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# **Welcome to Volusion Winter '09**

Welcome to Volusion Winter '09. We're excited that you've chosen Volusion as your e-commerce platform to help you successfully sell online.

If you're a new Volusion merchant, this manual will guide you through basics like setting up products and product options, as well as advanced techniques such as using Volusion's API to extend your store's functionality.

For V5 merchants who have upgraded to Winter '09, welcome to the latest release. In this manual you'll find details on all the new features and functions, including the new customer rewards program, quick edit features and more.

Let's get started.

## **What's New in Winter '09**

Whether you're a new Volusion merchant or an experienced user, Winter '09 offers many new features to utilize.

### **New Admin Area Look & Feel**

The Winter '09 Admin area has been redesigned to simplify functions and control. Navigating is now more intuitive.

### **Optimized Searching**

Winter '09 has improved search features that'll help your customers find what they are looking for more efficiently.

### **MyRewards Program**

You can now set up a rewards program that allows loyal customers to earn points toward store credit for future purchases. Best of all, you can specify whether your program awards points by currency unit or by product, and you can customize earnings totals and redemption requirements to suit your preferences.

### **AddThis™ Integration**

You can now use our integration with the Add This™ program to provide links to your product details pages on third party sites like AIM, Bebo, Kaboodle, Facebook, Blogger and many more.

## **Improved Language Settings**

Volusion Winter '09 offers the ability to edit more of the hard coded text that previously was not editable. You can now customize your storefront to a greater degree by changing the default wording or displaying another language.





# **Getting Started with Your Volusion Store**

The primary purpose of this section of the manual is to welcome new merchants to Volusion and guide them through the store setup process. It'll cover the basics of configuring Volusion Winter '09 from default settings to product creation with SEO basics as well as what to expect from the time of purchase. This is also a good reference point for 14-day free trial users looking to test the system before buying.

If you've recently upgraded from V5, feel free to look through this section to refresh your knowledge of the Volusion e-commerce system.

Once you've finished with this section, be sure to read on for a more in-depth description of settings, tips and tricks.

## **What Do You Do First?**

1. If you haven't already done so, we recommend signing up for a 14 day free trial of our Winter '09. You can do so [here](#) at absolutely no cost and with no obligations!
2. Once you choose the monthly hosted solution that meets your needs, you can make your purchase [here](#). All solutions come with our award-winning 24/7 customer support to help you with store set up and more.
3. If you don't already own a domain name, you can purchase one from Volusion [here](#). You'll need to own the domain name you plan to use before we can process your order.
4. Purchase an SSL certificate. You can add one to your monthly hosted solution purchase, or buy it later when you're approaching your opening date. You can read more about SSLs and why they're important [here](#).

Once you purchase your Volusion store, you'll receive two emails. The first is simply your order confirmation. At this time, your credit card hasn't yet been charged. The second will come once your order has been processed and our developers have set up your website on our servers. This email contains vital information like your login details and helpful links. Please save this email for your records. It usually arrives within two business days of your purchase.

If you have any questions regarding the purchase of an online store hosting plan, domain name or SSL, please feel free to contact one of our expert consultants at 800-646-3517.



## Volusion Wizards - Introduction

If you're logging in to your Volusion store or 14 day free trial for the first time, you'll encounter a series of special pages, collectively known as the Volusion easy setup wizards. These wizards are designed to guide you through the most basic steps you'll need to complete in order to set up your Volusion store.

Since the Volusion platform is a highly customizable and configurable e-commerce solution, the easy setup wizards won't cover every detail you may need in order to get your store ready to sell online, but they will cover the important initial steps.

The easy setup wizards are divided into two main types: Settings Wizard and Design Wizard.

After you've completed them, you can return to them later at any time by logging in to the admin area and clicking Dashboard >> Settings Wizard (look in the Resources section on the left side).

**Orders   Reports   Inventory   Marketing   Customers   Design   Settings**

### Settings Wizard

#### Design Setup

>>> <b>Choose Template</b>	<a href="#">Start</a>
>>> <b>Logos</b>	last edited 7/8/2009
>>> <b>Site Content</b>	<a href="#">Start</a>
>>> <b>Categories</b>	<a href="#">Start</a>
>>> <b>Products</b>	<a href="#">Start</a>

#### Other Settings

>>> <b>Company</b>	last edited 6/8/2009
>>> <b>Shipping</b>	last edited 7/8/2009
>>> <b>Tax</b>	last edited 11/8/2009
>>> <b>Payment</b>	last edited 12/8/2009
>>> <b>Last Steps</b>	<a href="#">View</a>

## Design Wizard

There are a total of 5 different design wizards within the easy setup wizard collection:

### Choose Template

Orders Reports Inventory Marketing Customers Design Settings

Template Logos Site Content Navigation Menu LiveEdit File Editor

### Settings Wizard [Main Menu](#)

**Choose Template** (next: Logos) **Next**

Impress your visitors with a modern, professional design that fits your business style. Choose your favorite template then click Install.

**Custom Template: V-Blue**

My Company

PUBLISH PREVIEW

This is a custom template. Click on Publish to see this template on your site.

[Duplicate this Template](#)

My Templates Free Templates

- 1 - The New Edge : Blue
- 2 - The New Edge: Red-Orange
- 3 - 100 - V-Blue
- 4 - 101 - V-Chrome
- 5 - 102 - V-Sherbet
- 6 - 103 - V-Total
- 7 - 104 - V-Gloss
- 8 - 105 - V-Turquoise
- 9 - 106 - V-Peach
- 10 - 107 - V-Racer
- 11 - 108 - V-Rising
- 12 - 109 - V-Golden

Here you can choose from a wide variety of free templates to select the look and feel of your storefront. You can also access this page by clicking *Design Template*

### Logos

**Settings Wizard** [Main Menu](#)

**Add Logos** (next: Site Content) **Next**

Make your brand known! Upload your logo to have it appear on your website and invoices.

**Logo Type** ☐ Text ☒ Graphic

**Website Heading Logo**

**Invoice Logo**

Recommended Website Logo Graphic Size: 847 x 121

Here, you can enter text or upload an image to act as your storefront logo. You can also access this page by clicking Design Logos.

## Site Content

**Settings Wizard** [Main Menu](#)

**Site Content** (next: Categories) **Next**

**Home Page**

**ABOUT US**

At Retro Computer Warehouse, we take provide in providing you with the best possible products and services - we don't skimp on anything to ensure you've got everything you need to get your project done successfully. That's how we've been successful so far and it's how we intend to keep running the show!

Receive Bulk Discounts by Signing Up as a Contractor:  
Email us: [contractors@buildingsupplyinc.com](mailto:contractors@buildingsupplyinc.com)

Need to Contact Us?

Here, you can enter text or HTML to configure prominent areas of your storefront, particularly

the area above the *Featured Products* section on your homepage. You can access the articles presented here by clicking *Design >>Site Content*.

## Add Categories

**Settings Wizard** [Main Menu](#)

**Categories** (next: Products) **Next**

Your Categories are also known as your Navigation Menu. These links will appear on your website helping customers to find your products easily. If you sell clothing, for example, you'd want to create categories such as "Shirts", "Pants", "Shorts", "Shoes", and so on.

Computers	<a href="#">Remove</a>
Peripherals	<a href="#">Remove</a>
Vintage Software	<a href="#">Remove</a>
Magazine and Media	<a href="#">Remove</a>

[+ More Categories](#)

Here, you can quickly create categories. Categories organize or structure your store into distinct product groupings. They generally make up the navigation menu of a website located either on the top to the left side of the storefront. The purpose of this menu is to help your customers navigate to their desired destination with ease.

Note that you cannot create sub-categories within this wizard, only primary categories. For more category management features, visit *Inventory >> Categories*.

## Add Products

**Settings Wizard** [Main Menu](#)

**Products** **Next**

You're here to sell products online, so let's go ahead and add some products now! Simply fill out the information about the product and then upload your product photo.

**Product Code:** 4TCPYQL9

**Product Name:**

**Product Price:**

**Category:** Apple Computers

**Product Weight:**

**Product Description:**

**Product Photo:**

Here, you can quickly add products to your store. Note that not all product settings are available on this page. For more product settings, visit *Inventory >> Products*.

Once you've completed each of the design wizard pages, you'll arrive at a page that provides the option to view your storefront or return to your dashboard.

**Settings Wizard**

**Congratulations!**  
You've completed the Design Wizard

Ready to see what you've built in a manner of minutes using Volusion?

[View My Storefront](#) (link will open in a new window)

**You're doing great!** From here you can click below to visit the dashboard of your demo. You can also choose to continue with the wizard if you prefer. You will find helpful training videos and getting started documentation [here](#). You can also contact your sales rep listed in the welcome email for additional assistance (800-646-3517).

**LAUNCH MY DASHBOARD**

OR click [here](#) to continue Wizard

## Settings Wizard

There are a total of 5 different settings wizards within the easy setup wizard collection:

### Company



**Orders Reports Inventory Marketing Customers Design Settings**

Company Shipping Tax Payment Currency IP Firewall Config Variables Custom Fields Maintenance

## Settings Wizard [Main Menu](#)

**Update Company Info** (next: Shipping) **Next**

**Company Name** Retro Computer Warehouse [More](#)

**Company Address** 1818 Mantooth Drive  
Walla Walla, WA 99109

**Email** gary\_spillman@volusion.com [More](#)

**Domain Name** Domain Name <ttkxe.fmrln.servertrust.com>

**Time Zone** (GMT-08:00) Pacific Time (US & Canada); Tijuana  
☒ Automatically adjust clock for daylight savings changes  
[Edit Terms & Conditions](#)

Here, you can configure vital information such as your store name, business address, time zone and domain name configuration. You can also view this page by clicking *Settings >> Company*.

## Shipping

**Orders Reports Inventory Marketing Customers Design Settings**

Company Shipping Tax Payment Currency IP Firewall Config Variables Custom Fields Maintenance

## Settings Wizard [Main Menu](#)

**Manage Shipping Details** (next: Tax) **Next**

**Ship To Countries**

Active Countries	Inactive Countries
Canada United Kingdom United States	Algeria American Samoa Andorra Angola Anguilla Antigua & Barbuda Argentina Armenia Aruba Australia

[Edit Countries](#)  
[Edit States](#)

**Shipping Origin**

Name Computers N Stuff ☐ Use a different origin for calculating shipping rates.

Company Name CNS Holdings LLC

Address 1 8919 Riverside Dr

Address 2 Building 120

Country United States

State / Province CA

City Los Angeles

Zip / Postal Code 90102

Phone Number 310-999-6666

**Choose Carrier** [Edit All](#)

UPS FEDEX FEDXG USPS DHL CANADAPOST AUSTRALIAPOST ROYALMAIL

Here, you can select the shipping options you wish to offer your customers and the countries you wish to ship to. You can also access it by clicking *Settings >> Shipping*.

## Tax

**Orders Reports Inventory Marketing Customers Design Settings**

Company Shipping **Tax** Payment Currency IP Firewall Config Variables Custom Fields Maintenance

### Settings Wizard [Main Menu](#)

**Update Tax Settings** (next: Payment) **Next**

Are you based in the United States? ☒ Yes ☐ No

Tax Settings <a href="#">Add</a>					
Results 1 - 10 of 65534					
Page 1 of 6554 <a href="#">Next &gt;&gt;</a> <a href="#">Advanced Edit</a>					
	Country	State / Province	Postal Code	Tax Rate	
<a href="#">Edit</a>	United States	WA	00072-0000	7.9%	<a href="#">X</a>
<a href="#">Edit</a>	United States	WA	00072-0001	7.9%	<a href="#">X</a>
<a href="#">Edit</a>	United States	WA	00072-0002	7.9%	<a href="#">X</a>
<a href="#">Edit</a>	United States	WA	00072-0004	7.9%	<a href="#">X</a>
<a href="#">Edit</a>	United States	WA	00072-0005	7.9%	<a href="#">X</a>
<a href="#">Edit</a>	United States	WA	00072-0006	7.9%	<a href="#">X</a>
<a href="#">Edit</a>	United States	WA	00072-0007	7.9%	<a href="#">X</a>
<a href="#">Edit</a>	United States	WA	00072-0008	7.9%	<a href="#">X</a>
<a href="#">Edit</a>	United States	WA	00072-0009	7.9%	<a href="#">X</a>
<a href="#">Edit</a>	United States	WA	00072-0010	7.9%	<a href="#">X</a>

Here, you can configure your store to charge sales tax, VAT or GST, depending on your region's tax requirements. You can also access this page by clicking *Settings >> Tax*.

## Payment & Security

**Orders Reports Inventory Marketing Customers Design Settings**

Company Shipping Tax **Payment** Currency IP Firewall Config Variables Custom Fields Maintenance

### Settings Wizard [Main Menu](#)

**Update Payment Settings** (next: Last Steps) **Next**

**Accepted Payment**  
[Edit All](#) ☐ Other ☒ ☒ ☒   
☒ ☒ ☒ ☒ Cash

PayPal Email Address:

Google Checkout Merchant ID:   
 Google Checkout Merchant Key:   
[Configure Shipping Methods](#)

**Payment Gateways** For an all-in-one low cost merchant account/gateway solution try [Volusion Merchant Services](#)

Here, you can select which payment methods to offer your customers, and configure your store's payment card processing settings. You can also access this page by clicking *Settings >> Payment*.

## Last Steps

**Orders** **Reports** **Inventory** **Marketing** **Customers** **Design** **Settings**

Overview Phone Orders Recurring Billing Returns / RMAs Point of Sale Abandoned / Live Carts

Settings Wizard [Main Menu](#)

Last Steps

1) Sign up with Volusion Merchant Services

[Start](#)

2) Purchase your domain

[Start](#)

3) Sign up & Activate SSL certificate

[Start](#)

4) Create Email accounts

[Start](#)

5) State your return policy (required to accept credit cards)

[Start](#)

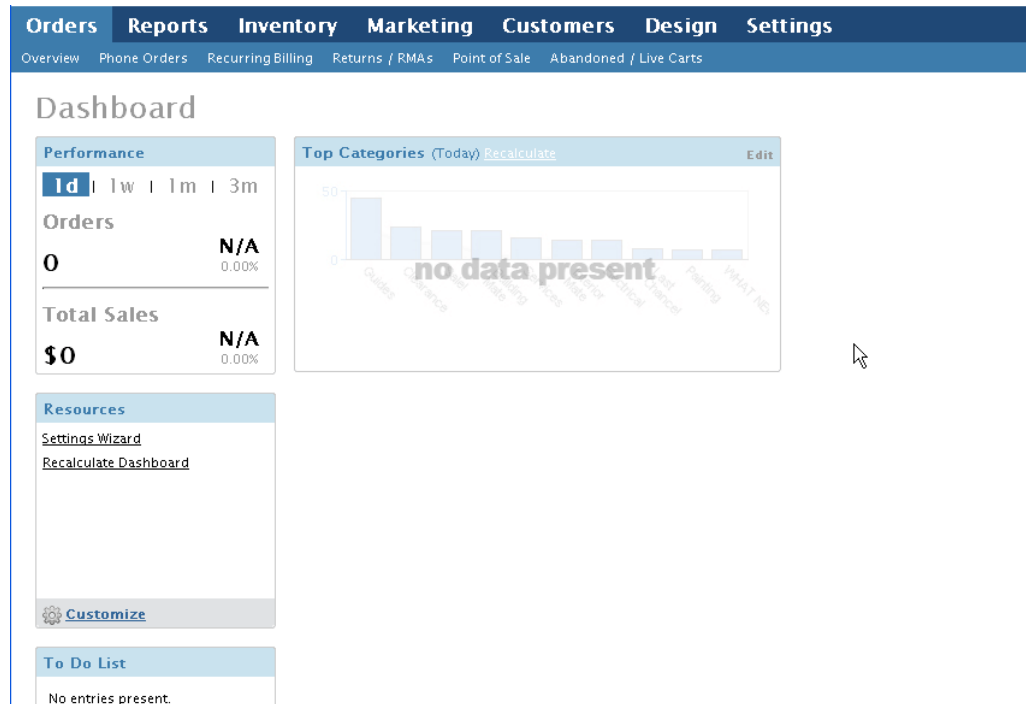
6) Carrier registration for live rates

[Start](#)

Once you've finished the easy setup wizard, you'll arrive at the Last Steps page. It showcases a list of helpful links that'll assist you with further setup.

## Introducing the Volusion Admin Area

Once you've logged into your Volusion store's admin area, you'll arrive at the dashboard. You can navigate from this page to any other admin area page by using the tabs at the top of the screen. These tabs contain links to all the pages you'll need to set up and configure your store.



Simply mouse over and select from the options in the menu bar to access a specific admin area page.

## Navigating the Admin Area

The admin area is divided into seven sections.

### Orders

This section provides access to new and past orders from customers as well as functions such as RMA processing, phone order generation and point of sale checkout.

### Inventory

This section features all settings required to configure products in your store. It also includes the products database table, the import / export functions and vendor and warehouse settings.

## Marketing

This section allows you to create special marketing elements for your store. You can also add discounts, coupons, and newsletters and access SEO functions..

## Customers

This section allows you to view and manage information for customers and administrators, as well as set up and administer the customer relations management system.

## Reports

This section allows you to create reports for sales financials and marketing ROI.

## Design

This section allows you to customize your store's look and feel, including your logo, template and even the store's HTML and CSS files.


## Settings

This section allows you to configure your store's logistics, such as shipping provider integrations, shipping rates, sales tax, payment options and more.

## Managing the Dashboard

Upon logging in to the admin area, you'll arrive at the dashboard by default. If you navigate away from it, you can return at any time by clicking the link above the admin area menu bar in the top right corner.

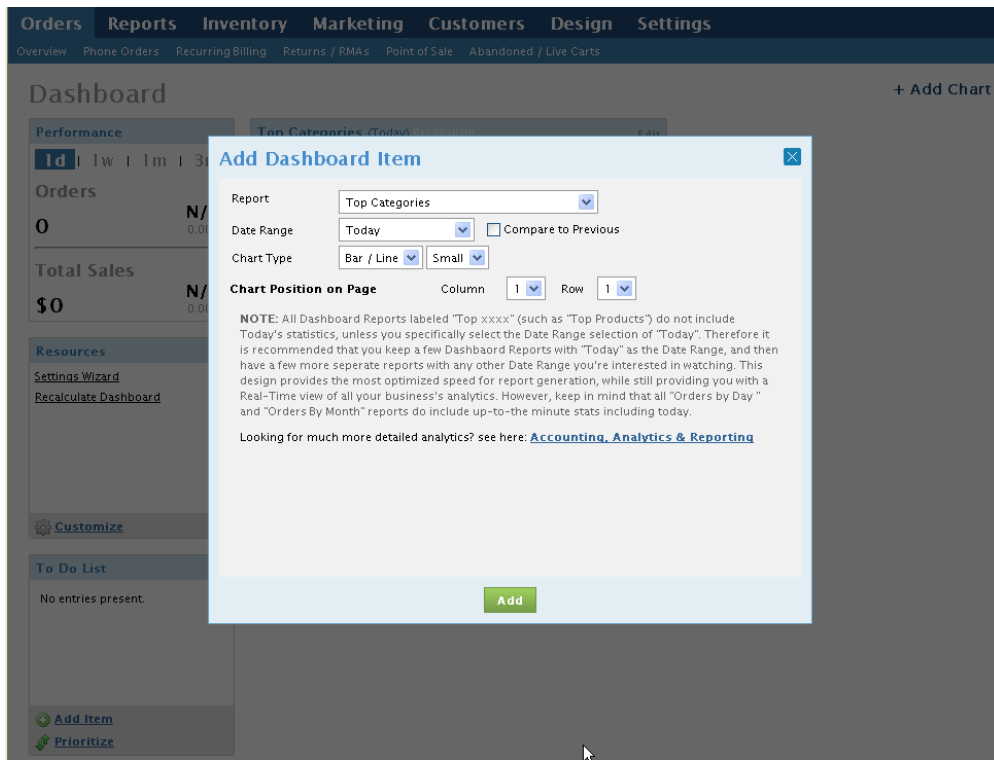
[Dashboard](#) | [Storefront](#) | Hello, [test name](#) | [Log out](#)



If you've previously used V5, you'll notice the difference in the design. Winter '09 was designed for simplified navigation and displays helpful elements such as a quick glance performance box on the left side. This displays total orders and sales for your store and an updated to do list. The dashboard also provides access to charts, graphs, and reports, which you can configure for quick and immediate access to specific store data.

## Dashboard Item -Types

If you haven't configured any dashboard widgets , you'll first see "*Add Item*" upon logging in.



If you've configured one or more widgets, you can access this option by clicking **+Add Chart** in the top right corner.

You can use this menu to add items to your store's dashboard based on any of the following eight item types:

## Top Categories

This item reports on the most heavily-browsed categories within your selected date range.

## Top Products

This item reports on the most heavily-browsed products within your selected date range.

## Top Selling Products

This item reports on the top-selling products within your selected date range.

## Orders by Payment Amount by Date Range

This item reports on order payment totals within your selected date range.

### **Orders by Order Count by Date Range**

This item reports on total orders placed within your selected date range.

### **Orders by Day**

This item reports on daily order number totals within your selected date range.

### **Orders by Month**

This item reports on monthly order totals within your selected date range.

### **RSS Feed**

This item displays any RSS feed accessible online, such as news, weather or financial reports. This is a new Winter '09 dashboard report feature.

## **Dashboard Item Settings**

All dashboard items except *RSS Feed* utilize the same configuration settings.

### **Report**

This setting allows you to choose which of the eight dashboard item types you'd like to display.

### **Date Range**

To report information based on a specific time period, choose an option from this drop-down menu.

### **Chart Type**

This setting offers data display options of bar graph, pie chart, or simple data chart, as well as chart size display options.

### **Compare to Previous**

This creates a dashboard report as a comparison between current results and prior results based on your selected date range.

## Column/Row

This setting allows you to define the location of your dashboard item on the dashboard page.

## Editing and Deleting Dashboard Items

Once you've created a dashboard item, you can edit it's settings simply by clicking *Edit* in the top right corner of the item. Here, you can make and save changes, or use *Delete* to remove the item from your dashboard.

### Items to Note

Volusion recommends that you configure your store only with the most important and useful dashboard widgets. While it can be convenient to have immediate reporting on every facet of your business, too dashboard widgets can reduce the overall performance of your store's admin area.



# Winter '09 Getting Started Checklist

The following checklist provides new merchants a prioritized store setup guide. Each step is categorized as required, recommended or optional.

## Step-by-Step Priority Key:

Steps	Required	Recommended	Optional
<b>Step 1: Store Settings</b>	<ul style="list-style-type: none"> <li>• Configure company settings</li> <li>• Activate shipping settings</li> <li>• Configure tax settings</li> <li>• Set payment methods</li> <li>• Payment gateway registration/configuration</li> <li>• Currency configuration</li> </ul>		
<b>Step 2: Email Settings</b>	<ul style="list-style-type: none"> <li>• Set up email accounts (whether with Volusion or a third party) and fill out email fields in Settings &gt;&gt; Company of your admin area</li> </ul>		<ul style="list-style-type: none"> <li>• FTP account setup</li> </ul>
<b>Step 3: Design</b>	<ul style="list-style-type: none"> <li>• Set up store logos</li> <li>• Choose a store template</li> </ul>	<ul style="list-style-type: none"> <li>• Update your site content with your company information</li> </ul>	
<b>Step 4: Categories, Products &amp; Options</b>	<ul style="list-style-type: none"> <li>• Create categories</li> <li>• Create products</li> <li>• Set up product options (if applicable)</li> </ul>		<ul style="list-style-type: none"> <li>• Importing and exporting</li> </ul>
<b>Step 5: Marketing</b>	<ul style="list-style-type: none"> <li>• Search engine optimization</li> </ul>	<ul style="list-style-type: none"> <li>• Create sales promotions/coupons</li> </ul>	<ul style="list-style-type: none"> <li>• Create email newsletters</li> <li>• Setup MyRewards</li> </ul>
<b>Step 6: Advanced Marketing</b>	<ul style="list-style-type: none"> <li>• Submit your sitemap to Google</li> </ul>	<ul style="list-style-type: none"> <li>• Market products with AdWords</li> <li>• Market via MySpace or Facebook</li> </ul>	<ul style="list-style-type: none"> <li>• Register with Google Base</li> <li>• Blog your store</li> <li>• Using your store's Affiliates system</li> </ul>
<b>Step 7: Placing Orders</b>	<ul style="list-style-type: none"> <li>• Placing orders on your store</li> </ul>		<ul style="list-style-type: none"> <li>• Set up the Point of Sale System/Place orders</li> </ul>
<b>Step 8: Reporting &amp; Analytics</b>		<ul style="list-style-type: none"> <li>• Sign up with Google Analytics</li> <li>• Register for a Google Webmaster Tools account</li> </ul>	<ul style="list-style-type: none"> <li>• Register with more advanced, paid analytics services</li> </ul>

Ready to get started? The following sections of this manual will describe each of the above steps in detail and help you establish a greater comfort level with the software.

## Step 1 - Store Settings

Before you can open your store, you'll first have to configure basic settings for company details, shipping, tax, payment methods, gateway, and currency.

### Configure Company Settings

The first important store setup step is to enter some basic information about your company and configure settings for automated functions such as order notification emails and shipping calculations.

### Company Page

In the admin area, click *Settings >> Company*.

The screenshot shows the 'Update Company Info' form within the Volusion admin interface. The top navigation bar includes 'Orders', 'Reports', 'Inventory', 'Marketing', 'Customers', 'Design', and 'Settings'. Below this, a sub-menu shows 'Company', 'Shipping', 'Tax', 'Payment', 'Currency', 'IP Firewall', 'Config Variables', 'Custom Fields', and 'Maintenance'. The 'Company' sub-menu is active, and the 'Update Company Info' form is displayed. The form contains the following fields:

- Company Name:** A text input field containing 'Retro Computer Warehouse' and a 'More' link with a plus icon.
- Company Address:** A text input field containing '1818 Mantooth Drive' and 'Wallah Wallah, WA 80109'.
- Email:** A text input field with a masked email address and a 'More' link with a plus icon.
- Domain Name:** A dropdown menu showing 'Domain Name <ttkxe.fmrln.servertrust.com>'.
- Time Zone:** A dropdown menu showing '(GMT-08:00) Pacific Time (US & Canada); Tijuana' and a checkbox for 'Automatically adjust clock for daylight savings changes' which is checked.

At the bottom of the form is a green 'Save' button. There is also a link for 'Edit Terms & Conditions' with a plus icon.

This page contains the following fields:

### Company Page

#### Company Name

Enter your company's name here (e.g. "My E-Store" or "Specialty Widgets Online"). This field defines the company name that appears on various documents generated by the Volusion software, including order confirmation emails and shipping notifications.

**Company Address**

For labeling purposes, enter your business location. Note that this field does not correspond to the shipping location settings defined on the in the Volusion Shipping page.

**Email**

Enter the primary email address you wish to use for contact with customers. Note that this entry populates to the Contact Us link on the storefront and appears in the “from” field of every email generated by the Volusion software.

**Domain Name**

This setting allows you to alternate between the store’s default Servertrust address and the domain name you specified on your order form. You won’t be able to use this option until your domain name has been forwarded to Volusion’s domain name servers. If you registered the name through Volusion, the name will be forwarded properly by default. If you registered the name through a third party service such as Go Daddy, you can learn more about additional configuration steps in the “Tips and Tricks” section of this manual.

**Time Zone**

From this menu, select the time zone in which your business operates. Once configured, all timestamp displays within your store will use this setting. You can also automatically adjust your store to observe daylight saving time.

## More Settings

You can access three additional settings areas from the *Company* page.

### Company Name - More

Below *Company Name*, click *More*. Here, you can use *Legal Company Name* to define an additional business name.

### Update Company Info

**Company Name** Retro Computer Warehouse

**More** ➔

**Legal Company Name** CNS Holdings LLC (ex.: My Company, Inc)

**Website Title** Retro Computer Warehouse (ex.: MyCompany.com)

**Company Address** 1818 Mantooth Drive

*Website Title* is important if you use plain text for your website logo because this entry appears on the storefront header unless you override it with a different entry in *Design >> Logos*.

## Email - More

Below *Email*, click *More*.

## Update Company Info

**Company Name**

[More](#)

**Company Address**

**Email**

[More](#)

Send Order Notifications To

(ex: fulfillment@mycompany.com)

CC Orders To

(ex: billing@mycompany.com)

Send Billing Emails From

(ex: billing@mycompany.com)

Send Affiliate Applications To

(ex: affiliates@mycompany.com)

**Domain Name**

**Time Zone**

☒ Automatically adjust clock for daylight savings changes
 
[Edit Terms & Conditions](#)

Save

Here, you can define roles for company email addresses in important automated software functions:

## Additional Settings

**Send Order Notifications To** This field allows you to specify the email address that receives all notifications when new orders are generated.

**CC Orders To** This field allows you to specify a secondary email address for order notifications.

**Send Billing Emails From** This field allows you to specify the email address that receives all declined payment notifications when using the recurring billing feature.

**Send Affiliate Applications To** When a customer clicks the storefront link to become an affiliate, the software generates an email notification. This field allows you to specify which address receives those notifications.

## Edit Terms & Conditions

When visitors sign up for a customer account on your store, the software displays a basic set of legal terms and conditions governing use of their account. This link gives you access to review and edit that text. Note that the text contains some programming variables such as `$(ComapnyNameLegal` that allow the software to automatically populate entries from the *Company* page settings when displaying the terms to the customer. We don't recommend removing or modifying these variables.

## Update Company Info

Company Name

[More](#)

Company Address

Email

[More](#)

Domain Name

Time Zone

☒ Automatically adjust clock for daylight savings changes

[Edit Terms & Conditions](#)

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## Activate Shipping Settings

Shipping is a vital element of ecommerce. You won't be ready to fulfill orders until you've configured store shipping options.

## The Shipping Wizard

This section of the manual discusses the basics of the Volusion shipping wizard. The more advanced settings within the shipping configuration will be discussed in a later section.

- Log in to your admin area and click *Settings >> Shipping*.



## Manage Shipping Details

 This is a screenshot of the 'Manage Shipping Details' page. It is divided into several sections:
 

- Ship To Countries:** Contains two lists. 'Active Countries' lists Canada, United Kingdom, and United States. 'Inactive Countries' lists a longer list including Algeria, American Samoa, Andorra, Angola, Anguilla, Antigua & Barbuda, Argentina, Armenia, Aruba, and Australia. There are arrows between the lists to move items. Links for 'Edit Countries' and 'Edit States' are on the right.
- Shipping Origin:** A form with fields for Name (Computers N Stuff), Company Name (CNS Holdings LLC), Address 1 (8919 Riverside Dr), Address 2 (Building 120), Country (United States), State / Province (CA), City (Los Angeles), Zip / Postal Code (90102), and Phone Number (310-999-6666). There is a checkbox 'Use a different origin for calculating shipping rates.' with a plus icon.
- Choose Carrier:** A row of buttons for UPS, FEDEX, FEDXG, USPS, DHL, CANADAPOST, AUSTRALIAPOST, and ROYALMAIL. The 'UPS' button is selected and highlighted.
- UPS Section:** Below the carrier selection, there is a UPS logo, a link 'Show registration information', and four checked checkboxes: 'UPS Next Day Air Early A.M.', 'UPS Next Day Air', 'UPS Next Day Air Saver', and 'UPS 2nd Day Air A.M.'.

- Here, you can configure your basic shipping settings using the form fields provided. This page is divided into several sections:

## Ship to Countries

### Manage Shipping Details

 This is a partial screenshot of the 'Manage Shipping Details' page, focusing on the 'Ship To Countries' section. It shows the 'Active Countries' list with Canada, United Kingdom, and United States, and the 'Inactive Countries' list with a longer list of countries. There are arrows between the lists and links for 'Edit Countries' and 'Edit States' on the right. The 'Shipping Origin' section is partially visible at the bottom.



- Select all countries and regions you'd like to ship to.
- Most countries are already configured. Simply highlight a country in the *Inactive Countries* list and click the left arrow button to populate it over to the *Active Countries* list, then click **Save** at the bottom.
- Note that to ship to an entire country, there is no need to add that country's states/provinces to the active list, as the country name will suffice.
- To add or modify your store's internal list of countries or states/provinces, use the *Edit Countries* and *Edit States* links to the right.

## Shipping Origin

**Shipping Origin**

Name	Computers N Stuff	<input type="checkbox"/> Use a different origin for calculating shipping rates.
Company Name	CNS Holdings LLC	
Address 1	8919 Riverside Dr	
Address 2	Building 120	
Country	United States	
State / Province	CA	
City	Los Angeles	
Zip / Postal Code	90102	
Phone Number	310-999-6666	

**Shipping Center**

- Enter the physical location and contact information of your business.
- You must enter a valid shipping address in this field. The information entered here is used to calculate live rates for shipping providers with which you've registered.
- If you're shipping from a remote warehouse or using a third party fulfillment/shipping service, click the *Use a different origin for calculating shipping rates* checkbox after filling out your shipping origin fields. Then, enter the shipping information of your warehouse or fulfillment center in the yellow section. This allows you to retain proper shipping rate calculation without defining the warehouse or fulfillment center as the primary location of your business.

## Choose Carriers

Choose Carrier  
[Edit All](#)

UPS

FEDEX

FEDXG


USPS

DHL

CANADAPOST

AUSTRALIAPOST

ROYALMAIL


[Show registration information](#)

☒ UPS Next Day Air Early A.M.
 ☒ UPS Next Day Air
 ☒ UPS Next Day Air Saver
 ☒ UPS 2nd Day Air A.M.
 ☒ UPS 2nd Day Air
 ☒ UPS 3 Day Select
 ☒ UPS Ground
 ☒ UPS Standard
 ☒ UPS Worldwide Express
 ☒ UPS Worldwide Express Plus
 ☒ UPS Worldwide Expedited
 ☒ UPS World Wide Saver

[Verify Settings Match Default](#)  
[More Shipping Settings](#)  
[Test Shipping Rates](#)

Save

- The tabs across the top of this section represent the carriers with which Volusion has integrations.
- After selecting a tab, check any shipping methods you wish to provide to your customers.
- Click *Edit All* to alter any shipping method. This is useful when you want to set a minimum and maximum order price or order weight for a specific shipping method, or to

selectively apply a method to certain countries or states/provinces.

The screenshot shows the 'Shipping Methods' configuration page in Volusion. The top navigation bar includes 'Orders', 'Reports', 'Inventory', 'Marketing', 'Customers', 'Design', and 'Settings'. Below this is a sub-navigation bar with 'Company', 'Shipping', 'Tax', 'Payment', 'Currency', 'IP Firewall', 'Config Variables', 'Custom Fields', and 'Maintenance'. The main heading is 'Shipping Methods | 101'. There are buttons for 'Search', 'Add', and 'Delete', along with 'Back to List' and 'Expand All | Collapse All' links.

The 'Details' section contains the following fields:

- ID: 101
- System: LIVE
- Gateway: UPS
- Service Code: 14 (Must be spelled EXACT)
- Shipping Method Name: UPS Next Day Air Early A.M.
- Shipping Order By: A08
- Shipping Method Active: ☒

The 'Apply this Shipping Method to' section has a checkbox for 'Apply To All Countries And States' which is currently unchecked. Below this are two lists:

- Apply To Entire Countries:** Canada (37), United States (234). A 'Click To Edit' button is next to the list.
- Apply To States / Provinces:** Canada > NUNAVUT (63). A 'Click To Edit' button is next to the list.

The 'However, Do Not Apply To' section has a checkbox for 'DO NOT Apply To Entire Countries' which is currently unchecked. Below this is a list: Andorra (4), Belarus (19). A 'Click To Edit' button is next to the list.

- Several carriers provide live rate registration. You can register with these services to receive live shipping rates from your preferred carriers by clicking *Show registration information* within that carrier's tab and following the instructions provided.

### Note to Royal Mail Users

Volusion provides live rate integration for Royal Mail through Parcel Force. No API registration is required for Royal Mail users. Simply enable any of the available Royal Mail shipping methods on this page to engage live rate integration with Royal Mail.

## More Settings & Rate Testing

*More Shipping Settings* allows you to configure global settings for your shipping rates calculations, such as applying tax to all shipping.

[More Shipping Settings](#)

☒ Apply Tax to Shipping  
☒ Extra Shipping Cost  
 Add Fixed Amount  Add Percent

☒ Enable Free Shipping  
 Free Shipping Qualify Price

Weight Units  Add Extra Shipping Weight

☒ Display Estimated Shipping on the Shopping Cart ☒ Insure all Packages

Shipping Rates Address Type

Use Delivery Confirmation

[Test Shipping Rates](#)

[Save](#)

You can also test your shipping settings by clicking *Test Shipping Rates*.

[Test Shipping Rates](#)

Enter a shipping origin and destination to test rates. *(This information will not be saved)*

From:  [Edit Warehouses](#)  
 Country   
 State   
 Postal Code

To:  [Edit Your Addresses](#)  
 Country   
 State   
 Postal Code   
 Residential ☒  
 Test Order Cost   
 Test Order Weight   
 Free Ship Item ☐

[Run Test](#)

[Save](#)

## Configure Tax Settings

Depending on your location, you may be required to charge your customers certain taxes on goods and services. Whether this is state sales tax, consumption tax, or VAT, you can configure your store to automatically process tax charges for various regions and locales. This article will guide you through configuring tax settings in Winter '09 and show you other tax-related functions featured in the Volusion system.

## Using the Volusion Tax Settings Page

The Volusion tax wizard makes configuration of the basic elements of your tax settings simple. In your admin area, click *Settings* >> *Tax*.

Are you based in the United States?: ☒ Yes ☐ No

**Tax Settings** [Add](#) Results 1 - 1 of 1 Page 1 of 1 [Advanced Edit](#)

Country	State / Province	Postal Code	Tax Rate	
<a href="#">Edit</a> United States	CA		8.3%	<a href="#">Edit</a>

- Within the wizard, you'll see a tax table that contains current tax rules for your store.
- Click *Edit* next to any tax rule to alter it, or click *Add* near the top of the table to add a new rule.
- You can also specify whether or not you are based in the United States using the radio option at the top of the wizard.

## For US Based Merchants

- Your store's tax rate is set to the state of California by default.
- If you wish to charge tax to customers in other states, click *Add* to add new tax rates or *Edit* to change the existing record.
- You can enter a 5-digit zip code to apply the tax setting to a specific area within the state.

- Enter a name for your tax rate in the *Base Tax Title* field and enter a numeric value into the accompanying rate text box to define your tax rate. For example, enter 7.85 into this field if your region's sales tax rate is 7.85%.
- Click **Save** when finished.

## For non-US Based Merchants

- Note that the *Tax* page is configured for a store based in the United States by default. If your store isn't based in the United States, click *No* on the *Are you based in the United States?* option.

### Update Tax Settings

Are you based in the United States?: ☐ Yes ☒ No

Disable VAT **Save**

**Tax Settings** [Add](#) Results 1 - 1 of 1 Page 1 of 1 [Advanced Edit](#)

Country	State / Province	Postal Code	Tax Rate	
<a href="#">Edit</a> United States	CA		8.35%	<a href="#">Edit</a>

- You'll notice a new dropdown menu within the wizard to configure storefront display types for VAT and GST taxes. These tax types are applicable to some countries such as the UK, Canada and Australia. You can also access these options by clicking *Advanced Edit >> Settings*.
- Click *Add* to open a new section below the *Tax Settings* section. Here, set the *Region Country* to which you'd like to apply the tax and choose the state/province. Set the *Base Tax Title* (the name of the tax as it displays to your customers) and the actual rate of the tax charged.
- If you've enabled VAT or GST taxes, you'll also have a *Second Tax Title* field. You can configure these settings to govern how VAT or other taxes behave. We'll discuss this in more detail later in the manual.
- Click **Save** to apply your settings.

- If you need to further configure your store's tax rates or charge tax for multiple regions, postal codes or states/provinces, click *Add* to continue with configuration.

Note that, for every region or location for which you want to collect tax, you'll have to create an individual rule. Fortunately, Volusion sets no limit on the number of tax rules you can configure. This means the system can support a multitude of tax requirements.

## Importing Tax Settings

If your store requires many different tax rules, you can use *Settings >> Import/Export* to add them quickly to your tax table.

To begin, make sure at least one entry exists in your tax table and use the export wizard to export your store's tax table to a CSV file. You can then edit this file within the spreadsheet application of your choice, such as Microsoft Excel.

You can quickly modify the exported CSV file to include additional tax rules. When finished, save your file, then use the *Import Wizard* to update your store's tax table.

There are several additional tax settings you may need to become familiar with, especially if you plan to sell tax-exempt products or make other special tax arrangements and exceptions. For information on the complete list of tax settings, check out the "Tax" chapter of the "Advanced Settings" section of this manual.

## Set Payment Types

Before opening your store to customers, you'll need to configure your payment settings, including which payment methods you plan to accept and how you plan to process them.

Click *Settings >> Payment* in your admin area.

**Accepted Payment**  
[Edit All](#)

☐ Other
 ☒
☐ PayPal
 ☐

☐
☒
☒
☒ Check by Mail

☒ Electronic Check
 ☒ Purchase Order Number

**Payment Gateways**

For an all-in-one low cost merchant account/gateway solution try [Volusion Merchant Services](#)

[View this section as the Merchant would see it](#)

Merchant Gateway Country  
 United States

Merchant Gateway Name  
 Volusion Merchant Services [SKIPJACK]

Skipjack HTML serial number

Skipjack developer serial number

**Electronic Checks**  
 Gateway Name

**Credit Card Storage Policies:** ☒ Use most secure settings

☒ **Authorize at Sale, Capture at Shipping** (Safe & Most Reliable. Recommended!)  
 NOTE: Not all gateways support the ability to "Authorize". [For a credit card processing solution, visit the Volusion Merchant Services page](#)

☐ **Authorize and Capture at Sale**  
 The drawback to this selection is that some regulations recommend that you do not capture funds until shortly before

This page is divided into three major sections: *Accepted Payment*, *Gateways* and *Credit Card Storage Policies*. More advanced settings will be discussed in the “Advanced Features” and “Tips and Tricks” sections of this manual.

## Configuring Payment Methods

Under the *Accepted Payment* heading, simply click the checkbox next to your preferred payment method(s) to enable that option for your customers and click **Save** at the bottom.



## Update Payment Settings

The *Other* option un-hides additional options.

### Items to Note

Most electronic payment gateways support all major card types, but we recommend contacting your payment gateway provider for confirmation. If you select PayPal as a payment type, you'll need to enter the email address registered with your PayPal account into the *PayPal Email Address* field.

## Payment Gateway Registration

Your first major store operations decision will be which electronic payment gateway to use for processing credit and debit cards. Ideally, you'll want a payment gateway that operates in the same region as your business, provides many features (e.g. authorizing, capturing, crediting and voiding payments) and is known for functional stability.

For US-based merchants, Volusion Merchant Services provides a full-featured, stable and affordable payment acceptance platform with the Skipjack gateway. Click the link in the *Payment Gateways* section to learn more, or visit [this page](#).

For merchants based outside the US, or US merchants who wish to use a different payment gateway, there are many options available. Please review the following link for more information on [all supported gateways](#)

For further questions or concerns regarding payment gateway integration, contact Volusion Technical Support.

## Gateway Configuration

Once you've decided which payment gateway to use, configuration is simple:

- In the admin area, click *Settings >> Payment*.
- Under the *Payment Gateways* heading, select which country your business is based in from the *Merchant Gateway Country* dropdown menu.

**Payment Gateways** For an all-in-one low cost merchant account/gateway solution try [Volusion Merchant Services](#)

Merchant Gateway Country  
United States

Merchant Gateway Name  
Volusion Merchant Services [SKIPJACK]

Skipjack HTML serial number

Skipjack developer serial number

- Select the gateway from the *Merchant Gateway Name* menu. Note that this menu will only display gateways associated with the country chosen in the previous dropdown menu. For US merchants not using Volusion Merchant Services, choose *Other*.
- Selection-specific fields will appear. You will obtain this information from your gateway provider after registration. Please see this [article](#) for specifics about individual supported gateway.
- Click **Save** at the bottom.

If you choose to offer electronic checks as a payment method, choose your provider from the *Electronic Checks Gateway Name* list. Once you make your selection, the relevant integration fields will appear. Make sure to enable *Electronic Check* in the *Accepted Payment* section above.

