## Getting Started with Web Shop Manager

### Web Shop Manager

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**Introduction**

Welcome to Web Shop Manager™ (WSM™)! We make it simple and easy to understand how to set-up your online store. WSM™ is an effective tool, helping your online business thrive and succeed. Whether you own a small or large business, WSM™ is adaptable with ease and precision. WSM™ is fully customizable to fit your business, your inventory, and your customers. Most importantly, the customer experience could not be any easier. The combination of intuitive navigation, custom search engine, and shopping cart, makes finding and purchasing the right product quick and easy. The faster the customer can find the product, the more likely they'll buy the product. WSM™ has been specifically designed knowing the user and customer experience needs to be simple and effective.

The WSM™ Getting Started Manual is intended to help you to set up your new online store. Please keep in mind that we are continuously adding new features and improving existing ones to accomplish your needs, our customer. We continue to strive to update this manual however; you may periodically see a small variance in a screen shot or instruction.

We will continue to add new sections to this manual. You many find areas of this manual that reference sections that are not yet complete. We will send you a notification when new sections are available!

**Log into WSM™**

The staff at Web Design Solutions will provide you with a username and password that you can use to access WSM™. This account will be set as the owner of the site and can be used to create accounts for other employees, see User Access in chapter Intermediate Site Settings & Features.

1. Open your preferred browser, we recommend Firefox for the best experience.
2. Go to the WSM™ website, [webshopmanager.com/admin](http://webshopmanager.com/admin)
3. Type your username and password, click Login

![Login to WSM](image)

The first screen you see is the Dashboard, which gives you a quick overview of the site activity. From this screen you can access all the development and communication tools that WSM™ offers for a truly interactive, unique, and easy to use web experience.
Setting up your Online Store on WSM™

One of the first steps to setting up your online store is specifying several System Configuration settings. This section of the instructional manual will walk you through each setting.

Please remember that you may not complete all of the information required in this section when you first begin. You will need to revisit the Configuration and this section of the manual, as you develop your site to finalize the settings.

The System/Configuration consists of 8 sections indicated by the tabs under the Configuration heading. To access each section, click on the tab. The active section tab will appear in a darker color.

Site Information

The information required in this section will be used in several areas throughout your website and when communicating with your customers using automated WSM™ tools.

Follow the login steps to access WSM

Highlight System, Click Configuration

1. Click in each text box to enter your company information. Note: if you type this information in lowercase it will appear that way to the customer. The red asterisk * indicates the required fields. But consider filling all data so your customers can contact you when needed.

The email address is used to notify you when a customer submits information using the contact form.
2. The information you provide in this section will automatically update what your customers see when viewing your website.

Home Page Sample

Contact Us Page

Email to Customers, Order Confirmation

General

The information in this section will affect settings for internal use as well as web pages viewed by your customers. A few of these items are settings for features that will be described in more detail later in this manual. The screen shot of the General tab is numbered and will be described below.

Remember to always click the Save Changes button on the bottom right of the General Configuration screen after making any changes and before leaving this WSM™ screen.

Follow the login steps to access WSM
Getting Started with Web Shop Manager

Highlight System, Click Configuration, Click the General Tab

1. **News Articles** – the number specified in this section will regulate how many articles are display to your customer on you news page, see News Content Management chapter for details on creating your news page. The default setting is 5, so the 6th news article and the older posts automatically move to a new page. WSM™ provides page navigation at the bottom of your news page for easy access to older articles. Below is an example of how the page may look to your customers.

2. **Contact Form Text** – the text that is typed is this field will be added to your contact page. It is added below your address information and above the form. Use this field to enter extra contact information, for example your instant messenger ID. If you want to apply any special formatting to this text you must type the HTML codes. The minimal amount of code you should type to keep the text consistent with the rest of your site is `<p>` this should appear at the beginning of your text and `</p>` should appear at the end. See the sample below for a few additional formatting codes.
Example of how the text is displayed to your customers.

3. **Google API Key** – this key is used in conjunction with the WSM™ Locator module, see Modules/Locator in the Content Management chapter for details on creating your store locator page. Before you launch your site to the public complete the following to acquire your API key.

   - Goto, [http://code.google.com/apis/maps/signup.html](http://code.google.com/apis/maps/signup.html) or click the link under the Google API Key heading on the general tab. A new browser window will open and take you to the appropriate Google web page.

   - Click the Google Account link in the first paragraph. If you already have a google account login. If not click the Create an Account Now link. Complete the form with the required information.

   - When prompted review the terms and conditions, select the appropriate box indicating you agree, type your website domain name in the field provided, and click the Generate API Key button.

   - When the key is displayed on your screen, highlight it by clicking and dragging your mouse, press Ctrl C on your keyboard to copy the key. You should also print this page for your records.
- Go back to WSM™ by clicking the appropriate button on the bottom of your computer screen and click your mouse in the Google API Key field.
- Press Ctrl V on your keyboard to paste the key.
- Click the Save Changes button on the bottom right of the General Configuration screen.

4. **Time Zone** – specify the time zone for your shipping location. The time zone is used when customers place orders or submit an inquiry using the contact form. See Customers/Inquiries in the Intermediate Site Settings & Features chapter for additional information. Click the dropdown arrow to select your time zone.

5. **Allow Comments** – If you check the checkbox, this feature will allow users to post comments to blog posts and your gallery photos.

