



## **User Manual**

# Introduction

Welcome to the Inovica Store user manual. This document covers all of the functions and facets of the Inovica ecommerce platform, so if there is ever anything that you need a bit of help with on your new store, check here first and see if the answer lies within.

We developed Inovica Store as a fully comprehensive ecommerce platform that offers everything from an integrated shopping cart to blogging capabilities, so whatever you sell, or whatever approach you take to your online business, Inovica Store has the flexibility to help you make the most of your site.

The following document covers all of the current functions within the store, however we are always looking to develop the system to add new features and to improve the existing ones, so keep an eye out for news updates on your Dashboard (more on this later!) and we'll be in touch.

The Inovica Team

# Table of Contents

Part I: Getting Started .....	5
1. How to log in to your admin .....	5
2. Your dashboard .....	5
Part II: Setting Up Your Store (Configuration).....	6
1. The set up wizard – Coming Soon! .....	6
2. Taking payments .....	6
3. Company Information.....	6
4. Shipping & handling .....	7
4a. Initial set up .....	7
4b. Shipping Methods.....	7
4c. Shipping options.....	9
5. Order status management .....	10
6. Tax settings .....	10
7. Currency settings.....	11
8. Timezone settings.....	11
9. Countries list.....	11
10. Email templates.....	11
11. Form settings .....	13
12. Settings Permissions - Users and groups.....	14
13. Insert javascript .....	14
14. Managing image sizes.....	15
14a. Image resizing .....	15
14b. Fixed thumbnail sizes.....	15
15. General Settings .....	15
15a. Product codes .....	15
15b. Categories and brands .....	16
15c. Products in categories .....	16
15d. WYSIWYG editor.....	16
15e. Favicon files.....	17
15f. Robot.txt files .....	17
15g. Social media linking .....	17
16. Managing your domain .....	17
Part III: Let the World Know What You're About.....	19
1. Menus & pages .....	19
2. Your news.....	20
3. Your articles.....	20
4. Testimonials.....	21
5. Homepage .....	21
6. Snippets .....	22
7. Don't let people get lost on your site - 404 error.....	22
8. Your blog .....	23
9. Banner Areas .....	23
Part IV: Setting Up Your Products.....	25
1. Your catalogue .....	25
1a. Adding products individually .....	25
1b. Adding products on mass .....	28
1c. Exporting product information .....	31
1d. Uploading images.....	31
1e. Uploading stock information .....	31
2. Stock Management .....	31

3. Categorising your products .....	32
4. Assigning brands & manufacturers .....	33
5. Setting product options .....	34
6. Creating sale templates .....	35
7. Managing featured lists .....	36
Part V: Your Orders and Customers .....	37
1. Receiving and managing orders .....	37
2. Managing your customers .....	38
Part VI: Reporting .....	39
Part VII: Marketing .....	40
1. Email marketing .....	40
2. Your mailing list .....	40
3. Coupons and discounts .....	41
Part VIII: A Little Extra Help .....	43
1. Understanding CSV Files .....	43
2. Using the WYSIWYG editor .....	43
3. Search Engine Optimisation (SEO) .....	44
4. Sitemap Generation .....	45

# Part I: Getting Started

## ***1. How to log in to your admin***

To access the admin area of your ecommerce store, add **/admin** to the end of your URL, which will look like this: [www.domain.com/admin](http://www.domain.com/admin).

You will be directed to a login page, like this, where you can enter your username and password

If you forget your password, click 'Forgotten Password?' at the bottom of the login box and then enter your email address. We will then send out a password reminder.

## ***2. Your dashboard***

When you do log in, the first thing you will see is your store dashboard - this gives you a quick overview of what is happening with your store.

Here you can see a brief overview of how many new orders and new customers you have had, as well as how many products are on your store. We also give you a range of quick stats such as how many pages and products have been viewed on your site, and how many searches have been done.

The stats are then given for 'today', 'yesterday', 'this week', 'this month', 'this year' and a 'total' so that you can see how well your store is doing right now, and how you are progressing over time.

At the left hand side, there are boxes where you will be updated with all of the latest Inovica News - if there is something new happening with Inovica Store such as updates, new features and improvements to the existing features, this is where we will let you know about it.

From your dashboard you can access all of the parts of the store admin by clicking on the menu items along the top of the screen.

## **Part II: Setting Up Your Store (Configuration)**

### ***1. The set up wizard – Coming Soon!***

This part of the store is under development!

### ***2. Taking payments***

Taking payments through your new store is simple. We have already integrated a selection of payment gateways for you to use to allow your customers to make payments.

To add a new method of payment for your customers go to the 'Configuration' menu, then 'Payment Gateways' and click 'Add Payment Gateway'. Simply select your chosen methods of payment from the list.

Once you have done this you can configure the methods that you have chosen, with the details that are asked for. So for Paypal for example, all you will need is your Paypal email address, whereas for Sage Pay or Worldpay, you will need a merchant number from your bank.

Don't forget to set the payment method live, and click save at the bottom of the screen. You can also tick the box if you want this to be your default method of payment.

For more information on how to set up accounts with the likes of Paypal, Google Checkout and Sage Pay, and how to find the details that you need to activate a payment gateway, please visit their prospective websites, which are listed in the appendix.

### ***3. Company Information***

Company information is a very basic part of the admin system, but it is very vital that it is filled in.

Go to 'Company Information' in the 'Configuration' settings menu and enter your details. This information will then appear in the relevant places on the website.

Beneath this information is another form, although this form filters information into the invoices and packing slips that the Inovica system automatically generates for you. You can tick the box above the form to keep the information the same as the above form, or you can choose to have a different details if your trading address differs from your registered address, and so on.

At the bottom of this page there is also the option to add in three images, one for printed documents, one for templates (front end of your website) and 1 for the admin logo. You can upload images here so that your site, admin area and printable documents are fully branded.

The first image will appear on your invoices and packing slips, the second will appear in the upper left hand corner of your site as your site logo and the third will appear in the upper left hand corner in admin, as well as on the admin log in page.

## **4. Shipping & handling**

Setting up shipping is a vital part of getting your store up and running, but also, given the nature of shipping itself, is very complex. Take our advice and keep it simple.

### **4a. Initial set up**

Go to the 'Configuration' menu and then 'Shipping Settings'. You will see a screen that lists the basic settings that are necessary for you to configure your shipping settings. First of all you will see your country of origin displayed and your postcode. You will have filled in your postcode on the Company Information section of the site and this information will be pulled in to shipping settings to give you a starting point.

Here you can also select what you would like your default shipping unit to be, either kilograms (kgs) or pounds (lbs). (If you are going to ship by weight)

Your default currency will be displayed, and this is something that you configure in 'Currency Settings' [see Part II, 7], followed by your free shipping level, if you have one.

You are then able to select your zone-based shipping options. In terms of this initial set up you just need to tick the first box if you would like to group countries into geographical zones for shipping and tick the second box if you would like to exclude countries that you do not set up in zone shipping from having goods delivered to them.

The next checkbox on this screen allows you to give your customers shipping options. You can either set an option yourself that becomes the default for your store, or you can give your customers the option to choose between things such as 'next day delivery', and 'standard delivery' which will each have different price settings.

The final checkbox lets you choose to activate 'Special Code' shipping, alongside your other shipping methods. Special codes must be set on an individual product, or category basis and they will take priority over your other shipping methods.

### **4b. Shipping Methods**

Once you have saved this, you can then move onto the next tab which is 'Shipping Methods'. Currently, all shipping is zone-based, therefore the zone-based shipping box must be ticked on the first page, then this is where you start to set up your zones. We have already set up 3 basic zones for you, which you can edit, or get rid of to start again. The 3 zones that we have set up ship to, UK = zone 1, Europe = zone 2, the rest of the World = zone 3. These are to give you an idea of how the zones can be set up.

To create your own, start by clicking 'Add Shipping Zone'. This will take you to a page where you can title your shipping zone, choose whether to set that zone as your default, and where you can add countries for that zone.

For example, you may wish to ship goods to Europe, and you may have a set price for doing this. If so you would 'Add Shipping Zone', then call the zone 'Europe' - if you are shipping from the UK, and do most of your trading in the UK, you may want to have the UK as your default but if you deal primarily on the Continent, you may want to set Europe as your default zone. This means that all shipping with automatically be calculated for this zone, unless details are entered to the contrary during checkout.

Once you have named your zone and decided whether it should be the default, you then have to add the countries that you ship to. When you click 'Add Country' you will get a drop down list from which you can choose the countries that you will ship to. The countries list that you see here is populated from the 'Countries List' in the 'Configuration' menu, so you can edit what countries are available here.

Once you have chosen all of the countries for that zone, click save. From there, go back out to the 'Shipping Methods' page, where you can then manage the shipping settings for that zone. You can click the 'edit' button on the right to change the countries in the zone if need be, but click 'manage' in order to set the type of shipping that you would like to apply to this zone. Your options are:

1. Free Shipping - you set a level at which orders qualify for free shipping, and when the order reaches this threshold, shipping charges will automatically be withheld.
2. Flat Rate - you specify one shipping price for all orders
3. Per Item - specify shipping per item - you can make the shipping on the first item more than subsequent ones etc.
4. By Price (Percentage of Total) - allows you to set the percentage of the total order that you will charge as shipping
5. By Price (Price Range) - allows you to set fixed fees for products that fall into different price ranges
6. By Weight - very simple, price by weight
7. By Weight (Weight Range) - allows you to set fixed fees for products that fall into different weight ranges
8. Special Codes - this is a great way to have flexible pricing for shipping. Create a code with a price assigned and then assign that code to which ever products you like. Create as many codes as you need.