**Electronic Checks Gateway Name** Authorize.Net eCheck [ECHECK]

Authorize.Net API ID

Authorize.Net Transaction Key

## Credit Card Storage Policies

Volusion is a fully PCI Complaint ecommerce platform. Online data security has become an industry essential that Volusion takes very seriously. That's why each of our stores comes pre-configured with the highest level of PCI security and compliance standards. These standards

and best practices are set forth by the [Payment Card Industry Security Consortium](#). Your store's method of authorizing, capturing and storing credit card data is already pre-configured based on these guidelines. As such, the majority of Winter '09 merchants won't have to adjust these settings. They are available to you, however, in the event that your business model or payment gateway provider requires adjustment. If you uncheck *Use most secure settings*, you'll have even more options

**Credit Card**  
**Storage Policies:** ☐ Use most secure settings

Authorize	Capture	Ship	Never
Delete card data after the card has been authorized. For most gateways, you may still capture, void & credit without the credit / debit card number, so there is no need to keep it beyond the authorization. <b>(Recommended!)</b>	Delete card data after the funds have been captured or debited.	Keep credit / debit card data until I mark the order as "Shipped".	Keep credit / debit card data until the "Maximum Days" specified below.
<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

When should credit / debit card data be deleted? Choose:

Keep payment information for maximum of  days.

(If you set this number of days to more than 14 days, the customer will be given the option to "Keep my payment method on file for easy checkout on future orders.". If you set this value to 0, please note that credit / debit card data is still collected and stored temporarily in the database during the checkout process from the point the card is entered until the order is placed. If the checkout is abandoned, the card data will be deleted within 24-48 hours.)

☒ **Authorize at Sale, Capture at Shipping** (Safe & Most Reliable. Recommended!)

NOTE: Not all gateways support the ability to "Authorize". [For a credit card processing solution, visit the Volusion Merchant Services page](#)

☐ **Authorize and Capture at Sale**

The drawback to this selection is that some regulations recommend that you do not capture funds until shortly before you actually ship the merchandise.

☐ **I'll Do Everything at Shipping**

The drawback to this selection is that you end up storing credit / debit card data longer than the above choice since all data needs to be stored until you decide to charge the card. Also this is the only selection (of the 3 choices) in which you cannot accept CVV2 data (which is not required, but helps against fraud).

For in-depth information on this portion of Winter '09, please see the "Advanced Settings" portion of this manual, which will be up upon general release of Winter '09

## Currency Settings

Volusion stores come configured to display prices in US dollars by default, but if you need to accept other forms of currency based on your business location or the scope of your customer base, you can set up additional currencies by clicking *Settings >> Currency* in your admin area.

**Update Currency Settings**

**Settings** [Add](#) [Advanced Edit](#)

	Name	Symbol	Exchange Rate	Default	
<a href="#">Edit</a>	Dollar	\$	1	Y	<a href="#">x</a>

## Configuring the Currency Wizard

- Click *Edit* next to the default table entry, or *Add* to create a new one.

### Update Currency Settings

**Settings** [Add](#) [Advanced Edit](#)

	Name	Symbol	Exchange Rate	Default	
<a href="#">Edit</a>	Dollar	\$	1	Y	<a href="#">x</a>

**Add**

Currency Name

Currency Symbol

Exchange Rate  to 1

Default? ☐

Paypal Currency Code

[Save](#) [Cancel](#)

- In *Currency Name*, enter the currency name as you would like it to display for customers.
- In *Currency Symbol*, enter the text character that displays next to your pricing (e.g. “£” for GBP).
- In *Exchange Rate*, set the numeric value of the currency unit as it compares to the US Dollar (e.g. if the British Pound is currently worth \$1.60, simply enter 1.6 this field).
- Check *Default?* to make this currency the default currency for your store.
- Click *Save* to apply your entry.

## Configuring Multiple Currencies

Configuring multiple currencies within Volusion is easy; just repeat the above steps to add another currency type. Note that Volusion can display multiple currency types, but the cart will only collect payment in the default currency type.

### Example

If you're a merchant based in the United Kingdom and you sell both domestically and to other parts of Europe, you can enable British Pounds as the primary currency, but also display prices in Euros. To configure Winter '09 for this scenario or for another like it, please see the "Advanced Settings" portion of this manual.

## Step 2 - Email & FTP Setup

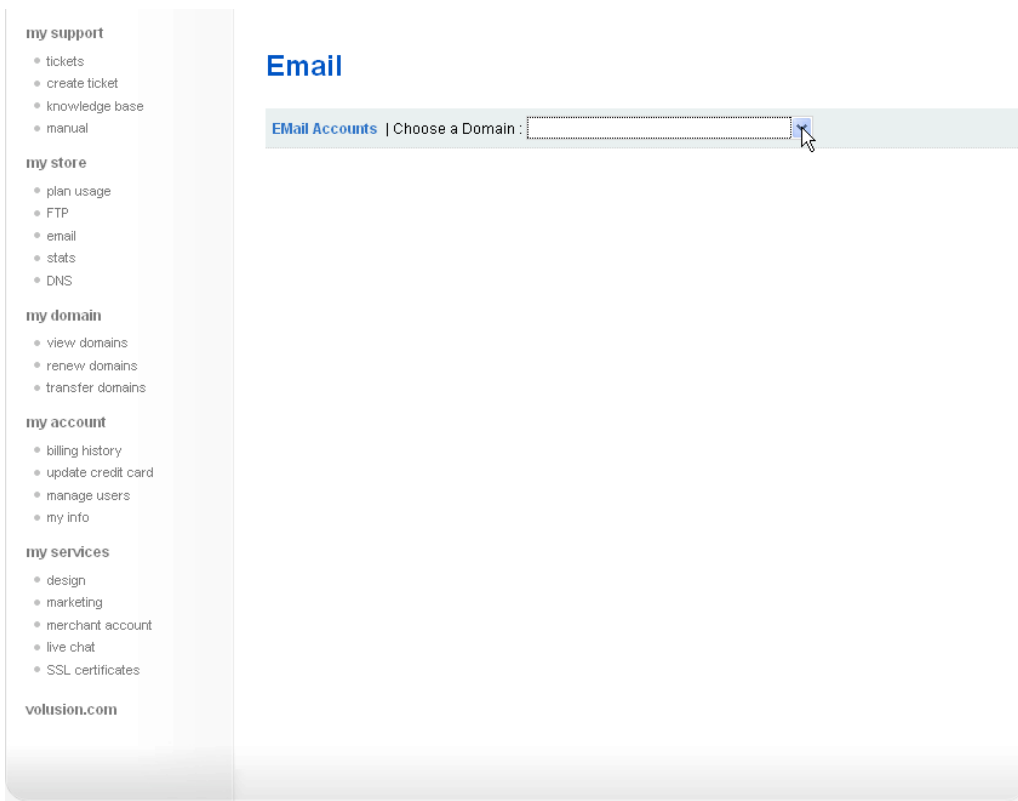
All Volusion hosting plans come with email hosting that'll enable you to establish professional-looking contact addresses such as sales@yourdomain.com, and FTP accounts that'll allow you to transfer store files from the server to your hard drive for editing, then back to the server again.

### Email Account Setup

Volusion can only host your email if your store is on a root domain, such as www.yourdomain.com. If you use a sub-domain such as store.yourdomain.com, you'll have to contact the company that controls your domain name to set up email hosting.

To create an email account:

- Log in at Click *Email* under the *My Store* heading on the left.



- Select your store's domain name from the dropdown menu.
- Click *Add* next to *Mailboxes*.
- In the *Username* field, enter the name for the email account (e.g. sales, returns, orders, help, etc.).
- Fill out the remaining form fields.
- Check the *Active* box and click *Create*.

-

If you purchased your domain name from a third party, you'll need to point your domain to Volusion's domain name servers before you can use this tool to create a valid email account. To read more on this topic, [click here](#).

You can create as many email addresses as your Volusion plan allows. You can also create a number of aliases, which are addresses that redirect to other email accounts. These limits will be listed within your email account settings at <http://my.volusion.com>.

## Logging in to Your Email Account

You can access your Volusion-hosted email accounts online through a web browser, or through a third party POP email client such as Microsoft Outlook, Outlook Express or Apple Mail.

To log in to your email account online:

- Open your browser to **mail.yourdomain.com** (insert your actual domain name in the middle portion).
- When prompted, enter your email address in the *Username* field.

**volusion® WebMail**

email:

password:

**Log In**

☐ Remember Name & Password

**Volusion is Upgrading Your Email Service!**  
And we're increasing storage up to 500MB per email address!

Volusion is partnering with industry leading Rackspace Email to provide improved email service. This upgrade will improve overall service and additional increase your mailbox limit from up to 100MB per account to up to 500MB per email address!

[Learn More](#)

**Email Software Instructions**

[Email Software POP Instructions](#) [Email Software IMAP Instructions](#)

**Additional Articles:**

[Email Upgrade Details](#)

[Email Upgrade FAQ](#)

[Importing Contact List Instructions](#)

[Change Your Email Software Settings \(POP/IMAP\)](#)

[See the New Webmail Interface](#)

[Change Your Email Password](#)

[Recover Your Forgotten Email Password](#)

[Create a Catch All Email](#)

**Common Questions:**

[When will my email be upgraded?](#) You will receive an email with the upgrade date for your account.

[Will my login still be the same?](#) Your password will be automatically reset for security reasons. Your new password will be emailed to you in advance of your upgrade date.

[Do I have to do anything for the upgrade?](#) If you use Outlook or other email software programs, you will need to update your POP/IMAP settings. Please follow these [detailed instructions](#).

[Will my email be down or inaccessible during this time?](#) We do not expect any downtime for your email service.

[Will I receive emails during the upgrade?](#) You will continue to receive emails as usual.

[What do I do if I'm using Outlook \(or other email software programs\) or a mobile phone for email access?](#) Please update your POP/IMAP settings by following these [detailed instructions](#).

- Enter your account's password and click *Login*.
- Here, you can read, reply to, and compose new messages just as with any web-based email system such as Hotmail, Gmail or Yahoo.

You can also arrive here by clicking *Go To Webmail* in the email setup portion of my.volusion.com.



**my support**

- tickets
- create ticket
- knowledge base
- manual

**my store**

- plan usage
- FTP
- email
- stats
- DNS

**my domain**

- view domains
- renew domains
- transfer domains

**my account**

- billing history
- update credit card
- manage users
- my info

**my services**

- design
- marketing
- merchant account
- live chat
- SSL certificates

volusion.com

## Email

[Email Accounts](#) | Choose a Domain :  [Go to Webmail](#)

### Mailboxes [Add](#)

4 out of 20 [Need More?](#)

Email	First Name	Last Name	Active?		
			✓		
			✓		
			✓		
			✓		

[Advanced Settings](#)

### Aliases [Add](#)

Email  To:

You currently have no aliases set up. Click "Add" to add a new alias.

[Advanced Settings](#)

### Support

[Change Outlook Settings](#)
[Create A Catch All Email](#)
[Webmail Help](#)
[Advanced Settings](#)
[Help](#)

## Sending & Receiving POP Email

There are many POP (Post Office Protocol) email clients available for a variety of computing platforms. This portion of the manual covers the necessary steps to configure your Volusion email account for use with Microsoft Outlook 2003. Note that while these instructions are specific to a particular POP program, the POP configuration required to access to your Volusion email account will be the same regardless of which email client you use.

After launching Microsoft Outlook, click *Tools* in the program menu bar.

- Click *Email Accounts*.
- Select *Add a new email account* and click *Next*.
- Select *POP3* and click *Next*.
- In *User Information*, enter your name and you Volusion email address into the form fields.
- Under the *Logon Information* area, use your email address as your username, enter your password and select *Remember Password*.

- For Server Information, enter “pop.emailsrvr.com” in the Incoming Mail Server field.
- Enter “smtp.emailsrvr.com” in the Outgoing Mail Server field.
- Click More Settings.
- Select Outgoing Server in the popup and check My Outgoing server (SMTP) requires authentication.
- Be sure that the settings in this tab are configured to Use same settings as my incoming mail server.
- Click Advanced and make sure that your Outlook account's incoming and outgoing email port settings are configured to 110 and 25 respectively.
- Click Ok (this closes the More Settings popup) and then click Next to finish. Click Advanced and make sure that your Outlook account's incoming and outgoing email port settings are configured to 110 and 25, respectively.

When configuring your outgoing (SMTP) email settings, please keep in mind that many ISPs (Internet Service Providers) actively monitor and detain any SMTP traffic that originates from any third party SMTP server (e.g. your Volusion email account's sending mail server). Many ISPs do this to monitor and maintain control over email sent over their networks.

When using your Volusion account's SMTP settings, this may cause your email sent via POP to be delayed. If you experience such a delay, we recommend you replace the above outgoing server name and port with one provided by your ISP. Note that you will also be required to enter the password for your ISP's email system into the outgoing mail authentication settings under Outgoing Server.

#### **Items to Note**

For those who wish to host their store's email account(s) outside of the Volusion email system, this option is available, but does require extra setup. Simply send a ticket to Volusion support from <http://my.volusion.com> requesting to have your email hosted through a third party. You'll need to provide us with the MX records for your third party email host. Please allow at least 1 business day for your request to be processed.

You can also point your own MX records inside [my.volusion.com](http://my.volusion.com) through the DNS section (under the My Store heading on the left). Knowledge of DNS is required to update the records.

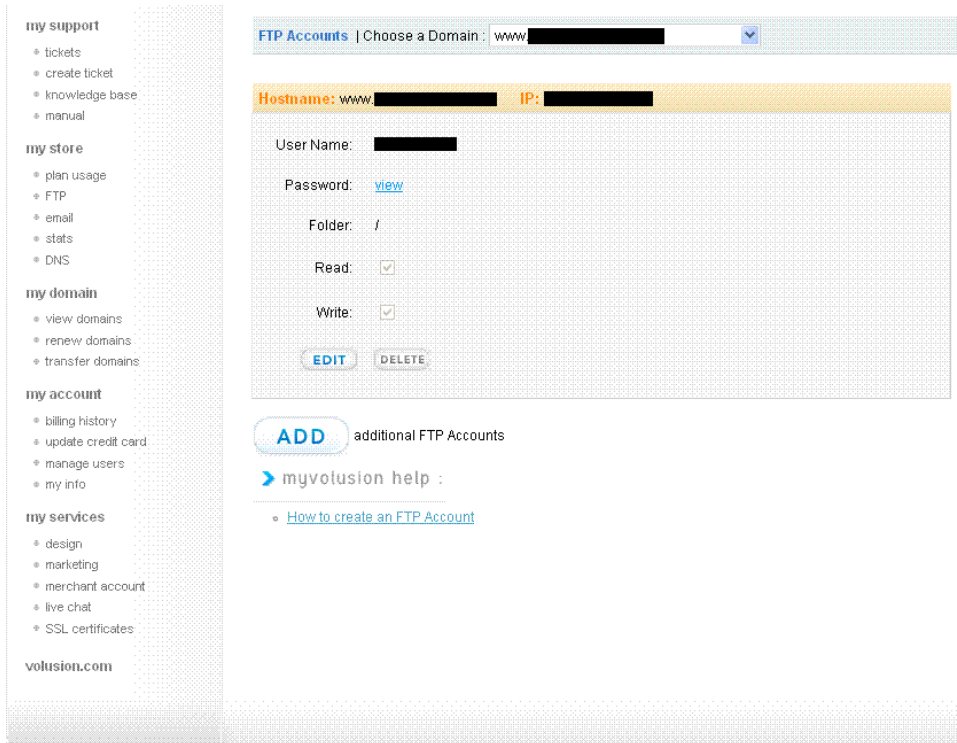
## FTP Account Setup

FTP stands for File Transfer Protocol, a common method used to transfer files from one computer system to another.

FTP access isn't required for store setup or administration, but it can be very helpful because it allows you to upload large numbers of files to your store. It also gives you access to template files and images for editing. For web designers who wish to modify a store's look and feel, FTP access is necessary.

Creating an FTP account is very similar to creating an email account:

- Log in [my.volusion.com](http://my.volusion.com).
- Click FTP under My Store.
- Choose your store's domain name from the list at the top of the page.
- Click Add.
- The system will automatically generate an FTP account name and password.
- You can edit these fields as you wish. Note that they must contain at least eight characters each, as well as a mixture of upper case and lower case letters, and at least one number.
- You can assign read and/or write access to the FTP account. For the purpose of using this account with a website editor such as Dreamweaver, both read and write access must be enabled.
- Click Save to create the account.



## Logging in to Your FTP Account

You can access your FTP account through numerous FTP client programs, such as FileZilla, CuteFTP, Fetch (for Mac) or even through design programs such as Adobe's Dreamweaver web design software.

To access your Volusion store through an FTP program, you'll need the following information:

- Your FTP address (e.g. <ftp.mysuperwidgetstore.com>)
- Your FTP account username
- Your FTP account password
- The FTP server port number (this should be set to 21).

Upon logging in, you'll have access to your store's files and directories within the "/v/vspfiles/" heading.

Please note that there are numerous FTP applications available for both PC and Macintosh platforms. Unfortunately we cannot cover login instructions for all programs in this manual. Please see the Volusion Knowledge Base for further information [here](#).

## Step 3 - Design

Customizing your store's look and feel is a key component to standing out from your competition. This section of the manual will cover two major design topics: choosing a store template and configuring your logo.

Many other design functions and features will be covered in detail in the "Advanced Settings" section of this manual.

### Store Template

An online store's look and feel influences a visitor's initial impression of its professionalism and competency. A well-designed store reassures visitors and helps convert them from browsers into customers. The most important visual aspect of the store is the template: the navigational framing device that remains constant throughout most pages of the website.

### Choosing a Template

Choosing a look and feel for your store is a major decision. We've provided the design wizard to make this process as smooth and fluid as possible. In the admin area, click Design >>Template.



Here, you'll see a *My Templates* tab. By default, a few templates are displayed in this area for you to try. Simply click on the template name to preview a thumbnail of the template on the left side.

## Previewing a Template

You can preview the selected template prior to applying it to your storefront. Click *Preview* to open a new browser window with the selected template applied to your storefront. Note that the save you are currently viewing is not yet saved.



## Publishing a Template

Once you've selected your template, simply click the thumbnail in *My Templates* and click *Publish*. After a few seconds, your new template will be applied to your store.

## Downloading More Templates

There are many more options for you to choose from besides the defaults. Click *Free Templates* to browse through the gallery, using the *Next* and *Prev* buttons. Note that some templates have color swatches to allow you to preview color variations.

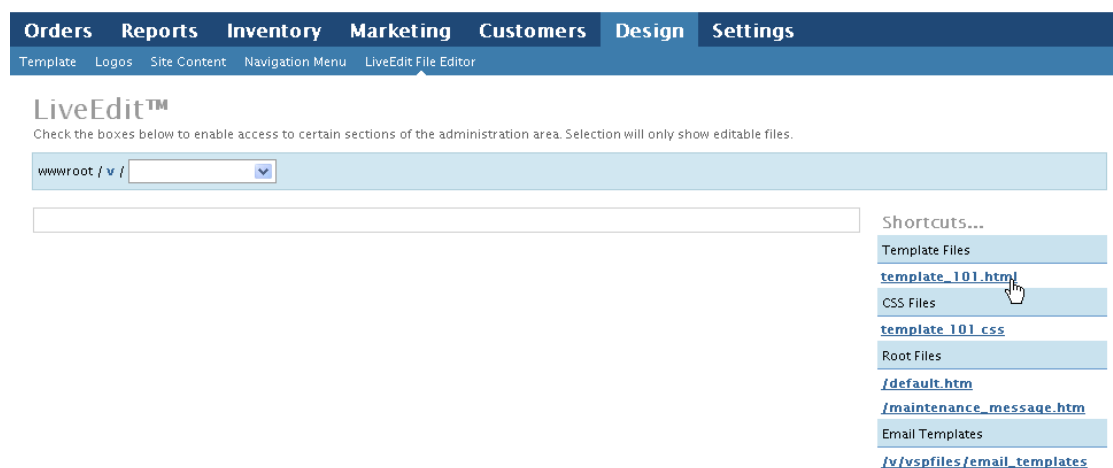
To download a new template to *My Templates*, click *Install*. From here, you can choose the new template, preview it or publish it to your store.

## A Note on Custom Designs

If you have a specific design in mind, or if you'd like a professional designer to create one for you from scratch, check out Volusion's custom design services at <http://www.volusion.com/web-design-pricing.asp>.

## Accessing the Winter '09 Templates

Winter '09 allows you direct access to template files through the admin area or through FTP. To access templates through the admin area, click *Design >> LiveEdit File Editor*. Here, you'll see *Shortcut* files on the right side that link to your template files.



The names correspond to the name of the template installed in the design wizard. The “template\_XX.html” file contains programming for the template’s header, footer and navigation. The “template\_XX.css” file contains template CSS, which primarily allows you to modify the look of the text.

To access template files through FTP, review the “Email & FTP Setup” portion of this manual. For more advanced template features, check out our online training video.



## More Template Options

Besides our free templates, Volusion also offers a selection of premium design templates you can purchase directly online at [http://www.volusion.com/web\\_design.asp](http://www.volusion.com/web_design.asp)

Just as an overall site design can define an entire user experience to your visitors, your logo is equally as important. It represents your company and is a vital part of your brand.

Winter '09 makes it easy to add custom website logos to your store header, emails and invoices. To add logos, click *Design >> Logos* in the admin area.

From here, you can create a simple text logo, upload a graphical logo and even upload an image for your emails and invoices.

## Adding a Store Logo

You can use either a text-based or an image-based logo for your store. By default, the store is configured to use a text-based logo in the header of the storefront.

- On the *Logos* page, select the *Text* option under *Logo Type*.
- Enter the exact text you'd like to display as the logo.

- Click **Save** to apply.

### Items to Note

By default, the text logo size, font and color are determined by the store template's style properties. You can modify these in the template's CSS file.

To add a graphic logo:

- In the *Logos* page, select the *Graphic* option under *Logo Type*.

- Enter the path to the graphic file on your local hard drive, or click *Browse* to locate it.
- Click **Save** to apply.

### Items to Note

Volusion only supports .GIF and .JPG image formats for use as website logos. Any other image format (e.g. .BMP, .PNG, .TIF) aren't supported.

## A Note on Graphic Logo Sizes

Consider the size of your graphic logo carefully. A prominent, bold logo can instantly capture your visitors' attention, but the wrong logo size can cause a negative impression. For each Volusion template, suggested sizes are provided for the logo graphic.

Below the current *Website Title* and *Website Heading Logo* preview images, you'll see a recommended size displayed (in pixels). For example, a recommended graphic size of 800x150 is 800 pixels wide by 150 pixels high. If your logo doesn't match these dimensions, you can change them with a graphic editing program like Adobe Photoshop, Picasa or Corel Paint.

## Adding an Email / Invoice Logo

Adding a logo to automatically-generated order invoices and emails is as simple as adding a logo to the store header. By default, if you chose to add a text-based logo to your site, your logo will automatically be added to your invoices and emails as well.

To add a graphic logo to your invoices and emails, simply enter the path to the image file on your local hard drive or locate the file by clicking *Browse*. Then, click *Save* to apply the graphic.

### Items to Note

To use a graphic logo on store invoices and emails, you must enable the *Graphic* option within the *Logo Type* setting of the *Logos* page. Furthermore, all invoice logos must be of .GIF file format and can be of any size.

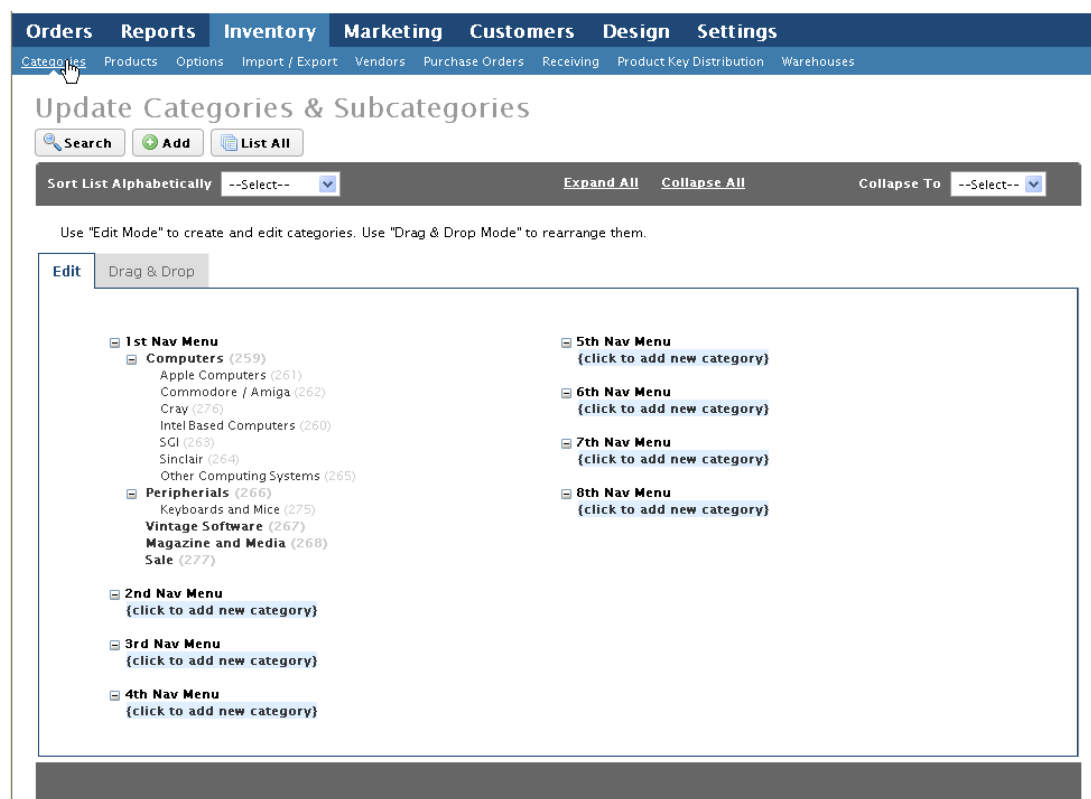
## Step 4 - Categories, Products & Options

Categories and products are the core elements of any online store. This section of the manual will cover how to create records for these elements, as well as options for products that require them.

### Create Categories

Categories organize your store into distinct product groupings. They generally make up the navigation menu of a website — located either on the top or the left side of the storefront. The purpose of this menu is to help your customers navigate to their desired destination with ease. For example, if you're operating a clothing website, categories could include "Shirts", "Pants", "Skirts", "Shoes" and so forth.

In the admin area, click on *Inventory >> Categories*.



This page defaults to *Edit* mode. You can also switch to *Drag & Drop* mode by clicking the tab at the top.

## Using Edit Mode

In *Edit* mode, the categories list is divided into navigation menu elements. Winter '09 supports up to eight navigational menu elements that you can configure with any number of categories and subcategories.

## Creating a New Category

In Edit mode, any navigation menu element without categories is an empty navigation menu (nav menu). In these cases, the Click to add new category option is visible. To add a category to any empty nav menu:

- Press the Click here to add new category option.
- New Category will appear in the empty nav menu, along with its automatically generated category ID number.
- Mouse over New Category. This will reveal a menu with the following options:



- 
- *Advanced View*
  - *Add New Category*
  - *Add New Subcategory*

- When you click New Category, a text box appears. Enter the category name.
- Click Save to update.

2nd Nav Menu

New Name

Save Cancel Delete Expand

3rd Nav Menu  
{click to add new category}

4th Nav Menu  
{click to add new category}

- On top of the page, you'll see *when you're done making changes to your categories on this page click here to publish.*

Orders Reports Inventory Marketing Customers Design Settings

Categories Products Options Import / Export Vendors Purchase Orders Receiving Product Key Distribution Warehouses

### Update Categories & Subcategories

Search Add List All

Sort List Alphabetically --Select-- Expand All Collapse All Collapse To --Select--

Use "Edit Mode" to create and edit categories. Use "Drag & Drop Mode" to rearrange them.

When you're done making changes to your categories on this page **Publish**

Edit Drag & Drop

1st Nav Menu

- Computers (259)
  - Apple Computers (261)
  - Commodore / Amiga (262)
  - Cray (276)
  - Intel Based Computers (260)
  - SGI (263)
  - Sinclair (264)
  - Other Computing Systems (265)
- Peripherals (266)
  - Keyboards and Mice (275)
  - Vintage Software (267)
  - Magazine and Media (268)
  - Sale (277)

2nd Nav Menu

- New Name (278)

3rd Nav Menu

- {click to add new category}

4th Nav Menu

- {click to add new category}

5th Nav Menu

- {click to add new category}

6th Nav Menu

- {click to add new category}

7th Nav Menu

- {click to add new category}

8th Nav Menu

- {click to add new category}

- Unless you configured the store to auto-publish (see the chapter on *Config Variables* for more information), click *Publish* to save all edits you've performed in *Edit* mode.

To create new categories within nav menus that already contain categories, mouse over one of the existing category titles and click Add New Category or Add New Subcategory, and follow the above steps.

## Using Additional Modes

As mentioned, there are additional category modes to use. Feel free to test them to find the mode that's right for you. To learn more about them, see the "Advanced Settings" section of this manual.

## Creating Products

This section will show you how to add products to your categories. Note that every product can be configured with a wide variety of settings. This section will detail the basic settings required for each product. Further product settings are discussed in the "Advanced Settings" section of this manual.

### Basic Product Info

In the admin area, click on *Inventory >> Products*.

To add a product to your store, click Add at the top.

Under Basic Product Info, enter information into the following fields to define the required product settings:

## Easy Setup - Products

<b>ProductCode*</b>	This field contains the individual ID number which acts as a reference point. It can contain letters, numbers, hyphens or periods. Note that it cannot include punctuation marks and must be unique for each product.
<b>ProductName*</b>	This field contains the actual product name as it displays on your site.
<b>ProductPrice*</b>	This field contains the product's price.
<b>ProductWeight</b>	This field defines the product's weight for shipping. It should only be left blank for downloadable products, gift certificates, or items with fixed shipping costs.
<b>ProductDescription</b>	This field stores a basic product description and any html or image links you wish to display.
<b>Category</b>	This dropdown allows you to assign the product to a category or subcategory.

\*These fields are required for each product.



Once you're finished configuring the following fields for your product, click Save at the bottom of the page.

## Additional Settings

Winter '09 offers additional settings that aren't required for each new product you create. Some are very important to each product's behavior, however, and should be configured under special circumstances.

### Product Weight

This field allows you to assign weight to the product, which the software uses to calculate shipping costs. A weight should be entered for every product, with the exception of downloadable products, gift certificates or products with a fixed shipping cost. Note that if you leave this field blank, the software will assume by default that the product is downloadable and offer only the Online Delivery option during checkout. To properly set up a fixed shipping cost product, please contact Technical Support.

### Product Description

This field displays to visitors browsing your website. You can use text, HTML or a combination of both. Each description should inform your customers thoroughly about products they're considering for purchase.

### Apply to Category ID(s)

This setting allows you to a product to one or more categories. All products should be assigned to at least one category to help your customers find them. This also allows options such as Filter Categories to function properly.

## Search Engine Optimization

Search Engine Optimization (SEO) is located below Basic Product Info. It contains five optional text fields that should be configured for all products. SEO is the act of inserting specific "meta

data” into web pages to increase the chance of search engines like Google, Yahoo!, and MSN of successfully browsing, indexing and categorizing them. SEO is essentially a marketing best practice — the more that search engines browse and index your site, the easier it will be for potential customers to find your store.

To optimize each product page for SEO, fill out all five fields. We will discuss SEO feature details in the “Marketing” portion of this manual. For now, enter your product’s name into each of these five fields. Note that all five fields must be set for SEO to function properly.

## Warehouses

Under the Shipping Options section of the category page, Warehouse ID(s) allows you to assign an ID number that relates to a warehouse location you’ve programmed. This option isn’t necessary for every product, but it must be configured if you ship products from a location other than your primary business address (as defined in Company >> Settings of the admin area). The Click to Edit option allows you to configure the product’s warehouse.

## Stock

Unless your product is downloadable or you don’t wish to track inventory, each product should have an initial stock value. Under Vendor Information, enter the number of units in Stock Status and click Save. Stock can be set to 0, or to a negative number if the store allows backorders.

Note that this value must be initialized before the system will track a product’s stock. By default, this value is null and will never change based on orders, RMAs or purchase orders processed.

## Product Images

Product images are important because they help potential customers evaluate the product more than any other factor. In Winter '09, each product’s settings page contains an Image Management section.

- Click Browse to find and select an image file.
- Click Upload to upload the image file to the product page. Once the upload is complete, the image will display to the right of the image upload options.

- All images are resized automatically during upload to pre-set dimensions for various display functions throughout the store. You can change the dimensions by clicking Advanced Options.

Please note that product photos must be in either .jpg or .gif format. If product photos are edited in image editors such as Adobe Photoshop or Corel Paint, please ensure that the image is in RGB color format before saving.

To find more information and some tips on additional advanced settings, see the “Advanced Settings” and “Tips and Tricks” sections of this manual.

## Configuring Product Options

For certain store types, product options are just as important as products themselves. For example, a clothing retailer probably won't sell a t-shirt without additional attributes. The shirt will most likely come in a variety of sizes and colors. In this example, attributes like “large” and “blue” are options, and the attribute classifications such as “size” and “color” are option categories. Winter '09 allows you to establish all attribute combinations to your customers from a single page.

### Option Categories

Although you can set up product options before option categories, we recommend setting up option categories first. In the admin area, click Inventory >> Product Options. This page is divided into two sections: the Options table and the Option Categories table.

Orders Reports **Inventory** Marketing Customers Design Settings

Categories Products Options Import / Export Vendors Purchase Orders Receiving Product Key Distribution Warehouses

## View & Edit Options

Search Add

Customize | Bulk Updates

Quick Edit View **Options** Results 1 - 12 of 12 Page 1 of 1

Option	Option Categories Desc	Option Categories By	Option Category	Options Desc	Price Diff	Setup Cost Diff	Recurring Price Diff	Vendor Price Diff	Product Weight
<a href="#">60</a>	Choose Your Color	100	21	Bondi Blue	\$0.00				
<a href="#">61</a>	Choose Your Color	100	21	Grape	\$0.00				

Near the top of the Options table, select Option Categories from the View dropdown menu, then click on a default option category ID number to edit it.

Orders Reports **Inventory** Marketing Customers Design Settings

Categories Products Options Import / Export Vendors Purchase Orders Receiving Product Key Distribution Warehouses

## OptionCategories | 21

Search Add Delete Back to List | Next >> Expand All | Collapse All

**Details**

ID 21

Heading Group

**Option Categories Desc** Choose Your Color

About Option Categories Select one from the list of available colors

**Arrange Option Categories By** 100

Display Type DROPDOWN

Hide Option Categories Desc

Include In Search Refinement

Is Required ☒

Last Modified 8/6/2009 3:11:00 PM

Last Mod By [16] tad wilkins

Each product option category offers the following settings:

### Product Option Categories

ID\*

This field contains an auto assigned number used for the system identification.

HeadingGroup

This field can be used to group option categories together on the store. Setting this field to the same value for two or more option

	categories will combine them under a single storefront heading.
<b>OptionCategoriesDesc*</b>	In this field, specify the name of the option category that displays to visitors (e.g. "shoe size" or "choose color")
<b>AboutOptionCategories</b>	This field allows you to provide a category description for your customers in a popup window when they click a help icon next to the option category in the shopping cart.
<b>ArrangeOptionCategoriesBy*</b>	This field sets up the order in which option categories display on a product's page. The higher the number, the later the option category will display on the page. If values for one or more option categories are the same or set to none, the system will display them alphabetically by default.
<b>DisplayType</b>	This dropdown menu provides eight different format options for each category display. These will be discussed in more detail below.
<b>IsRequired</b>	Enabling this option forces the category to require your customers to choose an option in order to complete a purchase.
<b>Hide_OptionCategoriesDesc</b>	Enabling this option will hide the text defined in the OptionCategoriesDesc field from customers.
<b>Include_In_Search_Refinement</b>	This option includes the category in the search refinement options near the top of the shopping cart page.

\* These fields are required for each option category.

## Option Category Display Types

As mentioned above, option categories can use one of eight different display types that affect which options display to store visitors:

### Option Category Display Types

<b>DROPDOWN</b>	Displays the options in a dropdown menu.
<b>CHECKBOX</b>	Displays the options as a series of checkboxes for customers to select (often used to provide customers the opportunity to select multiple options in the same option category).
<b>RADIO</b>	Displays each option with a round "radio" button.

<b>TEXTBOX</b>	Displays a text box in which customers can manually type options (often used to provide customers customized options).
<b>DROPDOWN_CONTROL</b>	Similar display to DROPDOWN, normally used in conjunction with the DROPDOWN_CLIENT display.
<b>DROPDOWN_CLIENT</b>	Similar display to DROPDOWN, normally used in conjunction with the DROPDOWN_CONTROL display.
<b>DROPDOWN_SMARTMATCH</b>	Similar display to DROPDOWN, normally used in conjunction with Color-Swatch and Inventory Control Grid settings in Products. Review the “Advanced Settings” section of this manual for more details.
<b>PLAIN_TEXT</b>	Displays each option as a line of plain text. Most often used to display options automatically included with the selected product..

## Creating Options

To create product options, go to Inventory >> Options. From this table, you can edit a default option, or click Add to create a new one.

Orders
Reports
Inventory
Marketing
Customers
Design
Settings

Categories
Products
Options
Import / Export
Vendors
Purchase Orders
Receiving
Product Key Distribution
Warehouses

Options | Add New

Search

Back to List

Expand All | Collapse All

Details

ID

Price Diff

Option Cat ID

Options Desc

Apply To Product Code(s)

Advanced Options

Arrange Options By

Product Weight

Textbox Size

Setup Cost Diff

Jump To Product Code

Is Product Code

Is Product Code Qty

No Value

Options Desc Side Note

Vendor Price Diff

Recurring Price Diff

Textbox Max Length

Textbox Rows

Is Product Price

Is Fixed Shipping Cost

Is Product Quantity

Product options can utilize many possible settings. The following table details the basic settings required for each product option you create:

Details	
<b>ID*</b>	This field contains an auto-assigned number used for system identification.
<b>PriceDiff*</b>	In this field, enter a price for the system to add or subtract from the main product price when a customer chooses this option. For options that do not affect the main product price, enter "0."
<b>OptionCatID*</b>	This field assigns the option to an option category. Note that an option can only be assigned to one option category.
<b>OptionDesc</b>	This field contains the text that displays to customers when they select the option.
<b>ApplyToProductCode(s)</b>	This field assigns the option to one or more products by product code. Each product code must be separated by a comma.

\* These fields are required for each option.

### Things to Note

Although an option can only be assigned to one option category at a time, you can create an unlimited number of option categories for each product, and an unlimited number of options for each option category.

To learn more about the Inventory Control Grid feature and how it affects product options, and for information on additional settings, see the “Advanced Settings” portion of this manual.

## Importing & Exporting

If you need to quickly add a large number of products to your store, or to edit them in bulk within a spreadsheet, Winter '09 provides importing and exporting capabilities. In the admin area, click Inventory >> Import/Export. This page is divided into two main sections — Standard Import/Export and Other Import/Export Features

**Orders Reports Inventory Marketing Customers Design Settings**

Categories Products Options Import / Export Vendors Purchase Orders Receiving Product Key Distribution Warehouses

### Import / Export Data

View:

#### Standard Import / Export

<b>Data Import</b>	Import data in bulk from an Excel Spreadsheet or CSV (comma delimited) text file.
<b>Data Export</b>	Export data to an Excel Spreadsheet or CSV (comma delimited) text file.

#### Other Import / Export Features

<b>QuickBooks Export</b>	Export data to Quickbooks format. <a href="#">[Click here to configure QuickBooks mapping]</a>
<b>Yahoo! Store Import</b>	Import your Yahoo! Store products
<b>Volusion API</b>	Import / Export your data in XML format.



## Data Export

To export your product information to a spreadsheet, click Data Export.

**Data Export Wizard**

View: **Export Wizard**

**Export to a file...**

Table:  

Columns:

Export To:  

**Did you know?**  
A CSV (Comma Delimited Text File) can be easily opened with Microsoft Excel, or imported into Microsoft Access.

Also FYI: Exporting to TAB delimited files now **does NOT include quotes**. Therefore you may need to adjust your froogle or other shopping engine settings.

Export as unicode ☒ Yes

If you receive the error "Invalid procedure call or argument" during export to CSV, this means you have unicode data in your database.  
If you enable this, it will fix the problem, however you will have to open your CSV in excel by opening excel and going to the menu "Data > Import External Data" rather than just double-clicking to open the file.

**Export Now**

[Export Later](#)

**ESTIMATED PROCESSING TIME:** (after your file has been uploaded)  
100 Products = approx. 30 seconds  
1000 Products = approx. 3 minutes  
(Maximum 2 hours at a time.)

**Recommended Browsers**  
[Internet Explorer 7](#)  
[Firefox](#)

**Data Type Reference**

Data Type	Description	Example #1	Example #2
TEXT : 50	Any characters (up to X char limit)	abc	
MEMO	Any characters (no limit)	abc	
LONG	Integer Number	48	
DOUBLE	Number	17.38	8.9
CURRENCY	Currency Value	19.95	
DATETIME	Date	6/17/04	6/17/2004

\* Unique Identity - Numeric or text value (depends on table), but must be unique.  
\*\* Virtual Field - The data is created on the fly and does not actually exist as a field in the database, therefore usually cannot be imported back in.

## Supported File Types

The export section of the Import/Export system supports four file types:

Supported File Types	
CSV	Comma Separated Value files are essentially text files. Values within these files are delineated by commas. This is the most commonly file type used for importing and exporting. The benefit of this file type is that it can easily be imported to a spreadsheet program (such as Microsoft Excel) for convenient editing.

<b>TAB</b>	Tab delineated files are similar to CSV files, but all values are separated by a tabbed space within the text file. Many text file editors can read and modify these files. This file type is expressly used as the default export file type for other ecommerce systems and is provided to allow for easy data migration from other shopping cart systems to Volusion.
<b>PIPE</b>	Pipe Delineated Files are text files similar to CSV and TAB files with the exception that values within the file are separated by the pipe (   ) character.
<b>XML</b>	Short for extensible Markup Language, XML is an industry standard used to format data in a nested or hierarchical manner that appears similar to HTML.

## Step 1 - Choose a Table

Within the Table field, select the Volusion data table you wish you export. Note that you can only export data from the tables listed in this menu. Also, you can only export data from one table at a time. In this case, select Products.

## Step 2 - Choose Columns to Export

This field auto-populates a list of all variables in the database table including a list with the data type of each variable. In this case, enable all options. Note that columns marked with (\*) are the primary key — the column that contains the unique identifier for every entry in the table. It's recommended to always export this value, especially if preparing a file that will be imported back into the system. Columns marked with (\*\*) are dynamic, virtual columns that are assembled by two or more connecting tables. This data can be exported, but cannot be re-imported. Leave these fields unchecked.

## Step 3 - Choose a File Type

As previously mentioned, the system supports four file types. For this project, choose CSV.

## Step 4 - Export

Click Export Now. Note that an export from a very large table, such as a products table that contains over 100,000 entries, may take several minutes to export. Once the export is

complete, you'll receive a notification with a link to download the exported file to your local hard drive.

Once you've downloaded the CSV file, you can open this file in your text editor or spreadsheet program of choice (e.g. Microsoft Office, Open Office, etc.).

When you open the CSV file, you'll see a spreadsheet containing all data from your store's product table with each expressed as a separate column. You can edit or add to this file as needed. Although it is not necessary to configure every column, it may be a good idea to familiarize with if you plan to use this method for editing tables. When finished editing, save.

#### **Note for Macintosh Users**

If editing a CSV file generated by Volusion export in Microsoft Office, note that the Mac version of MS Office supports multiple CSV file formats. When saving your CSV file, use the "CSV (MS Windows)" file type.

## **Data Import**

The purpose of the import function is to quickly insert a large amount of data into one or more of your database tables to add, replace or update table content. In the admin area, click Inventory >> Import/Export >> Data Import.

**Orders Reports Inventory Marketing Customers Design Settings**

Categories Products Options Import / Export Vendors Purchase Orders Receiving Product Key Distribution Warehouses

## Data Import Wizard

View: Import Wizard

**Upload your file...**

Table: [Dropdown]

File Name: [Text Field] [Browse...](#) (max 10MB)

**Overwrite Existing Data?**

☐ No, do not change any records already in my database.

☐ Yes, replace any existing data with my new updated data.

☒ Clear entire table (delete all records), and replace with this import file

**Test Mode?**

☒ Go ahead and import my data.

☐ Test my file, do not import it yet.

[Advanced Debugging](#) (Tools to debug your import file)

[Upload My Files](#)

**ESTIMATED PROCESSING TIME:** (after your file has been uploaded)

100 Products = approx. 30 seconds

1000 Products = approx. 3 minutes

(Maximum 2 hours at a time.)