6. **Order Update Redirect** – this feature changes the action that is taken when you, the owner or manager of your site, are updating information on an order. Our experience has found that most new storeowners prefer to stay on the order page, but we offer the alternatives as your order volume increases which will increase your processing speed. See Orders for more information on maintaining orders. Click the dropdown arrow to select the screen you would like WSM™ to navigate to once you have saved a change on an order screen.

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**Catalog**

The settings in the Catalog section of the Configuration will determine the WSM™ features that are available to your customers on the product pages and how some items are displayed. The screen shot of the Catalog tab is numbered and is described in detail below.

Remember to always click the Save Changes button on the bottom right of the Configuration screen after making any changes and before leaving this WSM™ screen.

Follow the **login** steps to access WSM

**Highlight System, Click Configuration, Click the Catalog Tab**

1. **Item #** - If you click the dropdown arrow for this feature you will see that you have 6 options for the display of your Item # on the product page. WSM provides a unique number that is automatically created for you when you **Add Products**; Stock is a number that you provide as your own internal Stock ID. It should be the number that your staff will use to pull and pack the product for shipping; the 3 remaining selection are a combination of the above mentioned.
2. **Item Number List** – When the check box is selected this Item # is displayed to the customer on the category, brand, and search results page. This could be useful for return customers or if you reference your item numbers when working with your customers via the phone or email. It is displayed in the format selected in the Item # field.

3. **Inquiry Button** – When the check box is selected the inquire feature is active. This feature will place a button on your product page, Item Inquiry. When your customer clicks this button, it will display your “contact us” page and automatically populate the product name in the product field. When the customer completes the “contact us” form and click “send”, an inquiry is generated. See Inquiry in the Content Management chapter for more information about managing inquiries. Below is an example of how this button may appear on your product page.

4. **Tell-a-Friend Button** – When the check box is selected, the tell-a-friend feature is active. This feature will place a button on your product page, Tell a Friend. When the button is clicked by your customer a Tell a Friend form is displayed for them to input information about them (name and email address), and a message. When they click send a message is sent to the address they typed in the Friend’s Email field.

   ![Tell A Friend](image)

5. **Cross Sell Count** – When a number greater then 0 is entered, Cross Sell Count, will display the number of products specified at the bottom of your product page. This feature is a great way to suggest other products to your customers to increase your sales! If you do not specify your own items in the cross-sell section on a product page then WSM™ software will select similar items in the same category for you. For information about specifying the products yourself, see Cross-sell in the Content Management chapter.

6. **Customer Reviews** - Allow customers to post product reviews to the catalog. Reviews will need to be moderated by staff before they become visible by your customers and only registered customers will be able to post reviews. The New Reviews label in WSM™ indicates the number of reviews pending approval. Click the heading to begin your review process.

   When approved the reviews are listed at the bottom of the product page.
**Cart**

The settings in the Cart section of the Configuration will determine the WSM™ features that are available to your customers on the product pages and the shopping cart. The screen shot of the Cart tab is numbered and is described in detail below.

Remember to always click the Save Changes button on the bottom right of the Configuration screen after making any changes and before leaving this WSM™ screen.

Follow the **login** steps to access WSM

**Highlight System, Click Configuration, Click the Cart Tab**

1. **Wishlists** – When the check box is selected the wishlist features is active. This feature will place a button on your product page, Add to Wishlist. When your customer clicks the ‘Wishlist’ button, if they are not logged in, it will display the login screen where they can either login or click a link to create an account. If they are already logged into your site, it will add the product to their wishlist page. The customer can view their wishlist page any time when they are logged in to your site. The wishlist allows them to save items they are interested in and move it from the wishlist to their cart for purchase! Below is an example of how this button may appear on your product page.

2. **Recommended Items** – You have three options to select. **Disable** – will turn this feature off. **Auto generate** - will randomly display products from your specified cross-sell, if set, then for products that were purchased together from prior orders, and finally for products in similar categories. If you select a **Category name** - products will be randomly selected from the category. If you select auto generate or a category, the products will be displayed on the cart screen below the estimate-shipping feature. This is a great way to feature products for impulse buying.

3. **Shipping Quote Tool** – When the check box is selected a feature is available to your customer in the cart where they can estimate their shipping prior to proceeding to the checkout screen. Please note that you need to specify a **Shipping Method** before this feature will display the estimated shipping rates to your customers.
4. **Cart Message** – This field offers a great opportunity to give your customers some additional information. One example might be a free freight message i.e. Free Shipping on orders $60 or more. Make sure you double check your spelling! The message appears above the items in the cart.

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### Checkout

The settings in the Checkout section of the Configuration will determine the WSM™ features that are available or displayed to your customers during the checkout process. It also offers feature that will help you or your staff with managing **Orders**. The screen shot of the Checkout tab is numbered and is described in detail below.

Remember to always click the Save Changes button on the bottom right of the Configuration screen after making any changes and before leaving this WSM™ screen.

Follow the **login** steps to access WSM

Highlight System, Click Configuration, Click the Checkout Tab

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1. **New Order Notification** - When set with one or more valid email addresses, an email will be sent to notify you each time a new order is placed. This feature is optional and you may want to provide an email when you first launch your site and remove it later. If you specify multiple email addresses separated them with a comma, i.e. email@yourdomain.com,email2@yourdomain.com.