You can see which of these methods are live at any given time, as there will be a green tick in the column to the right.

1. To set up free shipping, you simply select 'edit' on the right and tick the box to activate.
2. To set a flat rate, click 'edit' and simply type in the shipping price that would like to have across the entire store for this zone. You can also set your free shipping level here. Tick the box at the end to set this live.



3. To set a price per item, click 'edit' then enter an initial price per item, then a price for each additional item added to the basket if you wish to offer a slightly discounted rate. Again, set your free shipping level here and tick to set it live.

4. To set by price, based on a percentage of the total, click 'edit'. Set the percentage that you desire by typing the number into the top field. Underneath that is the base charge, where you should set the minimum level of shipping. Click the tick box to set this method live.

5. To set the shipping price by range, first enter your base charge (the minimum you will charge for shipping) and then enter your free shipping level. Then click 'Add a New Price Range'. Beneath that, a row of boxes will appear - enter the low end of the price range, followed by the top end of the price range, followed by the price at which you will ship items that fall within that range. Click save. You can continue to add ranges in this manner until you have all of the items in your store covered.

6. Setting the price by weight is very simple. You will have already decided whether you want your default shipping unit to be Kilograms or Pounds, so here you just need to enter how much per kg / lb, as well as a base charge and your free shipping level. Again tick the box to set this method live and press save.

7. Setting shipping by weight range is exactly the same as the set up for shipping by price range. Add your base charge and free shipping level, followed by as many weight ranges as you need, followed by the price that you will ship products for if they fall within that range.

8. Special shipping codes can be used to give you greater flexibility when assigning shipping prices. To create special shipping codes, go to 'edit' then 'Add a New Code'. Here you can create a code and assign a price, as well as any comments about the use of the code. You can create as many codes as necessary here, then to implement them, you assign them to products or categories in the individual product admin. [See Part IV, 1 for information on assigning codes] If you ticked the box on the first 'Shipping Settings' page to allow 'Special Codes' along side other shipping methods then you will be able to use this method to create even greater flexibility within your shipping structure.

#### **4c. Shipping options**

If you clicked the tick box on the 'Shipping Settings' page to allow for 'Shipping Options', you can set those here in 'Shipping Methods'. At the top of the screen, above the tabs, you will see 'Add Shipping Option'. Click this to get started. Shipping options allow you to set options for your customers to choose in relation to how quick an item will be delivered. If you are able to offer things like Next Day Delivery, then you would set that here.

When you click 'Add Shipping Option', you will see a field where you can create the option name, so here you would put, 'Next Day Delivery'. Now, when you go back out to the 'Shipping Methods' screen, this option will be listed on the page, instead of 'Free Shipping', 'Flat Rate' etc, as there was before. You can continue to add further shipping options here, not forgetting to create one for 'Standard Delivery' which will contain your standard shipping settings.

Now, to get to your shipping settings, you have to click on the 'manage' button, to the right of your shipping option. This will then take you through to the screen where you can set your 'Flat Rate', 'Shipping by Weight' etc. So for each shipping option that you create, you can then go through and create separate shipping charges, so that, depending on which sort of shipping option the customer chooses, the shipping charges will change accordingly.

## ***5. Order status management***

Status management relates to your ability to let both your employees, and your customers know the status of individual orders. While you inevitably change the status of an order in the individual order admin, you must first set up what 'status levels' there are and enter them here.

As a default, we have 6 settings:

1. Pending
2. Processing
3. Order Shipped
4. Completed
5. Cancelled
6. Fraudulent

You can delete these status settings and add a new ones to the list if you wish by clicking Add New Status in the upper left. Then, simply add the name of the status and press save.

## ***6. Tax settings***

In tax settings you are able to tick to say whether your company is VAT registered, and if so you are able to select how VAT is shown and calculated on the store.

First of all you must tick to say whether or not your company is VAT registered. Then choose which country you will be running the store from so that the applicable tax can be calculated. From there you can change the settings to say whether the price that you entered for your products in admin is inclusive or exclusive of tax, as well as selecting whether or not to display the price on the site with tax included or excluded.

The final settings let you tick to say whether you want VAT to be calculated on the price of the product + shipping charges, or just on the price of the product, and you can also tick to indicate whether EU laws apply.

The next tab along deals with 'Tax Rates'. In here we have already set the UK VAT tax rate. if there are changes to this number you will need to change it here. To edit

an existing tax rate, click 'edit' on the right hand side, where you will be able to see the name of the tax rate, the rate and any notes about that tax. Simply change the relevant details and press save. Alternatively, to add a new tax rate, click 'Add New Tax Rate' where you will be able to input a new tax rate title, a rate, and any notes about the new tax that you have added. This will be useful for stores that are not trading in the UK and need to apply their own local tax rates.

## ***7. Currency settings***

In currency settings you are able to select the currency that your store trades in.

As a standard we have listed GBP (£), Euro (€), USD (\$) and Yen (Y). You can select one of these from the pull down menu if they are applicable to your store. If you require another currency, simply type in the name of the currency in the top field and enter the currency symbol in the box provided. You can then also set the symbol position, having it either to the left or the right of the price.

## ***8. Timezone settings***

In timezone settings, we have made it easy for you to go in and set the timezone from which you operate. You simply click on the drop down and select your timezone from the available list. As a default we have just listed GMT as the timezone, but if you click on the tick box that says 'Display All Timezones' you will then be able to choose from a comprehensive list of timezones.

Once you have chosen your timezone, you will see that the time below changes. Click to save and now all of your records will be correctly time synced with where you are in the world.

## ***9. Countries list***

The countries list is exactly that, a list of countries. This list of countries filters information into other parts of the site - in particular, the shipping settings. When you go to shipping settings and set up shipping zones by adding countries from a drop down list, this is where that list is populated from.

We have added this section in admin, in case you want to add other places, or remove places that are not relevant to your business. It's your store so you can personalise it as much as you want.

## ***10. Email templates***

The Inovica Store system has been build to automate many of the processes involved in running an online store. One of these processes is the sending out of certain generic emails to your customers when they sign up to your store, make an order, forget their password or you change their order status.

When you go to the 'Configuration' menu and then 'Email Templates', you will see that we have set up generic emails for you already. We have set up:

- Registration email for the customer, which they receive when they register on your store
- Email to customer about placing an order. The customer will automatically get an email summarising their order
- Email to admin about placement of an order. An email will be sent to you admin address letting you know that someone has placed an order, and the details of the order.
- Email to notify customers about their order status - customers will receive an email when you change the status of their order in admin. This lets them know when their order is being processed, or if the order has been shipped.
- Customer password reminder email - if a customer has forgotten their log in password, they can request for it to automatically be sent out again.
- Admin password reminder email - in the event of you or someone else with admin privileges forgetting the log in password, you too can have an email reminder sent out
- Contact form - customer. Emails the customer to thank them for their feedback and to summarise what they submitted
- Contact form - admin. Email to let you know that a customer has contacted you, and the details of their submission

These generic emails should be fine to send as they are, however the personal touch always makes emails that much nicer. You can easily go in and edit the emails so that they are signed with your personal or company name, or you can go in there and edit them completely so that they are 100% your own voice.

We supply a number of tags in the email template system. These tags pull information from other parts of the system in order to personalise each email for the customer. We supply the following tags as standard:

%%customer\_firstname%% - first name of a customer  
 %%customer\_lastname%% - last name of a customer  
 %%customer\_email%% - email address of a customer  
 %%customer\_address1%% - address of a customer  
 %%customer\_address2%% - address2 of a customer  
 %%customer\_telephone%% - telephone number of a customer  
 %%customer\_mobile%% - mobile number of a customer  
 %%customer\_town%% - town of a customer  
 %%customer\_county%% - county of a customer  
 %%customer\_postcode%% - postcode of a customer  
 %%customer\_country%% - country of a customer  
 %%customer\_password%% - password of a customer

So, for example - if an automatic email was sent out to John Doe, of 183 Albert Street, Newcastle upon Tyne, NE2 3RT and you had the email set up like this:

*'Dear %%customer\_firstname%%,*

*Thank you for placing an order with us.*

*Your order will be dispatched to:*

*%%customer\_address1%%*

%%customer\_town%%

%%customer\_postcode%%'

When it reached the customer, it would read:

Dear John,

Thank you for placing an order with us.

Your order will be dispatched to:

183 Albert Street

Newcastle upon Tyne

NE2 3RT

You can customise each of the email templates this way so that your customers feel that little bit closer to you and your business.

## **11. Form settings**

In the 'Configuration' menu, then 'Form Settings' you are able to manage the details that your customers will have to fill in on the forms for registering for the site and contacting you.

The first form is Registration, and your customers will come across this form if they choose to sign up for an account with your store, or when they go through the checkout process. The form is pre-filled with fields such as 'Your First Name', 'Your Last Name', 'Your Email Address' and so on. You can keep these fields as you can edit them by changing the text in the boxes down the left hand side of the screen. Once you're happy with the fields, there are then two options - one to choose whether that field appears on the form on the site, and the other to choose whether you require that field to be filled in by the customer before they can progress to the next page on the site.