**Notes:**

You may generate new templates from the [Export Wizard](#) page. Then input all of your data into spreadsheets (csv file). Once you've added your data to the templates, follow the instructions below...

Products created in Volusion V5 have Free Shipping eligibility enabled. Users importing new products into their store that will not be eligible for free shipping will need to mark the FreeShippingItem column for each new product to 'N' before they import new products into the system.

**How to import a CSV file:**

- 1) Open your Microsoft Excel spreadsheet.
- 2) Go to File > Save As > and save as type "CSV (Comma Delimited)"
- 3) The filename may be anything as long as you give it a ".csv" extension.

**Other Helpful Notes:**

**How to convert from MDB to CSV:**

- Open your Microsoft Access database
- Right-Click on the table and choose "Export"
- Save as type: "Text Files"
- Click EXPORT to continue
- Now in the Export Text Wizard, choose "Delimited"
- Click NEXT to continue
- Choose "Comma" as the delimiter.
- Check the box "Include Field Names On First Row"
- Set Text Qualifier to double quotation marks "
- Click NEXT then FINISH

## Executing an Import:

### Step 1 - Choose a Table

From the Table menu, choose the table you'd like to update. Note that you can only import data into the tables listed in this dropdown menu. Also, you can only import data to one table at a time. In order to import data to multiple tables, you'll have to perform multiple imports. In this case, select the Products.

### Step 2 - Choose a File

From the File Name field, define the file path or use Browse to select the local file you'd like to import. In this case, select the CSV file you saved to your hard drive.

### Step 3 - Choose Import Type

There are three action types to choose from in the Overwrite Existing Data? section when importing data :

1. **"No, do not change any records already in my database"** — This option inserts new data from the import file into the database without overwriting or modifying any existing table data. For example, if the system encounters CSV file entry with a product code that matches a

one already in your store's database, the system will ignore CSV file row and proceed to the next row.

2. **“Yes, replace any existing data with my new updated data”** — This option inserts new data from your file into your database table and updates existing data for matching product codes.

3. **“Clear entire table and replace with this import file”** — This option deletes all content in the specified table and replaces it with the content of the import file. Use this method with extreme caution, as it will permanently remove all existing table data!

### Step 4 - Define Test Mode

The Define Test Mode field allows you to specify whether to import the file or simply test whether or not it can be imported. Go ahead and import my data file is selected by default. Test my file; do not import it yet performs the import functions without importing the data. When used in conjunction with other diagnostic options available here, you can troubleshoot previous import issues.

### Step 5 - Import

Click Upload My Files to begin the import process. Note that importing can take some time, depending on the amount data to be imported. For example, importing a CSV file containing 100 entries to update the productstable should be completed in less than a minute, but attempting to update the same table with a CSV file containing 100,000 entries will take significantly longer.

### After the Import

When the import is complete, you'll receive a confirmation that the import was successful and the data from the imported file will be visible in the selected table.

### Rebuilding the Product Index

After importing data, it's important to rebuild your product index. This is a simple step that reorders your database and monitors and repairs any possible inconsistencies. In the admin area, click Settings >> Maintenance >> Rebuild Product Index.

**Orders Reports Inventory Marketing Customers Design Settings**

Company Shipping Tax Payment Currency IP Firewall Config Variables Custom Fields Maintenance

## Manage Maintenance

**Maintenance Toolbox**  
[Rebuild Product Index](#) You last indexed 25hrs ago.  
[Rebuild Search Index](#)  
[Reassign Inventory Control Grid](#)  
[Manage 301 Redirects](#)  
[Close store to view more tools](#)

Your store is currently: **OPEN**

[Close my store](#)

This page allows you to temporarily close your store for maintenance. For example if you need to perform modifications on your database or files, closing your store will post a notice on your website telling your visitors the store is "temporarily closed for scheduled maintenance, please try back in 15 minutes to and hour. Thank your for your patience."

[Customize your maintenance message here.](#)

## Using the HTML Editor

The HTML editor allows you to create HTML code without any knowledge of or experience with HTML. You can find links to the editor in various locations of the admin

The HTML editor allows you to create HTML code without any knowledge of or experience with HTML. You can find links to the editor in various locations of the admin area, such as product edit pages, category edit pages and site content edit pages.

## Inserting Photos

1. Click HTML Editor.
2. Place your cursor on the page location where you'd like to insert an image, then click the image icon.
3. You can either select an image already on your site from the area labeled File Name, or you can upload a new image from your computer by clicking the folder icon next to the Source field. [I see no File Name section]
4. To upload an image from your hard drive, locate the file and click Upload.
5. Click Insert to apply the image to the editor window.
6. Click Copy HTML to Parent Window and then Update.

### Items to Note

When referencing images uploaded by the HTML Editor, we recommend prefixing the path in the Source field with a single forward slash "/." For example, "EasyEditor/assets/sample.jpg" should be entered as "/EasyEditor/assets/sample.jpg. Also, your image names should not contain any spaces.

## Creating Hyperlinks

1. To create a link, click the hyperlink icon in the editor window.
2. Select the protocol you'd like to use from the Source dropdown menu:

http:// — Use this option to link to another page in your website.

https:// — Use this option to link to another page in your website through a secure connection.

mailto:// — Use this option to open a new mail window on the customer's screen.

ftp:// — Use this option to link to an ftp site for a file download.

news:// — Use this option to link to a newsgroup article.

### Items to Note

If you are linking to a page within your website, we highly recommend leaving this menu blank. Using http:// when attempting to access a page on a site using a secure certificate can cause errors.

3. Enter the destination of the link to the right.
4. Use the Target menu to designate where you want the link to appear:

Self — This option opens the link in the current window. If you're using frames on the page, the link will open in the frame that contains the link.

Blank — This option opens the link in a new browser window.

Parent — This option opens the link in the parent browser.

### Items to Note

If you're using frames, the link will open in the browser without using the designated frame set. If you enter the link in a popup, the link will open in the popup window.

5. Use the Name field to specify the clickable text displayed on your website for your link. For example, if you insert a link to `contact_us.asp`, you could enter "Contact Us" here.

Most of the features in the HTML Editor are used for text formatting, such as font, color and size specification, as well as indentation. It operates much like a word processor.



## Step 5 - Marketing

Your online store is starting to take shape. Sure, you may have your products, options and shipping settings all set to offer your customers great deals and great products or services, but how do you plan to get the word out about your new store?

Winter '09 comes equipped with a series of tools and functions that put the word out there. This set of marketing tools helps get your business noticed and drives traffic (and potential sales) to your store.

In this section, you'll find out just how to configure your store to stand out in the crowd.

### Search Engine Optimization

If you're new to this term, Search Engine Optimization is a class of design techniques and best practices involving website design, layout and function that are aimed at increasing the ability for various web search engines (e.g. Google, MSN, Yahoo!) to browse, categorize and index information contained within a website. This in turn increases the likelihood of that information being returned via relevant search queries to these search engines. As a result, it increases the potential of more traffic reaching your site, which provides you additional opportunities to convert visitors into customers.

To configure SEO settings, click *Marketing >> SEO* in the admin area.

**Orders Reports Inventory Marketing Customers Design Settings**

Coupons / Discounts Nav Menu Promotions MyRewards Newsletters Gift Certificates **SEO** Affiliates In-Stock Requests

### Manage Search Engine Optimization

**Enable SEO**

☒ Enable SEO  
☒ Use Hyphens (-) instead of Underscores (\_) To prevent duplicate content in search engines, do NOT change this after you go live.

Enabling SEO Friendly is a great feature. This turns all of your category and product pages into ".htm" files, while keeping them 100% dynamic. This means you don't have to worry about re-generating static html pages... your pages will remain up-to-date automatically, while the ".htm" static pages with **no querystring, no (?) question mark**, make it even **EASIER** for ALL search engines to crawl your website.

**Add Meta Tags**

**Easy Mode** **Advanced**

**Meta Title** Vintage Computer Warehouse *Ex: Audio Unlimited - Superb Speakers & Sound!*

**Meta Description** Vintage and Retro Computers and Electronics - Apple Macintosh, Commodore 64, Amiga, Atari Computers and Accessories! *Ex: Audio Unlimited is your one stop shop for all your audio equipment. We carry the latest speakers, headphones, microphones, mixers, and more!*

**Meta Keywords** Apple Macintosh, Commodore 64, Atari, Amiga, Retro Computers, Vintage Computers *Ex: Speakers, Headphones, Microphones, Mixers, Speaker Wire, Subwoofer, Bass Module, JBL, Sony, Kenwood, Yamaha*

**Save**

This page is divided into several functions that address optimizing your store based on the data, URLs or content.

## Enabling Basic SEO Settings

Within this section of the *SEO* page, you'll find two settings.

### Manage Search Engine Optimization

Enable SEO

☒ Enable SEO  
☒ Use Hyphens (-) instead of Underscores (\_) *To prevent duplicate content in search engines, do NOT change this after you go live.*

Enabling SEO Friendly is a great feature. This turns all of your category and product pages into ".htm" files, while keeping them 100% dynamic. This means you don't have to worry about re-generating static html pages... your pages will remain up-to-date automatically, while the ".htm" static pages with **no querystring, no (?) question mark**, make it even **EASIER** for ALL search engines to crawl your website.

First, check Enable SEO Friendly and click Save near the bottom of the page. This turns on Volusion's SEO engine and enables subsequent SEO features. This option must be active for other SEO settings to work.

## A Note on SEO-Friendly URLs

By default, each product, category or article displayed within your store is generated by a series of active server pages. This eliminates the need for you to create individual web pages for each item displayed on your storefront. This process, however, uses a dynamic URL for each product, category or article (e.g. *www.mystore.com/product\_details.asp?ID=ABC123*). This type of URL is not conducive to SEO.

Volusion's SEO engine, however, reformats dynamic URLs to appear as simple, static web pages. This increases optimizes the pages for search engines. This URL reformat (or rewrite) is automatically implemented once the Enable SEO option is activated.

For example, the dynamic URL listed above could be rewritten by the SEO engine to appear as *www.mystore.com/cool\_product/ABC123.htm*.

## Hyphens vs. Underscores

This option is matter of visual preference. Configuring it will neither increase nor decrease your store's level of optimization. It simply allows you to choose whether you prefer hyphens ("-") or underscores ("\_") when rewriting your URLs for SEO compliance. Note that hyphens or underscores will be used to substitute for spaces within product or category names, and within article titles.

## Configuring Store Meta Tags

Meta tags are specialized HTML data tags that contain information about a page's content for the benefit of a search engine system.

Search engines examine web page content directly, but they also reference the site's meta tags when indexing the page. Essentially, the more relevant data you store within meta tags, the easier it will be for search engines to index web content.

The *Default Meta Tags* section consists of three basic settings that allow you to quickly configure meta tags for your store. Note that the meta tags defined here control meta data for the main areas of your store. Product and category meta tags are defined elsewhere in the Volusion store.

The following meta tags can be configured from this page:

Meta Tags	
<b>Meta Title</b>	This field sets the title meta tag of the entire site. This title will appear in the title bar of any web browser window visiting the store. This setting does not affect other title settings within the store such as the business name that appears on shipping labels, etc.
<b>Meta Description</b>	This field should contain a brief description of the store (e.g. what the store sells or specializes in).
<b>Meta Keywords</b>	Enter keywords that relate to your store. These keywords will be indexed as meta data related to the store and can be used by potential visitors to find the site via search engines. Each keyword should be separated via commas (e.g. term1, term2, term3) and should relate to products, services or brands that a store specializes in.

Once these settings are configured, simply click on **Save**.

## Advanced Settings

SEO also provides access to a *Advanced* settings.

**Add Meta Tags**

Easy Mode **Advanced**

Meta Tags Override:

Globally Appended Meta Tags:

Save

*Ex:* <title>mysite.com</title>  
 <meta name="Description"  
 content="stuff" />  
 <meta name="Keywords"  
 content="abc,xyz" />  
 <meta  
 http-equiv="Content-Type"  
 content="text/html; charset=UTF-8"  
 />

Note that the SEO settings in *Advanced* tab on this page override any settings configured within the *Easy Mode*. In most cases, you won't use the *Advanced* mode, but it is available for experienced web designers who want to enter custom meta information.

## Configuring SEO for Products & Categories

After configuring your store's meta tag settings, the store will be optimized for search engines, but additional settings must also be configured for individual elements within the Volusion database such as products and categories.

For these elements, there will be a heading within their individual configuration pages marked *Search Engine Optimization*. The settings contain all variables for that element's meta tags and other SEO information. The number of meta tag settings available will vary depending on what type of element you're editing (e.g. products have five meta tag settings, categories have only four).

Note that to reach the SEO settings for any category within the store, you must mouse over a category name in the main *Categories* page and select *Update Category*.

It's important to enter values for every meta tag setting available, whether you're editing meta data for a product, category, website article or any other element. All meta tag fields should be defined for your products and categories. This will increase the chances of online search engines indexing and directing visitors to your site.

Below are examples of how the SEO URLs will appear for your article pages, category pages and product pages when your site is optimized.

**Site Content Articles:** [http://www.Yourdomain.com/MetaTagTitle\\_a/ArticleID.htm](http://www.Yourdomain.com/MetaTagTitle_a/ArticleID.htm)

**Category Pages:**  
[http://www.Yourdomain.com/LinkTitleTag\\_s/CategoryID.htm](http://www.Yourdomain.com/LinkTitleTag_s/CategoryID.htm)

**Product Detail Pages:**  
[http://www.Yourdomain.com/ProductNameShort\\_p/ProductCode.htm](http://www.Yourdomain.com/ProductNameShort_p/ProductCode.htm)



Here, you can edit default coupons and discounts by clicking the number in the left-hand column, or click *Add* to create a new one.

## Coupons/Discounts Settings

Coupons and discounts can be configured with a variety of settings. The following section will cover creating a coupon and a quantity discount. Feel free to experiment with other ideas. For more detailed information on each coupon setting as well as a few tips, see the “Advanced Settings” section of this manual.

### Setting up a Coupon

If you want to create a 10% off coupon redeemable for any store product when 2 or more products are purchased in that category, you can create a specific coupon code for this discount, which you can add to your store newsletter or other marketing materials. The coupon is valid for one-time use only, is non-transferable and can't be used with any other coupon or discount.

First, enable coupons for your store at *Settings >> Config Variables*. Select *Checkout Variables* from the View menu at the top. Locate *Config\_EnableCoupons*, check the box, and save your changes. To create the coupon:

Return to *Marketing >> Coupons/Discounts* and click Add.

**Discounts | Add New**

Search Back to List Expand All | Collapse All

**Details**

ID +

Coupon Code +

Name +

Discount Type +

Discount Value +

Min Qty +

Max Qty +

Begin Date +

End Date +

Span (ie Buy 10 of any product) +

One Time Use Coupon +

Cannot Be Used With Any Other Coupon +

Apply To Category ID(s) +

Apply To Product Code(s) +

Last Modified + +

Last Mod By +

- Enter the actual coupon code into the Coupon Code field. This will be the code customers must enter to apply the coupon to their order during checkout (e.g. new10off).
- Assign a title for the coupon in the Name field (e.g. 10% Off Promo).
- Select "*Percent off ENTIRE ORDER*" from the *DiscountType* menu.
- Set the discount's value to 10.
- Assign a promotion start date and (optionally) an end date. For example, you can set the redemption period for one month.
- Enable the "*One Time Use Coupon*" and "*Cannot be Used with Any Other Coupon*" options.
- Enter the ID of the categories the coupon will apply to in the *ApplyToCategoryID(s)* field. In this case, you'd enter the IDs for every category in the system. Note that each category ID must be separated by a single comma
- Enter "2" into the *MinQty* field.
- Enable the *Span* option within the coupon settings.
- Click Save to finish.

These types of promotions can be helpful when marketing an online store. Since customers must know the coupon code to actually apply the discount to their order, this can be used as an incentive for them to sign up for your email newsletter, or as a way to reward valued customers.

## Setting up a Quantity Discount

This section will detail how to create a quantity discount that applies automatically to certain products when a customer orders three or more units. It can be used multiple times for each new order a customer places, cannot be combined with any other discount, and has no expiration date:

- Under *Marketing >> Coupons/Discounts*, click *Add*.
- Assign a name to the discount (e.g. 10% Off For 3 or More).
- Select "*Percent off a PRODUCT*" from the *DiscountType* menu.

- Set the discount's value to 10.
- Enable the "*Cannot Be Used with Any Other Coupon*" option.
- Enter the product codes of all products the coupon will be eligible for in the *ApplyToProductCode(s)* field.
- Set the *MinQty* field to 3.
- Enable the *Span* option within the coupon's settings.
- Click *Save* to finish.

Repeat the above steps to create a tiered quantity discount system. For example, you can offer a greater discount for a purchase of five or more units, and an even greater discount for a purchase of ten or more.

Once this coupon is created, a "*QTY Discounts*" button will appear on the product's detail page. When your customers click it, they'll see the available quantity discounts. Any order placed for three or more units will automatically be reduced by 10%. This type of discount can not only increase order quantity, but also number of orders.

## Create Email Newsletters

One of the primary goals of marketing is to reach out to your customers and keep them connected to your business. Building a relationship helps foster loyalty. The Volusion newsletter system can help you accomplish this.

The Newsletters page allows you to create newsletter emails and automatically send them to customers who signed to receive store updates. You can design the email content, focus the email to a broad or targeted audience and even track the return on investments with this system.

### The Newsletter Table

In the admin area's *Marketing >> Newsletter* page, you can view a list of default newsletters, and view basic statistics for any email newsletter, including:

- Number of times each newsletter has been sent
- Percentage of newsletters that have been opened by recipients
- Percentage of clicks each newsletter has generated per recipient



- Percentage of conversions based on the number of newsletters sent

You can edit a newsletter by clicking the ID number in the left column. To remove a newsletter, simply click on the X checkbox to the far right of the entry and click **Save**.

## Creating a Newsletter

Creating an email newsletter is easy. Email newsletters can entice potential customers to your store, inform existing customers of new products or highlight an upcoming sale.

You can style your newsletters using HTML, creating elaborate notices with product photos, images or simple text.

To create a newsletter, click **Add**, and edit the following settings (required):

**newsletters | Add New**

Search Back to List Expand All | Collapse All

**Details**

ID Newsletter Name Scheduled Send Date (only for reference) Send Test Email To Include people who un-subscribed (i.e. for important news)

Edit Email Template Send To

Email Subject

Email Body (HTML Version) HTML Editor

Email Body (Text Only Version)

Send to customers w/ the following interests only Edit

Monthly Newsletter Newsletter 11

## Newsletter Settings

**Newsletter Name** Enter a name for the newsletter.

<b>Send Test Email To</b>	Every newsletter must be tested on a valid email address prior to sending. Enter the test email address in this field. Note that any address entered into this field must be an address contained within in the admin area's Customers >> Accounts table. This can be your address.
<b>Active</b>	Enable this option to activate the newsletter campaign. When active, newsletters will be distributed by your Volusion store based on the date/targets you've configured for them.
<b>Active Timeline</b>	Enter a date value into either of these fields to configure a date range for newsletter distribution.
<b>Email Subject</b>	This field allows you to define the subject line for the email.
<b>Scheduled Send Date</b>	This contains the send date of an email newsletter. Note that you can override this value by clicking Send Now.
<b>Send To</b>	Choose which customer type will receive the newsletter, based on a customer settings (discussed in further detail in the "Advanced Settings" portion of this manual).
<b>Email Template</b>	Each newsletter is automatically generated using one of several email templates built into the Volusion system. You can choose the email template for your newsletter by selecting it from this menu. Select the Newsletter.asp field. Note that once you've configured the email body, you can save it as a template.
<b>Email Body (HTML)</b>	Define the actual newsletter content here, using text or HTML to suit your design needs.
<b>Email Body (Text)</b>	As some email systems will remove HTML from incoming messages for security purposes, you will also want to enter a basic, plain-text version of the ad copy contained in the Email Body (HTML) field.

## Targeted Newsletters

Once you've designed your initial newsletter content using the settings described above, you'll have to define its target audience.

## Customer Interests

Initially, each newsletter entry comes configured with 20 different customer interest types that you can enable or disable under the *"Send to Customers with following interests"* only heading. This list corresponds to an identical list within each customer's account settings.

To keep track of the 20 possible interests within your newsletter and customer accounts, you can name each interest globally by clicking Edit located just to the right of this section's heading. Simply enter your custom description for any item in the interests table and click Save.

Note that your customers can't configure interests for their own accounts — this feature is only available for store administrators.

## Testing & Sending a Newsletter

Before sending a newsletter, make sure to test it by reviewing the content, design and overall presentation. On the newsletter edit page, click *Preview*.

**Newsletter Confirmation**

**Who you're sending this to:**

Send To: SUBSCRIBERS

Send Test To: [Redacted]

Interests: N/A

[Send Test Email](#)

[Newsletter Best Practices](#)

**Statistics**

12 of 12 total emails have been sent. ( 100% )

12 of 12 certified emails have been sent. ( 100% )

0 of 0 non-certified emails have been sent. ( 0% )

0 of 12 emails have been opened. ( 0% )

3 of 12 customers have chosen to unsubscribe. ( 25% )

0 of 12 customers have marked this as spam. ( 0% )

[More Information](#)

**What the e-mail looks like:**

From: [Redacted]

To: john\_smith@whatever.com

Subject: test

[HTML Version](#) [Text Only Version](#)

**Retro Computer**

test

This message was sent to \$(EmailAddress) by [Redacted].com located at Retro Computer Warehouse, 1818 Mantooth Drive Wallah Wallah, WA 80109. [Click here to unsubscribe.](#)

On this page, you can not only preview the newsletter, but also view the following statistics:

- Number of newsletters sent during the current billing period.

- Amount of emails opened within the current billing period.
- Number of customers who unsubscribed from the store's newsletter list.
- Number of customers who've marked the newsletter as spam.

This data can be instrumental in determining the effectiveness of the email campaign.

### **Note on Sending Newsletters**

There are limits to the amount of email newsletters you can send depending on your monthly pricing plan. Please see the [Newsletter Limits](#) portion in the Knowledge Base.

### **Note on Unsolicited Email**

Email can be a very powerful marketing tool, but some people consider them an unsolicited annoyance or even an intrusion of privacy. When it comes to spam, Volusion has a no-tolerance policy. You have access to powerful email marketing tools within Winter '09, but we ask that you do not abuse these privileges.

To meet industry guidelines to guard against unsolicited email, all emails you send should meet the following criteria:

- The recipient has made a purchase, requested information, responded to a questionnaire or a survey or has had offline contact with your business.
- Newsletter emails must provide a working link to unsubscribe from the mailing list (already provided in your store's default email template).
- Requests to unsubscribe from newsletters must be processed within 10 days of receipt.
- The "from address" must contain the Volusion store domain name.
- Email subject lines must not contain misleading information.

For more information, US-based merchants should review stipulations provided by the CAN-SPAM Act of 2004, located here:

<http://www.ftc.gov/bcp/edu/pubs/business/ecommerce/bus61.shtm>

In order to unsubscribe a customer from your email newsletter list, you must edit the email subscriber variable on their account page. Information on this process can be found in the "Advanced Settings" portion of this manual.

## MyRewards Program

The newest marketing feature in Volusion is the *MyRewards* Program, which was heavily requested by users of V5. While this is not a required feature, we encourage you to check it out.

### Enabling the Program:

- In the admin area, click *Marketing >> MyRewards*.

**MyRewards**

**Configuration**

MyRewards Setup Points for Cash

Points Earned per Currency Unit

**Redemption**

Points Redeemed per Currency Unit

Minimum Points Required to Redeem

Time until Rewards are Redeemable (days)

Time Rewards are redeemable (days)

**Save**

- The program is disabled by default. Use the *MyRewards* Setup dropdown to select a reward structure:
- Points for Cash* — your customers make purchases and earn points based on the amount they spend (based on the order subtotal before tax and shipping are applied); they can redeem these points for store credit.
- Points for Product* — your customers earn points based on purchase of items that carry specific point totals; this requires configuration on the product records under the *Advanced Options* section.

If using *Points for Cash*, the *Points Earned per Currency Unit* field instructs the program how many points a customer earns per each default currency unit spent (e.g. USD, GBP, Euro, etc.).

- The *Points Redeemed per Currency Unit* field instructs the program how many points are redeemed by each reward currency unit. You can also think of this value as the number of points required to earn a reward currency unit.

- Set the *Minimum Points Required to Redeem*. This value must be larger than *Points Redeemed per Currency Unit* to be relevant.
- If you'd like to set a timeframe (days) between when points are earned and when the system awards them to the customer for redemption, use *Time until Rewards are Redeemable*. Note that the program does not consider points as earned until the order is marked as "shipped."
- If you'd like an expiration date for awarded points, enter the number of days in the Time Rewards are redeemable (days) field.

Your customers will be able to view and redeem their points by clicking *MyRewards* on the *My Account* page accessed from your storefront.



## My Account

Welcome to your account test name. You may use this page to manage your orders, [Edit](#)ments, and other information, all in one place.

My Orders	
<a href="#">Review orders / track packages</a>	<a href="#">Change quantities / cancel orders</a>
<a href="#">Change shipping address</a>	<a href="#">Print invoices</a>
<a href="#">Change billing address</a>	<a href="#">Return items</a>

Personal Information	
<a href="#">Change e-mail address, or password</a>	<a href="#">Manage your billing addresses</a>
<a href="#">Change my e-mail preferences</a>	<a href="#">Manage your shipping addresses</a>

Payment Settings	
<a href="#">Edit or delete a credit / debit card</a>	<a href="#">View gift certificate balance</a>
	<a href="#">Apply a gift certificate to your account</a>

Other Features	
<a href="#">Edit a review that I wrote</a>	<a href="#">View my Wish List</a>
<a href="#">My Rewards</a>	



[I'm done managing my account, log me out.](#)

Here, customers can also review the terms and conditions of the program.

## MyRewards - Reap the rewards with every purchase

It pays to go with MyRewards. Every time you make a purchase with [your company or website's name], you'll receive points [if product based, then] for the product(s) you purchase [if total amount of purchase, then] based on your total purchase amount. It's a great way to save on your next purchase whether it's for you or someone special.

### Here's how it works:

1. Once you've placed your order and it has shipped, your MyRewards Point will be redeemable in [X] days.
2. To view your MyRewards, simply go to [MyRewards](#).
3. Enter the total amount (in points) you'd like to redeem below (X points = \$X).
4. When you're done, a confirmation will be sent to your email address.
5. You're now ready to save on your next purchase. Upon placing your order, your available MyRewards will automatically be deducted from the total purchase amount.

Available Points: 0  
Pending Points: 0

  **redeem now**

Want to learn more about MyRewards? For more MyRewards information, see the [Terms & Conditions](#).

If you view this page on your storefront, you'll be able to edit the default text.

60

My Rewards Terms & Conditions

Site Content Editor

```
<link type="text/css" rel="stylesheet" href="/a/c/myrewards.css" />
<div id="rewards_content">
<h3>My Rewards Terms & Conditions</h3>
<h4>Overview</h4>
<ul>
<li>_____ reserves the right at any time and from time to time, without
notice, to add to, remove from and/or change the MyRewards ("Program") Terms and
Conditions; for example, _____ may change the Program benefits, MyReward
credit levels, Program affiliations or redemption of MyReward credits.</li>
<li>_____ reserves the right to terminate the Program at any time.
Participants will have three months from the date of notification to redeem
MyRewards. At the end of the three-month period, the Program will terminate and all
remaining MyReward credits will be voided.</li>
<li>The availability of any MyReward or Reward level cannot be guaranteed.
MyReward credits required for redemption may increase prior to MyReward
redemption.</li>
<li>When you enroll in the Program, you agree to be bound by these Program


Easy Editor Save



Edit this Article in extended mode See all text in "Articles"



Terms and Conditions, the Participant's enrollment in the Program will be terminated and all Reward credits forfeited. Program Terms and Conditions, Rewards and redemptions are subject to applicable government laws, rules and regulations and are void where prohibited. Information regarding a Participant's account and participation in the Program is confidential, and _____ will not disclose any of its information to a third party not affiliated with _____, provided that _____ may disclose account information or participation history in order to comply with a subpoena or similar legal process, or in order to cooperate with a government investigation. In these circumstances, disclosure may be with or without the Participant's knowledge or consent.



### Participant Eligibility



- A Participant in the Program must (1) be a natural person who resides in the U.S.; (2) have a valid U.S. driver's license and a valid email address (email is the only means of official communication between MyRewards and Participants); and (3) have not been denied participation

```

You can also edit the default text through your admin area using page ID 144 under *Design >> Site Content*. Make sure to edit this page to reflect your chosen settings.



**Orders Reports Inventory Marketing Customers Design Settings**

Template Logos Site Content Navigation Menu LiveEdit File Editor

## Articles | 144

Search Add Delete Back to List Expand All | Collapse All

[View Live Article Page](#)

### Details

ID 144 Page Name MyRewards.asp  
 Spot Key MyRewards\_Terms Category ID [6] Other Articles

Article Title

Article Caption

Article Body  
[HTML Editor](#)

```
<link type="text/css" rel="stylesheet" href="/a/c/myrewards.css" />
<div id="rewards_content">
<h3>My Rewards Terms & Conditions</h3>
<h4>Overview</h4>
<ul>
<li>_____ reserves the right at any time and from time to time, without notice, to add to, remove from and/or change the MyRewards ("Program") Terms and Conditions; for example, _____ may change the Program benefits, MyReward credit levels, Program affiliations or redemption of MyReward credits.</li>
<li>_____ reserves the right to terminate the Program at any time. Participants will have three months from the date of notification to redeem MyRewards. At the end of the three-month period, the Program will terminate and all remaining MyReward credits will be voided.</li>
<li>The availability of any MyReward or Reward level cannot be guaranteed. MyReward credits required for redemption may increase prior to MyReward redemption.</li>
<li>When you enroll in the Program, you agree to be bound by these Program Terms and Conditions.</li>
</ul>
<h4>General</h4>
MyReward credits accrue and are redeemed in accordance with the Terms and Conditions of the Program.
Participants are responsible for accessing these sites in order to keep informed of Program features applicable to Participants' rights
```

Once the customer chooses to redeem the points, they'll be notified via email and on the account page. The system will create a gift certificate and automatically apply it to the customer's record. When they place their next order, their redeemed points will automatically be deducted from the total order amount.

You can also see how many points a specific customer has accrued in their admin account page.

**Orders Reports Inventory Marketing Customers Design Settings**

CRM System Accounts Customer Reviews Administrators Admin History Knowledge Base

## Customers | 13

Search Add Delete << Previous | Back to List | Next >> Expand All | Collapse All

This customer has placed **6 orders** totaling **\$7,544.24**, with the first order on 10/10/2008 10:46:00 AM.

[Login As This Customer](#)

### Basic Customer Info

### Optional Fields

### Special Privileges

Pays State Tax

Pricing Discount Level 1

Percent Discount

Reward Points 0

IsSuperAdmin (hidden)

Allow Access To Private Sections

Removed From Rewards

### Custom Fields

For more information, please refer to this Knowledge Base article:  
[http://store.volusion.com/kb\\_results.asp?ID=538](http://store.volusion.com/kb_results.asp?ID=538)

## **Step 6 - Advanced Marketing**

This section of the covers some advanced marketing techniques you can use.

### **Submit your Sitemap to Google**

Google offers website verification services through their online Google Webmaster Tools. This verification service allows you to declare you site layout for Google to better reference your overall site content. Before you follow the steps below, we highly recommended that you first set up your site for SEO.

To verify your site with Google's service, sign up for a Webmaster Tools account here <http://www.google.com/webmasters/>.

In order to perform verification with Google's Webmaster Tools, you must submit an XML-based sitemap to your Google Webmaster Tools account. With Winter '09, the XML sitemap you'll need has already been generated for you.

### **Obtaining Your Sitemap File**

To retrieve your XML sitemap, simply open your browser and go to the following address:

`www.yourdomainname.com/google_sitemap.asp` (substituting your actual domain name in the central portion)

Once the page loads, you'll be presented with the entire XML code for your store's sitemap. Simply copy the page content and paste it into an ordinary text file to save a local copy.

Once you've saved the sitemap contents to a local file, log in to your Google Webmaster Tools account and upload the file in the sitemap verification settings.

A link to Google's content submission page can be found here: <http://www.google.com/submityourcontent/index.html>.

Once your sitemap file has been uploaded, allow some time for Google's system to complete the verification process.

### Items to Note

This function of Volusion and Google's Webmaster Tools verification service doesn't guarantee increased page rankings or search engine stats. It does, however, increase the likelihood that potential site visitors will be able to find your store and its products by searching Google for similar content.

We also recommend that, if you wish to verify your store with Google's Webmaster Tools, you do so only after fully programming all categories, products and other content. Submitting your sitemap to Google prior to full setup will result in an incomplete sitemap listing. Also, if you've already submitted your sitemap to Google but have made a large number of recent changes in your category or products listings, you should re-submit your sitemap using the steps outlined above.

## Marketing Products with AdWords

Google offers a unique program that allows online business owners to advertise themselves regardless of budget constraints. The Google AdWords program allows you to post ads and links to your business right in Google's search results pages.

When you sign up for an AdWords account at [adwords.google.com](http://adwords.google.com), you'll create ad and enter specific keywords related to your online store or products. When visitors enter the same or similar key words in their Google searches, Google then presents your ad in the search results page.

This is a quick and easy way to generate site traffic. Moreover, those viewing your ad are likely already interested in your store or products because they triggered the ad based on searching by its keywords.

Every Volusion store comes with a coupon of at least \$50 toward a new AdWords account. Once your store is ready to sell online, simply sign up with AdWords, enter your Volusion coupon information and you'll be coming up in searches in no time.

## Market Via MySpace & Facebook

In order to take advantage of the vast possibilities of online marketing through popular social networking services, Volusion provides the ability to integrate your store with both Facebook and MySpace, allowing you to broadcast products to a mass amount of potential customers.

Note that you need access to Volusion API to take advantage of social site integration. Access to this tool is provided with any monthly plan of Gold or higher. You'll also need to establish an account with MySpace or Facebook account to publish store information there.

More information on this topic here:

[FACEBOOK](#)  
[MYSPACE](#)

## The Volusion Featured Products Export

Exporting product information to Facebook or MySpace is easy. The first step requires activation of a special Volusion API setting that sends product data to the Volusion Social Networking Application.

- In the admin area, click Inventory >> Import/Export >> Volusion API.
- Check the Enable public XML for Featured Products option and click Save.

Orders	Reports	Inventory	Marketing	Customers	Design	Settings
Categories	Products	Options	Import / Export	Vendors	Purchase Orders	Receiving
Product Key Distribution						
Warehouses						

### Volusion API

<input checked="" type="checkbox"/>	Enable public XML for Featured Products. Generated once a day.	<a href="#">Save</a>	<a href="#">Reset</a>
<input checked="" type="checkbox"/>	Enable public XML for All Products. Generated once a day.	<a href="#">Save</a>	<a href="#">Reset</a>

### Accounting

Quickbooks	Manage QuickBooks Web Connector <a href="#">HERE</a>
------------	--

### Generic

Generic	<a href="#">Google Base Integration</a>	
<a href="#">Run</a>	Generic\Orders	Generic Orders
<a href="#">Run</a>	Generic\Products	Generic Products
<a href="#">Run</a>	Generic\Customers	Generic Customers

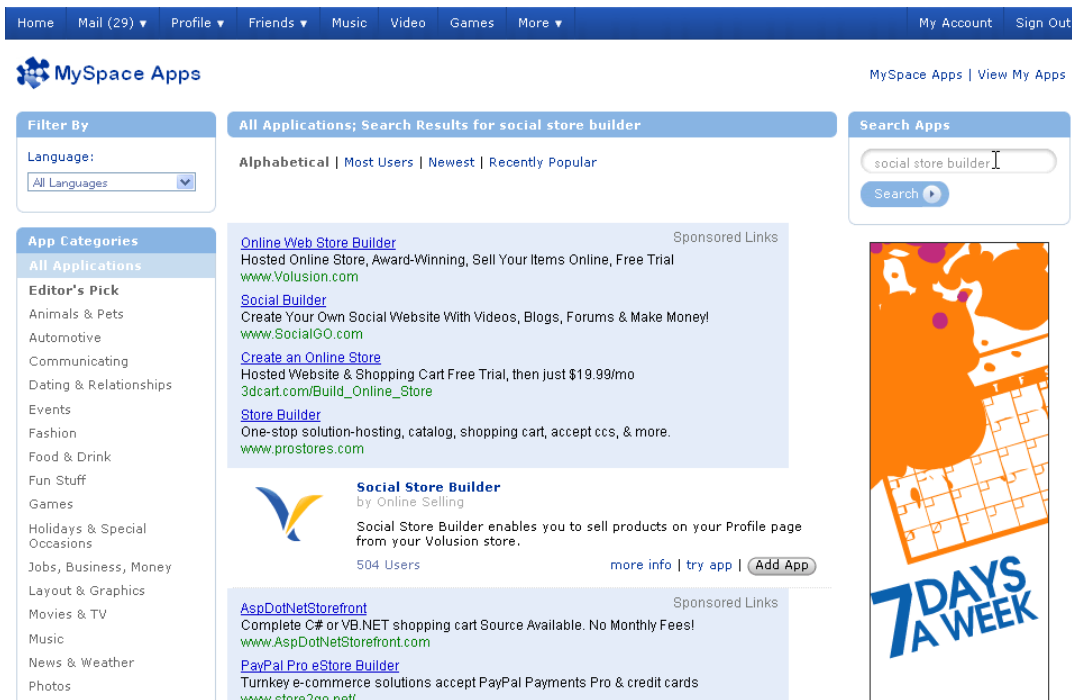
### Order Management

<a href="#">Run</a>	StoneEdge\downloadcustomers	StoneEdge downloadcustomers
---------------------	-----------------------------	-----------------------------

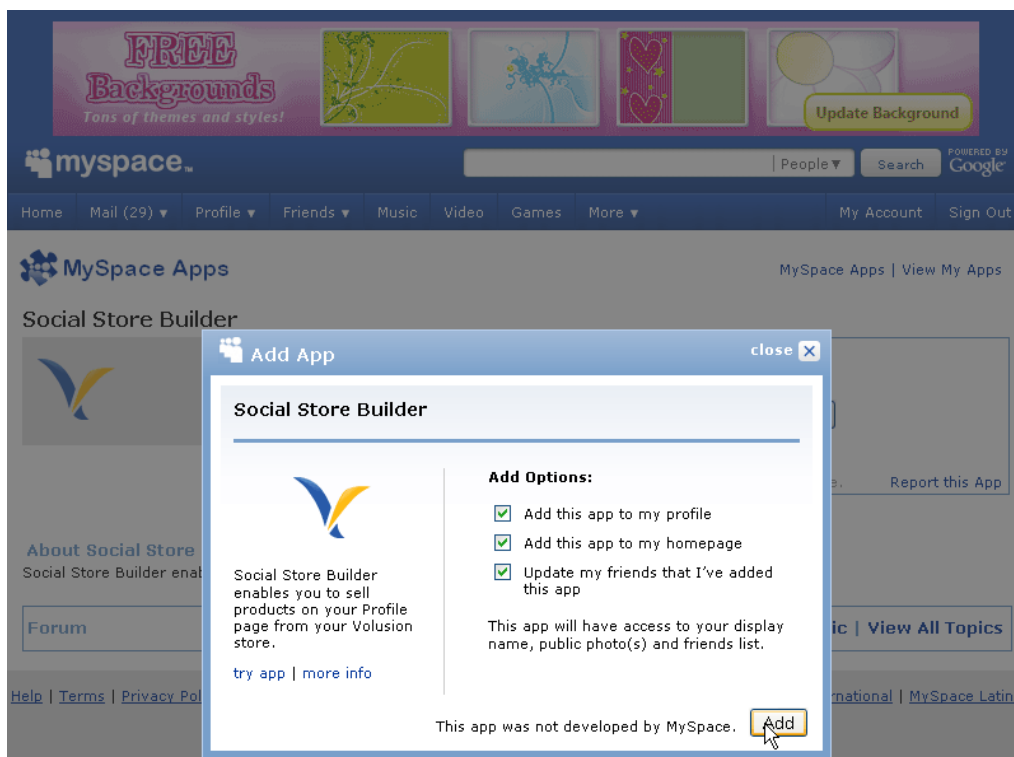
## Installing the MY Featured Products App in MySpace

- Log in to your MySpace account, click on More in the menu bar at the top of the page, and select Apps Gallery.

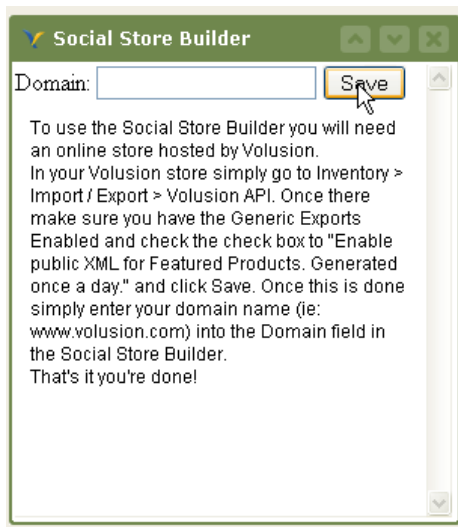
- To quickly find the application, simply search for "Social Store Builder" or "Volusion" on the MySpace Apps page (if results don't appear, click "Alphabetical" on the search results page).



- Click Social Store Builder app in the app search results page.

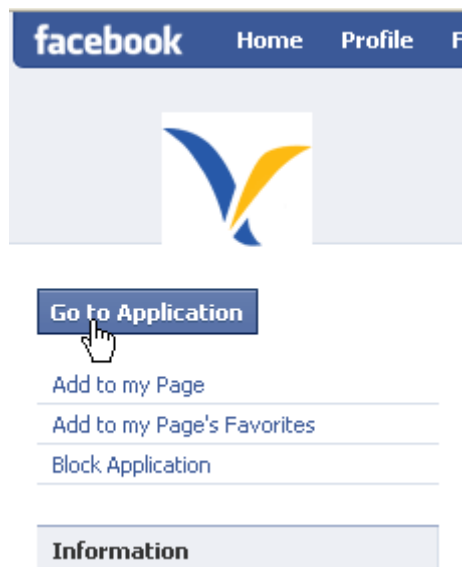


- Click Add this App.
- Click Home in the menu to navigate to your profile page.
- Locate the Social Store Builder app within the profile page. You must enter the domain name of your Volusion store into the text box (provided by the app) and click Save to complete the installation.



## Installing the My Featured Products App in Facebook

- Log in to your Facebook account and search for "Social Store Builder" in the upper right-hand corner, or click [here](#):
- Click the search result for the Volusion Social Store Builder app.
- Click Go to Application and then Allow. This installs the application on your Facebook account.



- If not already activated, click on the profile link in the top left corner to return to your Facebook home page.
- Click the Applications link in the bottom left.
- Select the Edit option from the menu.
- Choose Authorized from the menu.
- Click Edit Settings next to the listing for the Social Store Builder app within your Facebook applications page.
- Select the Profile tab within the application's popup window and click the link to add the application to your account box.
- Optionally, you can edit the application's privacy settings within this popup. When finished, click Okay.

Once these steps are complete, the Social Store Builder app will be loaded into the Boxes page within the main Facebook profile. Simply click on Boxes tab to view the app. Click on the app to edit its settings and enter the store domain name to connect with the Social Store Builder application. Be sure to omit "http://".

## Using Volusion with MySpace & Facebook

Once you've completed the integration steps, the system will automatically retrieve a list of products in the Home\_Featured group. Each product retrieved from the export will display in your social networking account with the product image, price, sale price and an Add to Cart link. Clicking this link will redirect visitors to your shopping cart page with the product

automatically loaded into the shopping cart. Visitors can then continue shopping within the Volusion store or proceed to checkout.

## Notes on Using the Social Store Builder

Only products in the Home\_Featured group will be exported to the system. We recommend only assigning a select number of products to this group (15-20 products) and regularly updating it to most effectively market your products. This will prevent social network profiles from becoming overloaded with product data and keep data transfer by the application to a minimum. This will also help you comply with display constraints enforced by MySpace.

Facebook users should note that because of display constraints within the Facebook user interface, the social store builder can't display product content within the applications area profile page. Because of this, the social store builder will only display content in the assigned area of your profile page.

## Register with Google Base

Google Base is one of many third-party services that Volusion can directly integrate with to help you sell online. Google Base allows users a new avenue to list items online. Using this tool can help drive traffic to your products and potentially increase sales.