2. **Checkout Requires Login** – When the check box is selected the customer is required to login when they click the checkout button. If they do not have an account they can click the link provided to create a new account. If you do not enable this feature the customer is allowed to select from 3 options during checkout. Please note the guest checkout is allowed if this feature is not enabled. The only data that is not collected from the customer using guest checkout is a password. An account
will not be created for them and they will not be able to see their previous orders online. However, it does offer an opportunity for your customers to have the feeling of a faster checkout process and in our tests increased conversion ratio overall.

3. **Checkout Terms** – The dropdown list will consist of the pages listed on WSM™ Site Pages. For more information about creating Site Page see the Content Management chapter. If a Site Page is selected, a message with a link is displayed to the customer during check out. If you check the box for required the user must agree to the terms and conditions before proceeding to the payment screen. Below is an example of a required message.

![Checkout Terms Example](image)

4. **Questions 1-3** – WSM™ provides you with the ability to add up to 3 open ended questions to your checkout/customer information screen. If you choose to add a question or questions you can elect to have any or all of them required. The questions and answers will be displayed in the Order screen. When the question is required a * will appear before the question.

![Questions Example](image)

5. **Checkout Message (Cust. Information)** – This message (if provided) will appear at the top of the Cart screen. This is useful to provide your customer with reminders about free shipping or current specials. See example below.

![Checkout Message (Cust. Information)](image)

6. **Checkout Message (Shipping & Payment)** – This message (if provided) will appear at the top of the Checkout/Payment & Review screen. This is useful to provide your customer with information about the processing of their order. See example below.

![Checkout Message (Shipping & Payment)](image)
7. **Checkout Message (Confirmation)** – This message (if provided) will appear at the top of the Checkout/Confirmation screen. This is an opportunity to offer additional information to your customer. See example below.

![Checkout Message Example]

8. **Confirmation Page Info** – This message (if provided) will appear at the top of the Checkout/Confirmation screen and below the Checkout Message (Confirmation). It is a great opportunity to offer additional information or a simple “thank you, visit us again!” See example below.

![Confirmation Page Info Example]

**Shipping & Handling**

The settings in the Shipping & Handling section of the Configuration is used to select the shipping options you want to offer to your customers. Prior to selecting the shipping method/methods you need to decide which method is the best option for your business. The screen shot of the Shipping & Handling tab is numbered and is described in detail below.

Remember to always click the Save Changes button on the bottom right of the Configuration screen after making any changes and before leaving this WSM™ screen.

Follow the **login** steps to access WSM

Highlight System, Click Configuration, Click the Shipping & Handling Tab

![Shipping & Handling Settings Example]
1. **Default Country** – Click the dropdown to specify the default country that is displayed to the customer in the Checkout/Customer Information screen.

2. **Available Countries** – Click the check boxes for each country you will able/willing to ship to. If you select only one country, and it is the same as the **Default Country**, then the country will appear as text on the Checkout/Customer Information screen. If you select multiple countries they will appear after the **Default Country**, on a dropdown list, in the order they are listed on this screen. Also, please note if you select a **Shipping Method**, which is only available for countries that are not enabled here, customers will not be able to use that shipping method. Below is an example of United States as the default and the only available country the eCommerce store ships to. Notice they are not able to select other countries.

3. **Handling Base Charge** – When set, adds this amount to the final handling total in the checkout screen. Handling amounts can be added to individual products in the **Add Product** process. This total will be added to the amount specified for the product.

4. **Handling Minimum Charge** – This is the minimum amount that could be added in the checkout process. This will override the total of handling added to a product and the base charge if the minimum amount is higher. i.e. the product handling charge is 2.00, the base change is .50. If I do not specify an amount in the Minimum Charge field the customer is charged 2.50. If I specify a
higher amount such as 5.00. Then the customer is charge $5.00. This total is displayed in the Checkout/Payment & Review screen.

5. **Non-Cont. U.S. Remark** – This feature is used in conjunction with your [Free Shipping](#) setting (if offering) and/or [Basic Shipping](#). When set, orders which are shipping to a location outside the 48 contiguous States will see the message set here in a warning box on the Checkout/Payment & Review screen. This feature is useful if you do not want to block shipping but want the option to review the order for adding a surcharge prior to shipping. If you offer free shipping and the customer meets the amount but wants the products shipped to a location outside the non-cont. U.S. they will not qualify for free freight and WSM™ will display the message you provide. See below for an example of the Payment & Review screen with additional non-cont. U.S. Shipments message.

6. **Shipping Methods** – WSM™ offers 4 options for providing shipping selections to your customers. It is not likely that you will use all 4 options. Please note that selecting more options may cause the calculation process to be slower.

Select the individual shipping methods you want to make available to your customers by clicking each checkbox. For each carrier you select you must request their service.

7. **Free Shipping Config** – This method should only be used if you, as a company, want to offer your customers the incentive to receive free shipping. When enabled you specify an amount the customer must reach in order to receive the free shipping. Available for US only

**Display Name** - WSM™ will display the information you provide. If you do not provide data the customer will see "Free Shipping".

**Required Subtotal** – You must specify an amount over $0.00, to enable free shipping. Free shipping will be available when the customer’s subtotal is greater than or equal to the value set here.