When editing the registration form, bear in mind what information you need, as the producer / shipper of the goods in question. For example, you would hope that people would fill in their post code if they're ordering something, but you can never be to sure. Make sure that fields like post code are not only on the form, but are required to be filled in by the customer.

The second form is for people wanting to contact you directly through the site. There are less fields here, as the form is just aimed at getting the persons name, a way to contact them if necessary and what they have to say. Again you can edit the content for each field and choose whether or not it is included and / or required on the form.

## ***12. Settings Permissions - Users and groups***

Whether you already have a number of staff that would like to be able to access the store system, or whether you are growing your business to be able to bring in staff to manage the store, there is a function to be able to control who can access what in the store admin.

If you go to the 'Configuration' pull down menu you can select 'Users and Groups' in order to edit access and permissions.

In this area you will be presented with a list of users, and there is a tab to move along to a list of the groups of users that have access to the store admin. By default there will be a Super Admin setting which allows full access to the system. To create new access settings and permissions, start on the Groups tab and to get started click 'Add Group'. On the Add Group page you can give the name a group and select what that group can have access to.

You can grant full access, or individual access to:

- orders
- catalogue management
- marketing
- configuration
- customers
- reports
- content management

You can tick just one, or any combination of the above to customise access as you like. You can come back and edit or delete this at any point by returning to the main Groups page and clicking the relevant option to the right of the group name.

In the Users tab, users names are listed, along with the group that they are assigned to. If you 'Add New User' you can enter the name of the user, and email address for the user and assign a username and password for their access to the system. Lastly, assign that user to one of the groups that you have already set up in order to set their access level. Again you can edit users at any time by returning to the main Users page and clicking the edit or delete button on the right hand side as required.

## ***13. Insert javascript***

On occasion, you may require to add some java script to your site, specifically into the <body> tag of your site.

Instances when this is likely is if you have, for example, a Google Analytics campaign running through Google Adwords. For this you would place your tracking code in the box provided in the 'Configuration' menu and then 'Insert Javascript'. Please visit [adwords.google.com](http://adwords.google.com) for more information on setting up Google Analytics.

## ***14. Managing image sizes***

In the 'Configuration' menu there is an option for 'image Management'. There are two styles of image management on the site. In the first instance, when you upload images into your site, the system automatically resizes them so that they look great on your store. This first option is the default, but you can also set your images to be fixed sizes so that they look uniform across your store.

### **14a. Image resizing**

Firstly, you can manage the automatic resizing of the images. Sizes here are based on pixels, which is something that you have to remember if you change these figures. We also suggest that you only resize either the width or the height, but not both. If you try to change both then you are likely to end up with distorted images. When you alter either the height or the width, the other will automatically follow to keep the image the same shape.

If you upload your images and find that they are not displaying properly, come back to your image settings and tweak them slightly until you see an improvement.

NOTE: to see changes with these settings you must re-upload your images

### **14b. Fixed thumbnail sizes**

If your works are all different sizes and orientations, you may find that your store pages look a little messy, but you can alter this using the fixed thumbnails settings. This will make your product images the same size by resizing and slightly cropping the images to be uniform.

To use this feature, tick the box to apply this for new uploads. You can then set your dimensions below. Again this is in pixels. Once you have set your sizes for the products on your store, and also any brand images that you may upload, tick the apply now box, and press save.

The change will be applied automatically here without having to re-upload the images.

Note: this only affects images in the product list view. The entire image will be shown in the form that you upload it on the individual product page.

## ***15. General Settings***

In general settings you are able to control a number of aspects of your store, and the admin.

### **15a. Product codes**

You can choose whether or not the system automatically generates a product ID for you when you add a product to the store. The default setting will be for the system to do this. If you have your own product ID system that would like to use, deselect this check box.

## 15b. Categories and brands

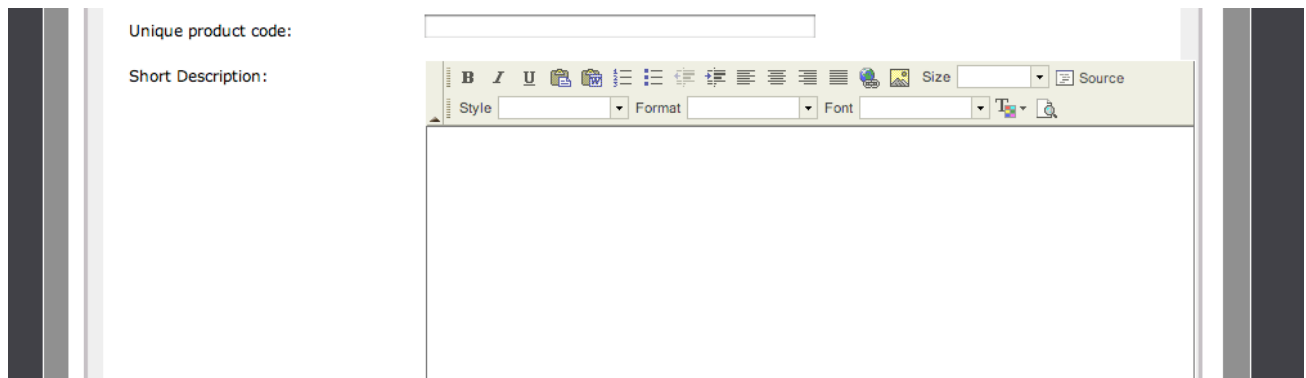
You can change how many categories and how many brands are listed at the front end of your store. The default setting is 9 of each, but you can change this to accommodate your individual needs.

## 15c. Products in categories

You can change how many products show per category on your site. You may want each page to have just a few, or each page to have a lot, whatever you think works best for your products.

## 15d. WYSIWYG editor

The WYSIWYG editor is functional on the boxes in admin which allow you to add textual content to the site, such as the boxes on the individual product admin pages as you can see below:



The basic WYSIWYG editors allows you to change the text to **bold** or *italics* and to add numbering or bulletpoints. You can also add internal or external links to the text and images in the box.

With the full WYSIWYG editor you can:

- **bold**, *italicise*, and underline text
- paste text that you have copied
- paste text from Microsoft Word
- add bulletpoints and numbering
- increase / decrease indents in the text
- left / right align, centre and justify text
- add hyperlinks to the text and images
- add images
- change the style, format, font and size of the text
- change the colour of the text
- preview the contents of the box
- view the HTML source code for the text

As a default, the advanced WYSIWYG editor is switched on.



## 15e. Favicon files

In 'General Settings' there is the ability to add a Favicon. A Favicon is the little icon that sits to the left of the URL in the web browser's URL bar.



This little icon can be good for further customising your site and creating a total brand. As well as appearing in the web browser, this little icon will also be associated with your site if it is bookmarked by anyone, giving them another way to recognise you.

Favicons have to be a special size (either 16x16, 32x32 or 64x64 pixel square, depending on the detail you want to get) and they have to be a special type of file - a *favicon.ico* file. There are a number of sites online where you can download favicons, or even create your own and then easily upload them to your site here.

## 15f. Robot.txt files

A robots.txt file is useful as it's the first file that a search engine usually requests when it crawls your site. You can upload a specific robots.txt files to your site in General Settings, but we have taken the liberty of uploading a standard one to let the crawler know that it is allowed to search and catalogue all pages.

A site map helps search engines to find their way around your site so that they can list your pages in searches done around the internet, Robots.txt files do the opposite. You use this file to block parts of your site that might contain private information that you don't want popping up in the search engines, sensitive material or information that is misleading about the site overall.

## 15g. Social media linking

Social media has really grown in the last few years, to the point where places like Facebook can be great for promoting your business. We have built in a few social media linking icons so that you can let people know that you are on Facebook, Twitter, Linked In or Digg.

All you need to do is tick the box on the left if you want the icon to show on your site, and add in the specific facebook / twitter / Linked In / Digg URL that you would like the icon to take people to.

## 16. Managing your domain

When we first create your store, your domain name will look something like this while you work on it initially: [www.mystore.inovicastore.com](http://www.mystore.inovicastore.com). However when you go live we recommend that you change this to be a more personalised domain, like [www.mystore.com](http://www.mystore.com).

If you have registered a domain already for your store, you need to go to 'Domain Management' on the 'Configuration' menu and enter your domain in the space provided.

Once you have entered your domain here, you or your hosting provider need to change your name server settings to match ours. The settings need to be:

ns10.dnsmadeeasy.com  
ns11.dnsmadeeasy.com  
ns12.dnsmadeeasy.com  
ns13.dnsmadeeasy.com

Once these are set and have had time to be registered, your site will then site at your new domain.

# Part III: Let the World Know What You're About

In the content management section of admin you are able to control the text and advertising images that appear as the main body of the site.

## ***1. Menus & pages***

Pages are informative areas about your site and your business such as your About Us section, your Privacy Policy, Terms and Conditions and your Shipping and Delivery policy. Your pages are organised on the site under three categories: information links, bottom links, and standalone pages.

It is up to you where the information is situated on the site, but as a default, we have it set up for you in the following way.

### Information links

Information links are the links about your site and your business that usually appear as part of your menus on the front end of your site.

The two main information links that we have set up for you are About Us, and Shipping and Delivery.

Your About Us text should include all of the information about your business that you want people to know. It should introduce who you are and what you do. It can include things like your mission statement or your goals for your venture. The internet can be an unfriendly place, so use your About Us text as a way to get a little closer to your audience and to make them feel comfortable on your site.