### Items to Note

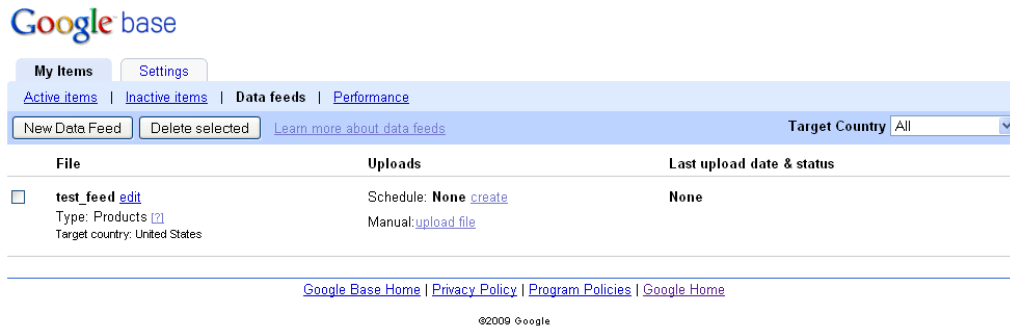
Google Base integration requires access to the Volusion API provided with monthly plans of Gold level or higher.

#### Configuring Google Base

- Register with Google at <http://base.google.com>
- Click Data Feeds.
- Click Settings and enter your store name in the Display Name field.
- Enter your store address in the Website URL field.
- Click Save Changes and then My Items.
- Click Data Feeds and then New Data Feed.



- Set the Item Type to Products.
- In the Setup Data Feeds section, enter a file name for the XML document that your Volusion store will export to Google Base (e.g. myproducts.xml)
- Click Register data feed.



## Configuring Google Base FTP Access

In order to obtain data from your store, you'll next need to set up FTP access within your Google Base account. Here's how:

- Log in to your Google Base account at [base.google.com](http://base.google.com).
- Click Data Feeds and locate the Settings tab.
- Locate the FTP Account heading.

- Here, you can create your Google Base FTP account by entering a login name and password. Then click Save Changes.

The screenshot shows the Google Base FTP account creation interface. At the top, the Google Base logo is displayed. Below it, there are tabs for 'My Items' and 'Settings'. The 'Settings' tab is active, and within it, the 'FTP account' sub-tab is selected. The page title is 'Create FTP Account'. A paragraph explains that FTP allows sending items to Google and that a username and password are required. A 'Learn more' link is provided. A note states that the FTP account is distinct from a Google Account. The form includes fields for 'FTP server name' (with a default value 'uploads.google.com'), 'Username' (with a default value 'Test\_Account1' and a note that it's lowercase letters, digits, and underscores only), 'Password' (with a note that it's 7-20 characters using letters, numbers, and punctuation), and 'Retype password'. At the bottom, there are 'Save Changes' and 'Cancel' buttons.

**Google base**

My Items Settings

General | Default item values | FTP account | Tax and Shipping | AdWords

**Create FTP Account**

The File Transfer Protocol (FTP) allows you to send your items to Google. Using FTP you can copy a file from your computer to Google's servers. To use FTP you will need to create a username and password.

[Learn more](#)

Note that for security purposes your FTP account is distinct from your Google Account.

**FTP server name**  
[uploads.google.com](#)

**Username**  
  
*(lowercase letters, digits, and underscores only)*  
 Please notice that you cannot modify your username after creating your FTP account

**Password**  
  
*(7-20 characters using a combination of letters, numbers, and punctuation)*

**Retype password**

Save Changes Cancel

Please note that it may take some time for your Base FTP account to become active.

## Configuring Google Base Settings in Volusion

To complete the integration process:

- In the admin area, click Inventory >> Import/Export >> Volusion API.
- Click Google Base.

**Volusion API**

☒ Enable public XML for Featured Products. Generated once a day. [Save](#) [Reset](#)

☒ Enable public XML for All Products. Generated once a day. [Save](#) [Reset](#)

**Accounting**

Quickbooks [Manage QuickBooks Web Connector HERE](#)

**Generic**

Generic	<a href="#">Google Base Integration</a>
<a href="#">Run</a>	Generic\Orders <a href="#">Generic Orders</a>
<a href="#">Run</a>	Generic\Products <a href="#">Generic Products</a>
<a href="#">Run</a>	Generic\Customers <a href="#">Generic Customers</a>

**Order Management**

<a href="#">Run</a>	StoneEdge\downloadcustomers <a href="#">StoneEdge downloadcustomers</a>
<a href="#">Run</a>	StoneEdge\downloadorders <a href="#">StoneEdge downloadorders</a>

- Enter the FTP login name, password and the Google Base XML file name exactly as you entered them in the Google Base configuration process above.
- Enter a title and description for your Google Base export into the fields provided.
- Click Generate XML. Note that the XML file generation process may take some time, depending on the size of your product database.

**Google Base**

FTP Username:

FTP Password:

FTP File Name:

Title:

Description:

[Generate XML](#) [Publish to Google](#)

**XML to be sent**

- Once the XML generation is complete, XML code will appear on this page.

- Click Publish to send the XML data to Google

It may take some time for Google's base system to publish your product information online after you have transmitted the XML information to your Base account.

## Product Requirements

The Volusion Google Base export will send product data for all products in your Volusion store's database to your Base account. Some products, however, will be exempt from the export. Please note that the Google Base export will not send product data for products that meet any of the following conditions:

- Products with the Google Product Type\*\* field left unconfigured
- Products marked as Hidden
- Products marked for Private Section Customers Only
- Any product configured as a gift certificate
- Any product configured with a setup cost
- Products configured with a membership cost
- Any product configured to be a donation product
- Child products

\*\* You can set your products' Google Product Type in admin area product edit page under 3rd Party Specific Fields heading.

You can find a list of Google Product Type examples online [here](#).

## Product Expiration

Google Base automatically sets a 30 day expiration date for any product data exported to the service. This expiration date is 30 days from the date Google receives your exported data. Regenerate your Google Base XML and re-send it using the controls provided in the Volusion API page every 30 days to update your product listings.

## Blog Your Store

Blogs and other forms of new media have emerged in the past several years as a major force in global communication. This media type is also a fertile ground for online marketing. Many of our merchants have utilized blogs to help promote their businesses through savvy, web-enabled marketing.

### Increase your SEO Rank through Blogs

All search engines reference and categorize text posted on the Internet so that users can find relevant content based on their search criteria. The more often content appears online, the more likely search engines will reference it. As such, it pays to advertize your store through blogs (e.g. your blog, friends' blogs, blogs related to your products, etc.). Blog visitors may click on your store directly, but this practice will also optimize your site for search engines.

### Registering Affiliates Who Blog

Does one of your customers have a popular blog? Sign them up to be a store affiliate using the steps outlined in the next section. Not only can affiliates increase your traffic and sales by posting their affiliate links on their blog, they can also earn some extra cash through affiliate commissions.

### Get Product Reviews through Blogs

Do you have a loyal customer who blogs? Ask if he or she is interested in writing a review for one of the products they purchased (they can also do this directly on your Volusion store). This will help increase your SEO, drive traffic to your site, and get the word out about your products or services.

## Start a Blog and Get Active

Are you passionate about your business? Do you think you have a winning product or service? Are you a non-profit organization looking to promote your efforts online? Get a blog! It's not difficult to start publishing. There are a wide variety of free blogging services available such as Blogger, Wordpress.com and LiveJournal. You can blog about your business efforts and products. This doesn't just boost your business, it also elicits an avenue for customer feedback through the blogs' commenting systems.

For more information on blogs, please read our article about them.

## Use Your Store's Affiliate System

The Affiliate system is a function of Volusion's Marketing and Customers pages that allows your store's registered customers to become affiliates.

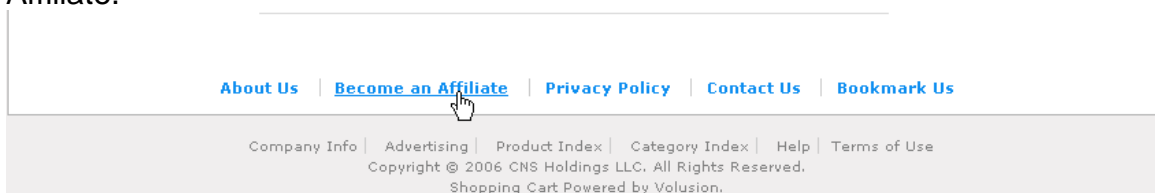
Affiliates can be instrumental in marketing and driving traffic (and sales). The Winter '09 functions allow your store to assign special tracking links to any approved affiliate. These links are provided to the affiliate, who can then place them in numerous areas on the Internet (e.g. high-traffic blogs, forums, etc.). These links will trace back to your store, allowing affiliates to drive traffic to your site.

Additionally, the Volusion affiliate system provides a way of tracking inbound activity to your site based on these special tracking links. The system can track click-throughs and sales based on affiliate link referrals. The system can even calculate percentages you pay to affiliates for referral commission (giving affiliates even more incentive to market your store).

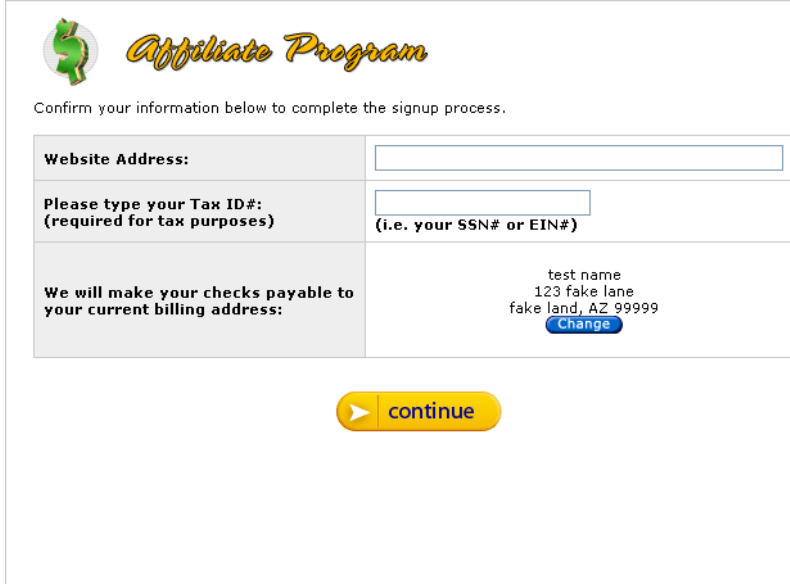
## Becoming an Affiliate


An affiliate is a special customer account within the Volusion store. Customers can request to become affiliates on your site and complete a brief registration process.

- Near the bottom of storefront, your customers can click on Become an Affiliate.




- They will then log in to their customer account to complete the affiliate registration process. If they don't have an account, they'll be prompted to create one.
- Prospective affiliates will be asked to enter their website address and a tax ID number (usually either a social security or EIN number) in order to help you verify the address to



 **Affiliate Program**

Confirm your information below to complete the signup process.

<b>Website Address:</b>	<input type="text"/>
<b>Please type your Tax ID#: (required for tax purposes)</b>	<input type="text"/> (i.e. your SSN# or EIN#)
<b>We will make your checks payable to your current billing address:</b>	test name 123 fake lane fake land, AZ 99999 <a href="#">Change</a>



which you send payments.

- They will then click Continue to complete the registration process. A notice will be sent stating that their affiliate account will be activated after a 24-hour approval process.



Thank you for your interest!

Please allow 24 hours for your account to be approved and fully activated.

- At this point, a store administrator must manually approve the customer's account to officially grant them affiliate status.
- Log in to the admin area and click *Customers >> Accounts*.
- On this table, click the ID number of the customer you wish to promote to affiliate status.
- Select Partner/Affiliate from the *Access Key* dropdown menu and click Update.

**Customers** | 20

Search Add Delete Back to List | Next >> Expand All | Collapse All

This customer has placed [0 orders](#)

Login As This Customer

**Basic Customer Info**

ID 20

First Name affiliate

Last Name test

Company Name

Address Line 1 123 fake

Address Line 2

City fake

State or Province FL

Postal Code 99999

Country United States

Access Key Partner / Affiliate

E-mail Address affiliate\_test@volusion.com

Password test123

Phone Number 8888888888

Fax Number

Website Address affiliatetest.com

Sales Rep

Notes

Note that fully functioning affiliate accounts can only be created using this method. Store administrators can create an affiliate account from the customers table, but this will prevent the creation of fully-functioning tracking URLs.

## Viewing Your Affiliates

To view a list of active affiliates, click Marketing >> Affiliates in the menu bar. Note that each affiliate listed here contains the same settings as that affiliate's entry in the customers table.

**Orders Reports Inventory Marketing Customers Design Settings**

Coupons / Discounts Nav Menu Promotions MyRewards Newsletters Gift Certificates SEO Affiliates In-Stock Requests

**Update Affiliates**

Search Add Customize | Bulk Updates | Export Results | Bookmark Results

Quick Edit View Affiliates Results 1 - 1 of 1 Page 1 of 1

Customer	Last Name	First Name	Company	Email Address	Website Address	State	Country	Last Modified	Delete
<a href="#">20</a>	test	affiliate		<a href="#">affiliate_test@volusion.com</a>	<a href="#">affiliatetest.com</a>	FL	United States	8/15/2009 11:12AM	<input type="checkbox"/>

Results 1 - 1 of 1 Page 1 of 1

Click the affiliate's ID number to view their account record in the customers table.

## Notes on Affiliates



Once a customer becomes an affiliate, they can log in to their customer account and click Visit My Affiliate Page link to access reports on the number of click-throughs, sales, and the commission they've generated.



**My Account**

**Welcome to your account affiliate test.** You may use this page to manage your orders, payments, and other information, all in one place.

My Orders	
<a href="#">Review orders / track packages</a>	<a href="#">Change quantities / cancel orders</a>
<a href="#">Change shipping address</a>	<a href="#">Print invoices</a>
<a href="#">Change billing address</a>	<a href="#">Return items</a>

Personal Information	
<a href="#">Change e-mail address, or password</a>	<a href="#">Manage your billing addresses</a>
<a href="#">Change my e-mail preferences</a>	<a href="#">Manage your shipping addresses</a>

Payment Settings	
<a href="#">Edit or delete a credit / debit card</a>	<a href="#">View gift certificate balance</a>
	<a href="#">Apply a gift certificate to your account</a>

Other Features	
<a href="#">Edit a review that I wrote</a>	<a href="#">View my Wish List</a>
<a href="#">My Rewards</a>	

Affiliate Statistics	
<a href="#">Visit My Affiliate Page</a>	

I'm done managing my account, log me out.

They can also sign up as many as four sub-affiliates registered through them.



## My Account

Choose the time period you wish to view: All  2009

Level	People in level	Click-throughs	Sales	Commission
<b>You</b> (5.00%)	1	0	0	\$0.00
<b>1</b> (3.00%)	0	0	0	\$0.00
<b>2</b> (2.00%)	0	0	0	\$0.00
<b>3</b> (2.00%)	0	0	0	\$0.00
<b>4</b> (2.00%)	0	0	0	\$0.00
<b>Total:</b>	<b>1</b>	<b>0</b>	<b>0</b>	<b>\$0.00</b>

**Advertising Tools**

[Generate Banner Ads](#)

**Helpful Reminders**

Your Link: <http://zmnzc.mxkcw.servertrust.com/?Click=20>

Anyone who visits "Your Link" will be tracked, and you will get credit. Place your link anywhere: In e-mails, banner ads, on your website, etc.

Each affiliate page also features a link that allows your affiliates to quickly create HTML banner ads that can be posted on websites and in emails. These banner ads contain links back to the Volusion store and include the affiliates ID information for tracking purposes.

This page will contain the affiliate's link and the affiliate's ID number. Clicking on this link will redirect visitors to the store and record all sales and click-throughs under the affiliate's account. Affiliates should copy this URL and embed it as a hypertext link on any websites or in any emails or online marketing tools they use.

## Affiliate Reports

To view a report of the most recent affiliate activity, click on the admin area's *Reports >> ROI Tracking* page. Here, you'll see a table listing all active affiliate links generated by your store, as well as the total number of clicks and sales each link has generated. The table also lists the clicks-to-sales conversion rate.

**Orders** **Reports** **Inventory** **Marketing** **Customers** **Design** **Settings**

Reporting ROI Tracking Affiliate Stats Search Terms

## Use ROI Tracker

This tracker allows you to closely monitor the ROI generated from all of your advertising campaigns. You can setup specific campaigns to accurately reflect referrals. To monitor all other traffic, you can view the default campaign labeled "Other". Please note that each newsletter you send out is automatically added as a new campaign.

**Date Range** ▼ **From** 07/16/2009 📅 **To** 08/15/2009 📅  
**Exclude** ☐ Free Orders  
**Include** ☐ Regular Affiliates ☐ Advertising Campaigns ☐ Newsletters  
**Group By** Selected Date Range ▼  
**AffiliateID**  (optional)

**ROI Tracker > All Campaigns**  
7/16/2009 through 8/15/2009, grouped by Past 30 Days

Affiliate Record	Customer Record	Group	Campaign	TrackingURL	Most Recent Click	Most Recent Sale	Conversion Rate	Total Clicks	Total Sales
			<a href="#">Other</a>		8/5/2009	8/12/2009	166.67%	3	5
<b>Totals:</b>							<b>166.67%</b>	<b>3</b>	<b>5</b>

**New / Inactive Campaigns...** [Add](#)

Affiliate Record	Customer Record	Group	Campaign	TrackingURL	Most Recent Click	Most Recent Sale	Total Clicks	Total Sales	Conversion Rate
<a href="#">1</a>	<a href="#">1</a>	<input type="text"/>	<a href="#">test name</a>	http://zmnzc.mxxkw.servertrust.com/?Click=1			0	0	<a href="#">✕</a>
<a href="#">18</a>	<a href="#">18</a>	<input type="text"/>	<a href="#">Newsletter: Testing Newsletter -</a>	http://zmnzc.mxxkw.servertrust.com/?Click=18			0	0	<a href="#">✕</a>
<a href="#">20</a>	<a href="#">20</a>	<input type="text"/>	<a href="#">affiliate test</a>	http://zmnzc.mxxkw.servertrust.com/?Click=20			0	0	<a href="#">✕</a>

**ROI Tracker Link Generator**

Initially, this page will show all affiliate activity within the past 30 days. You can use the reporting functions to view affiliate stats for different dates or time periods. For more information on using the ROI Tracking and other functions in the Reports section, please see the "Advanced Settings" section of this manual.

### Items to Note

Each affiliate is assigned an ID number. When viewing affiliate stats, you might encounter several entries in the ROI Tracking table for an affiliate with and ID of 0. These entries refer to automated affiliate campaigns and systems such as Google Adwords.

## **Step 7 - Placing Orders**

### **Understanding the Checkout Process**

Your customers will usually begin at your home page. Sometimes they will land on a category or product detail page if they came from a search engine. These are the general steps a customer will take to place an order on your store and the pages they will typically navigate to:

- Home page (Default.asp)
- Category pages/Search results pages (SearchResults.asp)
- Product details page (ProductDetails.asp)
- Shopping cart (ShoppingCart.asp)
- Log in (Login.asp)
  1. Log in with existing email and password or
  2. Click Create new account
- Create a new account or modify existing account info (AccountSettings.asp)
  1. Create new email address and choose a new password
  2. Enter new shipping address
  3. Enter new billing address, if different from shipping address
  4. Choose shipping preference for order
  5. Enter credit card/payment information
- Review order then hit proceed to checkout (One-Page-checkout.asp)
- Order finished confirmation/receipt (OrderFinished.asp)

New customers should follow the above steps intuitively as they shop at your website. Returning customers will skip most of Step 6, since all their past information is saved to facilitate a quick checkout process.

### **Quick Phone Order Page**

As the administrator, you can place orders from the front end of our store by simply following the same checkout process as your customers. You can also use the phone order page to take orders over the phone and enjoy some additional useful tools, controls and features.

### **Placing Orders from the Storefront**

- In the admin area, click Log Out in the upper right-hand corner.
- From your store home page, add items to the cart and proceed to checkout.
- When asked to log in or create a new account, simply create a new account with the customer's information. You're essentially standing in for the customer. If you've activated anonymous checkout, you won't have to create a new account, but you'll still have to provide an email address on the checkout page.

## **Placing Orders with the Phone Orders Page**

In the admin area, click *Orders >> Phone Orders*.

### **For New Customers**

Under Checkout Type in the Log In section, click the New Customer tab and enter an email and password, then click Create Account.

#### **Items to Note**

It's possible to place an order anonymously from this page by clicking the Anonymous tab before filling out the order. This method won't allow you to track the customer's email or address information, and the customer won't be able to track the order online. Also, all anonymous orders are combined in financial reporting.

### **For Existing Customers**

Click the Existing Customer tab, enter the customer's ID number from the admin's customers table, and click Log In. This will populate customer's email address to the page and keep the order listed in the customer's account.

### **To Add Products to a Phone Order**

- Click Go Shopping under the Order Summary section to add products to the cart. This will take you to your store homepage.
- Once you've added products to the shopping cart, close the browser and return to the phone order page.
- Click your browser's Refresh function. This will populate products added to the cart.
- Enter the customer's shipping information, click Precalculate Tax + Shipping Rates, then choose their preferred shipping method.
- Enter the customer's billing information and payment details, then click Place Order.

### Items to Note

When taking a phone order, you are logged in as an administrator. To place an order, however, you'll have to be logged in to the customer's account on the phone order page.

## Point of Sale System

If you conduct business as a brick-and-mortar store, you may need to use a point of sale (POS) system for quick checkouts. Fortunately, Winter '09 offers a built-in POS system under Orders >> Point of Sale. It assumes there will be no shipping cost, since the customer will physically pick up the item at your store location.

- Use your barcode scanner to scan each product. If you have a product without a UPC code or if you don't have a barcode scanner, you can simply use your online store to add products to the cart.
- Collect payment in one of the following ways:
  - Use your credit card terminal to swipe the customer's credit card.
  - Enter the cash value provided by the customer.
  - If the customer is paying by check, you can click Proceed to Checkout to use the Change Payment button to enter the MICR check info and then Save.
- Your receipt printer quickly prints the receipt and displays the amount of change to give to the customers who pay by cash.

The following POS hardware is supported:

- Barcode scanner
- Credit card swipe/magnetic stripe reader
- 3-inch receipt printer

### **Items to Note**

An MICR check reader is not supported at this time.

To purchase hardware, you might consider the following hardware vendors:

<http://pos.epson.com>

<http://www.symbol.com>

<http://www.waspbarcode.com>

You may also want to search eBay for low-cost hardware. One of the most inexpensive credit card swipes is the Magtek Credit Card Swipe.

### **Installing the Hardware**

Both the barcode scanner and credit card swipe hook up to any computer using the same plug as your keyboard. The barcode scanners and credit card swipes always come with a splitter to accommodate all POS devices. These devices are designed to save you time and ensure accuracy. The powerful convenience actually comes from using your ecommerce software in conjunction with this POS hardware. When using the POS System in your admin area, you'll simply place your cursor in the UPC Code field and scan any barcode to add the product to the shopping cart.

## Step 8 - Analytics & Reporting

**Analytics & Reporting** Once your store is set up and ready for business, it's a good idea to analyze your performance and your industry. Winter '09 features built-in reporting tools and access to third-party analytics. The following section covers how to use some of these features.

### Using Google Analytics

One of the primary ways to obtain information on store activities is through analytics services. A web analytics service tracks inbound traffic to a website and evaluates the overall traffic behavior. Analytics services can also capture the quantity and duration of page, track which links are clicked, which pages are most visited and the overall shopping patterns. This data provides you with information about how your customers interact with your store which you can use to shape your overall business strategy.

A robust and free analytics service called Google Analytics can help you generate the types of reports you need.

### Creating a Google Analytics Account

- Visit to [www.google.com/analytics](http://www.google.com/analytics). If you don't have a Google account (e.g. a Gmail account), you will have to register for one first.
- Sign in to the Analytics page to begin registration.
- Click Sign Up Now.
- Enter information your Volusion store information and click Continue.

**Google Analytics**

**Getting Started**

**Analytics: New Account Signup**

[General Information](#) > [Contact Information](#) > [Accept User Agreement](#) > [Add Tracking](#)

Please enter the URL of the site you wish to track, and assign a name as it should appear in your Google Analytics reports. If you'd like to track more than one website, you can add more sites once your account has been set up. [Learn more.](#)

**Website's URL:**   (e.g. www.mywebsite.com)

**Account Name:**

**Time zone country or territory:**

**Time zone:**

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- Enter your personal information and click Continue.





## Getting Started

## Analytics: New Account Signup

General Information > **Contact Information** > Accept User Agreement > Add Tracking

Last Name:   
 First Name:   
 Phone Number:  (e.g. 123-123-1234)  
 Country or territory:

[< Back](#) [Continue >](#)

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- Accept Google's service conditions and click Create New Account.



## Getting Started

## Analytics: New Account Signup

General Information > Contact Information > **Accept User Agreement** > Add Tracking

Please carefully read the following terms and conditions, then select the checkbox to accept.

### GOOGLE ANALYTICS TERMS OF SERVICE

The following are the terms and conditions for use of the Google Analytics service described herein (the "Service") between Google Inc. and you (either an individual or a legal entity that you represent as an authorized employee or agent) ("You"). Please read them carefully. BY CLICKING THE "I ACCEPT" BUTTON, COMPLETING THE REGISTRATION PROCESS AND/OR USING THE SERVICE, YOU ARE STATING THAT YOU ARE ELIGIBLE FOR AN ACCOUNT AND THAT YOU AGREE TO BE BOUND BY ALL OF THESE TERMS AND CONDITIONS OF THE SERVICE ("AGREEMENT"). The Service is offered to you conditioned on your acceptance without modification of the terms, conditions, and notices contained herein.

1. DEFINITIONS

"Account" refers to the billing account for the Service. All Profiles linked to a single Site will have their Page Views aggregated prior to determining the charge for the Service for that Site.

"Customer Data" means the data concerning the characteristics and activities of visitors to your website that is collected through use of the UTM and then forwarded to the Servers and analyzed by the Processing Software.

"Documentation" means any accompanying proprietary documentation made available to You by Google for

☒ Yes, I agree to the above terms and conditions.

## Data Sharing Settings

Your account is opted in to receiving benchmarking and ad service features which require access to your Google Analytics data.

[Edit Settings](#) | [Learn More](#)

[< Back](#) [Create New Account >](#)

- Copy the JavaScript code on the next page and paste it into your Volusion store (see Part II of this article). Click Finish.



## Getting Started

### Analytics: Tracking Instructions

General Information > Contact Information > Accept User Agreement > **Add Tracking**

**New Tracking Code (ga.js)**

[Legacy Tracking Code \(urchin.js\)](#)

Copy the following code block into every webpage you want to track immediately before the `</body>` tag. If your site has dynamic content you can use a common include or a template. [Learn More](#)

Use this tracking code to gain access to a wide range of exciting **new features** as they become available.

```
<script type="text/javascript">
var gaJsHost = (("https:" == document.location.protocol) ? "https://ssl." : "http://www.");
document.write(unescape("%3Cscript src='" + gaJsHost + "google-analytics.com/ga.js' type='text/javascript'" + ">"));
</script>
<script type="text/javascript">
try {
var pageTracker = _gat._getTracker("UA-10244649-1");
pageTracker._trackPageview();
} catch(err) {}</script>
```



**Note:** We recommend that you do not mix the new and legacy tracking code snippets together on any given page. Doing so might generate incorrect data. You can, however, migrate select pages of your site to the new version.



**What if I'm not the person who created the website?** Email the code above and instructions to your technical team or website administrator. Once they have added the tracking code to your website, click 'Check status' from the Analytics Settings page to find out if your website is being tracked and data is being collected.

**Finish**

You should now be logged in to your Google Analytics main page. Periodically, this page will be updated by Google's analytics system with statistical information regarding your Volusion store.

The screenshot displays the Google Analytics 'Overview' page. At the top, there's a navigation bar with 'Analytics Settings', 'View Reports: Click to select Website Profile', and 'My Analytics Accounts: www.YourDomain.com'. The main header shows the date range 'Jul 15, 2009 - Aug 14, 2009' and a comparison to 'Jun 14, 2009 - Jul 14, 2009'. Below this, a table titled 'Website Profiles' lists the profile 'http://www.YourDomain.com UA-10244649-1'. The table columns include Name, Reports, Status, Visits, Avg. Time on Site, Bounce Rate, Completed Goals, and Actions. The 'Visits' column shows a dropdown menu with 'Visits' and '% Change'. The 'Status' column shows a warning icon. Below the table, there are links for 'Add Website Profile', 'User Manager' (showing 1 user), and 'Filter Manager' (showing 0 filters). On the left, there are sections for 'Common Questions', 'Recommended for you' (including AdWords), and 'Resources' (including Help, Code Site, Features, Product Tour, Case Studies, and Conversion University).

## Installing the Google Analytics Code

- In the admin area, click Design >> LiveEdit File Editor.
- In the Shortcuts table on the right, click on template\_XXXX.html ("XXXX" is the number or name of your Volusion store template).
- In the Live Edit window, locate the tag marked `— * </body>` in the template code at the bottom.
- Paste the Java Script code from the Google Analytics page into your Live Editor just above this tag.

The screenshot shows a web editor interface with a file named `/v/template_101.html` (5.2KB). The editor displays HTML code for a footer template. The code includes a Terms of Use link, a Copyright notice, a Shopping Cart link, and Google Analytics tracking code. A 'Save' button is visible at the bottom right of the editor.

Shortcuts...

- Template Files
  - [template\\_101.html](#)
- CSS Files
  - [template\\_101.css](#)
- Root Files
  - [/default.htm](#)
  - [/maintenance\\_message.htm](#)
- Email Templates
  - [/v/vspfiles/email\\_templates](#)

- Click Save.

Once installation is complete, allow some time for Google's system to begin tracking your store. Soon, you'll be able to log in to your Google Analytics account and retrieve reports and information.

## Generate Reports in Volusion

Volusion also contains its own set of reporting tools. To access Volusion's reporting features, Click Reports >> Reporting in the admin area. To create a new report, click Create Report.

**Orders** Reports Inventory Marketing Customers Design Settings

Reporting ROI Tracking Affiliate Stats Search Terms

## Generate Reports

[+ Create Report](#)

Saved Reports:  Display Rows:  Page  of 1

### Orders [Orders By Orders.Year - No Date Specified]

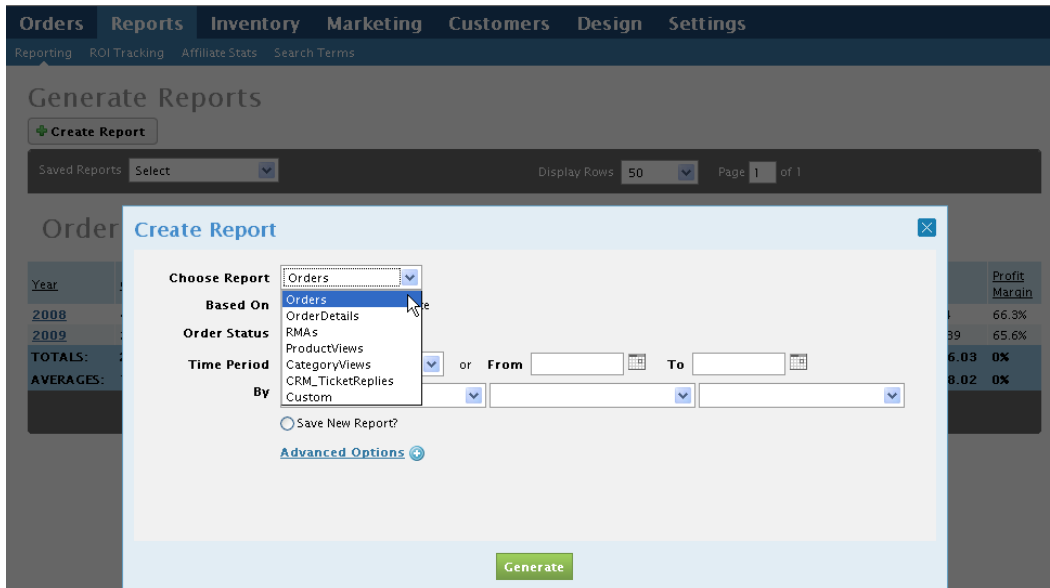
Year	Orders	Payment Amount	Payment Authorized	Payment Received	Sales Tax1	Sales Tax2	Sales Tax3	Shipping Cost	OrderDetails	Quantity	COGS	Profit	Profit Margin
2008	4	960.02	0.00	25.00	54.42	0.00	0.00	225.00	9	82	229.46	426.14	66.3%
2009	23	16,545.25	0.00	144.92	405.50	0.00	0.00	5,941.57	69	84	3,483.36	6,349.89	65.6%
<b>TOTALS:</b>	<b>27</b>	<b>\$17,505.27</b>	<b>\$0.00</b>	<b>\$169.92</b>	<b>\$459.92</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$6,166.57</b>	<b>78</b>	<b>166</b>	<b>\$3,712.82</b>	<b>\$6,776.03</b>	<b>0%</b>
<b>AVERAGES:</b>	<b>14</b>	<b>\$8,752.64</b>	<b>\$0.00</b>	<b>\$84.96</b>	<b>\$229.96</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$3,083.29</b>	<b>39</b>	<b>83</b>	<b>\$1,856.41</b>	<b>\$3,388.02</b>	<b>0%</b>

This page is divided into three sections — the Report Generator, the Report Graph and the Report Table. As the name implies, the Report Generator allows you to generate various report types and define their criteria. The Report Graph and Report Table display the data returned by the reports you generate.

Within the reporting page, you can generate a report on the following items:

- Orders
- Order details
- RMAs
- Products
- Categories
- CRM tickets

There is an additional option to create a fully custom report.



## Configuring a Revenue Report

One of the more common reports is the revenue report, which details how much revenue has been received over a specific time period based on orders placed.

To create such a report for the last 30 days that includes daily performance:

- Click Create Report.
- Set the Choose Report menu to Orders.
- Select either Based on OrderDate or Based on ShipDate.
- From the Time Period menu, select Past 30 Days.
- Within the three By filters, set the first filter option to Day.
- Click Advanced Options.
- Set the first filter to PaymentAmount, set your color and display options, enter Revenue in the text box within this row and then select Currency from the last menu.

Finally, click Generate to run the report. Once finished, a bar-graph or pie-chart will appear, displaying each day over the past 30 days and an indicator of the total daily order amount.

## Configuring a Product Report

One of the most popular reports is a product sales report. This simple report will give you information on the types of products sold. It can help reveal top-selling products and other key statistics.

If you'd like to view a list of quantities sold for each of your products within the fourth quarter of 2008:

- Click Create Report and choose OrderDetails from the Choose Report menu.
- Select either the Based on OrderDate or Based on ShipDate option.
- In the From text box, enter 10/01/2008.
- In the To text box, enter 12/31/2008.
- In the first By filter, choose OrderDetails.ProductCode.
- Click Generate.

The screenshot shows the 'Generate Reports' section of the Volusion dashboard. A 'Create Report' modal is open, allowing users to configure a report. The 'Choose Report' dropdown is set to 'OrderDetails'. The 'Based On' section has 'OrderDate' selected. The 'Time Period' is set from '10/01/2008' to '10/01/2008'. The 'By' filter is set to 'OrderDetails.ProductCode'. A 'Generate' button is visible at the bottom of the modal, with a mouse cursor hovering over it.

- If you plan to use this report again, you can save it in Saved Reports for easy access.

Once this report is created, a graph and table will display a list of all products by product code sold in the fourth quarter of 2008 and their quantities. This report can be regenerated by setting an additional filter to either Month or Day. This organizes the products sold report based on the selected day or month within that quarter.

## Additional Settings

There are many more reports and controls you have access to with Volusion. Feel free to experiment with this page to create your own custom reports. For additional information and more advanced tasks, please read the “Advanced Settings” portion of this manual.



## **Start Selling!**

Congratulations! You've completed the Volusion Winter '09 Getting Started Guide. At this point, you should be ready to sell online.

There's still much more Volusion can do for your online business, however. You might want to use our more advanced product configurations, or take advantage of the Volusion API. If you're ready to delve deeper into Volusion's advanced features, please proceed. You'll be amazed at what one of the world's most innovative ecommerce applications can do for your online business.

If you need any additional assistance along the way, Volusion is here to help. Feel free to visit the Volusion Knowledge Base to find specific answers to problems you encounter. Our Technical Support staff is also ready to assist you 24 hours a day, 7 days a week. You can write to us through your ticket area at <http://my.volusion.com>, talk to us through Live Chat or reach us by phone at 800-646-3517. If you're calling from outside the United States and Canada, please dial 805-416-5990.



## **Winter '09 - Advanced Settings**

Now that you've completed the initial setup for your Volusion store, you're ready to become an ecommerce expert.

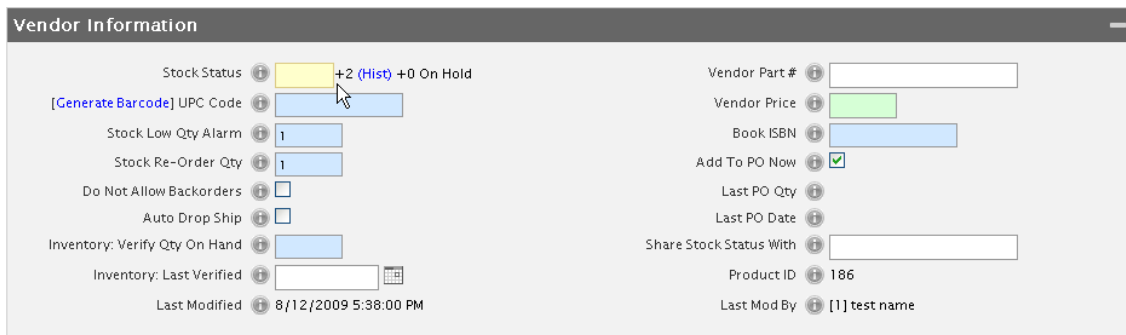
If there are some specific store settings you still have questions about, such as offering downloadable products or using our Smartmatch system, or if you're interested in more advanced tips and tricks, this portion of the manual is for you.

## Product Configuration

The Volusion ecommerce system can be configured to offer nearly unlimited products. Although you'll configure most products following the procedures outlined in the "[Getting Started Guide](#)" portion of this manual, there are many additional features to utilize.

### Setting Up Products for Inventory Management

Once you've added products to your store, you can set the Volusion system to track inventory just by configuring a single setting in your product's variables. In the admin area, click Inventory >> Products and choose a product code. Under the Vendor Information section, enter a value in Stock Status and click Update.



Vendor Information

Stock Status  [Hist](#)

[\[Generate Barcode\]](#) UPC Code

Stock Low Qty Alarm

Stock Re-Order Qty

Do Not Allow Backorders ☐

Auto Drop Ship ☐

Inventory: Verify Qty On Hand ☒

Inventory: Last Verified

Last Modified

Vendor Part #

Vendor Price

Book ISBN

Add To PO Now ☒

Last PO Qty

Last PO Date

Share Stock Status With

Product ID

Last Mod By

By default, any product created in the database has a stock value set to "null," meaning the product has no explicit value and will not be tracked by inventory management functions. Entering a value into the Stock Status field will initialize the product's stock status. Once initialized, the system will manage the product's stock based on this entry. For example, if you enter 100 and you process an order for 10 units, the stock status will update to 90.

#### Items to Note

You can enter a positive, zero or negative value in the Stock Value field. Once initialized, the Stock Status field can be updated manually, or automatically by an order, purchase order or a successful RMA.

You can view the entire product stock history by clicking Hist next to the Stock Status variable. This table records every event that has affected the stock status.

Orders	Reports	Inventory	Marketing	Customers	Design	Settings		
Categories	Products	Options	Import / Export	Vendors	Purchase Orders	Receiving	Product Key Distribution	Warehouses

## Stock History : ProductID 186

Customize | Bulk Updates | Export Results | Bookmark Results

Quick Edit		Legend		Results 1 - 7 of 7		Page 1 of 1			
▲ Stock History	▼ Product ID	▼ Product Code	▼ Previous Stock	▼ Change	▼ New Stock	▼ Event	▼ Event ID	▼ Last Modified	▼ Last Mod By
104	186	501	-4	6	2	EDIT		8/12/2009 5:38PM	1
83	186	501	0	-4	-4	EDIT		7/22/2009 7:20PM	1
82	186	501	1	-1	0	ORDER	77	7/22/2009 7:19PM	1
79	186	501	-6	7	1	EDIT		7/20/2009 11:18AM	1
78	186	501	-1	-5	-6	EDIT		7/20/2009 11:10AM	1
77	186	501	7	-8	-1	EDIT		7/20/2009 10:49AM	1
76	186	501			7	EDIT		7/17/2009 5:58PM	1
		Results 1 - 7 of 7		Page 1 of 1					

The Event column displays the type of event that modified a product's stock. There are four types of stock events:

ORDER — The stock value was decreased by an order.

PO — The stock was updated by a processed purchase order.

RMA — The stock was updated by an RMA.

EDIT — The stock was updated manually from the admin area.

To learn how to manage the stock status of product options, see the “Inventory Control Grid” section of this manual.

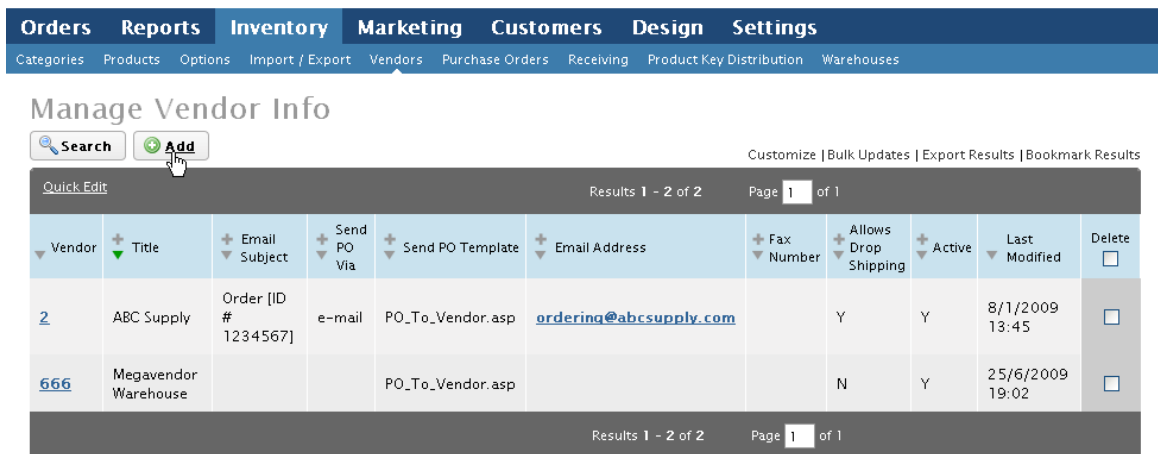
To configure product photos, see the “Product Image Setup Guide” portion of this manual.

# Vendors & Drop Shipping

## Vendor Management

### Adding Vendors

In the admin area, click Inventory >> Vendors >> Add to create a new vendor.



The screenshot shows the 'Manage Vendor Info' page in the Volusion admin interface. At the top is a navigation bar with tabs: Orders, Reports, Inventory (selected), Marketing, Customers, Design, and Settings. Below this is a sub-menu bar with links: Categories, Products, Options, Import / Export, Vendors (selected), Purchase Orders, Receiving, Product Key Distribution, and Warehouses. The main heading is 'Manage Vendor Info'. Below the heading are 'Search' and 'Add' buttons. To the right of the 'Add' button are links: 'Customize', 'Bulk Updates', 'Export Results', and 'Bookmark Results'. Below these is a 'Quick Edit' link and a status bar showing 'Results 1 - 2 of 2' and 'Page 1 of 1'. The main content is a table with the following columns: Vendor, Title, Email Subject, Send PO Via, Send PO Template, Email Address, Fax Number, Allows Drop Shipping, Active, Last Modified, and Delete. There are two rows of vendor data.

Vendor	Title	Email Subject	Send PO Via	Send PO Template	Email Address	Fax Number	Allows Drop Shipping	Active	Last Modified	Delete
<a href="#">2</a>	ABC Supply	Order [ID # 1234567]	e-mail	PO_To_Vendor.asp	<a href="mailto:ordering@abcsupply.com">ordering@abcsupply.com</a>		Y	Y	8/1/2009 13:45	<input type="checkbox"/>
<a href="#">666</a>	Megavendor Warehouse			PO_To_Vendor.asp			N	Y	25/6/2009 19:02	<input type="checkbox"/>

At the bottom of the table area, it shows 'Results 1 - 2 of 2' and 'Page 1 of 1'.