**Block P.O. Boxes** – If you do not plan to offer free shipping to P.O. Box shipping addresses, click the check box to enable the blocking.

8. **Basic Shipping Config** – This feature allows you to have set amounts for your shipping and all charges will be calculated from the information provided in this section. You will not typically use the Basic Shipping with UPS or FEDEX, however you may use it in combination with Free Shipping. Remember, when using Basic Shipping the customer is not allowed to select an expedited shipping method. Available for US only

**Display Name** - WSM™ will display the information you provide. If you do not provide data the customer will see "Basic Shipping".

**Required Subtotal** – In order to use the Basic Shipping you must set a value over $0.00.
**Base Charge** - The base charge amount is where all charges start. This is a flat one-time charge on the total calculated basic shipping amount.

**Percent Charge** - When set, the basic shipping will add this percentage of the subtotal to the basic shipping charge. Percentages are in decimal format, so 0.10 is 10%. For example, if your customer purchases a product that cost $55.00 and your Base Charge is $5.00 and your Percent Charge is 10%, their shipping cost would be $10.50 ($5 form the base and $5.50 from the 10% of $55).

**Minimum Charge** - When your set a value above $0.00, the calculated basic shipping charges you specified above, will not be allowed to fall below this amount.

**Block Non-Cont. U.S.** – If you enabled, addresses outside of the continental U.S. will be not be to use the basic shipping method. The customer will see a message stating, “Sorry, we do not ship to non-continental U.S. addresses”.

**Non-Cont. U.S. Surcharge** - When set to a value above $0.00, this charge will be added to the calculated basic shipping amount for orders using an address outside the continental U.S. If you choose to specify an amount in this location you cannot have a checkmark to enable “Block Non-Cont. U.S. Shipping”. The amount is automatically added to the customers shipping and no additional message is displayed.

**Block P.O. Boxes** – If you are unable or choose not the ship to P.O. Box addresses, click the checkbox to enable. Your customer will see a message, “Sorry, we do not ship to P.O. box addresses”.

**P.O. Box Surcharge** - When set to a value above $0.00, this amount will be added to the calculated basic shipping when shipping to and address that contains a P.O. Box. If you choose to Block P.O. Boxes then you cannot specify a surcharge. You must first uncheck the enable box on the above setting to enter an amount.

9. **UPS Shipping Config** – Use Negotiated Rates When enabled, requires all the data fields below. You must enter you UPS information to allow customer use your negotiated rates through UPS on WSM™. Contact your UPS representative to acquire this information.

**Access License Number** - Your UPS Access License Number acquired from your UPS account.

**User Id** - Your UPS access User Id acquired from your UPS account.

**Password** - Your UPS access Password acquired from your UPS account.

**Shipper Number** - Your UPS Shipper Number acquired from your UPS account.

**Supplemental Charge** – The supplemental charge is added to the calculated rates returned by the UPS server. If you specify an amount it will be added to all rates, both negotiated and non-negotiated.

Adding a surcharge will cause a message to be displayed to the customer indicating that the shown rates may include additional non-UPS charges, which are levied by your store. This message is required by the UPS license agreement when adding supplemental charges to the UPS amount.

**Supplemental Percent** - This is a supplemental charge added to the calculated rates returned by the UPS server. When set, this will add the percentage of the orders subtotal amount to all returned rates, both for negotiated and non-negotiated rate amounts. Percentages are in decimal format, so 0.10 is 10%.
Adding a surcharge will cause a message to be displayed to the customer indicating that the shown rates may include additional non-UPS charges, which are levied by your store. This message is required by the UPS license agreement when adding supplemental charges to the UPS amount.

10. FedEx Shipping Config – Select any "FedEx" Shipping Method to enable. Currently this is a Beta Feature in WSM™. Your FedEx account information is required to use FedEx shipping services in WSM. To obtain a FedEx shipping account, if you do not already have one, please visit the FedEx website at: http://www.fedex.com/.

**Key** - Your FedEx access User Key acquired from your FedEx account.

**Password** - Your FedEx access Password acquired from your FedEx account.

**Account Number** - Your FedEx access Account Number acquired from your FedEx account.

**Meter Number** - Your FedEx access Meter Number acquired from your FedEx account.

**Supplemental Charge** - The supplemental charge is added to the calculated rates returned by the FedEx server. If you specify an amount it will be added to all rates, both negotiated and non-negotiated.

Adding a surcharge will cause a message to be displayed to the customer indicating that the shown rates may include additional non-UPS charges, which are levied by your store. This message is required by the FedEx license agreement when adding supplemental charges to the FedEx amount.

**Supplemental Percent** - This is a supplemental charge added to the calculated rates returned by the FedEx server. When set, this will add the percentage of the orders subtotal amount to all returned rates, both for negotiated and non-negotiated rate amounts. Percentages are in decimal format, so 0.10 is 10%.

Adding a surcharge will cause a message to be displayed to the customer indicating that the shown rates may include additional non-UPS charges, which are levied by your store. This message is required by the FedEx license agreement when adding supplemental charges to the FedEx amount.

**Payment & Processing**

The settings in Payment & Processing are used to establish the payment options you want to offer your customers. Most options will require additional information before your customer is able to use it as a payment option. Make sure you review this information to allow yourself the proper amount of setup time before set your website “Live” date.