Your Shipping text should give your customers all of the information they need to know about how you ship and deliver your products. You should include things like where you deliver to, by what method you ship your products and how much you charge. It is good to be up front with your customers when dealing online. People can be suspicious when purchasing online, so the more information that they have upfront, the more likely they are to follow through with the sale.

### Bottom Links

These are again informative links, but they appear in small text at the very bottom of the homepage. This is usually where items like your Privacy Policy and your Terms and Conditions appear. Your privacy policy should tell people how you collect data on your site and how you deal with that data. You should conform to the Data Protection Act whenever you store the public's details so make sure that you do a little research into what you need to include in your privacy policy. Similarly your terms and conditions needs to outline a little about the content of your website, and how people can and cannot use it. Again it is worth researching what needs to be contained in the terms and conditions for your particular business.

## Standalone Pages

These pages are content pages that are not tied to any other module of your site - as their title suggests, they stand alone. You can use these pages to create an unlimited amount of written content for the site. When creating a new page you will be asked to create a unique code for this page - this will be reflected in the URL that is shown beneath the page code - you can use this URL to link to the content on this page from within your site. For example, if you are promoting a certain product, and you want to tell people a little more about it, you might create a banner on the homepage, or you might write some text about on one of the product pages, saying 'to find out more, click [here](#).' You would then create a standalone page all about that one type of product and use the URL that is created to link to that page.

This is great for creating as much content as you like for your site.

## **2. Your news**

Each of the Inovica Store systems is inbuilt with a news section. This allows you to post news about your business, or news about your industry. To start adding news stories, go to the 'Content Manager' menu and select 'News', then click 'Add News Article'. You can then add in the details of the news article, including the date and time, the title, body of the article and related links.

Once you have entered this information, click 'save' to make the article live on the site. Back on the main news page, your articles will be listed in the order that you posted them. You can delete and article or edit an article, using the icons on the right hand side.

Once the article is created, you can click to edit it, and in here you can add images on the next tab along. Simply browse your computer and click to upload the image, add a caption if you wish, and click to save. This will then be shown alongside your news story.

## **3. Your articles**

Each of the Inovica Store systems is inbuilt with an articles section. This allows you to post articles in reference to your business, or to your industry. To start adding articles, go to the 'Content Manager' menu, then 'Articles' and then click 'Add Article'. You can then add in the details of the article, including the date and time, the title, body of the article and related links.

Once you have entered this information, click 'save' to make the article live on the site. Back on the main articles page, your articles will be listed in the order that you posted them. You can delete and article or edit an article, using the icons on the right hand side.

Once the article is created, you can click to edit it, and in here you can add images on the next tab along. Simply browse your computer and click to upload the image, add a caption if you wish, and click to save. This will then be shown alongside your article.

## **4. Testimonials**

Nothing can make you feel better about hearing good things about your business, especially when it comes from your dedicated customers. It is also well known that stories about good experiences from customers encourages others to use your store or services. For this reason we have included a testimonials section, where you can add comments that have been sent to you by your customers.

To enter a testimonial go to the 'Content Manager' menu and then 'Testimonials List', then click on 'Add New Testimonial'. Here you can add the name of the client / customer responsible for the testimonial, their position and company if relevant, a link to their site and their quote. There is the additional option of adding an image, but this isn't necessary.

Click 'save' to make the testimonial live on your site. The testimonial comments will appear in the template design in the pre-designated place.

## **5. Homepage**

You can manage the content, and the look of your homepage here in the 'Content Manager' section. When you click on 'Homepage' you will then have a page that allows you to edit both the SEO settings for your homepage [See Part VIII, section 3] and your introductory page content, including a header banner.

In terms of SEO, you have 4 boxes in which to place keywords and information about your site that helps the search engines find and categorise your site when people perform searches. How to deal with these boxes is dealt with in more detail in 'Inovica and Search Engine Optimisation' towards the end of this guide.

Following this we have given you a box for additional text to be entered into the <HEAD> tag of the HTML script for your site. This box comes in useful if you use affiliates or if you wish to use Google Webmaster tools, as you are often given a section of code which needs to be pasted into the <HEAD> tag to prove that you own the site.

The final box on the page is where you can add the introductory text for your homepage which welcomes customers to your store. Add what you like here but we recommend that you tell people a little bit about who you are and what you do. You can also add banners here that let people know about your latest offers or just show off a certain aspect of your store. Any banners that you upload have to be custom fitted to the space on the template - if they are too small, the space will look a little odd, and if they're too big they could cause problems in the over all design template.

## **6. Snippets**

Snippets are the small parts of text on your site that let the customers know a little about that area of the site, or that a function that they have just performed has been successful.

The snippets that you will find already on the store are grouped into:

- Shopping cart
- News
- Testimonials
- Customers
- Admin
- Contact
- Mailing list
- Info panels
- Catalogue

We have already set up default text here for you so, for example, when someone signs up to your mailing list, they will see a generic message thanking them for signing up. With the news and contact pages, snippets appear under the title letting people know what the page is about. Again we have pre-filled this with some generic text. You can edit these snippets so that the little messages and passages of information about your site are more personal. To do this, select the snippet group that you would like to change and click 'view'. This will take you to the specific snippet listings in which you will be able to change the text.

## **7. Don't let people get lost on your site - 404 error**

Sometimes, if a link on your site isn't working then your customers can get a little lost. A 404 Error page is a place on your site where visitors will be directed to if they click a broken link. On this page you can explain to your customers that they've been misdirected, and then offer them help by giving a link back to the main page, for example.

When you click to set up the 404 Error page, the browser title will be pre-filled as 404 Not Found. After that there are boxes for your meta keywords and description which are meant for Search Engine Optimisation (SEO). [See Part VIII, section 3]

The important part of the 404 Error, is the text on the page. This allows you to leave a message for people who visit the site and end up at an error page, so that you can direct them back to your homepage, or any page of your choosing on the site. It is advisable to place a link on this page using the WYSIWYG editor [See Part VIII, section 2] so that your customers can simply click out of the error page, instead of having to go back in the browser.

## **8. Your blog**

The Inovica admin system comes with inbuilt blog functionality. You will find the blog section in Content Management. When you first click Blog, you will go to a page where you can add a new blog to the site. If you click 'Add New Blog' you can give your new blog a title, and add a description for your blog so visitors know what it's about.

When you save your blog it will come up in list form in the blog section. From here you can click on the name of the blog or the edit button on the right to go in and start adding posts to the blog. Click 'Add New Post' and you will be taken to an editing page. Here you can add a post title and the content of your blog. Adding content is straightforward, just type and format as you would in Word. See our section on using the WYSIWYG editor for tips on how to insert links and images into your blog posts.

Beneath the central content of the blog post you can add labels so that visitors can browse topics in your blog more easily. You can also alter the date and time of the blog post if you would like to back date it for any reason. Once you press save, your post will be visible on the blog section of your site.

Note: You can go back and edit or delete blog posts using the edit and delete logos to the right of each post.

If people come to view your blog, they can also leave comments on each post that you do. You can view and manage these comments on the second tab in blog admin. When a comment is made, it will be left in admin first so that you can decide whether or not to approve the comment. Only when you have approved the comment will it appear on the front end of your site for all to read.

The next tab along is 'Blog Settings', here you should title your blog, and add a description so that people know what they're letting themselves in for when they read your blog! You can then add a picture and profile information to personalise your blog a little bit more, as well as tick the settings that you wish to apply, such as whether to show your picture and profile, and whether or not to allow comments.

We have also included a links section in your blog. If you wish to add any links for others to visit, do so on the links tab, and these will appear in a separate box on the page.

## **9. Banner Areas**

The banner areas on your site, or those where you can place advertisements or images with links through to sections of your own site. Here we have a way for you to add your own banners, although there must be a banner area already specified in your design template for this to work.

To add a new banner, click 'Add new item.' This will take you to the standard WYSIWYG page. See Part VIII, section 2 on how to use the WYSIWYG editor. At the

moment, we have a banner area set up for on the right hand side of the homepage screen. You can also add banners to your homepage, through the homepage section of the content editor (see the 'Homepage' section for this) In order for your banner to appear in the right place on the screen, you must give it the correct tag. On the right hand side, banners must be labelled with **right\_banners** in order for them to appear in the right place. You would use **right\_banners** as the title in the 'Add New Item' section to make this happen.

After that you are free to enter the banner into the WYSIWYG editor, using the upload function. Remember, as with the central homepage banner you must be careful with the size and orientation of the banners that you try to add. For banners on the right hand side they need to be orientated in portrait and fit within the column provided.



# Part IV: Setting Up Your Products

You are able to manage all aspects of your catalogue and how your products appear on the site in the 'Manage Catalogue' section of admin. You can manage everything from the product availability and categorisation to featured items and products that are on sale.

## ***1. Your catalogue***

In 'Products' you are able to add, delete and edit all of the products that will appear in your store, as well as export, and upload information for your store.

We have added a few default products in to the store for you so that you can see how the information is created in admin, and then how that shows on the store. Once you have had a look at these you should delete them, and start adding your own products. Adding products can be added two ways:

- Individually
- Mass upload

### **1a. Adding products individually**

1. Firstly click 'Add New Product'. This will bring up a page where you can then fill in the product details.

2. Start by adding the 'Product Name', followed by a unique code for this product that will help you identify the correct product when someone orders one. If you are buying the items from a supplier, rather than producing them yourself, we recommend that you integrate the suppliers product code into your own. For example, if the supplier code is 223344, you might create the unique product code of TS-223344-2009.