Configure as follows:

**Orders Reports Inventory Marketing Customers Design Settings**

Categories Products Options Import / Export Vendors Purchase Orders Receiving Product Key Distribution Warehouses

vendors | Add New

Search Back to List Expand All | Collapse All

**Details**

ID <input type="text"/>	Active <input type="checkbox"/>
Vendor Title <input type="text"/>	Allows Drop Shipping <input type="checkbox"/>
Vendor Address <input type="text"/>	Vendor PO Ship To <input type="text"/>
<a href="#">Edit</a> Vendor PO Template <input type="text"/>	Vendor PO Ship Via <input type="text"/>
Vendor PO Send Via <input type="text"/>	Vendor PO Terms <input type="text"/>
Vendor Email Address <input type="text"/>	Vendor PO Due Date <input type="text"/>
Vendor Email Subject <input type="text"/>	Vendor PO FOB <input type="text"/>
Vendor Fax Number <input type="text"/>	Vendor PO Notes <input type="text"/>
Vendor PO Signed By <input type="text"/>	Last Modified <input type="text"/>
Vendor Contacts <input type="text"/>	

- Enter a unique number in Vendor\_ID.
- Enter the vendor's name in Vendor\_Title.
- Check the Active and Allows DropShipping options.
- Select PO\_to\_Vendor from the Vendor\_PO\_Template menu.
- Select Email from the Vendor\_PO\_SenVia menu.
- Enter the vendor's email address in Vendor\_EmailAddress.
- Enter a subject line for emails in Vendor\_Email\_Subject.
- Click Update.

These are the basic requirements for establishing a vendor for drop-shipping. Please read on for additional settings options.

## Setting up Vendor Rules

Once you've established a vendor, it's important to assign applicable products to it. In the admin area, click Inventory >> Products and choose a product code. On the product edit page, locate the Vendor Rules for... section near the bottom, and fill out the following fields:

Vendor Rules for "501"

Useful Links: [\(View All VendorRules\)](#) | [\(View All Vendors\)](#)

Displaying 1-1 of 1 Records

Vendor ID	Vendor Title	Vendor PartNo	Min Qty	Max Qty	Price	Deactivate Until	
1	Acme Supply	501	1		2.50		<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	

[Save Changes to Vendor Rules](#)

### Vendor Rules

Vendor\_ID

This field contains the individual ID number which acts as a reference point. It can contain letters, numbers, hyphens or periods. Note that it cannot include punctuation marks and must be unique for each product.

Vendor PartNo

This field contains the actual product name as it displays on your site.

Min Qty

Enter the minimum product quantity a customer may be allowed to order. In most cases, this will simply be 1.

Max Qty

This is an optional field used to set a limit to the quantity ordered.

Price

Enter the product price. This is the price paid to the vendor for the product ordered, not the price you charge customers. This is used to calculate the Cost of Goods Sold.

Deactivate Until

This is an optional field used to delay availability of seasonal or holiday products.

When finished, click Save Changes to Vendor Rules.



## Purchase Orders

### Generating Purchase Orders

Purchase Orders can be generated in the following ways:

1. Through automatic drop-shipping.
2. Through the Low Inventory products table.
3. By manually creating POs from the purchase orders table (click ADD).

### Using the Low Inventory & Queued for PO Tables

From Inventory >> Products, in the View menu, select Low Inventory. This table allows your purchasing department to quickly order inventory for products running low on stock. To use this feature, you must complete the following fields:

Orders Reports Inventory Marketing Customers Design Settings																
Categories Products Options Import / Export Vendors Purchase Orders Receiving Product Key Distribution Warehouses																
Products : Low Inventory																
Search Add		Customize   Bulk Updates   Export Results   Bookmarks														
Quick Edit View		Results 1 - 4 of 4 Page 1 of 1														
Product Code		Product Name		Product Weight	List Price	Product Price	Sale Price	Setup Cost	Stock Status	Low Qty Alarm	ReOrder Qty	Add To PO	Last PO Qty	Last PO Date	Hidden	Free Shipping
501	Touch_Color_501	98,100	1.75	\$10.50	\$12.98				-3	1	1	Y			N	Y
501-0001	Touch_Color_501 - Goldmine - Coppertone		1.5	\$13.98	\$12.98	\$12.50	\$1.00	-1	1	1	Y				Y	Y
501-0002	Touch_Color_501 - Goldmine - Mocha		1.5	\$13.98	\$12.98	\$12.50	\$1.00	-3	1	1	Y				Y	Y
501-0003	Touch_Color_501 - Goldmine - Peaches		1.5	\$13.98	\$12.98	\$12.50	\$1.00	1	1	1	Y				Y	Y
		Results 1 - 4 of 4 Page 1 of 1														

### Stock Low QTY Alarm

If the Stock Status of the product falls below the Stock Low QTY Alarm number, this product will appear in the table.

### Stock Re-Order QTY

This number specifies the product quantity to order each time the system triggers the low quantity alarm.

If your product is set to Add to PO Now, the product will be moved to the Queued for PO table automatically. In the Queued for PO table, cross-reference the data, including the vendors and costs for each product, and choose a vendor you'd like to use on that occasion. Alternately, you can allow the vendor rules to automatically select the cheapest vendor for the quantity you're ordering.

**Orders Reports Inventory Marketing Customers Design Settings**

Categories Products Options Import / Export Vendors Purchase Orders Receiving Product Key Distribution Warehouses

### Products : Queued for PO

**Generate All Purchase Orders** ☐ and send them now **Note:** Products assigned to multiple vendors will be listed more than once. When POs are created, the CHEAPEST vendor will be used.

Customize | Bulk Updates | Export Results | Bookmark Results

Product Code	Product	Product Weight	Product Price	Sale Price	Stock Status	Low Qty Alarm	ReOrder Qty	Add To PO	Last PO Qty	Last PO Date	Vendor Part #	Vendor Price	Vendor	Vendor Title
501	Touch_Color_501	1.5	\$12.98	\$12.50	-3	1	1	Y			501	\$2.50	1	Acme Supply
501	Touch_Color_501	1.5	\$12.98	\$12.50	-3	1	1	Y			501	\$2.50	1	Acme Supply
501	Touch_Color_501	1.5	\$12.98	\$12.50	-3	1	1	Y			501	\$2.50	1	Acme Supply
501	Touch_Color_501	0.5	\$24.00		-3	1	1	Y			501	\$2.50	1	Acme Supply
501	Touch_Color_501	1.75	\$12.98		-3	1	1	Y			501	\$2.50	1	Acme Supply
501	Touch_Color_501	1	\$12.99		-3	5	4	Y			501	\$2.50	1	Acme Supply
Angle_Brush	Perfect Angle Liner Brush by Paula Dorf	1.5	\$12.98	\$12.50	11	1	1	Y			Angle_Brush01	\$12.50	1	Acme Supply
Angle_Brush	Perfect Angle Liner Brush by Paula Dorf	1.5	\$12.98	\$12.50	11	1	1	Y			Angle_Brush01	\$12.50	1	Acme Supply
Angle_Brush	Perfect Angle Liner Brush by Paula Dorf	1.5	\$12.98	\$12.50	11	1	1	Y			Angle_Brush01	\$12.50	1	Acme Supply
Angle_Brush	Perfect Angle Liner Brush by Paula Dorf	0.5	\$24.00		11	1	1	Y			Angle_Brush01	\$12.50	1	Acme Supply
Angle_Brush	Perfect Angle Liner Brush by Paula Dorf	1.75	\$12.98		11	1	1	Y			Angle_Brush01	\$12.50	1	Acme Supply
Angle_Brush	Perfect Angle Liner Brush by Paula Dorf	1	\$12.99		11	5	4	Y			Angle_Brush01	\$11.00	1	Acme Supply

Results 1 - 12 of 12 Page 1 of 1

### Items to Note

If you'd like to choose a different vendor to order from on a particular occasion, click the product code at Inventory >> Products. Scroll down to the Vendor Rules section and fill in the Deactivate Until field with a data value such as 10/22/09 to deactivate the vendor until the specified date. Once you've created your purchase order(s), click Inventory >> Products and select Orders Queued for PO in the View menu. Check the Generate All Purchase Orders box and press the button.

## Creating a Purchase Order Manually

To create a purchase order manually, you must first create the vendor and establish vendor rules for the product. Then follow these steps:

- Click Inventory >> Purchase Orders >> Add.

Orders Reports **Inventory** Marketing Customers Design Settings

Categories Products Options Import / Export Vendors Purchase Orders Receiving Product Key Distribution

## Update Purchase Orders

Search Add Settings

Quick Edit View POs Results 1 - 3 of 3 Page 1

PO #	Customer Order	PO Status	Date	Vendor	Title	Send Via
7			8/21/2009 6:14:00 PM	1	Acme Supply	e-mail
6			7/22/2009 7:36:00 PM	1	Acme Supply	e-mail

- Choose the vendor from the dropdown menu and click Continue.

Orders Reports **Inventory** Marketing Customers Design Settings

Categories Products Options Import / Export Vendors Purchase Orders Receiving Product Key Distribution Warehouses

## Purchase Orders

Search

**Build New Purchase Order**


Choose a vendor: [1] Acme Supply [Continue]

Need to create a new vendor? [1] Acme Supply [8] ANOTHER TEST [7] NEW VENDOR

- On the Build New Purchase Order page, verify the PO information and click Build New PO.

<b>Orders</b>	<b>Reports</b>	<b>Inventory</b>	<b>Marketing</b>	<b>Customers</b>	<b>Design</b>	<b>Settings</b>		
Categories	Products	Options	Import / Export	Vendors	Purchase Orders	Receiving	Product Key Distribution	Warehouses

## Purchase Orders




### Build New Purchase Order

To Vendor: Acme Supply

#### How would you like to send it?

**Build PO using template:**

**Send Via:**  

**Subject:**

**(if sending via e-mail)**

**Email Address:**

**Fax Number:**

#### Build the details of this PO:

**Customer OrderID:**  (optional)

**Vendor Title:**

**From / Vendor:**

**Ship To:**

**Ship Via:**

**Terms:**

**Due Date:**

Note that not all bold field on this page are required.

- Enter the product codes and the quantity you wish to add to the PO one at a time. After every entry, click ADD to PO.

Orders Reports **Inventory** Marketing Customers Design Settings

Categories Products Options Import / Export Vendors **Purchase Orders** Receiving Product Key Distribution Warehouses

## Purchase Orders

Search

Purchase Order #8 [edit](#)

Current Status: Building / Ready to add items

**PO Items**


[Edit Items currently associated with this PO](#)

Add Product Code  Qty

**Send Purchase Order**

Are you sure you want to send this PO now via e-mail to "kking6182@gmail.com" ?

**Preview**



**Purchase Order #: 8**  
**Date:** 8/21/2009  
**Customer Order #:** N/A

**From / Vendor:**  
123 Acme Road,  
Houston, TX 77478

**Ship To:**  
8911 Capital of Texas Highway  
Austin, TX 78759

**Ship Via:** UPS  
**Due Date:**

**Terms:** Standard Terms & Agreement  
**FOB:**

Code	Item	Qty	Price	Total
				Subtotal: \$0.00
				Shipping Cost: \$0.00
				Grand Total: \$0.00

**Notes:**

**Signed By:** Palak Shah

- Once all products have been added to the PO, click Yes, Send Now, or, if you haven't yet configured the vendor settings, Yes, Print Now.

## Sending Purchase Orders

When sending purchase orders to vendors, the following options are available:

Orders Reports **Inventory** Marketing Customers Design Settings

Categories Products Options Import / Export **Vendors** Purchase Orders Receiving Product Key Distribution Warehouses

vendors | 8

Search Add Delete << Previous | Back to List | Next >> Expand All | Collapse All

**Details**

ID 8

Vendor Title ANOTHER TEST

Vendor Address

0

[Edit Vendor PO Template](#) PO\_To\_Vendor.asp

Vendor PO Send Via none

Vendor Email Address testing@test456.com

Vendor Email Subject

Vendor Fax Number

Active ☒

Allows Drop Shipping ☒

Vendor PO Ship To

0

Vendor PO Ship Via

0

Vendor PO Terms

0

Vendor PO Due Date

0

Vendor PO FOB

0

Vendor PO Notes

0

Update or Cancel ☒ Save + View Record ☐ Save + View List

## SendVia

### Email

Email the PO at the address specified for the vendor.

### Fax

Faxes the PO to the fax number specified for the vendor

### None

Prints the PO for manual send.

## Items to Note

You must sign up for an account with ClickFax to use the fax feature. This allows us to send the PO email to the ClickFax system, which instantly sends the PO to the vendor's fax machine. The email address that you register with ClickFax must match the one specified in the config variable Config\_EmailAddress\_Billing (click Settings >> Config Variables >> choose Email Variables from the View menu). Click here to sign up for a new account: ClickFax.

## Receiving Purchase Orders

Once you receive the inventory from your vendor, you'll need to mark the PO as received.

- In the admin area, click Inventory >> Receiving.
- From the dropdown menu, choose PO#.
- In the adjacent field, type the PO number (e.g.1089) and click Prepare.

- All items ordered through this PO will appear. After counting the tangible inventory to verify that you received the complete quantity of products ordered, fill in the Quantity Received boxes on this page and click Save when finished.

ProductCode	Price	VendorPartNo	Qty	Qty Received	ProductName	ShippingCost (weight)
ageless	3.00	ageless	1	1	ageless skincare	(0)
PO Sub Total: \$3.00			1	0		(0)

- In most cases, you won't know the actual shipping cost until this point. Enter it in the field above Distribute in the lower right corner, and click Distribute.

## Prepare Shipments & Receiving

PO#  < > Qty   View

Sent PO# 10

PO# 10 Items

ProductCode	Price	VendorPartNo	Qty	Qty Received	ProductName	ShippingCost (weight)
ageless	3.00	ageless	1	1 + 0	ageless skincare	1.50 (0)
PO Sub Total: \$3.00			1	0		(0)

If you enter \$59.91 for the shipping cost, for example, and click Distribute, the feature will distribute \$59.91 evenly throughout the items on the order, based on the weight of each product, to help you run more accurate cost/profit reports and ascertain the true cost of your goods. After clicking Distribute, you can easily adjust or edit the shipping cost for an item(s) as you wish. For example, you might be paying \$5.00 per item and selling it for \$12.00, assuming profit of \$7.00 per sale. That item, however, might actually cost you \$10.00 after shipping to your warehouse due to the size/weight. The Distribute feature calculates the true cost/profit of the item.

### Items to Note

In order to make stock status updates when receiving a PO, each product must already have a stock amount in the Stock Status field, even if it's 0. If you leave this field blank, the system assumes the stock is infinite and therefore won't update when you receive the stock from your PO.

## Customizing Purchase Orders

You can customize purchase order templates for each vendor as follows:

- In the admin area, click Inventory >> Vendors.
- Click the ID number of the vendor for which you wish to customize the PO.
- By default, the Vendor\_PO\_Template field is set to "PO\_To\_Vendor.asp." This field is located in the following directory:



**Orders Reports Inventory Marketing Customers Design Settings**

Categories Products Options Import / Export Vendors Purchase Orders Receiving Product Key Distribution Warehouses

vendors | 8

Search Add Delete

<< Previous | Back to List | Next >> Expand All | Collapse All

**Details**

ID: 8

Vendor Title: ANOTHER TEST

Vendor Address: [Text Area]

Active: ☒

Allows Drop Shipping: ☒

Vendor PO Ship To: [Text Area]

Vendor PO Ship Via: [Text Area]

Vendor PO Terms: [Text Area]

Vendor PO Due Date: [Text Area]

Vendor PO FOB: [Text Area]

Vendor PO Notes: [Text Area]

Vendor PO Send Via: [Dropdown Menu]

Vendor Email Address: [Text Area]

Vendor Email Subject: [Text Area]

Vendor Fax Number: [Text Area]

Update or Cancel

Save + View Record  
Save + View List

wwwroot/v/vspfiles/email\_templates/PO\_To\_Vendor.asp. You can also edit this file via FTP, or at Design >> LiveEdit File Editor (choose “/v/vspfiles/email\_templates” from the shortcut links on the right).

**Orders Reports Inventory Marketing Customers Design Settings**

Template Logos Site Content Navigation Menu LiveEdit File Editor

**LiveEdit™**

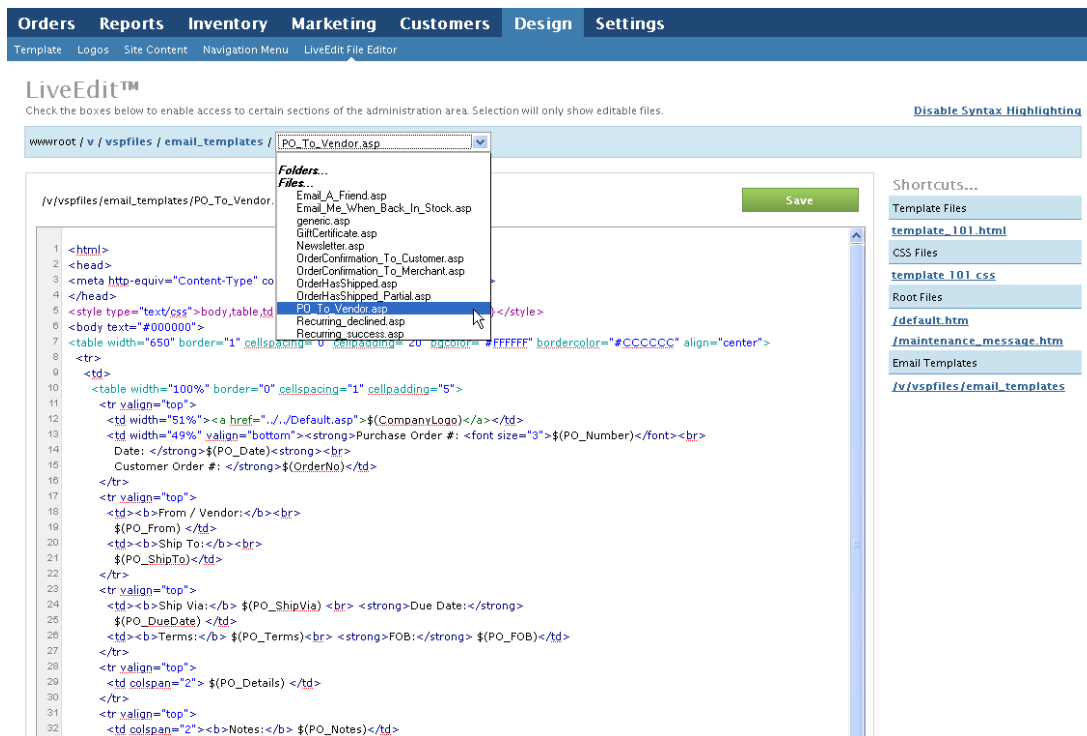
Check the boxes below to enable access to certain sections of the administration area. Selection will only show editable files.

wwwroot / v / [Dropdown]

Shortcuts...

- Template Files
- template\_101.html
- CSS Files
- template\_101.css
- Root Files
- /default.htm
- /maintenance\_message.htm
- Email Templates
- /v/vspfiles/email\_templates

- Click Edit next to the dropdown to locate the PO\_To\_Vendor.asp file and begin editing.



You can also create a custom email template for your POs and upload it through FTP:

- Log in via FTP and navigate to the “/v/vspfiles/admin/emails/” directory.
- Duplicate the PO\_To\_Vendor.asp file and rename it (e.g. “VendorABC.asp”).
- Open the new file to edit.

### Items to Note

This file is mainly HTML with some variables in the form of \$(variableID) to populate the vendor’s information. Knowledge of HTML is highly recommended.

## Automatic Drop-Shipping

### Setting up a Product for Automatic Drop-Shipping

In some cases, you may sell products for which you don't maintain physical inventory. For example, a reseller may sell a product that ships directly from the manufacturer. You can take orders for such products, but you'll have to somehow notify the manufacturer of new orders and specify the shipping destination. Fortunately, you can configure your products to auto drop-ship.

When a product is configured to auto drop-ship, the system automatically generates a PO for the product and emails it to the manufacturer/vendor once you've processed the order. To configure a product to auto drop-ship:

#### Step 1 - Setup a vendor

Follow the steps outlined above in the "Adding Vendors" section.

#### Step 2 - Assign vendor rules

Follow the steps outlined above in the "Setting up Vendor Rules" section.

#### Step 3 - Set the product to auto drop-ship

In the product edit page, under Inventory >> Products, locate the Vendor Information section, enable the AutoDropShip setting, and click Update.

The screenshot shows the 'Vendor Information' section of a product edit page. It contains two columns of settings. In the left column, the 'Auto Drop Ship' checkbox is checked, and a mouse cursor is hovering over it. Other settings in the left column include 'Stock Status' set to '+2 (Hist) +0 On Hold', 'Stock Low Qty Alarm' set to '1', 'Stock Re-Order Qty' set to '1', 'Do Not Allow Backorders' (unchecked), 'Inventory: Verify Qty On Hand' (checked), and 'Inventory: Last Verified' with a calendar icon. In the right column, settings include 'Vendor Part #' (empty), 'Vendor Price' (empty), 'Book ISBN' (empty), 'Add To PO Now' (checked), 'Last PO Qty' (empty), 'Last PO Date' (empty), 'Share Stock Status With' (empty), 'Product ID' set to '186', and 'Last Mod By' set to '[1] test name'.

Once this is complete, the system will automatically create and send a PO through fax or email (based on the vendor rules) once the payment has been processed or the order has been marked as "shipped."

In order for auto drop-shipping to work, you must configure the following settings:

- The Stock Status field must be set to 0, or to a negative number.
- The Auto Drop Ship checkbox must be checked.

Vendor Information

Stock Status ⓘ

Vendor Part # ⓘ

[Generate Barcode] UPC Code ⓘ

Vendor Price ⓘ

Stock Low Qty Alarm ⓘ

Book ISBN ⓘ

Stock Re-Order Qty ⓘ

Add To PO Now ⓘ ☐

Do Not Allow Backorders ⓘ ☐

Last PO Qty ⓘ

Auto Drop Ship ⓘ ☒

Last PO Date ⓘ

Inventory: Verify Qty On Hand ⓘ

Share Stock Status With ⓘ

Inventory: Last Verified ⓘ

Product ID ⓘ 190

Last Modified ⓘ 8/21/2009 6:55:00 PM

Last Mod By ⓘ [1] test name

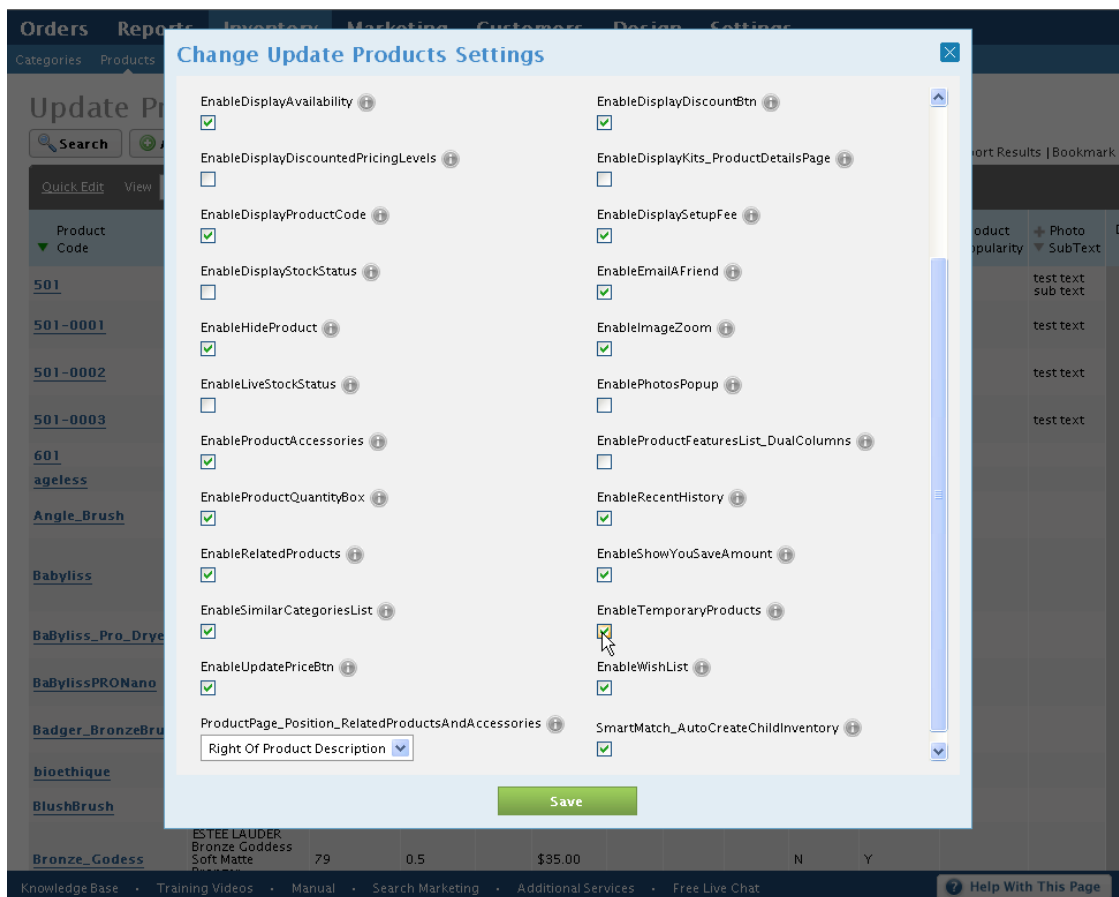
- The Do Not Allow Back Orders checkbox must be unchecked.
- The Config\_EnableAllowBackOrders checkbox (Settings >> Config Variables >> Checkout Variables) must be checked.

# Seasonal & Downloadable Products

## Seasonal Products

If you sell Christmas trees, swimming goggles, wool scarves or 4th of July decorations, you may only offer them during certain parts of the year. Winter '09 can help you do this with minimal effort:

- In the admin area, click Inventory >> Products >> Settings.
- Check Enable\_TemporaryProducts to turn on the Display BeginDate and Display EndDate fields for each product and click Save.



- Locate the product you wish to edit and click the product code.
- Locate the Advanced Options section.

- In the Display BeginDate field, enter the day on which you want the product to become available.

The screenshot shows the 'Advanced Options' form in Volusion. The form is divided into two main columns. The left column contains fields for VAT Percentage (a green input box), Home Page Section (a dropdown menu set to 'Home\_Featured'), Taxable Product (a dropdown menu set to 'Y'), Manufacturer (with an 'Upload Logo' link), List Price Name, Product Price Name, Sale Price Name, Setup Cost Name, AddtoCartBtn Replacement Text, Product Popularity (a blue input box), Display Begin Date (set to '10/01/2009' with a calendar icon), Display End Date (with a calendar icon), Gift Wrap Cost (a green input box), Uses Product Key Type(s) (an orange input box), Free Accessory(s) (a large orange input box), Use Same Photos As ProductCode (a checkbox), Photo URL Small, Photo URL Large, Additional Product Keyword(s) (an orange input box), Is Child Of Product Code, and Order Finished Note (with an 'HTML Editor' link). The right column contains checkboxes for Free Shipping Item, Hide Product, Hide When Out Of Stock, Enable Multi Child Add To Cart, Private Section Customers Only, Hide You Save, and Allow Price Edit. It also has input boxes for Price Sub Text, Price Sub Text Short, Min Qty (a blue input box), Download Filename (with an 'Upload File' link), Accessory(s) (an orange input box), Reward Points Given For Purchase (set to '100'), and Affiliate Commissionable Value (a green input box). A scrollbar is visible on the right side of the form.









































- If there is a date on which you'll no longer offer it, enter this date into the Display EndDate field.
- Click Save Changes.

## Downloadable Products - Part 1

Volusion Winter '09 allows you to sell music files, clip art, ebooks, or any downloadable product you wish to sell. To configure a downloadable product:

- Configure a product using the standard settings outlined in the "Getting Started Guide" portion of this manual.
- In Product Settings, the Product Weight must be set to 0.
- Under Advanced Settings, click Upload File next to the Download FileName field.

**Advanced Options**

VAT Percentage 	<input type="text" value=""/>	Free Shipping Item 	<input type="checkbox"/>
Home Page Section 	Home_Featured 	Hide Product 	<input type="checkbox"/>
Taxable Product 	Y 	Hide When Out Of Stock 	<input type="checkbox"/>
<a href="#">[Upload Logo]</a> Manufacturer 	<input type="text" value=""/>	Enable Multi Child Add To Cart 	<input type="checkbox"/>
List Price Name 	<input type="text" value=""/>	Private Section Customers Only 	<input type="checkbox"/>
Product Price Name 	<input type="text" value=""/>	Hide You Save 	<input type="checkbox"/>
Sale Price Name 	<input type="text" value=""/>	Allow Price Edit 	<input type="checkbox"/>
Setup Cost Name 	<input type="text" value=""/>	Price Sub Text 	<input type="text" value=""/>
AddtoCartBtn Replacement Text 	<input type="text" value=""/>	Price Sub Text Short 	<input type="text" value=""/>
Product Popularity 	<input type="text" value=""/>	Min Qty 	<input type="text" value=""/>
Display Begin Date 	10/01/2009 	<a href="#">[Upload File]</a> Download Filename 	<input type="text" value=""/>
Display End Date 	<input type="text" value=""/> 	Accessory(s) 	<input type="text" value=""/>
Gift Wrap Cost 	<input type="text" value=""/>	Reward Points Given For Purchase 	100
Uses Product Key Type(s) 	<input type="text" value=""/>	Free Accessory(s) 	<input type="text" value=""/>
Use Same Photos As ProductCode 	<input type="text" value=""/>	Hide Free Accessories 	<input type="checkbox"/>
Photo URL Small 	<input type="text" value=""/>		
Photo URL Large 	<input type="text" value=""/>		
Additional Product Keyword(s) 	<input type="text" value=""/>		
Is Child Of Product Code 	<input type="text" value=""/>	Affiliate Commissionable Value 	<input type="text" value=""/>
Order Finished Note 	<a href="#">HTML Editor</a>		

This link will allow you to attach the downloadable file to the product. You can also edit the Download FileName field to specify a file name.

- Click Update.


### Items to Note

A downloadable product can only host one downloadable file. For every downloadable file, you'll need to create a product in the Products table.

Downloadable products have no maximum size limits. Note, however, that when a customer downloads a product, this will use part of your monthly hosting plan's data transfer allotment.

Your customers will be emailed a link to any downloadable product they've purchased. This link will be automatically sent to customers only after their order's status is marked as "shipped."

Your customers will also be able to access downloadable products they've ordered by logging in to their store accounts and clicking Review Orders/Track Packages.



## My Account

[Return to My Account](#)

### Order Details

[Click here to download the files you've purchased.](#)

[Need to print an invoice?](#)

<b>Order#:</b> 1035		<b>Order Placed:</b> August 12, 2009 at 5:46:00 PM PST	
<b>Order Status:</b> New			
<b>Ship To:</b> test name 123 fake lane fake land, AZ 99999 United States 8888888888 <a href="#">Change</a>	<b>Items Ordered:</b> <ul style="list-style-type: none"> <li>1 of :</li> <li>2 of : Touch_Color_501 - Goldmine - Mocha</li> </ul>		
<b>Shipping Speed:</b> Free Shipping (7 Day Ground) <a href="#">Change</a>	<b>Price: Status:</b> \$1.00 Shipped \$25.00 Processing		
<b>Need to change quantities or edit an item?</b>			
<b>Payment Information</b>			
<b>Bill To:</b>	<b>Payment:</b>	<b>Order Summary:</b>	

## Downloadable Products - Part 2 (Product Keys)

Some Volusion merchants sell licensed computer software through the downloadable products feature. These orders usually require a licensing code for copy protection or registration requirements. Winter '09 allows you to offer this using electronically distributed product keys.

### Creating a Product Key

In the admin area, click Inventory >> Product Key Distribution.

Orders	Reports	Inventory	Marketing	Customers	Design	Settings		
Categories	Products	Options	Import / Export	Vendors	Purchase Orders	Receiving	<a href="#">Product Key Distribution</a>	Warehouses

### Manage Product Keys

[Search](#) [Add](#) [Customize](#) [Bulk Updates](#) [Export Results](#) [Bookmark Results](#)

[Quick Edit](#) Results 1 - 1 of 1 Page 1 of 1

Product Keys	+ Email Template	+ Email Subject	+ Key Type	+ Allow Reuse	+ Used	+ Email Body	+ Original Order	+ Original Order Detail	+ Date Added	Delete
1	generic.asp	Product Key	Guides	Y	N	This is your key: 123456789				<input type="checkbox"/>

Results 1 - 1 of 1 Page 1 of 1

By default, the system doesn't provide pre-programmed product keys. To create one, click Add.



Configure product keys using the following settings:

## Product Keys

PKey_Email_Template	In this menu, select a default email template to use for product key delivery. We recommend the <i>generic.asp</i> template.
PKey_KeyType	Enter a basic name for each product key type. <b>Do not enter the actual key value in this field.</b>
PKey_Email_Subject	In this field, enter the subject line for the email.
PKey_AllowReuse	Check this option if the key is to be used more than once. To configure a unique, one-time use key, leave this option unchecked.
PKey_Email_Body	In this field, enter any text or HTML you wish to display to recipients in the body of their product key email. <b>Enter the product key here.</b>

When finished, click Update. Repeat this process to create additional product keys.

### Items to Note

Even if an order using a product key has been generated, the system won't deliver the key email to the customer until their order is marked as "shipped." This is the case for both tangible and downloadable products. To complete the order, visit the order details page for each

individual order and click Complete Order/Send Emails or manually send the product key email with the Send Emails override control.

## Configuring a Product to Distribute a Product Key

Once you've set up a product key, the system must be configured to distribute the key whenever its related product is purchased. You can assign product keys to products as follows:

- In the admin area, click Inventory >> Products and click the ID number of the product receiving the key.
- Under Advanced Options, locate Uses Product\_KeyType(s) field.

- Enter the product key to be distributed into this field and click Update.

## Creating Multiple Versions of the Same Product Key

To distribute a one-time key on multiple occasions (e.g. a single software product that requires an individual activation key per user), use the following additional settings:

- Enter the unique product key for every version of the key in the PKey\_Email\_Body field. Each key must have the same PKey\_KeyType value and a different PKey\_DateAdded value per key.
- Ensure that PKey\_AllowReuse value is disabled. If you'd like to create a key to be distributed multiple times by a single product (e.g. the URL or password for an online meeting seminar, etc.), enable this option.

With this configuration, when the product is ordered and marked as shipped, the system will automatically send the oldest existing key for that particular PKey\_KeyType. Once this occurs, that key will be marked as Used, with OrderID and OrderDetailsID fields set accordingly, and made unavailable for further distribution.

To quickly create a large number of similar product keys, first create one key and then click Add to populate its settings over to the new, unsaved record. Then change the content of the PKey\_Email\_Body field and click Update using the Add + View Record in add mode setting. Alternately, you can use Import/Export to export your initial product key table, update it in your favorite text editor, and import its content into your store. See the Importing and Exporting section for more details.

### Items to Note

To identify whether a product key has been assigned to a specific order, click Inventory >> Product Key Distribution and choose a product key code. If the key has been assigned, you'll find an order's ID number from the orders table located in the PKey\_OriginalOrderID field.

Orders Reports Inventory Marketing Customers Design Settings												
Categories	Products	Options	Import / Export	Vendors	Purchase Orders	Receiving	Product Key Distribution	Warehouses				

### Manage Product Keys

Customize | Bulk Updates | Export Results | Bookmark Results

Quick Edit												
Results 1 - 3 of 3 Page 1 of 1												
Product Keys	Email Template	Email Subject	Key Type	Allow Reuse	Used	Email Body	Original Order	Original Order Detail	Date Added	Last Modified	Last Mod By	Delete
<a href="#">Z</a>	generic.asp	Here is your product key!	PK101	N	Y	Here is your key: 1234567890	1093	154		5/8/2009 11:12	16	<input type="checkbox"/>
<a href="#">8</a>	generic.asp	Here is your product key!	PK101	N	Y	Here is your key: 0987654321	1093	155		5/8/2009 11:12	16	<input type="checkbox"/>
<a href="#">9</a>	generic.asp	Here is your product key!	PK101	N	N	Here is your key: ABCDEFGHIJKLMNOP				5/8/2009 11:23	16	<input type="checkbox"/>

Results 1 - 3 of 3 Page 1 of 1

# Recurring and Donation Products

## Selling Subscriptions (Recurring Billing)

If you sell magazine subscriptions, satellite TV services, or access to exclusive online content, you may need to periodically collect subscription funds from your customers. Volusion's recurring billing system enables you to do this.

### Configuring a Product for Recurring Billing

Once you've created the product, click its product code under Inventory >> Products and locate the Recurring Pricing section to view the recurring billing settings:

The screenshot shows the Volusion product configuration interface for 'ALTAIR-101'. The top navigation bar includes Orders, Reports, Inventory, Marketing, Customers, Design, and Settings. Below this, a sub-menu lists Categories, Products, Options, Import / Export, Vendors, Purchase Orders, Receiving, Product Key Distribution, and Warehouses. The main content area is titled 'Products | ALTAIR-101' and includes buttons for Search, Add, and Delete. A list of configuration sections is shown on the left, with 'Recurring Pricing' selected and expanded. The expanded section contains the following fields:

- Recurring Pricing Text:
- Recurring Price:
- Recurring How Often (months):
- Recurring Duration (months):
- Recurring Start Price:
- Recurring Start Duration (months):

A note at the bottom right of the section states: 'NOTE: Use Product Price as a setup cost'. Below the recurring pricing section are links for 'Special Pricing Levels Edit', 'Vendor Information', and 'Inventory Control Grid for "ALTAIR-101"'.

## Recurring Pricing

Recurring Pricing Text	In this field, enter a description for your customers (e.g. "\$9.99 for the first month, \$11.99 each additional month").
Recurring Pricing	In this field, enter the price charged to the customer for each payment period (e.g. \$11.99).
Recurring Start Price	Use this field to specify an initial payment, if different than the recurring price (e.g. \$9.99).
Recurring How Often	In this field, enter the number of months that pass before the billing period ends and a new charge comes due (e.g. enter 6 to bill the customer every 6 months or 12 to bill annually).
Recurring Start Duration	If using the <i>Recurring Start Price</i> setting, enter the duration (in months) the system will wait between billing the <i>Recurring Start Price</i> and the regular <i>Recurring Price</i> (e.g. with a <i>Recurring Start Price</i> of 1, a <i>Recurring Start Duration</i> of 6, and a <i>Recurring Pricing</i> of 5, the system will bill the customer \$1 for the first 6 months and then \$5 after that point).
Recurring Duration	This field contains the duration (in months) the recurring billing process will last.

You can define an additional setup cost for recurring billing by simply entering the product price on the product edit page. The system automatically renames the Product Price field as Setup Cost when used in conjunction with recurring billing.

### Example

If you sell satellite TV systems and services with a \$100 setup fee for installation, an initial \$150 fee for the first month (to cover the cost of the hardware and the first month of service), and a monthly \$30 recurring fee after the initial month of service, use the following steps:

- Create a product for this service package and assign any options, shipping restrictions, etc.
- Set the Product Price field to 100.
- Set the Recurring Pricing to 30.
- Set the Recurring Start Price to 150.
- Set the Recurring How Often to 1.
- Set the Recurring Start Duration to 1.

- Leave the Recurring Duration blank.

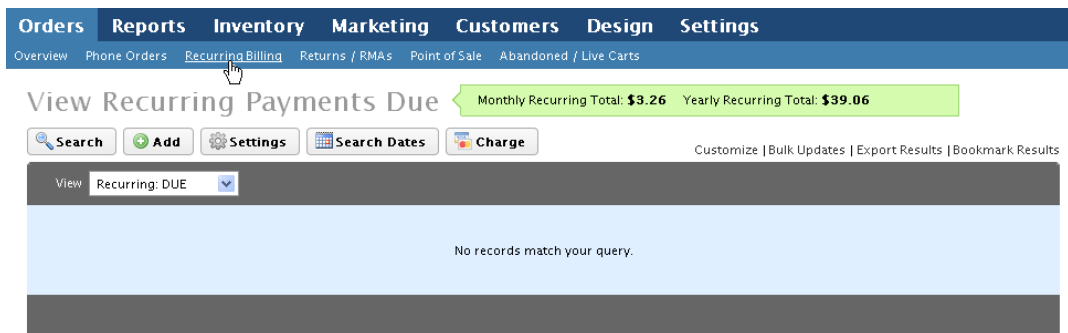
Your customer will be charged a \$100 setup fee, plus an initial \$150 for hardware (\$250 total) initial cost. When the 2nd month begins, your customer will be charged \$30 a month as long as service is provided.

### Items to Note

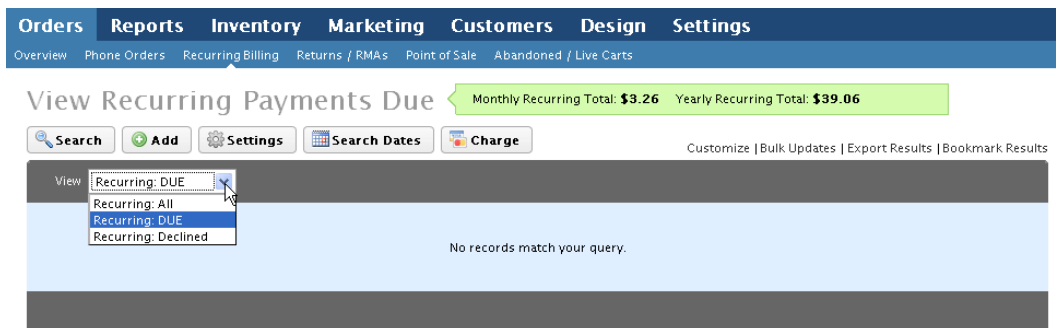
The recurring billing system will work with any standard payment gateway service, but is not designed for use with services such as PayPal and Google Checkout, due to their “order-now-pay-later” functionality. For details on order processing with recurring payments, see the “Order Processing Guide” section of this manual.

## Managing Recurring Payments

In the admin area, click Orders >> Recurring Billing. This page defaults to the Recurring: Due table.



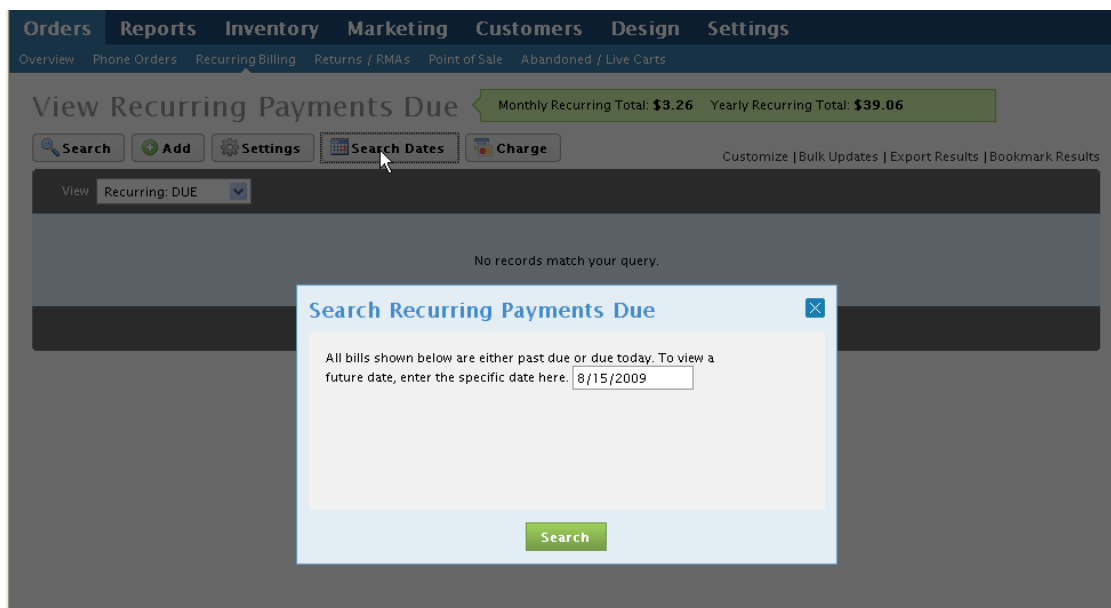
If you click the View menu, you'll also find options for Recurring: All and Recurring: Declined.



## Recurring: Due

This table lists all due or overdue payments. You can also use it to display recurring billing

totals received, or future payments due by clicking Search Dates, setting a desired range, and clicking Search.