Remember to always click the Save Changes button on the bottom right of the Configuration screen after making any changes and before leaving this WSM™ screen.

Follow the login steps to access WSM
Highlight System, Click Configuration, Click the Payment & Processing Tab

1. **Payment Options** – The method or methods of payment your store will offer to your customers. Click the check box for each payment option you want to offer. Most options will require additional information and each is outlined below. Please note that you can select multiple options but you should select only one Credit option.

   **Check** – If you select this option the message below will be displayed to the customer in the payment & confirmation screen during the checkout process. No additional setting information is required by WSM™.

   **Credit (Authorize.net)** – This option performs the capturing and authorizing of the credit card for the **Credit Card Brands** you select. You will need to create an account with Authorized.net. Visit [http://www.authorized.net/](http://www.authorized.net/) to setup your account. Then, to obtain the data required to use this option, follow the instructions below.

   **To get your Login ID:**
   Log into your Authorize.net merchant account.
   Click the "Account" tab.
   Click the "API Login ID and Transaction Key" link.
   Copy the value for "API Login ID" to your WSM3 "Authorize.net Login ID" field.
Authorize.net Transaction Key - This is the transaction key generated within your account at authorize.net. The transaction key is required for processing credit information through the authorize.net gateway. It is recommended that you change this periodically.

To get your Transaction Key:
Log into your Authorize.net merchant account.
Click the "Account" tab.
Click the "API Login ID and Transaction Key" link.
Enter your secret question and submit the form.
Copy the value from "Current Transaction Key" to your WSM3 "Authorize.net Transaction Key" field.

Authorize.net Capture Funds - By default, the checkout system will only authorize an amount on the customer's credit card to make sure the funds are available. If this is enabled, the checkout system will also capture the amount on the customer’s card when the order is placed.

$1 Authorization When enabled - This option will cause WSM to override the card authorization amount during checkout with the value of $1.00 rather than the full order amount. Note: The Authorize.net Capture Funds option cannot be used when this option is enabled.

*When wishing to capture the funds for the full amount of the order, follow the procedures listed below:
   1) Add transaction and capture funds for full order amount
   2) Cancel $1.00 authorization charge

Credit (Offline) – This option only performs the capturing of the credit card information for the Credit Card Brands you select. It does not perform an authorization or charge to the actual credit card. You will need to perform this task using equipment at your location when you ship the order.

The only additional information required by WSM™ is if you wish to enable the capturing of the security code on the credit card, see below.

Store Credit Card CID/CVV2/CVC2 - Setting this option causes the system to prompt for and temporarily store the credit card CID, CVV2, or CVC2 code until an order is marked "Complete". After an order is marked "Complete", it is assumed that payment for the order has been received and the order has been shipped. At this point, the code is wiped permanently from the system.

WARNING: Storage of a credit card numbers CID, CVV2, or CVC2 code under any circumstance is in violation of credit card PCI compliance standards. By enabling this option, you agree to take full responsibility for storage of such information, including compensation for any fees legal or otherwise incurred by Web Design Solutions due to storage of such information.
**Credit (Sage)** - This option performs the capturing and authorizing of the credit card for the Credit Card Brands you select. You will need to create an account with Sage Solutions. Visit [http://www.sagepayments.com/](http://www.sagepayments.com/) to setup your account. After you setup your account they will send you the information required by WSM™ to establish the connection with their Virtual Terminal.

![Image of payment options](image.png)

**Sage Merchant ID** - This is the merchant id generated within your account at Sage Payment Solutions. It is required for processing credit information through the sage payment gateway.

**Sage Merchant Key** - This is the merchant key generated within your account at Sage Payment Solutions. It is required for processing credit information through the sage payment gateway.

**Sage Capture Funds** - By default, the checkout system will only authorize an amount on the customer’s credit card to make sure the funds are available. If this is enabled the checkout system will also capture the amount on the customer’s card when the order is placed.

**$1 Authorization** – This option, when enabled, will cause WSM™ to override the card authorization amount during checkout with the value of $1.00 rather than the full order amount.

If you select any of the credit options the message below will be displayed to the customer in the payment & confirmation screen during the checkout process.

![Invoice payment information](image.png)

**Invoice** - If you select this option, the message below will be displayed to the customer in the payment & confirmation screen during the checkout process. No additional setting information is required by WSM™.
PayPal - Your PayPal® account email address. This is required if you are using the PayPal® cart or checkout. Visit www.paypal.com to learn more about creating a PayPal account.

2. **Credit Card Brands** – Click the check boxes for each card brand your store supports. This setting is only applicable if you have selected a Credit **Payment Option** (Credit Authorizes.net, Credit Offline, or Credit Sage) above.

3. **Sales Tax States/Providences** – Check each State you are required by law to collect sales tax in. If you are unsure when to charge sales tax or for which States, consult your Accountant for professional advice.

4. **Sales Tax** – The amount of sales tax charged for items within your store. By default the system will charge the base sales tax for the state set in your **Configuration/Site Information**. Under special circumstances you may need to set this to a custom value if your sales tax is different than the base tax for your state. If you need to set your sales tax back to the default value of your state, simply delete the value in the field and save your configuration. % (Default for GA: 0.0700).

**Advanced**

The features and settings in this section should be discussed with a WSM™ employee. They will establish these settings during your site design. Please consult with them before making any changes because they could affect the overall look of your website.