3. Add in a short description of the product to accompany the product name. Keep this very brief, and perhaps just highlight a main feature.

4. This is then followed by a longer description of the product. Any information that you want your customer to know about the product should go in this box. Important information that should go in here includes:

- What the product is
- What colour it is
- The materials
- A comprehensive description of the item, making note of any particular attributes
- Any special remarks e.g. 'not suitable for under 3's', 'may contain traces of nuts', etc

5. There is then the option to add the weight of the product, or the size of the product as this information might be relevant to the customer when it comes to shipping and delivery. If you choose to ship by weight, each product must be given a

weight in order for shipping charges to be calculated, or it may be important for the customer to know the weight or size of the product if it is particularly large.

6. Next you type in the price that you want to sell the product for and depending on whether you are selling at or below the recommended retail price, there is also a box to fill in the RRP if necessary. The tax class of the product can also be selected at this point, we have UK VAT tax set up as a default, however you have to configure and further tax settings in the 'Configuration' section of admin. See our section on 'Tax Settings' for information on how to do this.

Note: When adding prices to the Inovica system, you must add them as numbers only. If you include a currency symbol the information will not be accepted by the store. The currency for the store is set separately on the Configuration menu.

7. You then have the ability to set options for the given product. Options can include size, colour, type etc. Again, before you are able to select an option here you will have to have set the 'Product Options', which is further down the 'Manage Catalogue' menu.

8. Shipping is something that will need to set up on your store before anyone can purchase anything. Inovica Store predominantly runs on a zone-based shipping system and you will see that this is set as the default here. You need to visit 'Shipping Settings' in the 'Configuration' menu in order to set this up. Beneath this, there is also the option to add a Special Shipping Code - these codes again need to be set up before they can be applied to the product. You set these codes up in 'Shipping Settings' and they are useful with dealing with products or categories that don't fit within more general shipping settings.

9. You can next select whether the item is a sale item or not. By ticking the box the item will still appear in it's normal category on the site, but it will also be added to a separate 'sale' section. You can undo the choice by simply returning to the product and unticking the box. When you tick the box, you are then able to either type in the new sale price, or you can set the product to follow a sale template. We have set up an example 10% off sale template for you. Selecting this option will automatically take 10% off the original price.

10. Stock management lets you choose whether or not that product should be listed in line with what you have in stock. If you tick the stock management box you will be given a number of options. First of all, enter how many of this product you have in stock, followed by tick boxes indicating whether or not you want that number to be displayed on the site so people can see how many products are left and whether or not a number should appear when there is 0 items left in stock. Beneath this you can also choose what message to display to the customer, if the item is out of stock.

11. Affiliate linking is a form of online marketing whereby you generate sales of products for other suppliers and in turn receive an agreed commission. The Inovica ecommerce platform makes affiliate linking very straightforward and effective. The affiliate URL box is to be used to add a specifically designed affiliate link that takes buyers through to the suppliers website to make the purchase. The link will include tracking so that the supplier knows where the sale was generated from. This box is used most effectively when you link product to product, rather than linking the product to a general landing page on the affiliate site. To use this function you will

need to sign up to an affiliate programme like Amazon Affiliates, or an affiliate network such as Affiliate Window or Affiliate Future. Once you are signed up as an affiliate you will be free to sign up with the merchants of your choice, and they will provide you with the links that you need to insert here.

Note: When you enter an affiliate code, the 'Buy Now' button for that product will automatically be changed to a 'Buy From Our Partner' button.

12. Now you need to save the product. When you save, you are given the option to:

- set the product live so that people can purchase it
- set it as not live so that the product is in the database but it does not show on the store yet
- set it as live but catalogue only which means that people can view the product but they cannot purchase it yet
- set it as search only which means that it will appear on the store, but only if specifically searched for

13. The final box on this page, is the 'Duplicate Product' box. If you click this, the current item will be duplicated. This is useful if you have a number of products that are very similar that you want to add, as you can duplicate most of the information and just change what you need to.

When you have saved the Product Information page, the rest of the product management tabs will appear at the top, there are as follows:

#### 'Images' Tab

The next tab along is 'Images'. Here you can add the images of this particular product. On this screen, simply click 'Choose File' which will let you search your computer for the right image. Pick the image that you want, then beneath that you can add some hidden keywords for your image. These keywords help search engines to know what the image on the page is for searches.

Once you have chosen the image, and added some keywords, click save and the image will be displayed along side your description on your store. You can add multiple images here, which is great if you have some close ups or have multiple views.

#### 'Categories' Tab

You can choose how you want to list your products on your site. To give you as many options as possible we have created a 'Categories' section. This means that you can either just upload works without any categorisation, and they will just appear all together on the store, or you can create categories and assign your products to them. We go over how to create and manage categories in the next section of the guide, but once you have created your categories, you would come to this tab and simply click the tick box (or boxes if you want it to appear in multiple categories) for which categories you want the products to be assigned to.

### 'Brands' Tab

Like categories, you need to set up your brands in a separate part of admin (we go over this one after categories). Once you have added your product brands to the system, you would then come here to assign the product to a certain brand. All you do is find the right brand in the list, tick the box next to it, and press save. When you do this, the information is filtered into your store so that people can search your store by brand to find the products they are looking for.

### 'Other Settings' Tab

In other settings we have a number of settings to help you give your products maximum exposure on the site. The first of these is a products tags feature. This enables you to tag your product with keywords that when someone does a search for those keywords on your site, this product appears. This is useful if the name of the product is easily mis-spelled as you can put the mis-spelling in this box so that the item will appear.

The next setting is your featured lists. There are two featured lists set up by default, these are 'Special Offers' and 'Featured Products'. You have to set these lists up in the 'Featured Lists' part of admin, which is on the 'Manage Catalogue' menu, but once they are set up, tick boxes will appear here for you to assign products to those lists. Depending on the template that you are using for your store, these lists will appear on the homepage of your site, showing off the best products and offers that you have in store. To remove a product from a featured list, simply come back, and deselect the box.

The two final boxes, Complimentary Products and Similar Products are useful for up-selling to your customers. Here you can add the unique product codes of any other products in your store, and those products will appear underneath this product in the front-end, after the description. This is a great way to let people know what else they might like, or to remind them, for example, that they need to buy nuts to go with those bolts.

### 'SEO Settings' Tab

SEO stands for Search Engine Optimisation, and these tabs will feature across the store for every brand, category, product and page that appears as part of your site. SEO is an integral part of the success of your website as it can, if done right, push your website up to the top of the search engine rankings for your target area. SEO, while not all that difficult, it is time consuming and rather an art unto itself so we have created a section further on called 'Inovica and Search Engine Optimisation' which will give you a brief run down of how to fill in these sections on your store, and why it is useful to do so.

## **1b. Adding products on mass**

**For this, and a number of other functions on the store involving changes to a lot of products at once, we recommend using our csv file for uploading. Before reading the following about how to use the csv to add and update products, we recommend that you read our general csv advice, which can be found in Part VIII, section 1.**

If you have a lot of products to add, then it is best to do it using our 'Upload Products' function. Here we have provided a specially designed CSV (comma seperated values) file. You must use this form, in this format, in order to upload products to the store successfully. You can download a blank example of the CSV file by going to 'Upload Products' at the top of the 'Products' page and clicking on the link that we provide there. Alternatively, if you go to 'Export Product Info' you can download a CSV file which would contain all of the information about your products in the store. Providing you haven't already deleted the example products, downloading this now will show you how the products that are in your store appear in CSV format.

If you download the file, you will see that there are columns for:

- |                             |                               |
|-----------------------------|-------------------------------|
| - Categories                | - Use stock                   |
| - Product code              | - Display stock               |
| - Product name              | - Special codes               |
| - Product short description | - Active                      |
| - Product full description  | - Tax                         |
| - Brand                     | - Product tags                |
| - Price                     | - Similar product codes       |
| - Sale                      | - Complimentary product codes |
| - Sale price                | - SEO page title              |
| - Weight                    | - SEO meta keywords           |
| - Weight visible            | - SEO meta description        |
| - Size                      | - SEO URL keywords            |
| - Size visible              | - Affiliate URL               |
| - Stock level               |                               |

1) Categories - here you can add your top, and sub categories, but it must be done in a specific format. If your product is a long sleeved, men's shirt then you might have your categories set up on your store as follows:

Top category - Shirts

Sub category 1 --> Men's

Sub category 1a --> Long Sleeved

In the categories column on the products CSV, that would look like this:

Shirts::Men's::Long Sleeved

2) Listing a product for sale - if your product is on sale, you need to combine the Sale and Sale Price columns.

If the product is for sale put a '1' in the Sale column (this works on the basis that 1=yes and 0=no), and then put the price that you want it to sell for in the Sale Price column. Keep the original price as it is in the Price column.