Note that you can't use this feature to collect recurring payments due on future dates. You can only collect recurring payments on orders with due dates on or before the current date. Also, you can edit settings for each recurring billing record by clicking the ID number on the table. These fields are typically set when a recurring billing product is ordered. You can modify them if you need to adjust billing dates, amounts, or even to deactivate the billing process.

## Processing Recurring Payments

This is one of the main functions available on the Recurring: Due table.

- Click Charge.



- The system will ask you to enter the number of payments you wish to collect. Payments are collected in chronological order, based on which order was generated first (e.g., if you collect 5 of 10 payments due, you'll collect the first 5 payments based on their original purchase dates).

- Click Yes to process your payments.
- The page reloads, and lists all collected payment totals.

After collecting payments, all processed recurring billing records will be moved from the Recurring: Due table to the Recurring: All table.

Orders Reports Inventory Marketing Customers Design Settings										
Overview Phone Orders Recurring Billing Returns / RMAs Point of Sale Abandoned / Live Carts										
View Recurring Payments All										
Monthly Recurring Total: <b>\$3.26</b> Yearly Recurring Total: <b>\$39.06</b>										
Search Add										
Quick Edit View Recurring: All Results 1 - 2 of 2 Page 1 of 1										
Recurring Decline	Original Order	Billing First Name	Billing Last Name	Billing Phone	Email Address	Customer	Payment Method	Due Date	Recurring Price	Recurring Note
6	1056	Jack	Thompson	9998887777	test1@example.com	1	Visa	8/9/2009	\$0.55	test

## Recurring: All

This table contains a list of all recurring payments (both active and inactive), as well as the total funds collected for the month and for the year. As with the Recurring: Due table, you can click an ID number to adjust a record's settings, including all active recurring billing records associated with a customer's order history.

## Recurring: Declined

This table displays any failed attempts to collect on recurring payments due.

Orders Reports Inventory Marketing Customers Design Settings										
Overview Phone Orders Recurring Billing Returns / RMAs Point of Sale Abandoned / Live Carts										
View Recurring Payments Declined										
Search Add										
Quick Edit View Recurring: Declined Results 1 - 1 of 1 Page 1 of 1										
Recurring Decline	Original Order	Billing First Name	Billing Last Name	Billing Phone	Email Address	Customer	Payment Method	Due Date	Recurring Price	Recurring Note
6	1056	Jack	Thompson	9998887777	test1@example.com	1	Visa	8/9/2009	\$0.55	test test
Results 1 - 1 of 1 Page 1 of 1										

Decline responses are delivered by your payment gateway. They can result from a lack of funds available in the cardholder's account, an expired date on the card, cancellation of the cardholder's account, etc. To collect on declined payments, you'll normally have to contact your customers to inform them and make payment arrangements.

## Managing Declined Recurring Payments

To re-attempt a declined recurring payment:



- In the admin area, click Orders >> Recurring Billing.
- Choose Recurring: Declined from the View menu.
- Click the payment's original order number.
- Contact the customer via phone or email (you can configure the system to automatically email the customer by clicking Settings at Orders >> Recurring Billing) and secure a new or updated payment card.
- In the Payments section, select Credit Card from the Choose Payment menu.
- Enter the full card details, choose Apply the payment method change to ALL existing orders and click Apply New Payment.

Customer ID#: 1 placed 10 orders totaling \$1,139.06.

This order was placed via ONLINE via IP Address 69.36.65.82.

Billing [Edit](#) | [Map It](#)

Jack Thompson  
123 Baker St  
Woo Haa, CA 90210  
United States  
9998887777  
[test1@example.com](mailto:test1@example.com)

Shipping [Edit](#) | [Map It](#)

Jack Thompson  
123 Baker St  
Woo Haa, CA 90210  
United States  
9998887777  
(Residential Address)

Shipping Labels

[FedEx](#) [DHL](#) [USPS](#) [Address](#)

Email  [Send](#)

Order Notes

Private Notes

Account

asdf  
asdf  
asdfasdf

## Payments

### Payments & Credits

**Credit Card:** Visa

Jack Thompson  
www1111111111

Exp:

[Card data deleted. You may not authorize or debit anymore, but you may still capture / void / credit. [View Policies](#)]

Choose Payment

**Credit / Debit Card Type**

**Credit / Debit Card Number**

**Person's Name on Card**

**Expiration Date**

/

**CVV2 Number**

(Required for Visa, MasterCard, AMEX & Discover)

[Click here for help](#)

[Apply New Payment](#)

☐ Apply this payment method change to my Order#: 1056

☒ Apply this payment method change to ALL my existing orders.

### Payment Log

Payment Date	Payment Type	Payment Amount	Paid Via
7/3/2009 11:01:00 AM	DECLINED	\$15.00	Visa www11111
7/3/2009 11:00:00 AM	DECLINED	\$143.30	Visa www11111
7/3/2009 11:00:00 AM	DECLINED	\$143.30	Visa www11111
7/3/2009 10:58:00 AM	AUTHORIZE	\$143.30	Visa www11111
7/3/2009 10:58:00 AM	CAPTURE	\$143.30	Visa www11111

- Return to the Recurring: Declined table and click the payment's ID number.
- Set the Delay\_Charge\_Until field to the following business day and click Save Changes.

The screenshot shows the 'Recurring' section of the Volusion admin interface. At the top is a navigation bar with tabs: Orders, Reports, Inventory, Marketing, Customers, Design, and Settings. Below this is a sub-navigation bar with links: Overview, Phone Orders, Recurring Billing, Returns / RMAs, Point of Sale, and Abandoned / Live Carts. The main heading is 'Recurring | 6'. Below the heading are buttons for Search, Add, and Delete, and links for Back to List and Next >>. A summary line reads 'All Active Recurring Payment Records for this CustomerID 1...'. Below this is a table with columns: ID, StartDate, EndDate, LastPaid, OrderID, RecurringPrice, and Recurring\_Note. The table contains one record with ID 6, StartDate 7/8/2009, EndDate 7/8/2010, LastPaid 7/8/2009, OrderID 1056, RecurringPrice \$0.55, and Recurring\_Note test test. Below the table is a 'Details' section for the selected record. It shows fields for ID (6), Start Date (07/08/2009), End Date (07/08/2010), Last Paid (07/08/2009), Active (checked), Recurring Note (test test), Original Order ID (1056), Original Order Detail ID (1055), Recurring Price (0.55), How Often (2), Delay Charge Until (empty), Last Modified (7/7/2009 4:43:00 PM), and Last Mod By ([1] Mickey Mouse).

On the next business day, the recurring payment will reappear in the Recurring: Due table. From here, you can attempt to collect payment for this record again. If the payment is successful, normal billing functions will resume.

## Issues with Recurring Payments When Using PayPal and Google Checkout

Some electronic payment services such as PayPal have their own built-in recurring billing functions that can supersede those of the Volusion store. As with all PayPal and Google Checkout payments, which are processed completely within third party systems, Volusion is unable to accurately track financial data. For this reason, payment methods such as PayPal and Google Checkout are not recommended with our recurring billing feature.

## Note on Recurring Payments and Credit Card Policies

For the recurring billing feature to work properly, you'll have to change your credit card data settings to prevent the system's default storage policies from purging card data after receiving payment:

- In the admin area, click Settings >> Payment.
- Locate the Credit Card Storage Policies section.
- Un-check Use most secure settings.
- Change the When should credit / debit card data be deleted? option to Never.
- Set the Keep payment information for maximum of field to a large number, such as 9999.
- Click Save.

**Credit Card Storage Policies:** ☒ Use most secure settings

Authorize	Capture	When should credit / debit card data be deleted? Choose:	
<p>Delete card data after the card has been authorized. For most gateways, you may still capture, void &amp; credit without the credit / debit card number, so there is no need to keep it beyond the authorization. <b>(Recommended!)</b></p> <p><input checked="" type="radio"/></p>	<p>Delete card data after the funds have been captured or debited.</p> <p><input type="radio"/></p>	<p><b>Ship</b></p> <p>Keep credit / debit card data until I mark the order as "Shipped".</p> <p><input type="radio"/></p>	<p><b>Never</b></p> <p>Keep credit / debit card data until the "Maximum Days" specified below.</p> <p><input type="radio"/></p>

Keep payment information for maximum of  days.

(If you set this number of days to more than 14 days, the customer will be given the option to "Keep my payment method on file for easy checkout on future orders." If you set this value to 0, please note that credit / debit card data is still collected and stored temporarily in the database during the checkout process from the point the card is entered until the order is placed. If the checkout is abandoned, the card data will be deleted within 24-48 hours.)

☒ **Authorize at Sale, Capture at Shipping** (Safe & Most Reliant. Recommended!)

NOTE: Not all gateways support the ability to "Authorize". [For a credit card processing solution, visit the Volusion Merchant Services page](#)

☐ **Authorize and Capture at Sale**

The drawback to this selection is that some regulations recommend that you do not capture funds until shortly before you actually ship the merchandise.

☐ **I'll Do Everything at Shipping**

The drawback to this selection is that you end up storing credit / debit card data longer than the above choice since all data needs to be stored until you decide to charge the card. Also this is the only selection (of the 3 choices) in which you cannot accept CVV2 data (which is not required, but helps against fraud).

## Configuring Donation Products

Some online businesses, particularly non-profit organizations, may want configure product records for use in soliciting donations. You can use these records to accept donations in any amount or tender.

- In the admin area, click Inventory >> Products and create a product record (as outlined in the "Getting Started Guide" portion of this manual).
- When entering the product code, use the following naming convention to utilize the system's built-in donation functionality: "donation-1," "donation-2," "donation-3," etc.
- Set the product's name to a descriptive phrase, such as Donate to our cause.
- Set the product price and weight to zero.
- Locate the Advanced Options section, check Allow PriceEdit, and click Update.

This product will function like a standard product while allowing your customers to change the price after adding it to the cart. They can specify any amount they wish to donate and then complete their order as normal.

**Support Angelwish's work for Children living with HIV/AIDS.**  
 Thank you for supporting Angelwish. We've established several funds for you to contribute to that will provide children living with HIV/AIDS the happy childhood they so rightfully deserve. Thank you for becoming a Digital Angel!

**Donation Amount:** \* ☒ \$50.00 Bronze Donor  
☐ \$100.00 Silver Donor  
☐ \$250.00 Gold Donor  
☐ \$1,000.00 Platinum Donor  
☐ other

☒ I want to make a one-time donation.

**Select a program to donate to \***

[Edit](#)

 **place order**

### Items to Note

Since a donation product has the same features as a standard product, be sure you haven't configured any coupons or discounts to automatically apply to your donation products or the product categories you've assigned them to.

## Recurring Donations

You can create a recurring donation product that allows your visitors to donate funds over a period of time. Simply create a donation product as described above and configure the product pricing for recurring billing. Also, click Orders >> Recurring Billing >> Settings >> Donations\_Enable\_Recurring >> Save.

Orders

Reports

Inventory

Marketing

Customers

Design

Settings

Overview

Phone Orders

Recurring Billing

Returns / RMAs

Point of Sale

Abandoned / Live Carts

View Recurring Payments Due

Monthly Recurring Total: \$13.50

Yearly Recurring Total: \$162.00

Search

Add

Settings

Search Dates

Charge

Customize

Bulk Updates

Export Results

Bookmark Results

View

Recurring: DUE

Change View Recurring Payments Due Settings

To enable a setting shown below, click the checkbox next to it or uncheck to disable it.

Donations\_Enable\_Recurring

☐

EnableSendEmailRecurring

☒

EnableSendEmailRecurring\_Declined

☐

Save

# Custom Products

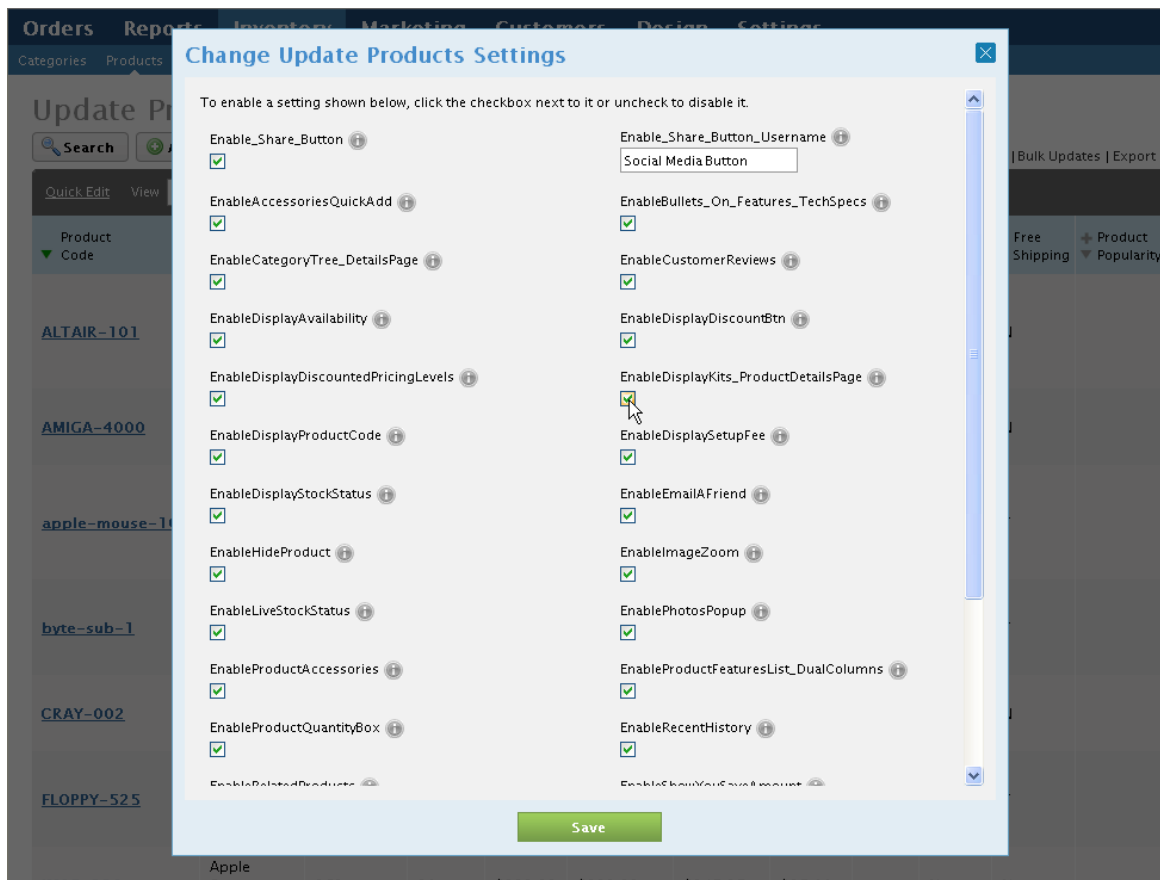
## Setting Up Combo Products

A bundled collection of products can add great value to your product offering. You could simply create a “bundled product” that includes, for example, a camera, tripod and memory card, but if you’d like to also sell them as separate products and manage their inventory individually, Volusion provides settings to accomplish this:

- Create the three products and initialize their stock values.
- In the edit page of the primary product (camera), locate the Free Accessory(s) field in the Advanced Options section.
- Enter the product codes of every included product (e.g. the tripod and memory card, separating each product code by a simple comma: “tripod-123,memory\_card\_a”) and click Update.

When offering product bundles, we recommend that you configure one additional setting. This enables you to communicate the value of the offering to customers as they browse.

- Click Inventory >> Products >> Settings.
- Check the EnableDisplayKits\_ProductDetailsPage.



- Click Save Changes.

### Items to Note

When assigning a product to another product's Free Accessory(s) setting, you can actually specify the quantity of each product you wish to include for free. Simply enter the numerical product quantity in parenthesis next to each product code, such as "tripod-123(1),memory\_card\_a(2)".

## Buy One Product, Get Another Free

To offer a free product with the purchase of another without having to create an additional product record for inventory management:

- Click Inventory >> Products.
- Create a new product and note its product code, or locate a product to which you wish to add a free product.
- Click Marketing >> Coupons/Discounts.

Orders Reports **Inventory** Marketing Customers Design Settings

Coupons / Discounts Nav Menu Promotions MyRewards Newsletters Gift Certificates SEO Affiliates In-Stock Requests

### Update Coupons & Discounts

Search Add

Customize | Bulk Updates | Export Results | Bookmark Results

Quick Edit Results 1 - 7 of 7 Page 1 of 1

Discount	Discount Name	Coupon Code	Min Qty	Max Qty	Min Order Price	Max Order Price	Start Date	End Date	Type	Value	Span	One Time Use	Last Modified	Delete
<a href="#">2</a>	90 Days FREE!		1						Per Unit	0	N	N	9/7/2009 13:39	<input type="checkbox"/>
<a href="#">3</a>	August Promotion - \$10 off coupon	123	1						Per Order	10			1/8/2002	<input type="checkbox"/>
<a href="#">5</a>	Bag Off!		5						Per Unit	5	Y	N	21/7/2009 15:10	<input type="checkbox"/>
<a href="#">10</a>	BlatBlat		1						Per Unit	2	N	N	24/7/2009 11:27	<input type="checkbox"/>
<a href="#">9</a>	Get Discounts Like a Boss	LIKEABOSS	1		101	1000	10/7/2009	31/7/2009	Per Unit	100	Y	Y	9/7/2009 13:18	<input type="checkbox"/>
<a href="#">7</a>	Test Coupon		3	5					Per Unit	10	N	N	18/6/2009 15:02	<input type="checkbox"/>
<a href="#">8</a>	Test Coupon 2		6	10					Per Unit	10	N	N	18/6/2009 15:03	<input type="checkbox"/>

Results 1 - 7 of 7 Page 1 of 1

- Click Add.
- Assign a description to the discount.
- From the DiscountType menu, select Dollar Amount off a Product.
- Set DiscountValue to 0.
- If this promotion is for a limited time only, configure the BeginDate and EndDate values appropriately.



- Enter the Product Code of the product required for purchase to receive this promotion in ApplyToProductCode(s).

Orders Reports Inventory **Marketing** Customers Design Settings

Coupons / Discounts Nav Menu Promotions MyRewards Newsletters Gift Certificates SEO Affiliates In-Stock Requests

## Discounts | Add New

Search Back to List Expand All | Collapse All

**Details**

ID

Coupon Code

**Name**

**Discount Type**

**Discount Value**

Begin Date

End Date

One Time Use Coupon ☐

Cannot Be Used With Any Other Coupon ☐

Apply To Category ID(s)

Apply To Product Code(s)

Min Qty

Max Qty

Span (ie Buy 10 of any product)

Min Order Price

Max Order Price

Last Modified

Last Mod By

Save or Cancel

☒ Add + View Record in edit mode  
☐ Add + View Record in add mode  
☐ Add + View List

- Click Update.

Your customers will automatically receive a notification about the free gift with the product purchase. This notice will also appear on the order details page to help remind your fulfillment staff to add the free item to shipments. This approach is only recommended if you offer a single, free item to include with a purchase.

## Selling Customizable Products

Volusion offers custom field functions that allow you to provide your customers customization options during checkout.

### Custom Fields

In the admin area, click Settings >> Custom Fields.

**Update Custom Fields**

Search Add Customize | Bulk Updates | Export Results | Bookmark Results

Quick Edit View Custom Fields Results 1 - 13 of 13 Page 1 of 1

Custom Field	Table Name	Alias	Question	Question SubText	Input Type	Input Max Length	Placement Order	Required	Public	Show On Invoice	Last Modified	Delete
<a href="#">2</a>	Customers	Additional	What additional Services would you like?	(We want to help!)	Textbox	100	2	N	Y	N	8/1/2009 10:40	<input type="checkbox"/>
<a href="#">1</a>	Customers	Contractor	Are you a Contractor????	fsdfsdf	Checkbox	50	3	Y	N	Y	9/7/2009 17:26	<input type="checkbox"/>
<a href="#">16</a>	Customers	Custobbb	Custom Field 5:		Textbox	50	5	N	N	N	9/7/2009 17:23	<input type="checkbox"/>
<a href="#">3</a>	Customers	Custom3	Custom Field 3:		Textbox	50	3					<input type="checkbox"/>
<a href="#">4</a>	Customers	Custom4	Custom Field 4:		Textbox	50	4					<input type="checkbox"/>
<a href="#">5</a>	Customers	Custom5	Custom Field 5:		Textbox	50	5					<input type="checkbox"/>
<a href="#">11</a>	Customers	CustomersTest	How did you find us?		Textbox	50		Y	Y	N	24/6/2009 18:30	<input type="checkbox"/>
<a href="#">13</a>	Customers	OrdersTest	Would you shop with us again?		Textbox	50		Y	Y	Y	24/6/2009 18:40	<input type="checkbox"/>
<a href="#">8</a>	Orders	Custom3	Custom Field 3:		Textbox	50	3					<input type="checkbox"/>
<a href="#">9</a>	Orders	Custom4	Custom Field 4:		Textbox	50	4					<input type="checkbox"/>
<a href="#">10</a>	Orders	Custom5	Custom Field 5:		Textbox	50	5					<input type="checkbox"/>

This page allows you to configure up to 15 custom fields to display on the checkout page. By default, two sets of custom fields are preprogrammed: customer-based fields and order-based fields. Click an ID number of any custom field to edit it, or click Add to create a new one.

### Setting up a Custom Field - Example

If you're a clothing retailer that offers shirts with custom monogrammed embroidery, you can configure a text box to appear on the product details page that allows your customers to enter their custom monogram with a maximum of 15 characters.

- Click on the ID number of a default custom field from Settings >> Custom Fields with Orders marked in the Table Name column.
- Give the field a meaningful description such as “Monogram.”
- The Question field should provide instructions for the customer (e.g. “Please enter a custom monogram for your shirt here:”).
- You can also set the Question\_SubText field to provide further instructions (e.g. “Max limit of 15 characters”).
- Set the Input\_Type field to Textbox and set the Input\_MaxLength to 15.
- Placement Order adjusts the field’s display location on the page. If you’d like this option to display first, set the value to “1.”
- To give customers the option to leave this field blank if they desire no customization, leave Is\_Required unchecked.
- Check Is\_Public to display the option on the storefront and Show\_On\_Invoices to show the entry on the invoice.

The screenshot shows the 'Custom\_Fields | 8' settings page. The top navigation bar includes 'Orders', 'Reports', 'Inventory', 'Marketing', 'Customers', 'Design', and 'Settings'. Below this is a sub-navigation bar with 'Company', 'Shipping', 'Tax', 'Payment', 'Currency', 'IP Firewall', 'Config Variables', 'Custom Fields', and 'Maintenance'. The main content area is titled 'Custom\_Fields | 8' and includes a search bar, 'Add', and 'Delete' buttons. The 'Details' section shows the following fields:

- ID**: 8
- Table Name**: Orders
- Alias**: monogram
- Question**: Please enter a custom monogram for your shirt
- Question Sub Text**: Max limit of 15 characters
- Input Type**: Textbox
- Input Max Length**: 15
- Placement Order**: 1
- Is Required**: ☐
- Is Public**: ☒
- Show On Invoices**: ☒
- Last Modified**: (empty)

At the bottom of the page, there are buttons for 'Update', 'Cancel', 'Save + View Record', and 'Save + View List'.

- Click Update.

Once these settings are configured, customers can view this information on the checkout page under the Additional Information section.

My Saved Billing Addresses:	My Saved Shipping Addresses:
<div>▼</div> First Name*: <input type="text"/> Last Name*: <input type="text"/> Company: <input type="text"/> Address*: <input type="text"/> City*: <input type="text"/> Country*: <input type="text" value="United States"/> ▼ State*: <input type="text" value="Then, Select State"/> ▼ Zip / Postal Code*: <input type="text"/> Phone Number*: <input type="text"/> Fax: <input type="text"/>	<div>▼</div> First Name*: <input type="text"/> Last Name*: <input type="text"/> Company: <input type="text"/> Address*: <input type="text"/> City*: <input type="text"/> Country*: <input type="text" value="United States"/> ▼ State*: <input type="text" value="Then, Select State"/> ▼ Zip / Postal Code*: <input type="text"/> Phone Number*: <input type="text"/> Fax: <input type="text"/> Gift Wrap: <input checked="" type="radio"/> No <input type="radio"/> Yes

[Copy Billing To Shipping →](#)

#### additional info

**Please Take a moment to help us improve our store.**  
*Questions are optional.*

Please enter a custom monogram for your shirt  Max limit of 15 characters

Who Referred You to Our Site?

Were you satisfied with your shopping experience?  ▼

#### 3 choose your shipping method

[Edit](#)

Free Shipping (7 Day Ground) ▼

Shipping to [United States][AZ][99999][Y]

[recalculate shipping & tax](#)

Subtotal: \$149.94  
 Shipping & Handling: \$0.00  
 Tax: \$0.00  
**Total: \$149.94**

#### 4 payment information

[Edit](#)

Payment Method\*:  ▼

[▶ place order](#)

The custom field will display on the order details page (click the order ID number at Orders >> Overview) under the Marketing section.

**Marketing**

**Sales Rep** Select sales rep

**Referral History**

Referrer	Info
cp.volusion.com	No Affiliate - 12/30/2008 228 days ago via <a href="#">69.36.65.82</a>
eventum.ads.volusion.com	No Affiliate - 12/30/2008 228 days ago via <a href="#">69.36.65.82</a>
eventum.ads.volusion.com	No Affiliate - 1/5/2009 222 days ago via <a href="#">69.36.65.82</a>
store.volusion.com	No Affiliate - 3/5/2009 100 days ago via <a href="#">69.36.65.82</a>

**Custom Fields**

Please enter a custom monogram for your shirt

Max limit of 15 characters

**Who Referred You to Our Site?**

**Were you satisfied with your shopping experience?**

**Custom Field 4:**

**Custom Field 5:**

**Drop Ship**

Drop Ship items now. [Go](#) ☐ Apply to all items regardless of status.

**Customer Management**

## Custom Field Dropdown Settings

When you create or modify a custom field, you can set the Input Type field to Dropdown. This option provides a dropdown menu to allow customers to select one of a series of values. In the admin area, click Settings >> Custom Fields and select Custom Fields Dropdown Values from the View menu.

**Orders Reports Inventory Marketing Customers Design Settings**

Company Shipping Tax Payment Currency IP Firewall Config Variables Custom Fields Maintenance

### Update Custom Fields

Customize | Bulk Updates | Export Results | Bookmark Results

Quick Edit View Custom Fields

Results 1 - 10 of 10 Page 1 of 1

Custom Field	Table Name	Alias	Question	Question SubText	Input Type	Input Max Length	Placement Order	Required	Public	Show On Invoice	Last Modified	Delete
<a href="#">2</a>	Customers	Additional	What additional Services would you like?	(We want to help!)	Textbox	100	2	N	Y	N	1/8/2009 10:40AM	<input type="checkbox"/>
<a href="#">1</a>	Customers	Contractor	Are you a Contractor?		Checkbox	50	1	N	Y	N	1/8/2009 10:33AM	<input type="checkbox"/>
<a href="#">3</a>	Customers	Custom3	Custom Field 3:		Textbox	50	3					<input type="checkbox"/>
<a href="#">4</a>	Customers	Custom4	Custom Field 4:		Textbox	50	4					<input type="checkbox"/>
<a href="#">5</a>	Customers	Custom5	Custom Field 5:		Textbox	50	5					<input type="checkbox"/>
<a href="#">9</a>	Orders	Custom4	Custom Field 4:		Textbox	50	4					<input type="checkbox"/>
<a href="#">10</a>	Orders	Custom5	Custom Field 5:		Textbox	50	5					<input type="checkbox"/>
<a href="#">8</a>	Orders	Monogram	Please enter a custom monogram for your shirt	Max limit of 15 characters	Textbox	15	1	N	Y	Y	8/15/2009 2:52PM	<input type="checkbox"/>
<a href="#">6</a>	Orders	Referred	Who Referred You to Our Site?		Textbox	50	1	N	Y	N	1/8/2009 10:33AM	<input type="checkbox"/>
<a href="#">7</a>	Orders	Satisfied	Were you satisfied with your shopping experience?		Dropdown	50	2	N	Y	N	1/8/2009 10:33AM	<input type="checkbox"/>

Results 1 - 10 of 10 Page 1 of 1

Click Add to configure the following settings:

## Custom Field Dropdown Settings

Custom_Fields_Dropdown_Values_ID *	This field contains an auto-generated number that identifies the dropdown.
Custom_Fields_ID	This menu allows you to define which custom field this menu option appears in. <b>Note that the menu options only function properly with custom fields set to the <i>Dropdown</i> input type.</b>
Title*	This field contains the text that appears in the menu on the storefront.
Value*	This field contains the text reported to the Volusion database and viewable in the admin area.
Placement_Order	This field stores a basic product description and any html or image links you wish to display.
Category	The number you enter in this field determines the order of appearance within the menu (lower numbers place the custom field higher on the list).

\*These fields are required.

Edit these values as needed and click Update to complete editing any entry, or Save when finished creating a new entry.

## Notes on Custom Fields

You can't create more than 15 total custom fields. This limit refers to the total number of customer-based and order-based custom fields for your store. Customer-based custom fields differ from order-based custom fields in that they only display to each customer one time and will not appear on subsequent orders. If you wish to gather information about every order using a custom field, use the order-based custom field type.

Note that, due to the functionality of the custom field Dropdown input type, a value will always be selected regardless of whether or not the customer makes a choice.

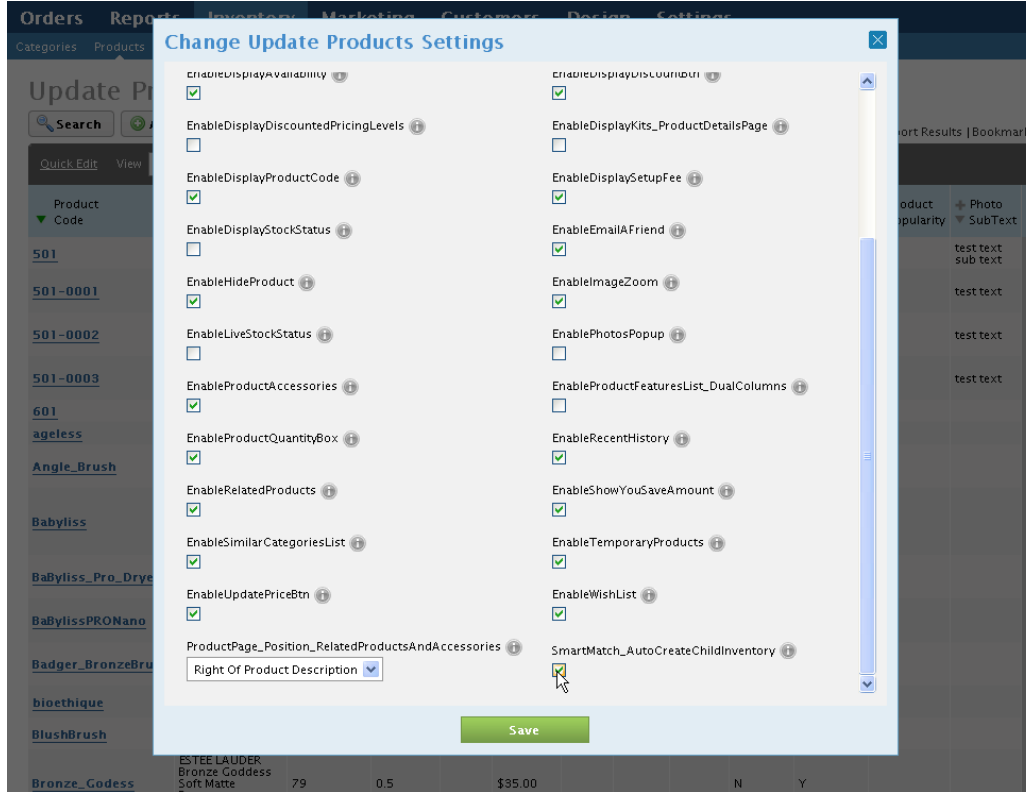
## Inventory Control Grid

One of the most powerful inventory features available with Volusion is the inventory control grid, which allows you to manage product inventory for product attributes (e.g. a small, red t-shirt vs. a large, blue t-shirt). It calculates every possible variation of a product and its options and treats each one as a separate product. This allows you to quickly create a series of products with various attributes, based on the base product.

### Using the Inventory Control Grid

In order for the inventory control grid to function, you must create a product with options, and activate the feature as follows:

- Log in to the admin area and [create a product](#).
- Create options and assign them to the product (e.g. colors, sizes, etc.).
- Click Inventory >> Products >> Settings.
- Ensure that the Smartmatch\_AutoCreateChildInventory option is checked and click Save.



- Return to Inventory >> Products and click the product code.
- Under the Product Options section, check Enable Options Inventory Control and click Update.

**Orders Reports Inventory Marketing Customers Design Settings**

Categories Products Options Import / Export Vendors Purchase Orders Receiving Product Key Distribution Warehouses

## Products | 501

[Search](#) [Add](#) [Delete](#) [Back to List](#) | [View Live](#) | [Next >>](#) [Expand All](#) | [Collapse All](#)

Image Management	+
Basic Product Info	+
Search Engine Optimization	+
Pricing Options	+
Shipping Options	+
Product Descriptions	+
Advanced Options	+
Product Options	-

Option ID(s) [Switch to Advanced View](#)

(13)<i> Please choose your color > (77) Goldmine  
(18)<i>Please choose your color</i> > (87) Coppertone  
(18)<i>Please choose your color</i> > (91) Mocha  
(18)<i>Please choose your color</i> > (79) Peaches

Click To Edit

Use Same Options As ProductCode

Selected Option ID(s)

Enable Options Inventory Control ☒

Helpful Links: [Edit options currently applied to "501" options](#)

3rd Party Specific Fields	+
Custom Fields <a href="#">Edit</a>	+
Recurring Pricing	+
Special Pricing Levels <a href="#">Edit</a>	+
Vendor Information	+

Once this process is complete, locate the Inventory Control Grid for... section. Here, all variants of the base product will display in a separate table that functions much like the main products table:



**Orders Reports Inventory Marketing Customers Design Settings**

Categories Products Options Import / Export Vendors Purchase Orders Receiving Product Key Distribution Warehouses

## Products | 501

[Search](#) [Add](#) [Delete](#) [Back to List](#) | [View Live](#) | [Next >>](#) [Expand All](#) | [Collapse All](#)

- Image Management +
- Basic Product Info +
- Search Engine Optimization +
- Pricing Options +
- Shipping Options +
- Product Descriptions +
- Advanced Options +
- Product Options +
- 3rd Party Specific Fields +
- Custom Fields [Edit](#) +
- Recurring Pricing +
- Special Pricing Levels [Edit](#) +
- Vendor Information +
- Inventory Control Grid for "501" -

**Useful Links** [\(View All Options\)](#) | [\(View All Child Products\)](#)

Displaying 6 Records

Option ID	Option Category	Option Description	Option OrderBy	Option PriceDiff	Grid PriceDiff	Product Price	Stock Status	Inventory Grid ProductCode	
77	[13] <i>Please choose your color</i>	Goldmine		\$0.00		12.98	+1	501-0001	<a href="#">Edit</a>
87	[18] <i>Please choose your color</i>	Coppertone		\$0.00			A		
77	[13] <i>Please choose your color</i>	Goldmine		\$0.00		12.98	-1	501-0002	<a href="#">Edit</a>
91	[18] <i>Please choose your color</i>	Mocha		\$0.00			A		
77	[13] <i>Please choose your color</i>	Goldmine		\$0.00		12.98	+1	501-0003	<a href="#">Edit</a>

## Inventory Control Grid

Option ID	This column lists the ID of every option (attribute) applied to a product. Clicking the ID will redirect you to the product option's settings page.
Option Category	This column contains the ID and name of all option categories this product variant utilizes. Clicking on a category will redirect you to the option category's settings page.
Option Description	This column lists the option name from each relevant option category.
Option OrderBy	This column lists the order in which the attributes are displayed on the product detail page. Note that attributes with the same OrderBy value will be listed in alphabetical order.
Option PriceDiff	This column lists the price difference (if applicable) the attribute adds to or subtracts from the base product.
Grid PriceDiff	The fields in this column allow you to override the price difference listed in the previous column.

Product Price	This column lists the overall price of the product variant. You can modify this value as needed.
Stock Status	This column contains a field that allows you to manually add to or subtract from the stock value of every product variant, as well as the current stock value.
Inventory Grid ProductCode	The fields in this column contain the product code of each variant. This field is automatically created by the grid, but can be manually edited if necessary. Once a variant is created in the grid, its individual product code can be modified as needed.

If you make any changes to a product variant here, click **Save Changes to Inventory Control Grid**.

#### Items to Note

If you activate the Inventory Control Grid for a product but you can't edit the pricing, or if the system doesn't properly create the variant product records, it's likely that the SmartMatch\_AutoCreateChildInventory variable isn't active. In this case, remove all attributes from the base product and save your changes, then enable the auto-create variable (Inventory >> Products >> Settings), reassign product options, and click Update to properly recreate the grid.

## Display Product Options Using Color Swatches

You can use other store functions in conjunction with the inventory control grid to better display your products and their variants on your storefront.

The color swatch function allows your customers to view images of product attributes to make more well-informed purchasing decisions. In keeping with our previous t-shirt example, you can assign images to each attribute (such as color) to create clickable thumbnails for customer display:

- Set up a product with product attributes (e.g. three color options such as red, blue and green) as discussed in the previous section.
- Make sure that your option categories' display settings are configured for Dropdown or Dropdown Smartmatch.

[Orders](#)
[Reports](#)
[Inventory](#)
[Marketing](#)
[Customers](#)
[Design](#)
[Settings](#)

[Categories](#)
[Products](#)
[Options](#)
[Import / Export](#)
[Vendors](#)
[Purchase Orders](#)
[Receiving](#)
[Product Key Distribution](#)
[Ware](#)

## OptionCategories | 18

<< Previous | Back to List | Next >>

### Details

<b>ID</b>	18
Heading Group	
<b>Option Categories Desc</b>	<i>Please choose your colo
About Option Categories	
<b>Arrange Option Categories By</b>	100
Display Type	DROPDOWN
Hide Option Categories Desc	
Include In Search Refinement	

Is Required

Last Modified

Last Mod By

DROPDOWN  
 CHECKBOX  
 RADIO  
 TEXTBOX  
 DROPDOWN\_CONTROL  
 DROPDOWN\_CLIENT  
 DROPDOWN\_SMARTMATCH  
 PLAIN\_TEXT

- Enable the inventory control grid both in the product table's Settings and in the individual product's Advanced Options.
- Click Inventory >> Products and click on the product code to which you applied the inventory control grid.
- Locate Option Color Swatch Images for X at the bottom.

[Orders](#)
[Reports](#)
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[Customers](#)
[Design](#)
[Settings](#)

[Categories](#)
[Products](#)
[Options](#)
[Import / Export](#)
[Vendors](#)
[Purchase Orders](#)
[Receiving](#)
[Product Key Distribution](#)
[Warehouses](#)

## Products | 501

[Search](#)
[Add](#)
[Delete](#)

[Back to List](#) | [View Live](#) | [Next >>](#)

[Expand All](#) | [Collapse All](#)

- Image Management +
- Basic Product Info +
- Search Engine Optimization +
- Pricing Options +
- Shipping Options +
- Product Descriptions +
- Advanced Options +
- Product Options +
- 3rd Party Specific Fields +
- Custom Fields [Edit](#) +
- Recurring Pricing +
- Special Pricing Levels [Edit](#) +
- Vendor Information +
- Inventory Control Grid for "501" +
- Vendor Rules for "501" +
- Option Color Swatch Images for "501" -

[See More information about color swatch functionality](#)

Swatch Size Swatch:

Swatch Size Medium:

Swatch Size Large:

☐ Make These My Default Sizes

Option Category Description	Option Description	Swatch Image	Medium & Large Images
(13) Please choose your color	(77) Goldmine		<a href="#">Add</a>
(18) Please choose your color	(87) Coppertone		<a href="#">Add</a>
(18) Please choose your color	(91) Mocha		<a href="#">Add</a>
(18) Please choose your color	(79) Peaches		<a href="#">Add</a>

[Upload Photos](#)

This table allows you to configure the image sizes of product attributes. Configure the sizes as needed or use the default settings.

- Below this section, every attribute combination currently configured to the base product appears in a table.

Option Color Swatch Images for "501"

[See More information about color swatch functionality](#)

Swatch Size Swatch:

Swatch Size Medium:

Swatch Size Large:

☐ Make These My Default Sizes

Option Category Description	Option Description	Swatch Image	Medium & Large Images
(13) Please choose your color	(77) Goldmine		<a href="#">Add</a>
(18) Please choose your color	(87) Coppertone		<a href="#">Add</a>
(18) Please choose your color	(91) Mocha		<a href="#">Add</a>
(18) Please choose your color	(79) Peaches		<a href="#">Add</a>

[Upload Photos](#)

- Click Add.

- Two Browse buttons appear for each combination: one for a color swatch and the other for a product image. You can use these fields to upload images for each combination: a swatch to represent the option(s) and an image for the product variant.
- After locating the desired image(s) on your local hard drive, click Upload Photos.

Option Color Swatch Images for "501"


[See More information about color swatch functionality](#)

Swatch Size Swatch:

Swatch Size Medium:

Swatch Size Large:

☐ Make These My Default Sizes

Option Category Description	Option Description	Swatch Image	Medium & Large Images
(13) <i>Please choose your color</i>	(77) Goldmine		<a href="#">Delete</a>
(18) <i>Please choose your color</i>	(87) Coppertone		<input type="button" value="Add"/>
(18) <i>Please choose your color</i>	(91) Mocha		<input type="button" value="Add"/>
(18) <i>Please choose your color</i>	(79) Peaches		<input type="button" value="Add"/>

Now the product details page displays a color swatch for each attribute combination. Upon clicking, the related product image displays in the main product photo area. When using the Smartmatch system, this also automatically selects the related product option from the dropdown menu.

It's always best to use the Medium and Large Images option so the system creates two images for the storefront display. Also, be sure to upload a main product photo for any base product, otherwise your customers will see the default "No Photo Available" image on the product details page.

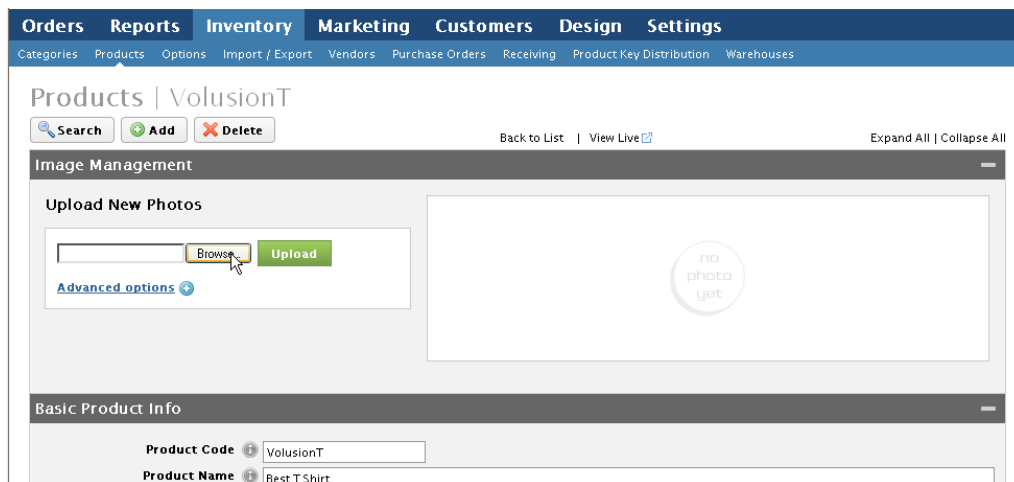
# Product Image Setup Guide

One of the most important steps during product setup is uploading product images. Customers want to see what they're purchasing. Volusion offers several display options for you to use.