**Categories**

Besides **Product** pages you need category pages to have a user-friendly commerce site. Categories give your commerce site its framework. Without them you cannot offer easy navigation for your products. Before finalizing your **Template** (for more information about Templates see the Content Management chapter) with your design team you should have a pretty good idea of the categories you need for your site. To decide your categories you will need to review your product offering & group them into categories and sometimes subcategories. This exercise will not only assist you with grouping your products but also with finalizing your category names which is also one of the menus displayed on your site.

To create a category highlight catalog and click categories.
Click the Add Category button to begin.

After inputting the required data plus any additional data you want/need to enter, click Add Category button at the bottom of the Add Category screen. If you are editing an existing category remember to click the Save Changes button.

1. **Information** – This section contains the main components and setup of your category page.
   - **Category Name** – This title will appear on the menu and at the top of the Category page when viewed. The title should be specific, short, and to the point.
   - **Description** – This is optional, if you choose to provide a description it will appear at the top of your category page under the title and next to the **Image** (if provided). Remember to spell check!
   - **Parent** – If this is a sub-category, select the main category that it should appear under. Do this by clicking the check box.
   - **Hidden** – This option provides the ability to have categories in development (when launching new products in a category) or seasonal categories. When Yes is selected the category will not be listed on your site.
   - **Priority** - Determines the order when displaying the link within the menu or on the main category page. Higher numbers will be displayed before lower ones.
   - **Image** – Click the Browse button to upload an image. This image will be displayed on the category page and on the Parent page if it is a subcategory. Your Configuration/Advanced settings are used to specify a unique size. Leave the checkmark on Yes to use the size from your advanced settings.

2. **Page Description** - This portion of the category is the information that it used when Search Engines list your pages.

3. **Customer Access** - Use these features to add secure access to the category. When used, your categories will be displayed based on your settings.
   - **Login Required** – If you specify Yes this category will not appear unless the person visiting your site is logged in. If you want all viewers to see the category then leave the setting on No.
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**Group Required** - Determines which menu group this link is displayed too. This option is not available unless you select Yes for **Login Required**. Click the dropdown arrow and select the group you want to have access to in this category.

**Products**

The main components of a commerce website are the products you want to sell. So, in addition to pages created by your **Categories** and **Site Page** (see Content Management chapter) you must have product pages! By using the **Products** feature provided by WSM™ you can easily create products and categorize them for easy access.

To add a Product page to your site highlight **Catalog** from WSM™ menu and click **Products**.

You can sort the Products view by clicking any of the column headings. Clicking the same heading twice will change the sort order from ascending to descending.

To add a new product, click the **Add Product** button.

To edit a product, click the Edit icon.

To create a new product with similar information, click the Copy icon.

To view the product page, click the View icon.

You can also access products through the Category screen (once you have assigned a product to a category). Highlight **Catalog** and click **Categories**.

Scroll until you find the category that contains the product(s) you need to edit, click the View Products icon.

**Note**: You can Add Product, View Products, Edit Products, and Copy Products from this screen. The Category Product screen is the best location to change the Priority of your products within the category. The priority controls the order in which the products are displayed on the category page and the menu (when used).

To change the priority, click the green up and down arrows under the Priority heading on the product you wish to change. The page will immediately refresh displaying the new priority.
Click the **Add Product** button on the top right of your screen. We will discuss the numbered items in the New Product screen below.
1. **Identification** – This section is used to uniquely identify your products.

   - **Product Name** - The name used to identify/describe your product. It is displayed to customers on Category pages, in the Shopping Cart, and on the Product page.

   - **Your Stock #** - Your stock identification number which is displayed to customers.

   - **Dealer/Supplier #** - This is the identification number given to the product by the manufacturer. If you are the manufacturer, then you may not use this number. It can also be displayed to the customer, depending on your Configuration/Catalog setting.

2. **Pricing** – Use this section to provide the pricing, tax requirements, cost, and required access for each product.

   - **Price $** - The regular price of the product. If the product is subject to sales tax, click the taxable checkbox to the right of the price field.

   - **Sale $** - When set, this will override the amount you entered in the Price $ field. Note: the sale price will be displayed below the crossed out normal price wherever the product is listed on your site.

   - **Cost $** - The base cost for the product. Used for calculating sale profits. This amount is **not** displayed to your customers.

   - **Group Required** – This checkbox, when checked, will require the customer to login in order to see the product. The price that is available to them is dependant on the information you provide. If you are not using any tiered pricing then they will see the amount you provided in Price and/or Sale above.

     Note: If you check this box, customers who are not logged in will **not** be able view the product. This is useful for products available for wholesale but not retail.

   - **Tiered Pricing** – Tiered pricing allows you to set discounted prices for your product when: a quantity amount is met; a customer is in the specified group; or both. When determining pricing, WSM™ will always display the lowest available price for the customer.

     To add **Tiered Pricing** first click the Open Tiered Pricing button, select the **Group** you want to create a tiered price for and click the **Add Rule** button.

     **Group** – This dropdown is used to determine who will see the tiered price(s) you create. You must create a group prior to assigning tiered pricing to a specified group. You can easily add quantity discounting for all customers using tiered pricing. Below is an example of two types of tiered pricing. For more information on creating groups and tiered pricing see the Intermediate Site Settings & Features manual (under development).
3. **Shipping & Handling** – Specify any unique shipping/handling cost for the product in this section. If you do not have any additional costs, the only item you need to review is “requires shipping” (which is checked by default).