- 3) Weight and Size - these two aspects work on the same premise as the sale columns, ie if you want the weight or size to show on the site place a '1' in the respective columns.
- 4) If you have chosen to have stock management active on the store, then use the 'Stock Level' and 'Display Stock' Columns to indicate how much stock you have and whether or not you want to list this for your customers to see by putting a '1' in that column.
- 5) Special codes are something that helps when setting up shipping for items that do not fit into your general shipping settings. Place your codes in this column to assign the product to that mode of shipping.
- 6) There are a number of different settings for your products in respect of whether they are live, not live or live but not for purchase on your store. To set these on the CSV file, place the relevant numbers in the Active column:
- Live on Site = 1
  - Not Live = 0
  - Search Only = 2
  - Live - Catalogue Only = 3
- 7) Product tags – these are search terms that you can apply to the product so that if someone searches for a certain term on your store, this product will appear.
- 8) Similar / Complimentary Product Tags - in this column you can add the unique codes of other products. This will populate the similar items and complimentary product parts of your site for upselling and cross selling purposes.
- 9) The SEO columns will already be prefilled with tags that will draw the correct SEO information from the information that you have already filled in. Make sure that you copy this information across for each product that you add.
- 10) The final column is where you place your affiliate code if you have one. If not it is still necessary to have something in this column in order for the system to accept the file. Simply place the word NONE into this column, then copy that cell over for the rest of the products.

Once you have filled in the csv file and you are happy with it, save it and go back to 'Upload Products'. Click choose file at the bottom to select browse your computer and select the saved csv file. Before clicking upload, you need to tell the system a little more about what you are giving it. If you tick to delete the existing database, everything in the store will be over written with this new information, and this cannot be undone.

Updating the existing products with new information lets you make changes, but also adds in and new products that you have created. You must tick the next box if your

file contains categories and tick the final box if you want any new categories to be added. The system updates products based on matching existing unique product codes with codes in the new csv so make sure you keep the same code for the same product when making changes.

### **1c. Exporting product information**

Once your store is full of products, you can download all of the information into a CSV file again but clicking 'Export Product Info'. You can choose whether you want the file to contain HTML (this is formatting tags), category names and images. If you download the file with categories in it and you have a product that appears in 4 categories, that product will be listed 4 times, once for each category it appears in, in the CSV. Also, if you click to include images, these will all be downloaded to a separate folder and will take more time to download.

Being able to export the information is very useful as it means that you can create mass edits on your store, all in one go. You can alter product information, update prices, set items to sale and change the status of your products, amongst other things, then upload the CSV again to see your changes instantly implemented.

### **1d. Uploading images**

With the image uploader you are able to upload multiple images files to the database in one go, which is very effective if you have a large number of products in the store. In order for the image uploader to assign the images to the right products, you must label the images with the same unique product code. So if your item has the unique product code TS-223344-2009, your image file needs to be named TS-223344-2009. Do this prior to upload.

### **1e. Uploading stock information**

If you click on 'Update Stock Levels' which is again at the top of the 'Products' page, you can download a different CSV that just lets you deal with the amount of stock that you have available. If you aren't running a stock management system on the store, then you won't need to use this, but if you are simply download the file which will give you your current stock information. Change that information as necessary, then upload it again for the changes to be implemented.

## ***2. Stock Management***

Stock management can be a really useful thing to ensure that your customers are only able to purchase the things that you have in stock. There are two ways to manage your stock levels on the store. The first is in individual product admin. So go to Manage Catalogue, and then Products.

If you are dealing with a single product with no product options, go into product details and scroll down to Stock Management. You need to tick the stock management box, this will reveal further options for you. Enter the number of items that you have in stock in the available field, and then set your display options. You can choose whether or not to display the stock number on your site for customers and, if so, whether to display the stock number if it is zero. When an item is out of stock you can also choose which if these you would like to see displayed on the site.

If a product has options available, such as different sizes. You can manage the stock level for each option. To do this, use the pull down menu in the stock management section in individual product admin to select an option, enter the number that you have in stock here and click, 'Add Option'. The page will update and the option will now be listed with the stock level. If you want to edit the stock level, click edit on the right and update the stock level. To add stock levels for the other options, simply repeat this process.

If you need to update your stock for a lot of products, you can do this all at once with a .csv file. If you're not familiar with .csv files, please view our csv section towards the end of this manual. Go to Manage Catalogue, and Products, then click 'Upload Stock Levels'. You will need to use a specially designed csv file, an example of which you can download from this page. Open the file in excel to start adding your own information. In the .csv you need to add in the product codes of the items you want to update, followed by the name of the option group and the option value. If there are no product options, you can leave the two option columns blank. Finally add your stock level to the end column.

To make these figures active on your store, save the .csv file and go back to admin. On the Upload Stock Levels screen you can upload the file. Click the tick box if you want to tell the system to ignore anything in the file that does not match a product code in the store, then click 'Choose File' to browse your computer and upload the file.

Stock can also be managed through the product upload csv. To find out more about this, see our Adding Products Using CSV section

### ***3. Categorising your products***

With lots of products on your store you want your customers to be able to find what they're looking for easily. To help you do this, we have built in a category system that is both easy to set up and easy to navigate.

You can add categories in two ways, firstly you can add each category manually, which is great if you only have a few categories to add. Alternatively categories can be added, on mass, with a csv file upload. Please see our 'Products' section to find out more about uploading by csv.

You can start adding categories manually by selecting the 'Categories' option in the 'Manage Catalogue' pull down menu.

From there, click 'Add New Category', which will take you to a screen where you can enter the relevant information. You have to add the category name, and then you can add a category description and a picture if you choose. Before saving, make sure that the 'visible on site' check box is highlighted, then press save to create the category.

Note: The category will not show on the store until at least 1 product is assigned to it.



Once you have saved the category you can then follow the process to create other 'top' categories, or you can now create sub categories. In order to create a sub category, click on the name of the top category and you will be presented with another screen that allows you to add further categories in the same manner that you added the top one. This process can continue down as far as you need to, and you can add as many top categories as you like.

Note: The store is set to only show 9 top categories on the homepage as the default. If you want to have more than 9 top categories on the home page go to the 'Configuration' menu, then 'General Settings' and type in the number of categories that you would like to show in the relevant field.

When you have added your categories and sub categories, you are then able to manage them. On the 'Categories' page you are told how many sub categories there are in that category, and how many products there are in that category. You can see what the status of the category is, ie if it is live, or if it is not live and you are able to move the categories up or down, depending on how you would want them to be ordered at the front end of the store. Finally you are able to edit the category information or you can delete the category altogether.

Note: If you choose to delete a top category, all of the sub categories will also be deleted.

When you click to edit a category there are 3 tabs; 'Edit Category', 'Category Info' and 'SEO Settings'.

On the 'Edit Category' tab, you can change the name of the category, add a brief explanation of what is contained in the category and add a picture. In 'Category Info' you can add text which will appear on the site explaining about the category. This is a good place to let people know if there are any products of particular interest in that category or if you want to explain the benefits of the products that are featured there.

Note: See our 'Products' section if you are unsure how to add products to your categories.

## ***4. Assigning brands & manufacturers***

Another way to help your customers to find what they're looking for easily is to assign brands to your products. We have built in a brand system that is easy to set up and easy to navigate, just like the categories. You can add brands in two ways, you can add each brand manually, which is great if you only have a few brands to add. Alternatively brands can be added on mass using the csv upload in products. Please see our 'Products' section to find out more about uploading by csv.

You can start adding brands manually by selecting 'Brands' in the 'Manage Catalogue' pull down menu.

From there, click 'Add New Brand', which will take you to a screen where you can enter the relevant information. You have to add the brand name, and then you can add a brand description and the brand logo. Make sure that the 'visible on site' check box is highlighted and press save to create the brand.

Note: The brand will not show on the store until at least 1 product is assigned to it.

Once you have saved the brand you can then follow the process to create other 'top' brands, or you can now create sub brands. In order to create a sub brand, click on the name of the top brand and you will be presented with another screen that allows you to add further brands in the same manner that you added the top one. This process can continue down as far as you need to, and you can add as many top brands as you like.

When you have added your brands and sub brands, you are then able to manage them. On the brands page you are told how many sub brands there are in that brand, how many products there are. You can see what the status of the brand is, ie if it is live, or if it is not live. You are able to move the brands up or down, depending on how you would them to be ordered at the front end of the store. Finally you are able to edit the brand information or you can delete the brand altogether. If you choose to delete a top brand, all of the sub brands will also be deleted.

When you click to edit a brand there are 3 tabs; 'Edit Brand', 'Brand Info' and 'SEO Settings'.

On the 'Edit Brand' tab, you can change the name of the brand, add a brief explanation of what is contained in the brand and add a picture. In 'Brand Info' you can add text which will appear on the site explaining about the brand. This is a good place to let people know if there are any products of particular interest in that brand or if you want to explain the benefits of the products that are featured there.

Note: See our 'Products' section if you are unsure how to add products to your brands.

## ***5. Setting product options***

Product options allow you to create exactly that; options for your products. This is useful if you sell products that come in different sizes, colours, weights etc. When you click on 'Product Options' in the 'Manage Catalogue' pull down menu you have a screen where you can add your various product options. Click on 'Add New Option Group', you are then able to add a name for that option and the name that will be displayed on the site in relation to that option. So for example, if you sell shoes, your option name might be 'Shoe Sizes' and the display name on the site, that will sit next to where the customer makes their selection, would be 'Size'.

When you press 'save' you will be taken back out to the main list of option groups. From here you can 'edit' the group that you've just created, which allows you to change the group name and edit the display name. You can also delete the option group completely, or view the options associated with this group. Click on 'options' on the far right to get started adding your options to your group.

Once there, click 'Add New Option'. Then you can add what the option is, so for shoe sizes you might have '3' as your first option. Note: There is no need to have extraneous information here, such as 'size 3', as the unit that the number or colour etc makes reference to is already accounted for. Beneath the option name you can

account for the price difference, if for example you wish to charge slightly more for the larger sizes, you simply add in the price difference here.