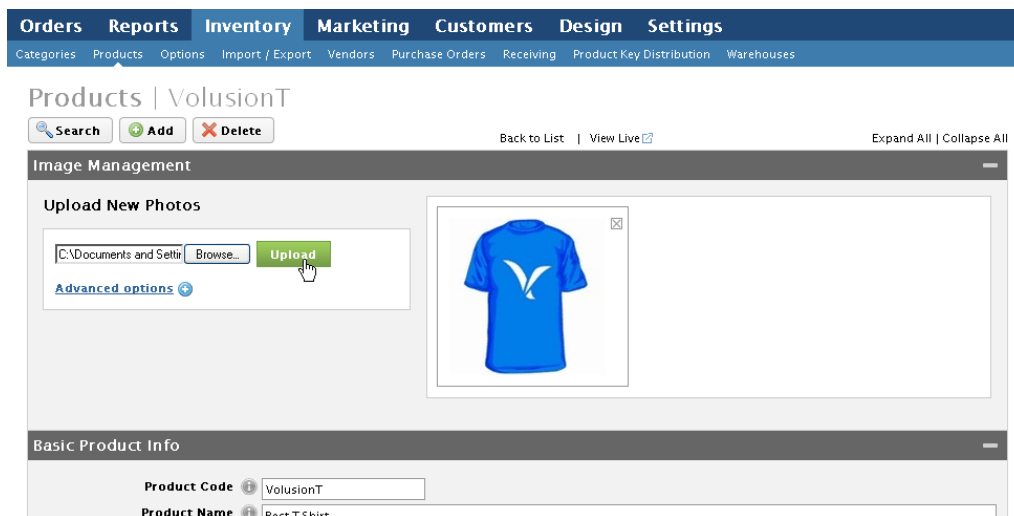
## Uploading a Product Image

On every product's settings page, you'll find functions for the product's images under Image Management. Here you can add a photo to a product:

- Click Browse to select an image file from your hard drive.



- Click Upload. Once complete, the product image will display to the right of the upload options.



- All images uploaded to products are resized automatically to preset dimensions. You can change these dimensions in Advanced Options prior to upload.

**Products | VolusionT**

Search Add Delete Back to List View Live Expand All Collapse All

**Image Management**

**Upload New Photos**

C:\Documents and Settings\ Browse... Upload

Advanced options

**Advanced Options**

Photo Size Tiny: 75 Both

Photo Size Small: 150 Both

Photo Size Medium: 200 Both

Photo Size Large: 450 Both

☐ Generate Alternate View Photo

☐ Make These My Default Sizes

**Basic Product Info**

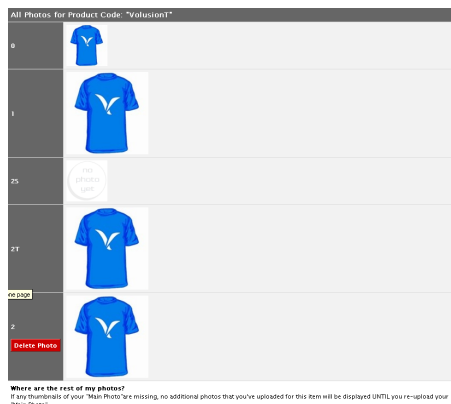
Product Code VolusionT

Product Name React T-Shirt

### Items to Note

Product images must be in either .jpg or .gif format. When editing images in photo applications such as Adobe Photoshop, make sure they're in RGB color format before saving.

When uploading the image, the system creates four versions of that image. You can view them by clicking on the image itself after completion of the file upload:



## Product Photos

**Photo Size Thumbnail (0)** This is the smallest image. It displays on the shopping cart page.

**Photo Size Medium (1)** This image usually displays in the product views such as the product grid or the “super deal” display.

**Photo Size Large (2T)** This is the main product image. It displays on the product details page.

**Photo Size Large Thumbnail (2)** This is the largest image. It displays when the visitor clicks Larger Photo on the product details page.

## Uploading Custom-Sized Images

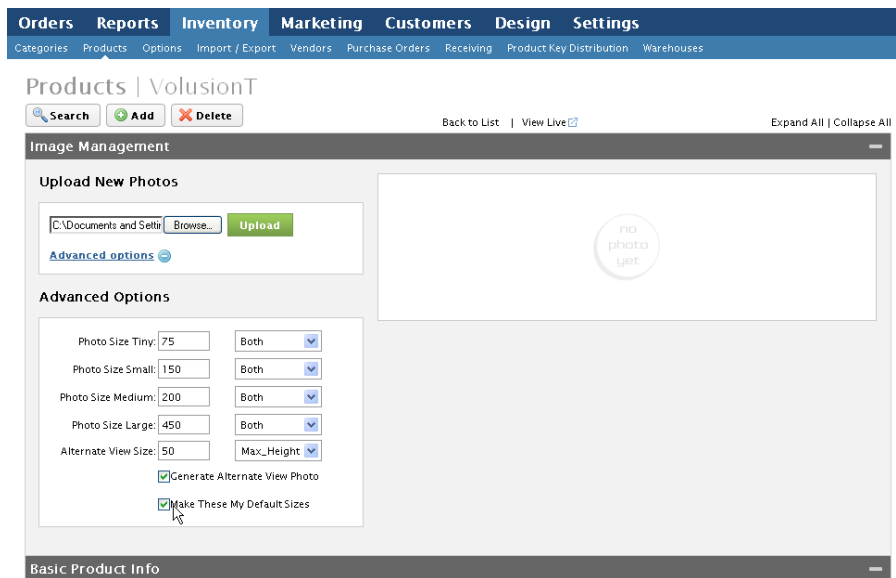
You can define custom image sizes by clicking Advanced Options in the Image Management section of product edit page. Using the input fields and dropdown menus, define the size in pixels for either the maximum width or maximum height (or both) for both the medium and large photos. Upon clicking Make These My Default Sizes, these custom sizes will be the default sizes for all future image uploads.

## Creating Alternate Product Images

If you'd like to offer multiple views of a single product:

- Within the Upload New Photos section, click Generate Alternate View Photo in Advanced Options (do this for the main product photo as well as any additional images).





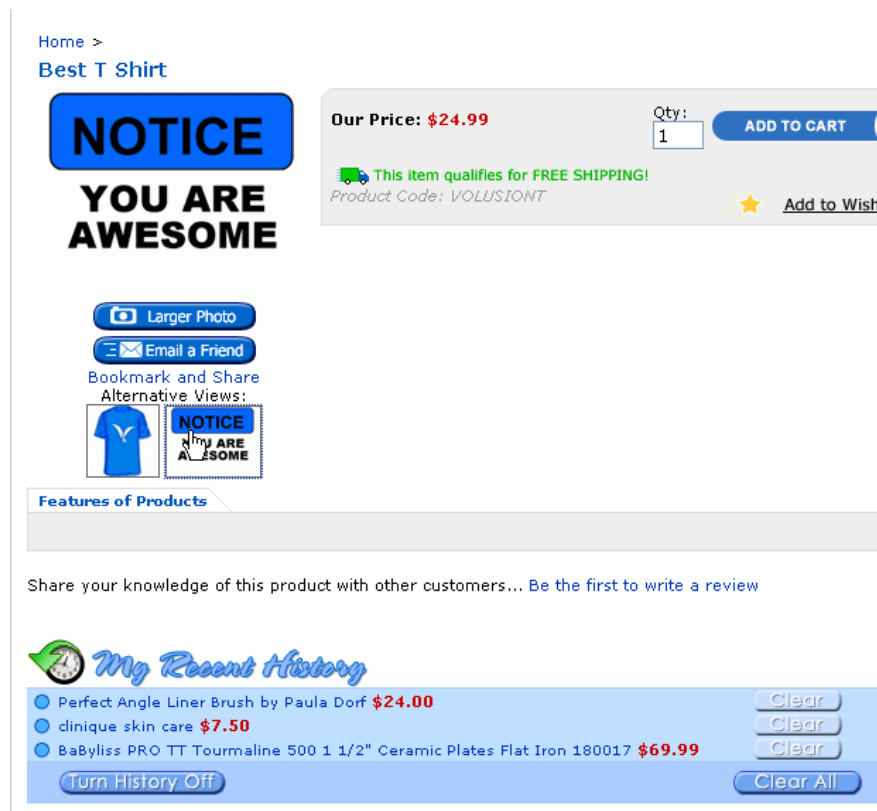
This enables the Alternate View Size fields.

- Define the size of the alternate thumbnail images (the default size is 25x25 pixels).
- Upload any additional images using the steps described in the previous section. The additional photo will appear next to the original product photo in the product's settings page.



- Repeat the process to create additional alternate views.

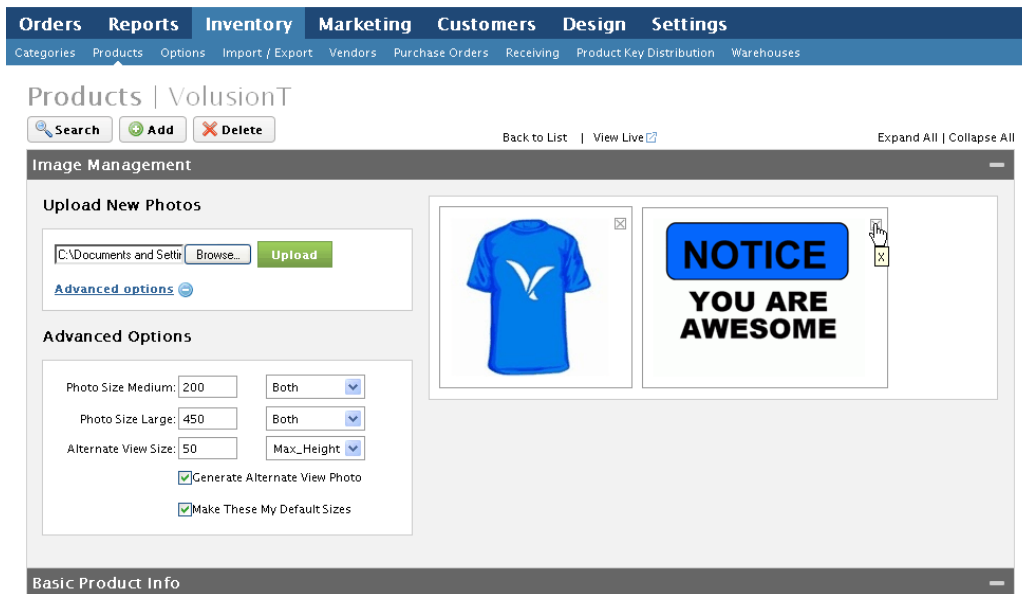
On the product details page, the alternate images appears when you click on the thumbnail images. This is a great feature when you need to showcase alternate views for products such as electronics, where front, back and side views should be available.



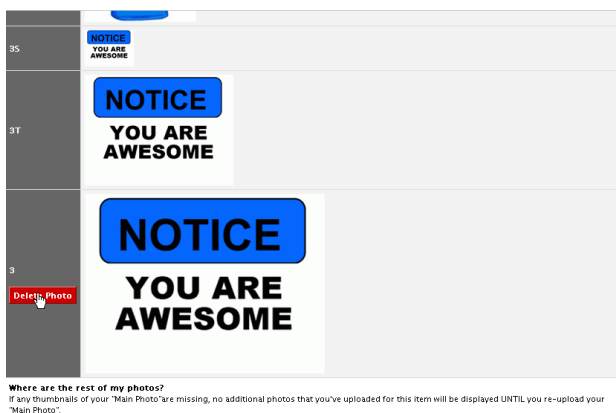
## Removing Product Images

If you need to replace an image already attached to a product, you'll first have to delete the original photo. You can accomplish this in two ways:

- Any image linked to the product will display on the right side of the Image Management section of the product edit page. Click the X icon near the top of the photo to remove it.



- You can also click the photo to view all photos within a popup window. Here, click Delete Photo to remove all attached images.



## Option Color Swatch Images

The option color swatch images feature provides customers different ways to view your products. You can add color swatches to products by clicking Option Color Swatch Images for... at the bottom of the base product's edit page.

To begin using the color swatch images function, the product must have at least one option category applied with the options displayed in either the Dropdown or Dropdown Smartmatch format. If using the inventory control grid, the product must have variant products for every attribute combination. Once these requirements have been met, you can use color swatch images on the base product. When you click Option Color Swatch Images for X on the product's edit page, a series of image size options and a list of every attribute applied to the base product will appear.

Option Color Swatch Images for "VolusionT"

[See More information about color swatch functionality](#)

Swatch Size Swatch: 25 Both

Swatch Size Medium: 250 Both

Swatch Size Large: 500 Both

☐ Make These My Default Sizes

Option Category Description	Option Description	Swatch Image	Medium & Large Images
(24) Choose Shirt Color	(100) Blue		<a href="#">Add</a>
(24) Choose Shirt Color	(101) White		<a href="#">Add</a>
(24) Choose Shirt Color	(102) Yellow		<a href="#">Add</a>

[Upload Photos](#)

## Adding images of product variants as follows:

- In the Color Swatch table, click Add. This activates the Swatch Image and Medium & Large Images options.
- Use Browse or enter the path to the desired image files on your hard drive.
- Click Upload.

Above the Color Swatch table, you can set the pixel size of the files. Simply enter a value in one of the three fields, select Height, Width or Both from the dropdown, and the system will format swatches and images to the defined values. You can also click Make These My Default Sizes to set any custom-size settings as the default.

Once the color swatches and photos have been uploaded, each color swatch will appear above the dropdown menu for each of the product's attributes.

Option Color Swatch Images for "VolusionT"

[See More information about color swatch functionality](#)

Swatch Size Swatch: 25 Both

Swatch Size Medium: 250 Both

Swatch Size Large: 500 Both

☐ Make These My Default Sizes

Option Category Description	Option Description	Swatch Image	Medium & Large Images
(24) Choose Shirt Color	(100) Blue		<a href="#">Delete</a>
(24) Choose Shirt Color	(101) White		<a href="#">Delete</a>
(24) Choose Shirt Color	(102) Yellow		<a href="#">Delete</a>

[Upload Photos](#)

Clicking on the swatch itself or selecting the option from the dropdown menu automatically changes the product photo to the appropriate color variant.

Home >  
Best T Shirt



Larger Photo  
Email a Friend  
Bookmark and Share  
Alternative Views:  


**Our Price: \$24.99**

 This item qualifies for **FREE SHIPPING!**  
Product Code: VOLUSIONT

Choose your options...

**Colors**

Click to view another {0} Choose Shirt Color



Choose Shirt Color\*: Yellow

Qty: 1

**ADD TO CART** 

 [Add to Wish List](#)

**Features of Products**

Share your knowledge of this product with other customers... [Be the first to write a review](#)

 **My Recent History**

- Perfect Angle Liner Brush by Paula Dorf **\$24.00** [Clear](#)
- clinique skin care **\$7.50** [Clear](#)
- BaByliss PRO TT Tourmaline 500 1 1/2" Ceramic Plates Flat Iron 180017 **\$69.99** [Clear](#)

[Turn History Off](#) [Clear All](#)

## Tips on Product Images

You can also add images to your store through your FTP account. FTP stands for “file transfer protocol” and is a standard way for computer systems to transfer files back and forth over the Internet. You can set up FTP access to your store at <http://my.volusion.com>, then log in to your FTP account using a standard FTP client application. Go [here](#) for more details on setting up and using FTP.

When logged into the store’s FTP account, navigate to the directory “vspfiles/photos.” This is the main directory where all product images are stored.

Product photos can be uploaded en-masse here, but they must be named properly for the system to recognize them:

- Each image file must begin with the product code name.

- After the product code, the “-” character should follow, and then the appropriate image type from the chart below:

## Product Image Suffixes

<b>0</b>	This is the small image used to display products in certain views such as grids and on the shopping cart page.
<b>1</b>	This is the medium image that appears in areas such as Top Sellers and search results listings.
<b>2</b>	This is the large image displayed when you click the image in a product's details page.
<b>2S</b>	This is a thumbnail image used to allow customers to select the 2T image when alternate images are enabled.
<b>2T</b>	This is the image used for the primary product display.
<b>3</b>	This is the large image used for an additional image when alternate views are enabled.
<b>3S</b>	This thumbnail image allows visitors to select three images when alternate views are enabled.
<b>3T</b>	This is the main image for a product's alternate view.

For example, name a series of images with a product code of ABC123 in the following way:

- ABC123-0
- ABC123-1
- ABC123-2
- ABC123-2T

These are the minimum image requirements for a product. You can continue to upload additional image sets (3, 3S, 3T, 4, 4S, 4T, etc.) for additional alternate views.

Finally, once these images are uploaded, it's a good idea to rebuild the product table index. To do this, click Settings >> Maintenance >> Rebuild Product Index.



## Manage Maintenance

**Maintenance Toolbox**  
[Rebuild Product Index](#) You last indexed 71hrs ago.  
[Rebuild Search Index](#)  
[Reassign Inventory Control Grid](#)  
[Manage 301 Redirects](#)  
[Close store to view more tools](#)

**Your store is currently:** OPEN

[Close my store](#)

This page allows you to temporarily close your store for maintenance. For example if you need to perform modifications on your database or files, closing your store will post a notice on your website telling your visitors the store is "temporarily closed for scheduled maintenance, please try back in 15 minutes to and hour. Thank your for your patience."

[Customize your maintenance message here.](#)

## Search Refinement System

The search refinement system is a special configuration of your store's categories that allow your customers to narrow search results based on options using a filter category dropdown menu. For example, you can configure the search refinement system to allow your customers to filter results by manufacturer, brand or other custom categories.

## What's New?

Volusion added new optimized search functions to the search and search refinement systems in Winter '09. You can activate them in the admin area at Settings >> Config Variables.

Update Configuration : General Variables

Search

Quick Edit View General variables Results 1 - 53 of 53 Page 1 of 1

Name	Value	Last Modified
<a href="#">Config_CRM_Plugin_URL</a>	<input type="text"/>	
<a href="#">Config_DateFormat</a>	MM/DD/YYYY	2/13/2006
<a href="#">Config_DidYouMean_Enable</a>	<input type="checkbox"/>	
<a href="#">Config_Donations_Suggested_Amounts</a>	50.00:Bronze Donor 100.00:Sil	7/13/2007 3:44PM
<a href="#">Config_Enable_Publish_Always_By_Default</a>	<input checked="" type="checkbox"/>	7/21/2009 6:27PM
<a href="#">Config_Enable24HourTime_Without_AMPM</a>	<input type="checkbox"/>	2/13/2006
<a href="#">Config_EnableAccessoriesBelowShoppingCart</a>	<input checked="" type="checkbox"/>	2/10/2006
<a href="#">Config_EnableDiscounts_With_SpecialPricing</a>	<input checked="" type="checkbox"/>	2/10/2006
<a href="#">Config_EnableDisplayEstimatedShipping</a>	<input checked="" type="checkbox"/>	2/10/2006
<a href="#">Config_EnableDisplayOptionProducts</a>	<input type="checkbox"/>	2/10/2006
<a href="#">Config_EnableFaxNumber</a>	<input checked="" type="checkbox"/>	2/10/2006
<a href="#">Config_EnableGiftCertificates</a>	<input checked="" type="checkbox"/>	2/10/2006
<a href="#">Config_EnableMaximumOrderQty</a>	<input type="checkbox"/>	2/10/2006
<a href="#">Config_EnableMembersOnlyBrowsing</a>	<input checked="" type="checkbox"/>	2/10/2006
<a href="#">Config_EnableMembersOnlyWebsite</a>	<input type="checkbox"/>	2/10/2006
<a href="#">Config_EnableMembersOnlyWebsite_TaxID</a>	<input checked="" type="checkbox"/>	2/10/2006

## Config\_DidYouMean\_Enable

If your customers misspell a word, this variable activates a "Did You Mean?" function.

SEARCH:

products GO

QUICKLINKS

» Fashion Makeup

You are here: Home > Search for "products"

We found 0 results matching your criteria.  
No results were found for your search, but we found items using these search terms:  
[products \(1\)](#)



## Config\_SearchRefinement\_EnableOnCategoryPage

By default, the search refinement system only displays on the search results page of your storefront. Enabling this variable displays the search refinement system on all category pages.

## Config\_SearchRefinement\_EnableSearchQtyOnCategoryPage

This variable displays the search result number on all category pages, not just the search results page.

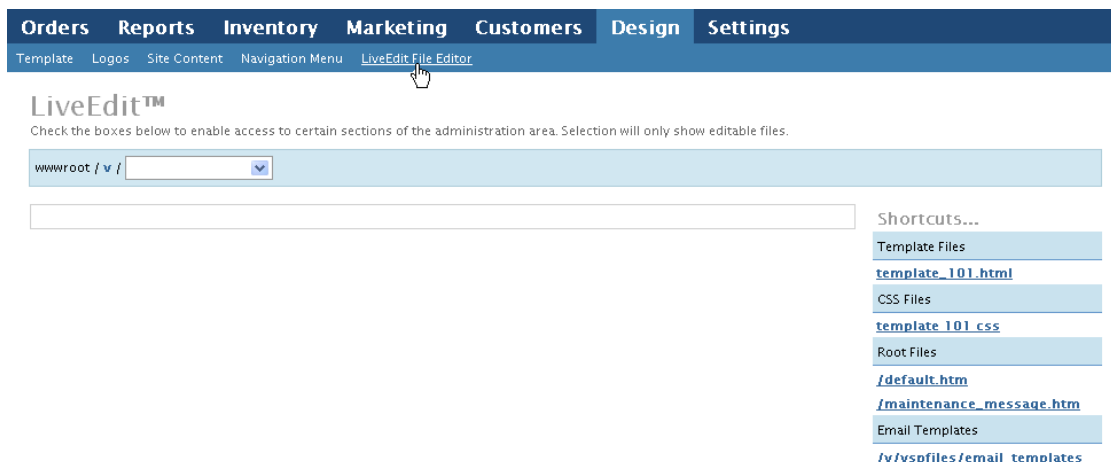
## Config\_SearchRefinement\_ShowDropdowns

By default, the search refinement displays results as links. This variable changes the display type to a dropdown menu.

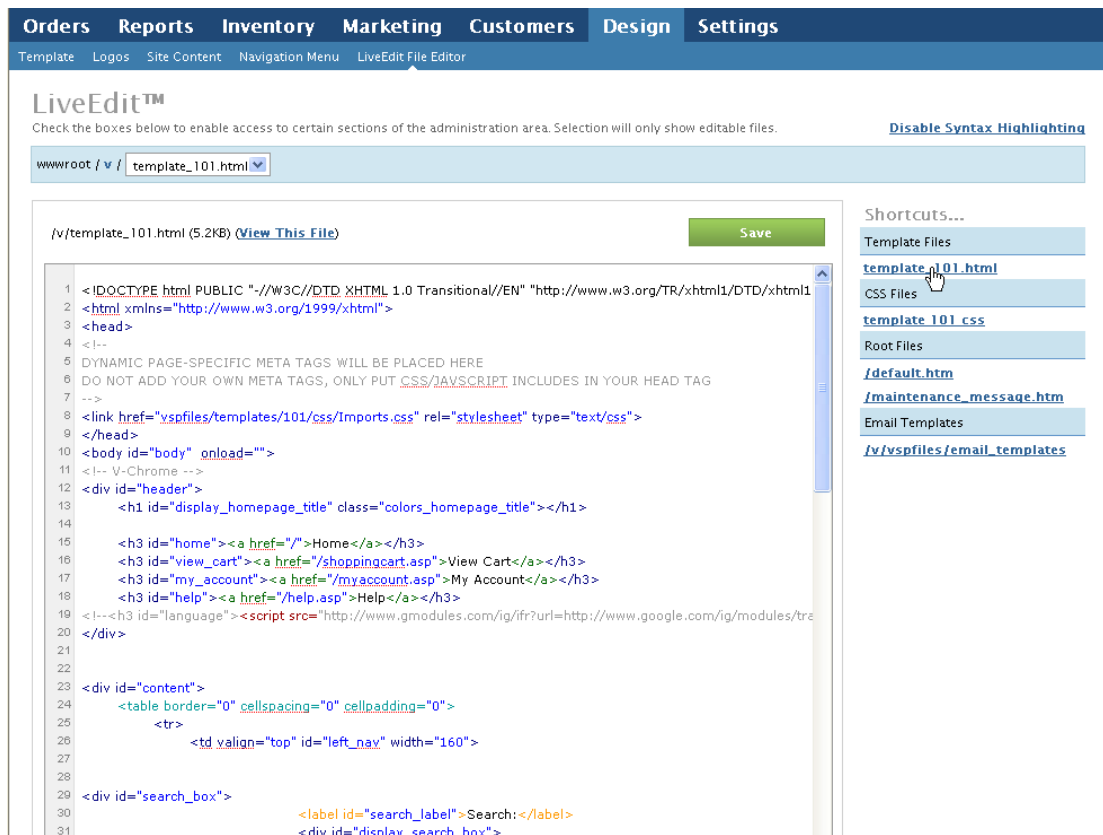
## Config\_SearchRefinement\_ShowInMasterTemplate

If you plan to code the search refinement display elsewhere in your template, turn on this variable to hide the built-in links or dropdowns (recommended for advanced merchants only):

- In the admin area, click Design >> LiveEdit File Editor.



- Click template\_X.html (where X is equivalent to the template ID number).



The HTML code for your active store template should appear.

- Insert the following code into your desired location within the template: `<div id="search_refinement_filters"> </div>`.
- This HTML tag displays a dropdown menu of your search refinement.
- You may have to modify your store's CSS or HTML to integrate this dropdown menu with your store's overall design.

## Config\_SearchResults\_UseTextPaging

The search refinement system's default settings display multiple pages of search results using a text box for result navigation. If you turn on this variable, the system displays a clickable number for each page of results.

## Turning on Search Refinement

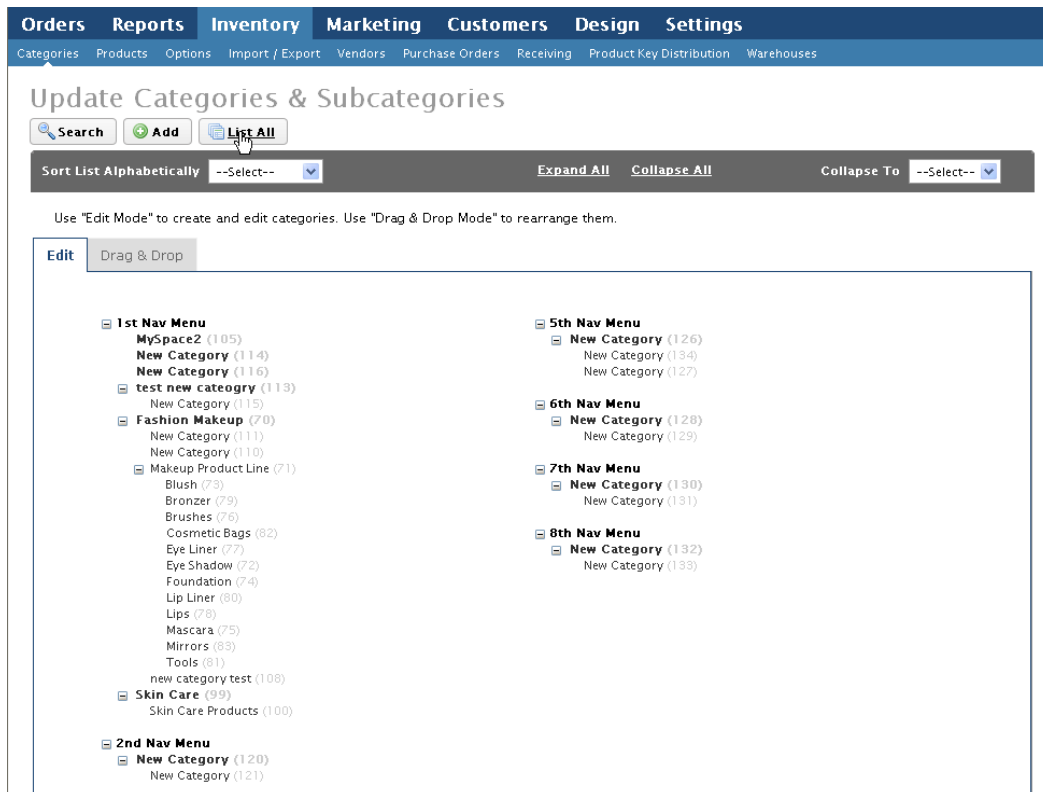
In the admin area, click Settings >> Config Variables, enable the Config\_Enable\_searchRefinement variable, and click Save.

## Configuring a “By Manufacturer” Filter

To create a filter category that allows customers to filter products by manufacturer, you must first build the filter, then assign manufacturers to your products.

### Building the Manufacturer Filter

- In the admin area, click Inventory >> Categories >> List All.



- Click Add.

**Orders Reports Inventory Marketing Customers Design Settings**

Categories Products Options Import / Export Vendors Purchase Orders Receiving Product Key Distribution Warehouses

## Update Categories & Subcategories

Search Add Settings

Customize | Bulk Updates | Export Results | Bookmark Results

Quick Edit  
Results 1 - 25 of 56 Page 1 of 3 Next >>

Category	Parent ID	Name	Order	Hidden	Visible	Delete
70	0	Fashion Makeup	250	N	1	<input type="checkbox"/>
84	0	Hair Care	450	N	1	<input type="checkbox"/>
99	0	Skin Care	300	N	1	<input type="checkbox"/>
105	0	MySpace2	50	Y	1	<input type="checkbox"/>
113	0	test new category	200	N	1	<input type="checkbox"/>
114	0	New Category	100		1	<input type="checkbox"/>
116	0	New Category	150		1	<input type="checkbox"/>
119	0	New Category	50	N		<input type="checkbox"/>
120	0	New Category	50	N	2	<input type="checkbox"/>
122	0	New Category	50	N	3	<input type="checkbox"/>
124	0	New Category	50	N	4	<input type="checkbox"/>
126	0	New Category	50	N	5	<input type="checkbox"/>
128	0	New Category	50	N	6	<input type="checkbox"/>
130	0	New Category	50	N	7	<input type="checkbox"/>
132	0	New Category	50	N	8	<input type="checkbox"/>
71	70	Makeup Product Line	100	N		<input type="checkbox"/>
108	70	new category test	250	N	1	<input type="checkbox"/>
110	70	New Category	50		1	<input type="checkbox"/>
111	70	New Category	25		1	<input type="checkbox"/>
72	71	Eye Shadow		N		<input type="checkbox"/>
73	71	Blush		N		<input type="checkbox"/>
74	71	Foundation		N		<input type="checkbox"/>
75	71	Mascara		N		<input type="checkbox"/>
76	71	Brushes		N		<input type="checkbox"/>

- Enter "Manufacturer" in Category Name.
- In Category Visible, select By Manufacturer (filter category).

**Orders Reports Inventory Marketing Customers Design Settings**

Categories Products Options Import / Export Vendors Purchase Orders Receiving Product Key Distribution Warehouses

## Categories | Add New

Rebuild Search Index Rebuild

Search Back to List Expand All | Collapse All

**Basic Category Info**

ID [0] MAIN CATEGORY

Category Name Manufacturer

Category Visible

Category Order

Hidden

Search Engine Optimization

Category Descriptions

Customizable SubCategory

Customizable Product Display

Product Display Mode

Default SortBy

Display Columns

Display Rows

Display Featured Products Only

Availability - Show it?

1st Nav Menu

2nd Nav Menu

3rd Nav Menu

4th Nav Menu

5th Nav Menu

6th Nav Menu

7th Nav Menu

8th Nav Menu

Home Page (controls home page featured products)

Search Results (controls search results)

Photo Gallery Display (display w/o Add To Cart buttons)

New Products (displays all new products)

By Price (filter category)

By Manufacturer (filter category)

List Price - Show it?

Sale Price - Show it?

You Save - Show it?

Stock Status - Show it?

Description - Show it?

Description SHORT - Show it?

- Locate the Advanced section and check Filter Category.

Orders Reports **Inventory** Marketing Customers Design Settings

Categories Products Options Import / Export Vendors Purchase Orders Receiving Product Key Distribution Warehouses

## Categories | Add New

Rebuild Search Index **Rebuild**

Search Back to List Expand All | Collapse All

### Basic Category Info

ID

Parent ID

Category Name

Category Visible

Category Order

Hidden ☐

### Search Engine Optimization

### Category Descriptions

### Customizable SubCategory Display

### Customizable Product Display

### Advanced

Alternate URL

Alternate URL Popup ☐

Filter Category ☒ Private\_Section\_Customers\_Only ☐

Custom Where Clause

Example:  
ProductManufacturer = 'sony' OR  
ProductCode LIKE '%sony%'

CUSTOM METATAGS OVERRIDE

- Click Save. The Rebuild Search Index option will appear at the top of the page when it reloads.
- Click Rebuild.

**Orders Reports Inventory Marketing Customers Design Settings**

Categories Products Options Import / Export Vendors Purchase Orders Receiving Product Key Distribution Warehouses

## Categories | Add New

**Rebuild Search Index** **Rebuild**

[Back to List](#) [Expand All](#) | [Collapse All](#)

### Basic Category Info

ID ⓘ

Parent ID ⓘ [0] MAIN CATEGORY ▾

Category Name ⓘ Manufacturer

Category Visible ⓘ By Manufacturer (filter category) ▾

Category Order ⓘ

Hidden ⓘ ☐

### Search Engine Optimization

### Category Descriptions

### Customizable SubCategory Display

### Customizable Product Display

### Advanced

Alternate URL ⓘ

Alternate URL Popup ⓘ ☐

Filter Category ⓘ ☒ Private\_Section\_Customers\_Only ⓘ ☐

Custom Where Clause ⓘ

Example:  
ProductManufacturer = 'sony' OR  
ProductCode LIKE '%sony%'

CUSTOM METATAGS OVERRIDE ⓘ

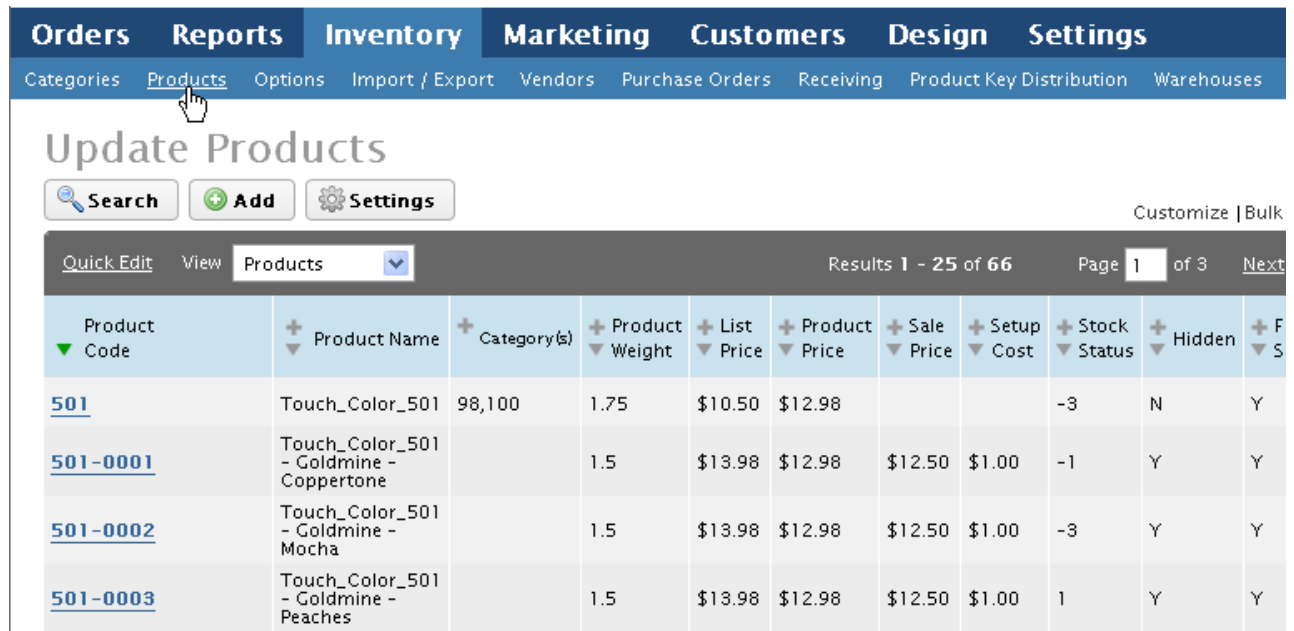
Last Modified ⓘ Last Mod By ⓘ

This will index your new filter category and display it accurately on your storefront.

## Assigning Manufacturers to Products

Once you've created the filter, you must assign a "Manufacturer" value to your products:

- In the admin area, click Inventory >> Products.



**Update Products**

Search Add Settings Customize | Bulk

Quick Edit View Products Results 1 - 25 of 66 Page 1 of 3 Next

Product Code	Product Name	Category(s)	Product Weight	List Price	Product Price	Sale Price	Setup Cost	Stock Status	Hidden	F S
<a href="#">501</a>	Touch_Color_501	98,100	1.75	\$10.50	\$12.98			-3	N	Y
<a href="#">501-0001</a>	Touch_Color_501 - Goldmine - Coppertone		1.5	\$13.98	\$12.98	\$12.50	\$1.00	-1	Y	Y
<a href="#">501-0002</a>	Touch_Color_501 - Goldmine - Mocha		1.5	\$13.98	\$12.98	\$12.50	\$1.00	-3	Y	Y
<a href="#">501-0003</a>	Touch_Color_501 - Goldmine - Peaches		1.5	\$13.98	\$12.98	\$12.50	\$1.00	1	Y	Y

- Click the product code of a target product.
- Locate the Advanced Options section and enter the product's manufacturer name in the Manufacturer field

Advanced Options	
VAT Percentage	<input type="text" value=""/>
Home Page Section	<input type="text" value=""/>
Taxable Product	<input type="text" value=""/>
[Upload Logo] Manufacturer	<input type="text" value="SONY"/>
List Price Name	<input type="text" value=""/>
Product Price Name	<input type="text" value=""/>
Sale Price Name	<input type="text" value=""/>
Setup Cost Name	<input type="text" value=""/>
AddtoCartBtn Replacement Text	<input type="text" value=""/>
Product Popularity	<input type="text" value=""/>
Display Begin Date	<input type="text" value=""/>
Display End Date	<input type="text" value=""/>
Gift Wrap Cost	<input type="text" value=""/>
Uses Product Key Type(s)	<input type="text" value=""/>
Free Accessory(s)	<input type="text" value=""/>
Free Shipping Item	<input checked="" type="checkbox"/>
Hide Product	<input type="checkbox"/>
Hide When Out Of Stock	<input type="checkbox"/>
Enable Multi Child Add To Cart	<input type="checkbox"/>
Private Section Customers Only	<input type="checkbox"/>
Hide You Save	<input type="checkbox"/>
Allow Price Edit	<input type="checkbox"/>
Price Sub Text	<input type="text" value=""/>
Price Sub Text Short	<input type="text" value=""/>
Min Qty	<input type="text" value=""/>
[Upload File] Download Filename	<input type="text" value=""/>
Accessory(s)	<input type="text" value=""/>
Reward Points Given For Purchase	<input type="text" value="10"/>

- Click Update.

Your customers will have access to a link menu near the top of your search pages that allow them to sort the products listed on the category page by the various Manufacturer entries in the admin area. You can use the config variables mentioned earlier to set the display mode to a dropdown rather than links, or turn on the refinement for category pages.

**You are here:** Home > Search for "babyliss"

We found 2 results matching your criteria.

Find by Pricing  Find by Brand

Sort By:: Price: Low to High  Search Within  25 per page  Page 1 of 1



## Configuring a “By Price” Filter

You can also set up the search refinement function to sort products based on price. Use the same steps outlined above in the “By Manufacturer” example, but select By Price (filter category) from Category Visible.

The screenshot shows the 'Categories' configuration page in Volusion. The 'Category Visible' dropdown is set to 'By Price (filter category)'. A dropdown menu is open showing various navigation and display options, with 'By Price (filter category)' selected. The 'Parent ID' is set to '[0] MAIN CATEGORY'.

Note that the pricing options from the filter category dropdown menu are set to default price ranges (e.g. \$0-\$30, \$30-\$300, \$300-\$500, etc.). These values cannot be changed. You can, however, create a custom filter category that allows you to define specific price ranges.

**You are here:** Home > Search for "babyliiss"

We found 2 results matching your criteria.

Find by Pricing  Find by Brand

Sort By:: Price: Low to High  Search Within   25 per page  Page 1 of 1

## Configuring Custom Filters

You can create your own custom filter category (referred to as an “assigned filter”) to help your customers sort search results. Use the same steps outlined in the previous example, with the following exceptions:

- Choose a descriptive Category Name.
- In Category Visible, select an option that corresponds to an inactive nav menu (e.g. Nav Menu 8).

## Building Assigned Filter Subcategories

Now that you've created the initial filter, you'll need to create the filterable categories. You can accomplish this by creating additional categories and assigning them to your main filter category as subcategories. Simply follow the same steps, but set the Parent ID to the custom filter category you just created. Don't forget to assign appropriate products to this subcategory.

### **Items to Note**

Use of custom assigned filters can be resource-intensive for some stores, particularly when using a large number of custom filters and/or custom filters with many subcategories. This can affect your store's performance and/or data transfer total.

## **Shipping & Logistics**

The “Getting Started Guide” portion of this manual walked you through the basics of setting up your shipping options. We’ll now cover more in-depth shipping configurations, such as how to fine-tune your shipping rates, including some specific shipping setups, as well as how to register your store so you can take advantage of online integrations with some of the world’s leaders.

### **Configuring Live Rates**

You can register with specific carriers to have accurate live rates populated into your store. Carriers who support this functionality can also forward pre-negotiated rates to Volusion. To register for live rates, go to Settings >> Shipping in the admin area. Under Choose Carriers, select the tab corresponding to your desired carrier(s) to view and enable preferred shipping methods. Click the link at the top of each window to obtain a list of registration requirement steps and complete all provided instructions.

#### **Royal Mail / Parcel Force & Australia Post**

Volusion provides live rate integration for UK-based merchants shipping via Royal Mail and Parcel Force, and for Australian merchants shipping via Australia Post. To gain access to live rates for these carriers, simply activate your desired shipping methods and click Save.

### **Advanced Shipping Settings**

Volusion offers many shipping rate modification settings and options. To access them for any shipping method:

- In the admin area, click Settings >> Shipping.
- Click Edit All next to Choose Carriers.
- Do not delete your store’s default shipping methods. Some are required for Volusion shipping functions to work properly. Also, many methods come with preset values specific to the related carrier necessary for live rate functionality. If you don’t intend to use a particular shipping method, simply leave it inactive.
- Click the ID number of the method you’d like to edit. Here, you can find basic settings, as well as advanced settings at the bottom.
- You can create your own custom shipping methods by clicking Add at the top of the table.

On the shipping method edit page, you'll find the following settings:

### Details

ShippingMethodID*	This is the system's ID number for the shipping method. It can be any unique number.
Gateway	If the method uses live rates, select the carrier from this menu.
System	This menu specifies the method's rate calculation type. Use Live for any method receiving live rates. Use Backup if providing a custom rate.
Service Code	This field contains the name of the shipping method as reported from a 3rd party API. This is required for all methods set to receive live rates. For pre-configured methods within Volusion Winter '09, do not delete or modify this field.
ShippingMethodName*	This field contains the name of the shipping rate as displayed to customers on the storefront.
ShippingMethodActive	This activates the shipping method on the store.
ShippingOrderBy	This variable assigns the position of the shipping method in the shipping rates selection list on the storefront. You can use letters or numbers (e.g. A1 will display before B1, etc.)

### Apply This Shipping Method To

Apply To All Countries and States	This option sets the shipping method to apply to all countries, states or provinces configured within the Volusion shipping wizard. Uncheck this option to enable the 2nd and 3rd variables in this section.
Apply to Entire Countries	This variable allows you to apply the method to every state/province within specific countries.
Apply to States/Provinces	This variable allows you to apply the method to specific states/provinces within a country.

### However, Do Not Apply To

Do NOT Apply to Entire Countries	This option excludes all states/provinces within specific countries, usually used in conjunction with Apply to All Countries and States when most countries and states/provinces apply.
Do NOT Apply to States/Provinces	This option excludes specific/provinces within a country, usually used in conjunction with Apply to Entire Countries when most states/provinces apply, such as excluding

Alaska and Hawaii from US availability.

## Advanced Options

(Backup\_System) BaseRate This option defines the base charge if live rates are unavailable, or for use of backup rates in general.

(Backup\_System) CostPerPound This option defines the cost per pound for custom rates when live rates are unavailable. Note that this value is added to the value defined in the Backup\_System BaseRate.

ExtraShippingCost This field defines a flat shipping cost for the method or an additional shipping cost for use in conjunction with a live or backup rate.

ExtraShippingCost\_Percent This field defines a flat percentage added to the overall shipping cost. .

MinOrderPrice This field enables the method to apply only to order subtotals that meet or exceed this value.

MaxOrderPrice This field enables the method to apply only to order subtotals equal to or less than this value.

MinOrderWeight This field enables to the method to apply only to orders with a combined weight that meets or exceeds this value.

MaxOrderWeight This field enables the method to apply only to orders with a combined product weight equal to or less than this value.

\* Required settings.

## More Shipping Settings

If you click More Shipping Settings at the bottom of Settings >> Shipping, you'll find a number of special variables you can use to globally modify your store's shipping calculations:

### Other Shipping Configuration Settings


Weight Units This menu allows you to define the global weight unit (pounds or kilograms) for your store's shipping calculations.