**Handling** - Specific handling charges for this product. This is a per-product shipping charge based on quantity and is in addition to handling charges set in the store Configuration/Shipping & Handling setting.

**Requires Shipping** - Uncheck this option if the product does not require shipping, such as registrations or downloadable purchases.

**Shipping** - The basic shipping rate for each product. This is a per-product shipping charge based on quantity and is in addition to shipping charges set in the store Configuration/Shipping & Handling setting.

**Shipping Remarks** - These comments are displayed on the product description page for customers.

4. **Inventory** – The Inventory section can be used to control the availability of the products on your site.

**Availability** – By default your product is set to **Available**. This setting will always allow the customer to purchase and add the product to their cart. If the availability is set to **Sold, Out of Stock**, or **Please Call** the customers will not be able to purchase the product or add it to their cart. Settings of **Unique** and **Limited Supply** will allow the customer to purchase and add to cart. These settings will also be displayed to the customer on the product screen under the Product Details heading.

If the availability is set to **Automatic**, the displayed availability is calculated based on the remaining inventory. If the remaining inventory is zero (0), then customers will not be able to purchase this item or add it to their cart. If you use **Automatic**, additional data is required. You must enter the remaining Inventory amount. This amount will be automatically adjusted after the customers order is marked **Complete**.

The last availability option is **Not for Sale**. **Not for Sale** allows you to display a product that is informational only. The display will include the picture, description, extended description, and extra details. This feature is great for an announcement that you want to feature in your product catalog.

**Availability Remarks** – You can use this field to provide any additional/unique information about the shipping of this product. For example to let your customers know how long an item will be out of stock, or the amount of time it will be on back order.
5. **Product Information** – The information in this section is used to display information on the product page and when customers use the search feature on your site.

**Page Title** - This is the page title for the product. This title is displayed in the browser window title bar. If you do not provide a page title, WSM™ will use the information provided for the **Product Name**. Limit to 60 characters or 9 words although less is usually better. Remember to not repeat any word more than 2 times.

**Description** - The description is the text displayed on the product page. If you want to apply any special formatting or use separate paragraphs, you must type the HTML codes. The minimal amount of code you should type to keep the text consistent with the rest of your site is `<p>` this should appear at the beginning of your text and `</p>` should appear at the end. The `<p>` tag starts a new paragraph. If you want a line break but not a new paragraph use the `<br/>` at the end of the line. To bold type `<b>` before the text to start and `</b>` at the end where you want to stop the bold.

Avoid the use of the `<, >, and & symbols in the text itself, and use them only for HTML.

**Extended Description** – This can be used to display additional information after the images on the product page.

**Meta Keywords** – The Search feature on your site and other search engines such as Google.com will use these key words to display a link to this page. Type as many words that apply to this product and separate them with commas. Limit to 1000 characters or 45 words with the most important first, and do not repeat any word more than 7 times.

**Meta Description** - Use this area to control the information people see when your page is included on search result pages. Limit to 200 characters or 2 sentences and do not repeat any word more than 4 times.

6. **Categorization** – Remember when you created your **Categories**? You will use this section to indicate which category pages you want this product listed in.

**Brand** – Brands are a way to categorize your products. If you are using the **Brand** (see the Intermediate Site Settings & Features chapter) feature on your site you must first create the Brands. Then you can specify which brand this product belongs to by clicking the dropdown arrow and selecting the appropriate brand name. For more information about using Brand, Options, and Tags see the Additional Setting manual (under development).

**Categories** - A product can be listed in multiple categories. Click the checkbox for each Category and/or Sub Category where you want this product listed.

If you want it listed on a sub-category page, click the blue arrow ▶️ to expand the main category heading. Please note that the screen shot below is just an example. On your product page your **Categories** will have names that are relevant to your products.
**Hidden** - Hidden items are not displayed in the store catalog. Click the checkbox in front of “do not display this item” in the store catalog to hide this product from all viewers.

7. **Options & Tags** - Here you can view & select a listing of option sets and tags that are tied to this product.

**Options** – When set, your customers will have options available to specify prior to adding the product to the shopping cart. There are two types of options. 1) Global option sets can be shared with multiple items. These will save you time if you need to change a value for multiple products later on. 2) Unique option sets belong to only one item. To create a unique option set click **Add Option Set** button. For more information about using Brand, Options, and Tags see the Additional Setting manual (under development).

Click the checkbox in front of the Options you want to use for this product.

**Tags** – Use tags to add additional information to this product. This information will be an active link under the Products Detail heading on the product page. If the customer clicks the tag name it will display a page with other products classified under the same tag. If you were selling shoes you could have a tag for Boots. By using this WSM™ feature you offer your customer a feature to easily view all boots sold on your site. For more information about using Brand, Options, and Tags see the Additional Setting manual (under development).

Click the checkbox in front of the Tags you want to use for this product.

8. **Additional Details** – You can use “add additional details” to add product information. The information is displayed under the Product Details heading. It is listed as a link, when clicked, can be expanded and collapsed by your customer.