Tick the box to assign that size to the default if you wish. It is recommended to make the most commonly bought option the default, which means that when the options are shown on the store, this option will always be pre-selected, with the customer having to select another size if they wish.

Click save, your option will be created and you will be taken back out to the list of options within this option group. Continue to add options in this way as necessary.

To then assign an option to a product, you have to go into the individual product admin, and on the product information page, click 'Add Option' and a list of your option groups will appear. Note: Option groups must have first been created in 'Product Options' before they can be selected in individual product admin.

Once you have completed this, if a customer wishes to buy shoes from your store, they can come along and browse until they find the right shoe, then they will click a pull down menu on the page that will list all of the options that you just created within that given option group.

## ***6. Creating sale templates***

This is where you set up templates for sale items in the store. So if you want to offer 10% off certain products on your store, you can go to 'Manage Catalogue', and then 'Sales Templates' in the pull down menu and create your sale option here. To start, click 'Add New Template' and begin by entering a name for the template - this name will help you to identify which offer you are assigning to a product later on so if you are offering 10% off, then call the template '10% off', or if you are offering 50% maybe call the template 'Half Price'.

After this, select what type of sale template you want this to be. Your options are 'percentage', which allows you to enter a percentage off the price, 'discount amount' which allows you to enter an amount to be deducted from the total price, and 'free shipping' which allows you to assign free shipping to individual products no matter what the price.

Beneath that enter either a percentage, or an amount, depending on what you have set the type of template as. If you have chosen a percentage template, then simply place the number '10' in this box to create a 10% discount. Similarly if you have chosen an amount template, just enter the number in here. If you picked 'free shipping' as the type, then this box will disappear and you will just be required to fill in the bottom section of this page, which concerns the dates and status for this discount.

You can set the offer to run for a limited period of time, starting on a certain date and ending on a certain date. You enter these here using the drop down menus. Alternatively, instead of entering an end date, you can set the offer so that it never expires. You can do this by selecting the box to the right of the end date options.

Finally, choose whether you want the option to be active on the site or not. This feature has been added so that you can set up any templates that you might need for the future and leave them inactive until they are needed. This removes the need for further set up in the future.

To learn how to assign sales templates to your products, both individually, and as part of a csv upload, view our 'Products' section of this guide.

## ***7. Managing featured lists***

Features lists are lists of products on the store that you have assigned especially - for example, you might want a 'special offers' section, or you may want a 'new this week' section. You are limited in the lists that you can create by what has been set up on your design template. For example, we might have added a place in the template for a 'special offers' section so you will be able to create this and it will appear on the site, however, we may not have built in a 'new this week' section on your site, therefore you would need to contact us if you wanted to explore your options here.

To create a list, go to the 'Manage Catalogue' menu, then 'Featured Lists'. Click 'Add New Section' to get started. You will then need to give you section a name, which will be something along the lines of 'featured items' or 'special offers'. After that you choose whether you want the list to be visible on the site - this is so that you can turn lists on and off as needed. State how many products you would like to be listed at a time on the list, and then choose how you want those products to be ordered in the list. You can choose to list them manually, alphabetically, either starting from A or Z. By price, most recent, or most popular. You can also display the products in a random order if you have no preferences. Click 'save' to create the list.

From there you need to assign products to this list. This is done in the individual product admin. When a list is created here, a tick box will appear in the 'Other Settings' tab. Simply tick the box, and that product will become part of the list. Being assigned to a list has no bearing on the product as it stands in your store normally, so it will still appear in the category and brand that you have already assigned it to.

Note: When you create a featured list it will not appear on your store until you assign products to it, and the lists will only appear on the site in the place where room for that list was created in the template.

# Part V: Your Orders and Customers

## ***1. Receiving and managing orders***

Click on the 'Orders' tab on the top menu, here you will find a list of all of your orders showing the date of the order, the order reference, the name of the person who made the order, the status of the order, the total amount paid and whether or not a voucher was used.

You will also see a column here relating to the payment status of an order. An order is registered in admin as soon as a customer moves to the payment page in the shopping cart. The reason for this is so that you capture their information and can then see if they are having any trouble paying. The payment status icons will display one of three symbols:

Blue tick – this means payment has been made successfully

Red cross – this means that payment has been unsuccessful or was not attempted by the customer

Green question mark – this means that the outcome of the payment is unknown. This applies to payment gateways such as Invoicing as it is impossible for the system to know whether payment has been sent, of Google Checkout as this payment gateway does not provide a payment call back. Either way, a question mark indicates that further investigation is needed.

To see more detail about any of the orders, you can then click on the order date, the order reference or the view icon at the right of the item you want to look.

Once you have clicked through to an individual order there are a number of functions that you can perform for that order:

1. Print a packing slip to include with the order when you ship it
2. Print an invoice for your records
3. Delete the order
4. Change the status of the order
5. Make notes about the order/customer for future reference

If you wish to change the status of the order (ie. processing order, order shipped etc), simply select the relevant status from a pull down list on the order page. We have set this up with default status setting in the 'Status Management' section on the 'configuration' menu, you can change them here if you wish. Beneath the pull down menu is a tick box which allows you to decide whether or not to let the customer know about the change of status. If you tick the box, an email will automatically be sent out to the customer.

The log at the bottom of this screen keeps a record of status changes and order activity when you make a change. Beneath this there is also a box for you to make any private notes about the order for future reference.

If a customer is having trouble making an order with a credit card or has been denied the ability to make payment (often indicated by a red cross in the payment status column in the list view), you can take a look where it says Payment Notes in order to see if the payment processor has provided any specific error notes for that order. These errors can be quite wide ranging covering everything from suspected fraud to more basic issues like the card number not being long enough. Please check with your individual payment processor for a full list of errors and what they mean.

Back out in the main orders page, you can click here to download a .csv file with information about all of your orders. The file opens in Microsoft Excel so you can store or print the information if you wish.

## ***2. Managing your customers***

Under 'Customers' you are able to manage the people who have purchased items on your store, as well as people who have signed up for an account with you. When you click on the 'Customers' tab you will have a list of customers in date order from when they first used your store. You can click any of the letters along the top, or use the search field and pull down menu to search through to find particular customers.

Information that is displayed about your customers at this point is their name, email address, registration date, number of orders that they have made, and their status on your store. From here you are also able to delete customers from your store or edit their details if necessary.

If you click 'edit' on the right hand side of the screen you will be taken to another screen that has further information about the customer that you can then add to or edit where necessary. The first part of this screen gives you the basic name, address, telephone number information about the customer, as well as what type of business they have if applicable. Following this there is 'Manage Password' where the customer's current password for your store is encrypted, but still available so that you can change it for them if necessary. You aren't able to find out what the current password is, but to change the password just enter the new details into the fields on the right hand side.

The further information on this page gives various details about how they have used the store - these include, when they registered, how many orders they have made, whether they accepted the terms and conditions and what their IP address is.

Beneath this you can also enter private notes about the customer which can help you in dealing with the customer in future - you can note down if they have had any comments about the store, or have any preferences when purchasing, and so on.

The next tab along takes you to their delivery address. You can alter the address here or add a new one manually if needed.

The final tab contains a list of the orders that the customer has made on the store, giving information such as the invoice number, the amount of the order and the status of the order.

## Part VI: Reporting

The Inovica system offers a number of reports to help you monitor how well your store is doing and to give you hints on what the people that visit your store are looking at.

We offer 4 types of report:

### 1. Search terms

This tells you what search terms people are using on your store. The search term will be listed, followed by the percentage of your visitors that searched for that term. This percentage is represented both as a bar, and also numerically.

### 2. Product views

This tells you which products have been viewed, and how many times they have been viewed. The results are also given as a percentage so that you know what proportion of your visitors looked at any given product. This is helpful for letting you know which of your products are the most popular.

### 3. Products sold

This gives you a break down of which products are selling, and how many are selling. While you get this information in the orders section of the site, it is not collated into an easily digestible table of results. Here you can easily see the information in an ordered, and useful set up.

### 4. Visitors per day

This gives you some idea of how many people are coming to your site on a daily basis. You can change the dates from which you view results so that you can compare the results of each day and monitor whether your visitor numbers are going up or down.

For the first three reports you are able to filter the results to show them for 'today', 'yesterday', 'this week', and 'this month' in order to get a distinct snapshot over a given amount of time.

You can export all of the results as a .csv file so that you can keep records over a given period of time.

# Part VII: Marketing

## ***1. Email marketing***

In email marketing you have the ability to send out mass emails to your customer and subscriber base. When you click on 'Email Marketing' you will enter step one of the process where you will start to specify which customers or subscribers you want to send an email out to. Here you will have a number of options to choose from. You can email to your entire list of subscribers (we will talk more about your mailing list in the next section). You can decide to email your account holders, by choosing either all accounts, accounts that have purchase, or accounts that haven't purchased. You can then define this further by entering the dates between which the purchase will have taken place. Alternatively you can email based on the type of business that the subscriber has. This is obviously more useful for some stores than others. Finally you can filter your mailing list by entering a keyword. This is useful if you want to email, say, all of your customers that are from Manchester. You would simply enter 'Manchester' into the field at the bottom of the page. Once you have selected the relevant option, click 'Next'.

Step 2 lets you know how many email addresses were found based on your search criteria and gives you the option to go back and edit, or to move onto the next step. The addresses that have been selected will be listed below, and you can use the tick box on the right to deselect anyone that you don't want to send an email to.

