded in your account database, and displayed here.

The information presented in the Traffic Statistics report includes:

Today's Unique Visitors

Each IP address that visits your online store is considered to be a unique visitor. The system scans the server traffic logs, and records each individual IP address it finds as a Unique Visitor.

Today's Page Views

A Page View is considered to be a successfully loaded web page hosted in your store account. If a visitor views ten different pages in your storefront, ten page views will be recorded. If a visitor reloads the same page ten times, ten page views will be recorded.

Average Hits per Visitor

This number represents the average number of successfully loaded web pages viewed by each visitor to your store. This value is calculated by dividing the number of Today's Page Views by the number of Today's Unique Visitors.

Today's Orders

The number of successful transactions that have been recorded in your online store today.

Today's Page View to Order Conversion

This value is determined by dividing the number of Today's Page Views by the number of Today's Orders.

Today's Visitor to Order Conversion

This value is determined by dividing the number of Today's Unique Visitors by the number of Today's Orders.

Top 30 Store Pages

This section of the Traffic Statistics report displays the most popular pages of your online store. Each time a store page is successfully loaded, it is recorded in this section of the report. Use the date range tools to review page popularity for a specific time period.

Top 30 Referrers

This section of the Traffic Statistics report displays the most common pages that people are coming from when they visit your online store. These are often pages with a link to your store, or links from search engines like Google. Use the date range tools to review the top referrers for a specific time period.

Support

The Support menu includes links to various resources to assist in managing your Modular Merchant account.

ALL Manuals

This link will connect you to the *Documentation Depot* section of the ModularMerchant.com website, which lists the entire library of manuals that are available.

Dev Schedule

Ever wonder what we're working on for the next update? The Dev Schedule lists the development status of the items we have queued for upcoming releases. This is a great place to find out what new features and fixes will be included in the next software update.

Forums

Each Admin account has its own Forum user account, with a unique user name and password, which is created automatically when the Admin account is created. Admins can find their forum user name and password below the list of *Recent Discussion Topics* on their administration home page.

The Message Board is a good place to look for answers to frequently asked questions. The Message Board includes a Search tool. Often times, supplemental information, not available in this User's Guide, is posted on the Message Board by Modular Merchant administrators.

Service announcements and release notes for software updates are also posted on the Message Boards, in the Announcements section. Recent messages from the Announcements section of the Message Board are also displayed in the Modular Merchant Bulletins table on the Admin Homepage of the account Administration area. For more information on the Admin Homepage, refer to its section in the *Home* chapter of this manual.

Knowledge Base

The knowledge base houses definitions and instructions related to sections of the store administration area. All of the question mark definitions are stored in the knowledge base. There's also tutorials, answers to frequently asked questions, and possibly a potato salad recipe in there somewhere.

QuickCode Tag Glossary

Modular Merchant has published an online glossary of the 650+ QuickCode Tags we've created for use in your store templates. Information, examples and tutorials are included for each QuickCode Tag.

Spheres of Support

In an effort to offer the best support to our clients, we offer a listing of our Spheres of Support. The Spheres of Support clearly defines what is included in the standard Modular Merchant support terms of service, and what services require additional billing. If you require custom programming, web design, or assistance with a third-party service, you can find details on Modular Merchant's design & consultation rates in the Spheres of Support.

Contact Numbers

This section of the administration area contains web links and phone numbers to use when contacting Modular Merchant. If you would like to contact Modular Merchant about a topic that is not covered here, you can also submit a question from the Contact page on the Modular Merchant website, located at:

<http://www.modularmerchant.com/contact.php>



Support Tickets

Support Tickets are the preferred method of communication between Modular Merchant and our clients. Support Tickets receive higher priority from our support department than phone or email communication.

The support ticket section of the administration area lists recent tickets, and the status of each. Several types of tickets can be created: Bug Reports, Feature Requests, Questions and Projects.

Modular Merchant techs will often create new tickets themselves for projects, such as setting up a site's hosting area after the account has been activated.

Contacting Technical Support

If you find yourself stuck on a problem, don't worry, Modular Merchant's Technical Support is available to address any problems, puzzlers or posers you encounter. There are several ways in which to contact MM Tech Support, including:

Support Tickets: Start a support ticket within your Administration area at: Support > Support Tickets

Email: support@modularmerchant.com

Message Board: <http://www.ModularMerchant.com/forum/>

Phone: 1-800-660-1352

A description of the types of issues that are and are not included within Modular Merchant's free Tech Support is available on the Spheres of Support section of our website, located at:

<http://www.ModularMerchant.com/sos/>

And don't forget to review our complete Administration Guide, which covers every section of your account's Administration area. A link to the Administration Guide is available in the Support section of your Administrations area. A copy of it can also be downloaded directly from:

http://www.ModularMerchant.com/docs/MMv2_Admin_Manual.pdf

Modular Merchant Terms of Service

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