Click the **Open Extra Details** button to access this feature. The information typed in the **Title** field will be displayed as your link. The information typed in the **Details** field will be displayed when the customer clicks the link. Remember to spell check! You can also use HTML Code to add formatting to your details, but this is optional. If you do not type any HTML Codes WSM™ will supply the line breaks for you. However, once you type any HTML, then you need to supply it all!

You can add multiple links by clicking the **Add Row** button.

Note: If you disable additional details when details are provided, they will permanently be removed from the product.

9. **File Attachments** – This feature can also be used to provide additional information for your customers. The information is displayed as a link. When the customer clicks the link the file will open in the program required. Current supported file types are PDF (Adobe Acrobat) only. File attachments can be used for extra description information, product manuals, and other useful information for your customers on or about the product.

To add attachments click the **Open Attachment** button. Then click the **Browse** button.

Locate your file from your computer, Click **Open**
Type the Caption, this is the text that will appear as your link.

You can add additional files by clicking the **Add Row** button.

10. **Image Gallery** – It is helpful to your customers to see a picture or pictures of the product you are selling. The Image gallery allows you to upload multiple images for this product. The first image that is listed in this section is the image that will be displayed on the **Category** pages. If you have multiple images you can rearrange them by clicking and dragging the image to the new order you desire. If you want to delete an image, simply click and drag it to the trash can on the left.

To add an image click the **Browse** button.

Locate your file from your computer, Click **Open**

Type the Caption, this is the text will appear at the bottom of the Zoom screen by the customer. It will also be used to meet the disability compliance, for use with screen readers.

11. **Cross-Sell** – This feature is used to offer suggestions to your customers during their shopping process. The products you select in this section will be listed at the bottom of the product page. When the customer clicks the product, they will see that products page. Review the **Configuration/Catalog** to set the number of cross-sell products you want listed on your product pages. Note: if you do not specify the products you want listed WSM™ will select products from the same category for you.

To determine which cross-sell products you wanted listed on this products page click **Open Cross-Sell** button. Click the checkbox in front of each product you want listed. If you select more products than your **Configuration/Catalog** setting, they will be randomly selected each time the product is viewed. To remove a product, remove the checkmark by clicking the checked box under each
Orders

The orders menu on WSM™ contains orders submitted by your customers. Each of the 9 different menu options, when clicked, will display the appropriate orders. When a new order is received you can access it 1 of 3 ways.

- By clicking on New under the order menu
- Using the All Orders menu (note when using this menu you should reference the status column to identify the new orders)
- Clicking Open, referencing the status column

Each view of your orders can be sorted by clicking any of the column headings. Clicking the same heading twice will change the sort order from ascending to descending.

Now onto the fun part, processing orders!

To Print an order click the icon. This will open your order and the print screen. Note: when you perform this action WSM™ will automatically change your order status to Processing.

To View an order click the icon. This will allow you to view an order without affecting the status (unless you specifically change it while viewing).

The order screen displays everything you need to know about your customer and their order. If the payment type is a credit card you will only be able to view the full credit card number until the order is marked complete (more on this later). Once the order has been completed, WSM™ will no longer store the entire number. This is a security feature and can be highlighted on your security and/or FAQ pages. Because WSM™ does not store CC#’s a returning customer will be required to input their # each time they shop.

We will discuss 5 main points about orders. Each numbered sections will be discussed below the image.
1. **Printing your order** - You have 3 different views you can print, use the icons at the top of the page to find which one works best for you (Print Ticket, Print Packaging Slip, or Print Invoice).

2. **Tracking Information** - When an order is packed, if you have a tracking number, click the **Add Tracking Number** button. This will open a section on the order for you to input the number. By including this number, a link will be available to the customer in the order update email WSM™ sends. You can click Add Tracking Number if you have multiple boxes for your order. Make sure you select the correct carrier from the dropdown list so WSM™ can create the link in the email properly.

3. **Order Status** - This feature allows you to control the status of an order. Click the dropdown arrow to choose the appropriate status for your order. This status will appear in the subject line and body of the email sent to the customer. It will also change the location of the order as listed in the Order Menus in WSM™.

4. **Comments** - This feature is used to input information about the order to your customer. A logged in customer can view all their orders when they click My Account. Also, they can follow a link in the email, if you select to send one. This is optional and can be used if you want to include a special message. You can add multiple comments to an order. When comments are added, and the Update Order button is clicked, the comments are added to the order screen and can referenced at any
time. WSM™ automatically adds the date & time (based on your time zone setting in Configuration/General setting) to the comments for you.

5. **Email this customer an update notification** - If this check box is checked, and click Update Order, an email will be sent to your customer. If you are adding information to the order, or need to change the status but are not ready to email the customer, you must remove the checkmark before clicking Update Order.

Remember any information or status change can be viewed by the customer if they log into their account.

6. **Update Order** - This button will save any changes made to the order and send an email if you have not removed the checkmark from "email the customer and update notification".

If you did not make changes, use your browsers back button or simply click a different menu.

We recommend that before you go live with your site that you perform the process of buying a product through your website. This will help you understand what your customers will see and the steps they will take. It will also provide you with the opportunity to view all the emails and screens seen by your customers during the checkout process. You can use a test credit card during the testing process.

Use any Name, Card type is MasterCard, Card Number is 5454545454545454, Expiration is any time in the future, and Security Code can be 123.