Clicking 'Next' takes you to step three, which is to create the email that you wish to send out. The screen is set out in the usual email format, so you can fill in the 'from email address' which will let your customers know where the email is coming from and where to reply to if necessary, the 'from name' again to let them know who the email is from. Then fill in the email subject and content as necessary.

We have supplied a number of tags in this section so that, even though the email will go out to the entire list of email addresses that you have chosen, you can still personalise each one to some extent. We have given you tags for the name of the member (%%member\_name%%) so that the email addresses them personally and the email address of the individual member if this is needed (%%member\_email%%)

As with normal email you can attach a file here, and then click to send.

## ***2. Your mailing list***

Your mailing list is collated from the information filled in on the forms on your site (contact forms, newsletter subscription, and checkout form) as well as customer email information. Here you can manage your list. First of all you can add subscribers manually if necessary. You may use this function if someone has asked you to add their details, or if you want to add your friends and family to the list without them having to come to your site and fill in their details.



You can also edit or delete the subscribers that are already listed by clicking on either 'edit' or 'delete' on the right of the screen. In 'edit' you can change the name or email address and you can tick to say whether this person is actually a customer on the store i.e. they have bought something from you. This box will be ticked automatically if the details were taken from an order form.

You can search through your mailing list alphabetically, using the letters along the top, or you can search using the search box to the right. You can also split the list by customers and non-customers, depending on who you are searching for.

Your mailing list can be downloaded as a .csv to keep for your records and in case you wish to import the contacts into another system.

### ***3. Coupons and discounts***

Discounts and coupons is included in the email marketing section as here, you are able to create special discount codes that can be emailed out to your customers or subscribers in order to give them a special discount at the checkout.

To create a new code, go to the 'Marketing' menu, then 'Coupons & Discounts' then click 'Add new discount' and fill in the fields. First of all, give the discount code a name so that you know what it is used for, e.g. 10% off, or Half Price Products.

After that enter a voucher code - you make this up so it can either be random letters and numbers (BUW398) or you can make it a word (MONEYOFF) or whatever you want it to be. We would recommend that you just keep it simple so that people can use the code effectively when they come to use it at the checkout.

Next enter the number of vouchers that are available. This gives you control over the use of the voucher code. You may want to limit it to a very small number so that it works on a first come first serve basis, or you may want to enter the same number as that of the amount of people who will receive the code - you can tick a box a little further down the page which limits the use of the code to the first order only, meaning that once the code is used on that account, it can't be used again.

You then need to choose the type of discount that the code will offer - will it be a percentage discount, will it be a certain amount off or will it be for free shipping? You choose. After that, place either the percentage or amount in the given field. So if your offer is a 10% discount, place the number 10 in this box. If you chose the discount to be free shipping then this box will disappear. Alternatively, if you chose percentage or amount discounts, there is then the further option to also add free shipping to this discount. There is also a tick box that activates free shipping for all products in the users basket, whether those other products are included in the voucher code or not.

You can stipulate a minimum order value which is useful for vouchers where you offer £20 any order over £100 etc. This also ensures that you're not going to be picking up the bill if someone tries to use, say a £10 off voucher, on a product that is only £5. As mentioned, there is then the tick box for limiting the use of the code to the first order.

You can time limit the voucher by giving a start date and an end date. This gives you more control over the use of the code and allows you to effectively run limited time offers. Alternatively you can tick to set the voucher so that it never expires if it is, say a gift voucher from you to your most valued customers.

Finally, you can set the status of the voucher code - this allows you to create the voucher, but to keep it on hold until it is needed.

# Part VIII: A Little Extra Help

## ***1. Understanding CSV Files***

When adding products, or changing product information on the store we recommend that you use our csv file upload, especially if you are changing a large number of products all in one go. Throughout the manual we go into the specifics of how to do that, however we thought that we should also give you some general advice about using csvs to ensure that you don't run into any trouble, or if you do, you can work out how to fix it. If there is a problem with your csv file, it will be rejected on upload and no changes will be made to your store. You will be notified of what type of error has occurred, ie a field error, or a line error, accompanied by a number indicating which line / field.

- A csv opens in Excel, but that doesn't mean that all Excel file formats will work. The file must be appended with .csv
- We specify a certain format, ie a specific number of columns with set functions. This cannot be altered. Do not add new columns, do not add content outside of the available column areas and do not enter non-specified content into the existing columns
- Uncommon symbols can also cause problems, so try not to use things like ///, §, ~
- Remember that each product must have a unique product code - if more than one product has the same code, updates will only occur with the first product that the system comes across, leaving the remaining products unchanged.

## ***2. Using the WYSIWYG editor***

The WYSIWYG (What You See Is What You Get) editor is a simple and straightforward tool for adding text and images to your site. Where appropriate, a WYSIWYG editor is included above the individual text boxes in admin.

Many of the basic functions are identical to those that you use in programmes such as Microsoft Word, these include adding bold, italicized or underlined text, indenting, and aligning text and altering the size and font of the text. Additional functions include uploading images and adding links to the text or images.

Copying and pasting images into the WYSIWYG editor is not recommended, instead, you should use the inbuilt image uploader. To use the uploader, click the yellow icon next to the 'size' option. This opens a separate box entitled Image Properties, which has a field for the URL of an image if it is stored on the internet, a field for adding alternative text to the image (these are hidden tags that help search engines when people search for images), image sizing fields and a preview box. To upload an image from your computer, first go along to the 'upload' tab. Here you can click 'Choose File' to browse through the files on your computer and select one to upload. Then click 'Send it to the Server'. You will get a confirmation message letting you know that this has been successful. From here you will be redirected back to the image info page - if your image is now in the preview box you can click ok and it will

be added into the WYSIWYG editor. If the image isn't in the preview box, or if you want to add an image that you have uploaded previously, click 'Browse Server'. This will open another window that contains all of the image files that you have uploaded to the server. Simply select the image that you would like and click 'upload'.

Another function that you may use in the image uploader is in the 'Link' tab. If you upload an image that you would like your customers to be able to click on, then you would add the destination URL here, and it will be assigned to the image.

Links can also be added to text when using the WYSIWYG editor. Simply highlight the text that you would like to make into a link, and click the 'world' icon, which is to the left of the image icon. Here, simply add the URL of where you would like the link to go to and click save.

### ***3. Search Engine Optimisation (SEO)***

The Inovica system is already set up so that your site can be fully search engine optimised. You may have noticed on many of the content pages in the admin system, there is a tab for SEO Settings.

SEO in itself is a huge field of internet theory, and although it can be time consuming to implement, the underlying principles are not difficult to get to grips with. Basically SEO revolves around various mechanisms that try to bring traffic to your site through the search engines. After all, the entire point of having a site at all is that people will visit it.

SEO takes into account the keywords and phrases that people are most likely to use to find your site, and puts them to work in various ways to make sure that when someone searches for those keywords on Google, for example, that your site comes up as high as possible in the search results.

Before you fill in the SEO sections of the Inovica admin, you should really have done some research into what keywords and key phrases will work best for your store. We have a whole booklet that guides you through the basics of SEO that will go into much more detail about how you can do this. If you would like a copy of the booklet, please email us at [seo@Inovica .com](mailto:seo@Inovica.com).

Once you have your keywords in place, you can start to look at the SEO section of the Inovica system. In the SEO settings you have a number of fields to fill in, you have:

#### Browser title

This is what will appear as the title of the page in whichever browser you use and it is important as search engines use this title to work out what your site is all about, and therefore decide whether to bring your site up in a search or not.

#### Images - Hidden Keywords

These are keywords that will be associated with the images on your stores homepage, but they will not be visible to people who visit the store. The purpose of hidden image tags is so that the search engines know whether or not to include your images from your site in an image search.

### Meta Keywords

These are again words that the search engines will read to try and work out what your site is about. The words won't be visible to visitors to the site but they are important to the background make up of your site.

### Meta Description

Like meta keywords, the meta description will not appear on your site, but it is very important to the search engines. Where the meta description does differ is that the information you place in this box may come up in the search engines when your site is listed as the description given about your site. Also unlike the other boxes, you should write in complete sentences in this box so that it makes sense for humans who might have to read it too.

When filling in the SEO sections, it is likely that your homepage will be the most general about what your store has to offer. You should really make use of the SEO settings in the brands and categories section on your site to drive traffic for specific areas or specialities on your site.

A final note on SEO for the site. To make your chosen keywords truly effective, you need to include them in the content for your site as well. While you should never stuff your site with keywords, it is vital that you do use them. If the search engines are to see your site as relevant to people who search for the things that you deal in, then they have to be able to read that in the content of your site.

For more information on SEO, email us at [seo@Inovica .com](mailto:seo@Inovica.com) to receive our comprehensive booklet.

## ***4. Sitemap Generation***

Sitemaps are very useful for letting search engines know exactly what your site structure looks like, and therefore makes it easier for them to crawl all of the available pages. If you do not have a sitemap available, search engines bots may get lost on your site, and then leave as a consequence, meaning that not all of your pages are crawled for the search engines.

As part of your search engine strategy it is also wise to submit your sitemap to the search engines themselves, letting the search engines know directly that you are there.

On your store you can automatically generate a sitemap by typing in the following URL, amended for your own site domain:

[www.yourdomain.com/sitemap.xml](http://www.yourdomain.com/sitemap.xml)