EnableDisplayEstimatedShipping This feature displays an estimated shipping cost to your customers when adding products to their shopping carts (prior to shipping selection)

Config_ShippingRates_AddressType	This menu allows you to specify the type of “ship to” address your customers can enter. You can set all addresses to residential or business, or allow your customers to specify.
EnableTaxOnShipping	This option automatically calculates tax on shipping charges for all orders.
ExtraShippingCost	This setting allows you to define a global shipping cost added to all orders (in addition to the standard shipping costs calculated by your shipping settings).
ExtraShippingCost_Percent	This setting allows you to define a percentage of shipping cost added to all orders (in addition to the standard shipping costs calculated by your shipping settings).
ExtraShippingWeight	This setting allows you to define a weight amount applied to all orders in addition to the weight of all products in the order, which in turn affects the total weight calculated for shipping costs.
FreeShippingQualifyPrice	This field allows you to define the price required for orders to qualify for free shipping. Note that if this field is left blank, it will automatically default to \$0.01.
Insure_All_Packages	This setting provides insurance options for all orders. The availability of this option depends on its availability with the chosen carrier.
Use_Delivery_Confirmation	This setting provides 4 signature options for delivery confirmation. The availability of this option depends on its availability with the chosen carrier.



## Testing your Shipping Rates

Volusion allows you to test your shipping rates by transmitting values set from a special portion of Settings >> Shipping.

[More Shipping Settings](#) 

[Test Shipping Rates](#) 

Enter a shipping origin and destination to test rates. *(This information will not be saved)*

From:	To:
Use Preset Address	Use Preset Address
	
<a href="#">Edit Warehouses</a>	<a href="#">Edit Your Addresses</a>
Country <input type="text" value="United States"/>	Country <input type="text" value="United States"/>
State <input type="text" value="CA"/>	State <input type="text" value="CA"/>
Postal Code <input type="text" value="90102"/>	Postal Code <input type="text" value="90101"/>
	Residential <input checked="" type="checkbox"/>
	Test Order Cost <input type="text" value="50"/>
	Test Order Weight <input type="text" value="10"/>
	Free Ship Item <input type="checkbox"/>

[Run Test](#)

[Save](#)

In this area, you can enter your shipping origin and destination addresses, your order costs, weights and warehouse information (if applicable) to test your active shipping settings. Run Test performs the operation.

## Test Results

Once a test has been executed, the page will reload and display XML code at the top. This is the XML output transmitted from your store to any 3rd party shipping API with which you've registered.



```

<ShippingRateRequest>
  <ShipmentID="0">
    <MerchantInfo>
      <Carrier Name="FEDEX">
        <AccountInfo>
          <UserName><![CDATA[]]></UserName>
          <PassWord><![CDATA[]]></PassWord>
          <AccessLicenseNumber>1894289</AccessLicenseNumber>
          <ShipperNumber>372504960</ShipperNumber>
        </AccountInfo>
        <PickupType>REGULARPICKUP</PickupType>
      </Carrier>
      <Carrier Name="UPS">
        <AccountInfo>
          <UserName><![CDATA[43f5a698]]></UserName>
          <PassWord><![CDATA[968a185d]]></PassWord>
          <ShipperNumber>34E0A7</ShipperNumber>
        </AccountInfo>
        <CustomerClassification>01</CustomerClassification>
        <PickupType>01</PickupType>
      </Carrier>
      <Carrier Name="USPS">
        <AccountInfo>
          <UserName><![CDATA[196VOLUS5219]]></UserName>
          <PassWord><![CDATA[]]></PassWord>
        </AccountInfo>
        <Country>United States</Country>
      </Carrier>
    </MerchantInfo>
    <ShipFrom>
      <Address>
        <State>CA</State>
        <PostalCode>90102</PostalCode>
        <CountryCode>US</CountryCode>
      </Address>
    </ShipFrom>
    <ShipTo>
      <Address>
        <ResidentialIndicator>Y</ResidentialIndicator>
        <City></City>
        <State>CA</State>
        <PostalCode>90101</PostalCode>
        <CountryCode>US</CountryCode>
      </Address>
    </ShipTo>
    <Packages>
      <Package ID="x00">
        <WeightUnit>KGS</WeightUnit>
        <ShipsByItself>false</ShipsByItself>
        <Weight>11</Weight>
        <DeclaredValue>50</DeclaredValue>
        <Packaging>

```

You can view a list of rates returned by the test (which would be available to customers placing orders) by clicking Show/Hide debugging information at the bottom of the page.

**Test Shipping Rates**

Enter a shipping origin and destination to test rates. *(This information will not be saved)*

From:	To:
Use Preset Address	Use Preset Address
<input type="button" value="▼"/>	<input type="button" value="▼"/>
<a href="#">Edit Your Addresses</a>	<a href="#">Edit Your Addresses</a>
Country: United States	Country: United States
State: CA	State: CA
Postal Code: 90102	Postal Code: 90101
	Residential: <input checked="" type="checkbox"/>
	Test Order Cost: 50
	Test Order Weight: 10
	Free Ship Item: <input type="checkbox"/>

[Run Test](#)      Test Results:

Free Shipping (7 Day Ground)

[Show/Hide debugging information](#)

**Weight: [11 Kilograms]**  
**From [United States, CA, 90102 ] to [ United States [234], CA [5], 90101]**

[#1] Live Rate Returned = [ShippingMethodID 154] FedEx Priority Overnight  
 [#2] Live Rate Returned = [ShippingMethodID 152] FedEx 2Day  
 Live Rate Returned, but not applicable = [ShippingMethod: FIRSTOVERNIGHT]  
 [#3] Live Rate Returned = [ShippingMethodID 153] FedEx Standard Overnight  
 [#4] Live Rate Returned = [ShippingMethodID 151] FedEx Express Saver  
 [#5] Live Rate Returned = [ShippingMethodID 142] FedEx Home Delivery  
 Live Rate Returned, but not applicable = [ShippingMethod: FEDEXGROUND]

**Loop Through Custom / Backup Rates:**  
 [#6] FREE Shipping Rate Returned = [ShippingMethodID 500] Free Shipping (7 Day Ground)  
 [#7] In Store Pickup Rate Returned = [ShippingMethodID 502] In-Store Pickup  
 [#8] Custom / Backup Rate Returned = [ShippingMethodID 109] UPS Standard  
 [#9] Custom / Backup Rate Returned = [ShippingMethodID 108] UPS Ground  
 [#10] Custom / Backup Rate Returned = [ShippingMethodID 107] UPS 3 Day Select<sup>SM</sup>  
 [#11] Custom / Backup Rate Returned = [ShippingMethodID 106] UPS 2nd Day Air<sup>®</sup>  
 [#12] Custom / Backup Rate Returned = [ShippingMethodID 105] UPS 2nd Day Air A.M.<sup>®</sup>  
 [#13] Custom / Backup Rate Returned = [ShippingMethodID 104] UPS Next Day Air Saver<sup>®</sup>  
 [#14] Custom / Backup Rate Returned = [ShippingMethodID 102] UPS Next Day Air<sup>®</sup>  
 [#15] Custom / Backup Rate Returned = [ShippingMethodID 204] USPS Parcel

The results include notification of whether or not the chosen method would be available based on your test settings, and whether any backup rate settings would apply.

## Diagnosing Live Rate Issues

The debugging information field normally returns the shipping method ID and its formal name, if the method is active and the test settings don't conflict with restrictions in the method's settings. If you receive notification that rates were returned but couldn't be assigned to a method, this may point to several potential problems in your settings. In many cases, a qualifying shipping method simply hasn't been activated, or the ship-to regions aren't configured properly for the address used on your test. If the tests returns backup rates when it should return live rates, make sure the method is configured to accept live rates and that the test settings don't conflict with any qualification restrictions.

## Special Shipping Settings

Beyond setting up shipping methods, regions, and registering for live rate integration, there are additional settings and conditions you may want to be aware of.

## Note on Product Weights

The Winter '09 shipping system doesn't apply shipping methods to individual products. Shipping methods are made available to orders based on their contents, the shipping origin and destination, and the overall weight. Because of this, it's important to configure all product weight settings (with the exception of digital downloads). For more information on product setup, please see the "Products" section of this manual.

## Free Shipping

Winter '09 provides an easy 3-step process for free shipping configuration:

### Step 1 - Enable Free Shipping

- In the admin area, click Settings >> Shipping >> More Shipping Settings (at the bottom).
- Check Enable Free Shipping and click Save.

### Step 2 – Set a Qualifying Price

You can specify a qualifying price for the application of free shipping based on the order total (e.g. all orders totaling \$100 or more receive free shipping):

- In the admin area, click Settings >> Shipping >> More Shipping Settings (at the bottom).
- Enter a value in the Free Shipping Qualify Price field. Note that when free shipping is activated, this field is automatically set to 0.01.

[Verify Settings](#) [Match Default](#)

[More Shipping Settings](#)

☒ Apply Tax to Shipping

☒ Extra Shipping Cost

Add Fixed Amount  Add Percent

☒ Enable Free Shipping

Free Shipping Qualify Price

Weight Units  Add Extra Shipping Weight

☒ Display Estimated Shipping on the Shopping Cart ☒ Insure all Packages

Shipping Rates Address Type

Use Delivery Confirmation

### Step 3 – Disable Non-Qualifying Items

Once you've enabled free shipping, all store items automatically qualify. To disable specific products:

- In the admin area, click Inventory >> Products and click the product code of an item.
- Locate the Advanced Settings section and note the Free Shipping Item field.

**Orders Reports Inventory Marketing Customers Design Settings**

Categories Products Options Import / Export Vendors Purchase Orders Receiving Product Key Distribution Warehouses

**Products | ALTAIR-101**

[Search](#) [Add](#) [Delete](#) [Back to List](#) | [View Live](#) | [Next >>](#) [Expand All](#) | [Collapse All](#)

**Image Management**

**Basic Product Info**

**Search Engine Optimization**

**Pricing Options**

**Shipping Options**

**Product Descriptions**

**Advanced Options**

VAT Percentage

Home Page Section

Taxable Product

[\[Upload Logo\]](#) Manufacturer

List Price Name

Product Price Name

Sale Price Name

Setup Cost Name

AddtoCartBtn Replacement Text

Product Popularity

Display Begin Date

Display End Date

Gift Wrap Cost

Free Shipping Item ☒

Hide Product ☐

Hide When Out Of Stock ☐

Enable Multi Child Add To Cart ☐

Private Section Customers Only ☐

Hide You Save ☐

Allow Price Edit ☐

Price Sub Text

Price Sub Text Short

Min Qty

[\[Upload File\]](#) Download Filename

Accessory(s)

When this field is set to its default (null) or to “Y,” the item is eligible for free shipping.

- Set the field to “N” to disqualify the product for free shipping.

### **Items to Note**

When free shipping is activated, it adds an additional option to the customer's shipping method selection list based on a pre-configured setting. It does not replace faster shipping methods. This means that customers can choose the default free shipping method, or pay for a faster method.

All products in an order must qualify for free shipping for this option to appear in the shipping method selection list. Also, note that you cannot split shipping methods among products within a single order.

## **Fixed Shipping**

Winter '09 allows you to configure a set shipping price for specific products. For example, you can offer \$10 shipping for product A and \$15 shipping for product B without using live rate calculation. Note that an order can include both a fixed shipping rate and normal shipping rate calculations. To configure:

- In the admin area, click Settings >> Shipping >> Edit All (under Choose Carrier).
- Click the shipping method ID 504, which is a preconfigured fixed shipping method, and make sure it's marked as Active.

[Orders](#)
[Reports](#)
[Inventory](#)
[Marketing](#)
[Customers](#)
[Design](#)
[Settings](#)

[Company](#)
[Shipping](#)
[Tax](#)
[Payment](#)
[Currency](#)
[IP Firewall](#)
[Config Variables](#)
[Custom Fields](#)
[Maintenance](#)

## Shipping Methods | 504

[Search](#)
[Add](#)
[Delete](#)

[<< Previous](#) | [Back to List](#) | [Next >>](#)
[Expand All](#) | [Collapse All](#)

### Details

**ID** 504  
**System** Fixed  
**Shipping Method Name** Shipping & Handling  
**Shipping Order By** 0

**Gateway**   
**Service Code**   
 (Must be spelled EXACT)  
**Shipping Method Active** ☒

### Apply this Shipping Method to

Apply To All Countries And States ☐

Apply To Entire Countries  
 Switch to Advanced View  
[Click To Edit](#)

Apply To States / Provinces  
 Switch to Advanced View  
[Click To Edit](#)

### However, Do Not Apply To

DO NOT  
 Apply To Entire Countries  
 Switch to Advanced View

- Set a cost in each product for which you wish to offer fixed shipping by clicking Inventory >> Products and clicking on the product code(s).
- Under the Basic Product Info section, set Product Weight to 0.
- Under the Shipping Options section, enter your chosen value in Fixed Shipping Cost.

- Set a value in Fixed Shipping Cost (Outside Local Region) if you'd like to offer a different price for customers located outside the defined local region.
- Click Update.

### Items to Note

-Fixed shipping does not apply a flat shipping rate to a total order. Flat shipping configuration is discussed later in this section.

-Fixed shipping costs are additive, in that other shipping configurations still apply to fixed shipping products.

-There can only be one fixed shipping method configured in the Volusion shipping method table at a time.

-If you apply specific countries or regions to this method, or establish additional costs for it, the system will ignore these settings.

Products configured to use fixed shipping cannot also be configured for free shipping eligibility. The Free Shipping Item field must be set to N within the product's settings. When importing new products via CSV or other file types, set this column to N for any product with a fixed shipping cost.

## Example I

Product A is configured with a Fixed Shipping Cost of \$5. Product B has no fixed shipping cost configured. A customer orders one unit of product A and one unit of Product B. Product B is eligible for FedEx Ground shipping with a cost of \$15. The total shipping cost for the order will be \$20 (\$5 for product A + \$15 for product B).

## Example II

Product A is configured with a Fixed Shipping Cost of \$5, but is also configured with a product weight of one pound. Product B has no fixed shipping cost configured. A customer orders one unit of product A and one unit of Product B. Both products are eligible for FedEx Ground shipping with a cost of \$15/item. The total cost for shipping for the order will then be \$35 (\$15 for product's A's shipping method + \$15 for product B's shipping method + \$5 for product A's fixed shipping rate).

## Downloads

Winter '09 allows you to offer downloadable products such as ebooks and instructional videos with ease. Any product with a Product Weight of zero and no fixed shipping cost will automatically be treated as a downloadable product.

When a customer purchases a downloadable product, the download process doesn't occur automatically. Once payment is collected and the order is marked as "shipped," customers can access the product by logging in to their customer accounts or through the Order has Shipped email sent when the order has been processed. Also, note that if customers check out anonymously (the customer didn't register for a customer account during purchase, or if registration isn't permitted), then access to downloadable products are limited only to the Order has Shipped email.

## In-Store Pickup

This option, like the download option, is pre-configured within all Volusion stores. It is most often used for merchants with brick-and-mortar retail locations that sell the same inventory from both locations. It's also sometimes utilized by merchants who use the software's POS features when selling the items in person.

If you're logged in to the admin area, this shipping method appears on all the checkout functions for all items. It'll never display to a customer, however, unless you've enabled the method and the customer's order qualifies based on your configuration settings.

## Configuring Flat Shipping Rates

Volusion merchants can modify existing shipping rates or build their own custom rates to provide a flat cost of shipping to their customers. Note that this is type of shipping configuration differs from fixed shipping methods in that flat shipping rates apply a blanket shipping cost to



an entire order rather than to a single product. For example, a merchant may wish to offer a flat shipping charge of \$10 for all orders weighing 15 pounds or less for all US states. The following demonstrates how to configure this arrangement:

- In the admin area, click Settings >> Shipping >> Edit All (under Choose Carrier).
- Click the ID number of any method you wish to set as the flat shipping rate, or click Add to create one from scratch.
- Within the shipping method's edit page:
  - Make sure ShippingMethodID has a unique number assigned.
  - Set the System menu to Backup.
  - Check ShippingMethodActive to activate the method.
  - Under Apply this Shipping Method to section, make sure the Apply to All Countries and States option is unchecked and edit the Apply to Entire Countries list to include only the United States.
  - Under the Advanced Options section, set (Backup\_System) BaseRate to 10.
  - Set the field marked MaxOrderWeight to 15.

Click Update.

Shipping Methods | 9999

Search Add Delete Back to List | Next >> Expand All | Collapse All

**Details**

ID: 9999 Gateway:   
 System: BACKUP Service Code:   
 (Must be spelled EXACT)   
 Shipping Method Name: SHIPPING-TEST Shipping Method Active: ☒   
 Shipping Order By:

**Apply this Shipping Method to**

Apply To Entire Countries   
 Switch to Advanced View   
 Andorra (4)   
 Argentina (8)   
 Click To Edit

Apply To States / Provinces   
 Switch to Advanced View   
 Canada > NEW BRUNSWICK (59)   
 Canada > PRINCE EDWARD ISLAND (65)   
 Click To Edit

**However, Do Not Apply To**

**Advanced Options**

(Backup\_System) Base Rate: 10 Min Order Price:   
 (Backup\_System) Cost Per Pound: Max Order Price:   
 Extra Shipping Cost: Min Order Weight:   
 Extra Shipping Cost Percent: Max Order Weight: 15

Update or Cancel   
☒ Save + View Record   
☐ Save + View List

Now, any order placed with a total weight of 15 pounds or less shipped to any location in the United States will be eligible for a flat shipping rate of \$10. Note that any other shipping settings configured within the Volusion store, such as the Add Shipping Cost field under the More Shipping Options area, will be added to this charge.

## Shipping to the 48 Contiguous US States

If you'd like to modify the above example to exclude Alaska and Hawaii, return to the method's edit page and locate the However, Do Not Apply To section. Here, add Alaska and Hawaii to the Do Not Apply To States/Provinces list and click Update.

## Configuring Tiered Shipping Rates

Many merchants use tiered shipping rate configurations to encourage customers to purchase extra items by offering shipping discounts on larger order quantities. For example, a merchant wants to offer three types of ground shipping to customers based on total order cost: \$5 + \$2/pound for all orders under \$25; \$5 + \$1/pound on orders between \$25 and \$100; and a flat \$5 charge on orders over \$100. To configure this example:

- In the admin area, click Shipping >> Settings >> Edit All (under Choose Carrier).

- Click the method ID number of a rate similar to the intended offering, such as a generic ground rate already set to the desired regions.
- Click Add. This will populate the method's settings into the new unsaved method record.
- Set ShippingMethodID to a unique number.
- Make sure the method is marked as Active.
- Set System to Backup.
- Review the region settings and edit as needed.
- Under the Advanced Options section, set BaseRate to 5.
- Set CostPerPound to 2.
- Set MaxOrderPrice to 25.
- Click Update.
- Click Add.
- Enter a unique ID for the 2nd tier.
- Change CostPerPound to 1.
- Change MaxOrderPrice to 100.
- Change MinOrderPrice option to 25.01.
- Click Update to save the 2nd tier record.
- Click Add.
- Enter a unique ID for the 3rd tier.
- Clear CostPerPound and MaxOrderPrice.
- Change MinOrderPrice to 100.01.
- Click Update.

Note that this is just one of many ways you can configure tiered shipping in Winter '09.

### Applying a Specific Shipping Method to (a) Specific Product(s)

Many merchants wish to assign one specific shipping method to a single product or a small number of products. This might be due to specific freight shipping cost requirements for the product, or other custom shipping requirements.

Volusion does not support assigning specific shipping methods to individual products because this could potentially require creation of a vast number of shipping methods, causing confusion for merchants (in configuration) and their customers (in method selection). The following guidelines, however, provide instructions on how best to limit a shipping method to a specific product:

- Following the steps in the previous examples, configure a custom shipping method with System set to Backup.
- In the Advanced Options section, configure the MinOrderWeight and MaxOrderWeight to the same extreme value (e.g. 99999).
- Configure either a BaseRate or BaseRate Percent. Refrain from using BaseRate\_PerPound.
- Click Update.

- Navigate to Inventory >> Products >> and click the product code to which you wish to apply the method.
- Set the weight of the product to the same weight value set in the shipping method and click Update.

The chosen product will now qualify for the custom shipping method. Use care with the chosen weight value, however, because any order with a total weight equal to the method weight specification will also apply for that method.

# Order Processing Guide

This portion of the manual covers order processing in depth.

## The Orders Table

Once you've received orders, you can view them in the admin area by clicking Orders >> Overview. By default, this table displays all unprocessed or partially-processed orders. Each order in the table has a unique ID number.

Orders Reports Inventory Marketing Customers Design Settings														
Overview Phone Orders Recurring Billing Returns / RMAs Point of Sale Abandoned / Live Carts														
Review & Process Orders														
<div> <b>Batch Order Processing</b> Choose Batch 1004 (0.00 of 14,382.18 received in 5 orders) Choose Action <span>GO</span> </div>														
<div>  Search  Quick Search  Filter Orders </div>														
<div> Quick Edit View Open Orders <span>Results 1 - 21 of 21</span> Page 1 of 1 </div>														
Batch Number	Batch	Order ID	Order Date	Payment Amount	Payment Authorized	Payment Received	Payment Method	Billing Company Name	Billing First Name	Billing Last Name	Email	Qty	Qty On Back	Order
1004	<input type="checkbox"/>	1039	8/15/2009 2:56PM	\$149.94	\$0.00	\$0.00	Check by Mail		test	name	test1@example.com	2	0	2
	<input type="checkbox"/>	1035	8/12/2009 5:46PM	\$26.00	\$0.00	\$26.00	Check by Mail		test	name	test1@example.com	3	1	1
	<input type="checkbox"/>	1033	7/21/2009 6:18PM	\$0.00	\$0.00	\$0.00	Check by Mail		test	name	test1@example.com	0	0	0
	<input type="checkbox"/>	1032	7/21/2009 6:17PM	\$78.88	\$0.00	\$0.00	Check by Mail		test	name	test1@example.com	0	0	0
	<input type="checkbox"/>	1030	1/9/2009 11:59AM	\$148.10	\$0.00	\$0.00	Purchase Order Number		John	Doe	test4@example.com	4	0	4
	<input type="checkbox"/>	1029	1/9/2009 11:58AM	\$194.33	\$0.00	\$0.00	Money Order		John	Doe	test4@example.com	19	0	1

## Searching and Filtering Orders

You can find specific orders or order types with the Filter Orders and Quick Search functions. When you click either of these buttons, a pop-up dialog displays a series of text fields or dropdown menus you can use to specify desired search criteria.

### Review & Process Orders

**Batch Order Processing**
Choose Batch 1004

Search
 Quick Search
 Filter Orders

## The Order Details Page

When you click an order's ID number, its full information displays on an individual page.

### Change Status

Use the options available in this portion of the page to change an order's overall status:

- Click Lock Order to prevent the customer from editing it through their store account.

**Orders** Reports Inventory Marketing Customers Design

Overview Phone Orders Recurring Billing Returns / RMAs Point of Sale Abandoned / Live Carts

### OrderID #1039

Search Back to List | Next >>

**Lock Order** **Complete Order** Status: New

Order Total  
**\$149.94**

Customer ID#: [1](#) placed [6 orders](#) totaling \$269.81.  
This order was placed via ONLINE via IP Address [69.36.65.82](#).

**Billing** [Edit](#) | [Map It](#) **Shipping** [Edit](#) | [Map It](#)

test name  
123 fake lane

test name  
123 fake lane

- Use the Status menu to set an order's status type.

**Orders** Reports Inventory Marketing Customers Design Settings

Overview Phone Orders Recurring Billing Returns / RMAs Point of Sale Abandoned / Live Carts

### OrderID #1039

Quick Jump:

Search Back to List | Next >> Expand All | Collapse All

**Lock Order** **Complete Order** Status: New Placed 2 days ago

Order Total  
**\$149.94**

Customer ID#: [1](#) placed [6 orders](#) totaling \$269.81.  
This order was placed via ONLINE via IP Address [69.36.65.82](#).

**Billing** [Edit](#) | [Map It](#) **Shipping** [Edit](#) | [Map It](#)

test name  
123 fake lane  
fake land, AZ 99999  
United States  
8888888888  
[test1@example.com](#)

test name  
123 fake lane  
fake land, AZ 99999  
United States  
8888888888  
(Residential Address)

Print  
[Invoice](#) [Packing Slip](#)

Shipping Labels  
[FedEx](#) [DHL](#) [USPS](#) [Address](#)

Email: Select

Order Notes Private Notes Account

New  
New  
Pending  
Processing  
Payment Declined  
Awaiting Payment  
Ready to Ship  
Pending Shipment  
Partially Shipped  
Shipped  
Partially Backordered  
Backordered  
See Line Items  
See Order Notes  
Partially Returned  
Returned

- Click Complete Order to mark the order as “shipped.”

**Orders**
**Reports**
**Inventory**
**Marketing**
**Customers**
**De**

[Overview](#)
[Phone Orders](#)
[Recurring Billing](#)
[Returns / RMAs](#)
[Point of Sale](#)
[Abandoned / Live C](#)

## OrderID #1039

**Search**

[Back to List](#) | [Next >>](#)

Status

**Order Total**

# \$149.94

**Customer ID#:** [1](#) placed [6 orders](#) totaling \$269.81.

This order was placed via ONLINE via IP Address [69.36.65.82](#).

**Billing**
[Edit](#) | [Map It](#)

**Shipping**
[Edit](#) | [Map It](#)

test name  
123 fake lane

test name  
123 fake lane

## Customer

This section contains information pertaining to the customer that placed the order. Here, you can review all customer account details.

**Customer ID#:** [1](#) placed [6 orders](#) totaling \$269.81.

This order was placed via ONLINE via IP Address [69.36.65.82](#).

### Billing [Edit](#) | [Map It](#)

test name  
123 fake lane  
fake land, AZ 99999  
United States  
8888888888  
[test1@example.com](#)

### Shipping [Edit](#) | [Map It](#)

test name  
123 fake lane  
fake land, AZ 99999  
United States  
8888888888  
(Residential Address)

## Print and Shipping Labels

Here, you can click any of the available links to display and print packing slips or invoices for an order, as well as generate and print shipping labels for orders shipped via FedEx, DHL or USPS. Note that you'll need to integrate your Volusion store with those carriers to obtain access to their related shipping label functions. The shipping labels do not include postage.

### Print

[Invoice](#) [Packing Slip](#)

---

### Shipping Labels

[FedEx](#) [DHL](#) [USPS](#) [Address](#)

---

## Send Email

This function sends specific emails related to an order to the customer's email address. Here, you can send shipping status notifications, invoices, product keys and gift certificates.

The screenshot displays the 'Send Email' interface. On the left, the word 'Email' is visible. Below it, a dropdown menu is open, showing options: 'Select' (highlighted), 'Shipped', 'Partially Shipped', 'Invoice (to Customer)', 'Invoice (to Merchant)', 'Product Keys', and 'Gift Certificates'. To the right of the dropdown is a green 'Send' button. Below the dropdown is a large text area for entering the email address. In the background, parts of other interface elements like 'Order' and 'Account' are visible.



## Order Notes/Private Notes/Account

These fields are provided for various types of order memos. Private notes can only be viewed on the order details page, whereas order notes also display on invoices and on packing slips under the Order Comments section (this field is part of the checkout page available to the customer). The account notes populate directly from the Notes field of the customer's account profile (under the Basic Customer Info section).

## Payments & Credits

Arguably the most important portion of the order details page, this section allows you to capture, refund or even void payments, as well as view the history of all payment actions related to an order. You can also use this section to issue store credit, modify payment types and more.

## Tracking/Shipping

In this section, you can apply tracking information from shipping carriers. Additionally, you can edit the current shipping method on the order.

## Details

This section contains a list of all products included in the order, as well as basic details such as product prices, weights and options. You can also use this section to manually apply discounts to orders and manage backorder status.

Details

Items

Edit | Add

This order's Stock Priority
3 - Normal
(All un-shipped orders will reallocate "On Hold" inventory on Save)

View	Product Code	Name/Options	Taxable	Backordered	Lbs.	Price	Qty	Total
	HW-RoofingScrew100	Roofing Screw 100-Pack	Y	N	3	\$8.79	3	\$26.37
	HW-RoofingScrew100-0001	Roofing Screw 100-Pack - 1"	Y	N	1	\$8.79	1	\$8.79
	HW-RoofingScrew100-0002	Roofing Screw 100-Pack - 1-1/2"	Y	N	1	\$8.79	1	\$8.79

☐ Remove items with Qty set to 0.

Discounts

Add

There are currently no discounts applied to this order.

Items Subtotal:

\$43.95

+ Tax

( 0.00 %):

\$0.00

\* (5 lbs) Shipping & Handling:

17.73

Grand Total:

\$61.68

Total Authorized:

\$0.00

Total Received:

\$0.00

Total Due:

\$61.68

## Marketing

In this section, you can assign a sales representative to the order, view any custom field questions, and obtain information such as the customer's method of referral to your store.

Marketing

Sales Rep

[1] test name

Referral History

Referrer	Info
eventum.ads.volusion.com	No Affiliate - 1/5/2009 224 days ago via <a href="#">99.52.130.45</a>

Custom Fields

Please enter a custom monogram for your shirt

Max limit of 15 characters

Who Referred You to Our Site?

Were you satisfied with your shopping experience?

Very Satisfied

Custom Field 4:

Custom Field 5:

For information on the custom fields that appear here, please refer to this section of the manual.

## Drop Ship

This section allows you to manually drop-ship an order (shipping an order from a location besides that of your business, such as a warehouse).



## Customer Management

This section allows you to view the order detail page and the completed order page as they appear to the customer. It also provides the ability to place a similar order, as well as a direct URL to provide to the customer for updating payment method details.



## Processing an Order

The order details page contains all the tools you need to fully process an order. Each time an order is generated, you'll receive an email notification at the address you specified during store setup. To review it:

- In the admin area, click Settings >> Company.
- Under the Email field, click More.
- Specify the address you'd like to use for order notifications in Send Order Notifications To.
- If you wish to send to an additional address, use CC Orders To.

Each day you receive orders, we recommend processing them in the following way:

### Step 1 – Lock the Order

The first step to processing a new order is the simplest. In the admin area, click Orders >>

Overview, click the order's ID number, and then Lock Order.



By default, registered customers can log in to their account pages and modify aspects of new orders such as payment method, billing information, and shipping address. In the locked state, only a store administrator can modify an order. This prevents the customer from modifying the order while you're preparing it for fulfillment. You can click the button again at any time to unlock.

## Step 2 – Collect Payment



As an online store owner, collecting payment is the most important part of your business. In this section, we'll detail what you need to know to make sure you've been paid properly.

### Payments & Credits

Under the Payments section of the order details page, the Payments & Credits area displays the payment method details entered by the customer, with options to change the method and/or execute payment commands. Depending on the payment method and the specific gateway service you use for credit/debit card payments, as well as your store's gateway settings, the options available to you here will vary.

The Payment Log portion of this section displays all payment commands you've processed on the order, as well as additional command options available to execute on credit/debit card payments, depending on the integration level of your gateway.

**Payment Log**

Payment Date	Payment Type	Payment Amount	Paid Via	
8/12/2009 4:25:00 PM	DECLINED	\$1.00	MasterCard ****1234	
8/12/2009 4:24:00 PM	AUTHORIZE	\$1.00	MasterCard ****1234	

Each entry will be stamped with the date and time of execution. Credit/debit card payments will also display transaction details such as basic card data, transaction ID and authorization code. Additionally, you'll find AVS and CVV2 response codes here, which are crucial fraud prevention tools. Contact your gateway service to obtain a list of code explanations.

The Payments section uses the following command terminology:

**Authorize**

This command refers only to credit/debit card payments. It can be performed automatically, or manually from the Payments & Credits portion of the Payments section (for properly-integrated gateways only). It describes confirmation by the card issuer that the transaction amount won't exceed the account's spending limit, and that the card hasn't been reported lost or stolen by the cardholder. Funds will be set aside in the cardholder's account for a period of time determined by the issuer, pending capture or void by the merchant.

**Capture**

This command applies only to credit/debit card payments. It can be performed automatically, or from the Payment Log portion of the Payments section (for properly-integrated gateways only). It describes the initiation of funds transfer from the cardholder's account to the merchant's account, and can only be executed on a transaction that has gone through the "authorize" step. Note that although you can capture a smaller amount than you've authorized, you cannot capture a larger amount than you've authorized, or capture multiple times on a single authorization, even if you didn't capture the full authorized amount on the first attempt.

**Debit**

This command can be performed automatically for credit/debit card and electronic check payments, or manually from the Payments & Credits portion of the Payments section for all payment methods. For credit/debit card payments, it describes authorizing and capturing of funds simultaneously. Note that use of this term by the Volusion system does not pertain to card type, as the system treats "debit cards" and "credit cards" identically. The term is also used by the system to describe completion of all other payment methods, such as PayPal & Google Checkout, check by mail, electronic check, cash, COD, money order, wire transfer, and purchase order.

## Declined

In most cases, this term applies to the denial by the card issuer of authorization (as such, it can apply to both “authorize” and “debit” commands). The Volusion system also uses this term to describe failed “credit” and “void” commands, as well as failed electronic check funds capture.

## Credit

This command applies to credit/debit card payments and electronic check payments, and can only be performed manually from the Payment Log portion of the Payments section (for properly-integrated gateways only). For credit/debit card payments, it describes the initiation of funds transfer from the merchant’s account to the cardholder’s account (reversal of capture/debit). Note that most gateways don’t permit crediting of a card that hasn’t been charged, or crediting of an amount that exceeds the capture/debit total. Contact your gateway service to confirm. You can use this option to refund a partial transaction amount if necessary, but you cannot perform multiple credits on a single transaction. Also, note that updates to the log automatically populate the card data currently listed in the Payments & Credits portion of the screen, which means that if a new card has been entered there after capture, it is possible to appear as though you’ve credited this card instead of the one you originally charged. This most likely is not the case; contact your gateway service to confirm.

## Void

This command applies to credit/debit card payments and electronic checks, and can only be performed manually from the Payment Log portion of the Payments section (for properly-integrated gateways only). For credit/debit card payments, it describes the deletion of an authorization or capture (as such, it can also apply to “debits”). This step can always be performed on authorized payments that haven’t been captured, which results in the merchant’s forfeit of the capture option. This step is also available on captures/debits for 24 hours by default. Note, however, that you can only void capture/debit prior to gateway submission of the transaction to the processor for settlement. This “batch submission” usually occurs daily around midnight for all funds captured the previous day. This means you may not be able to void a payment the day after capture/debit, even though the Volusion system displays the option. Contact your gateway service to confirm batch submission timelines.

See our website for a list of command options available for each gateway integration.

## Payment Collection

In most cases, you'll process credit card transactions from the Payments section of the order details page (we'll discuss other payment methods later in this portion of the manual). The steps you take will depend on your gateway configuration in Settings >> Payment under Credit Card Storage Policies. Note that the following steps apply only to gateway integrations that offer "authorize" and "capture" functions.

### Authorize at Sale, Capture at Shipping

This is the default setting for every store, which automatically attempts to authorize payments during checkout without capturing funds. This setting allows you to review the order before receiving payment to protect against fraud. When this setting is enabled, all orders using a credit/debit card will already display "declined" or "authorize" in the payment log.

- If a payment has been successfully authorized, you'll see an Apply button in the payment log next to the dropdown menu displaying Capture by default.

**Payments**

**Payments & Credits**

**Credit Card:** MasterCard  
 Tom Mix  
 \*\*\*\*1234  
 Exp: 01/2011 CVV2:   
 DEBIT  **Receive**  
 Choose Payment  
 Select

- Compare the amount in this section with the amount listed in the Total Due near the bottom.
- If the amounts are the same and you wish to complete the order, click Apply.
- If the amounts are different, you can manually adjust the total before clicking Apply using the nearby text field. If the command was successful, it will automatically appear as an entry in the payment log. Proceed to step 3.
- If unsuccessful, you'll receive an error code and the payment log will display a declined entry. See the "note on declined payments" below.
- Alternately, you can change the dropdown command to Void if you don't wish to complete the transaction and click Apply.
- If the void was successful, it'll appear automatically as an entry in the payment log.
- If unsuccessful, you'll receive an error code and the payment log will display a declined entry.

## **Authorize & Capture at Sale**

This setting automatically attempts to authorize and capture payments during checkout. While it offers the most streamlined payment processing functionality, it doesn't allow you an opportunity to review orders before collecting funds, which can expose you to costly chargebacks in the event of fraudulent card use. When this setting is enabled, all orders using a credit/debit card will already display "declined" or "debit" in the payment log. In the latter case, no further action is required to receive payment; proceed to step 3. In the case of a declined debit, see the "note on declined payments" below.

## **I'll Do Everything at Shipping**

This setting doesn't attempt to automatically authorize or capture payments during checkout. It's most useful during gateway service malfunction or maintenance (which will cause all automatic authorization commands to fail) and you wish to continue receiving orders. It offers most of the safety provided by "Authorize at Sale, Capture at Shipping," with one key exception: it doesn't permit storage of the CVV2 code for future payment processing (the CVV2 code is one of the most powerful fraud prevention tools available to you). If you prefer, you can contact the cardholder to obtain the CVV2 code for manual entry during processing.

When this setting is enabled, all orders using credit/debit cards will display card details in the Payments & Credits portion of the order details page. Here, you'll see a dropdown menu displaying the "debit" command by default. Make certain the nearby text field displays the same amount as the Total Due near the bottom. If different, you can manually adjust the total in the text field before completing the transaction.

Use the Receive button to authorize & capture the payment, or change the dropdown menu to "authorize" and use Receive to perform authorization only. If successful, a command entry will automatically display in the payment log. A successful debit will allow you to proceed to step 3. A successful authorization will still require manual capture from the payment log. If a debit or authorization fails, you'll receive an error message and a declined entry will appear in the payment log.

## **Note on Declined Payments**

When card authorization fails, the Payments & Credits portion of the order details page allows you to re-attempt payment commands following internal or external payment method updates. To update the payment method internally, select Credit Card from the Choose Payment dropdown menu and fill out all fields. You can re-enter or change the payment card when speaking to the customer by phone. Alternately, the customer can use their account page to edit their current card entry, re-enter it (if data has been deleted), or add a new one (be sure the order is unlocked). Once new card data is available, follow the procedure outlined in the "I'll Do Everything at Shipping" section above.



## Other Payment Types

Besides credit/debit cards, you can offer a number of other payment method selections to your customers from Settings >> Payment:

### Electronic Check

This method provides fields in which your customers enter the bank name, routing number, account number, and check number. These details are processed through a separate gateway service specified at Settings >> Payment >> Electronic Checks Gateway Name. As with a credit/debit card gateway service, you must sign up for this service separately. If using the Authorize and Capture at Sale gateway setting, funds transfer will attempt automatically. If successful, you'll see a "debit" entry in the payment log. If unsuccessful, you'll see a "declined" entry. If using the I'll Do Everything at Shipping gateway setting, click Receive in the Payments & Credits portion of the Payments section to attempt funds transfer. Note that if you accept electronic check payments, you cannot use the Authorize at Sale, Capture at Shipping gateway setting.

### Check by Mail

When a customer chooses this payment method, the order confirmation screen displays article 56 in the Design >> Site Content table, which you can customize to include your address and/or any additional instructions you wish to include. You can click Receive in the Payments & Credits portion of the Payments section once the check arrives, or once it clears after deposit. When you ship the order is up to you.

### Cash

When a customer chooses this payment method, the order confirmation screen displays article 77 in the Design >> Site Content table, which you can customize to include your address and/or any additional instructions you wish to include. Once you receive the cash, click Receive in the Payments & Credits portion of the Payments section.

### Money Order

When a customer chooses this payment method, the order confirmation screen displays article 76 in the Design >> Site Content table, which you can customize to include your address and/or any additional instructions. Once you receive or redeem the money order, click Receive in the Payments & Credits portion of the Payments section.

### Wire Transfer

When a customer chooses this payment method, the order confirmation screen displays article 55 in the Design >> Site Content table, which you can customize to include your bank details and account information, as well as any additional instructions you wish to include. Once

you've verified receipt of the transfer with your bank, click Receive in the Payments & Credits portion of the Payments section.

### **COD**

This method requires the customer to submit payment upon receipt of the order. All such payment arrangements must be made between you and the customer independently. When you've verified receipt of payment, click Receive in the Payments & Credits portion of the Payments section.

### **Purchase Order**

This method allows customers to use a purchase order number you've previously supplied them. The order confirmation screen displays article 54 in the Design >> Site Content table, which you can customize to include your mailing address, fax number, and/or any additional instructions you wish to include. At your own discretion, click Receive in the Payments & Credits portion of the Payments section.

### **Note on Other Payment Types**

The debit/receive functionality for check by mail, cash, COD, money order, wire transfer, and purchase order methods exists for record-keeping purposes only and does not guarantee payment receipt functionality of any kind.

### **Note on PayPal & Google Checkout**

Generation of Paypal and Google Checkout orders does not guarantee payment through those methods. When a customer chooses either one, they will be directed to the respective third party website to complete the order. Since Volusion will be unable to determine whether the customer completed the order after exiting the Volusion server, you must verify that payment was received within the third party application before clicking Receive in the Payments & Credits portion of the Payments section and shipping the merchandise.


## **Step 3 – Printing Labels & Invoices**

Once you've verified that payment has been collected on the order, the next step is to prepare it for shipping. The Print section of the order details page allows you to view and print invoices, packing slips and mailing labels for outgoing orders.


### **Invoice vs. Packing Slip**

Click on Invoice or Packing Slip to view either of these documents within your web browser. You'll also be prompted with the option to print the document through your web browser's built-

in print functionality. Note that the order invoice contains full order information including billing address, mailing address, order number, a list of products ordered, associated product options and the total cost of the order.

 <b>Fake Beauty Store</b>		<b>INVOICE</b> <b>Date:</b> 8/15/2009 <b>Order#:</b> 1039	
<b>Order Comments:</b>			
test text here for Order Notes			
<b>Additional Information:</b>			
Please enter a custom monogram for your shirt: Susan			
<b>Bill To:</b> (CustomerID#1)		<b>Ship To:</b>	
test name 123 fake lane fake land, AZ 99999 United States 8888888888 test1@example.com		test name 123 fake lane fake land, AZ 99999 United States 8888888888	
<b>Payment Method:</b>		<b>Shipping Method:</b>	
Check by Mail		Free Shipping (7 Day Ground)	
<b>Code</b>	<b>Description</b>	<b>Qty</b>	<b>Price Total</b>
BaByliss	BaByliss PRO TT Tourmaline 500 1 1/2" Ceramic Plates Flat Iron 180017	1	\$69.99 \$69.99
BaByliss_Pro_Dryer	BaByliss PRO Nano Titanium Dryer	1	\$79.95 \$79.95
		Subtotal: \$149.94	
		Tax: \$0.00	
		Shipping & Handling: \$0.00	
		<b>Grand Total: \$149.94</b>	

A packing slip, while similar in appearance, contains more streamlined information: customer billing and shipping information, order ID numbers, and a list of products contained in the order.

 <b>Fake Beauty Store</b>		<b>PACKING SLIP</b> <b>Date:</b> 8/15/2009 <b>Order##:</b> 1039	
<b>Order Comments:</b>			
test text here for Order Notes			
<b>Additional Information:</b>			
Please enter a custom monogram for your shirt: Susan			
<b>Bill To: (CustomerID#1)</b>		<b>Ship To:</b>	
test name 123 fake lane fake land, AZ 99999 United States 8888888888 test1@example.com		test name 123 fake lane fake land, AZ 99999 United States 8888888888	
<b>Payment Method:</b>		<b>Shipping Method:</b>	
Check by Mail		Free Shipping (7 Day Ground)	
<b>Code</b>	<b>Description</b>	<b>Qty</b>	<b>Price Total</b>
BaByliss	<b>BaByliss PRO TT Tourmaline 500 1 1/2" Ceramic Plates Flat Iron 180017</b>	1	N/A N/A
BaByliss_Pro_Dryer	<b>BaByliss PRO Nano Titanium Dryer</b>	1	N/A N/A

## Mailing Labels

Once you've printed an order's invoice or packing slip, your next task is to generate any mailing labels required for shipment. Volusion provides mailing label integration for FedEx, US Postal Service and DHL. Click on any of the related links to visit the mailing label generation page for that carrier.

Here, you can select the shipping method chosen by the customer, configure any additional information that may be required for the order (e.g. entering customs information for international orders), obtain a tracking number for the shipment, and view/print the label.

Note that Volusion provides support for shipping label printing using standard computer printers (inkjet, laser jet, etc.) as well as thermal-based label printers commonly used by shipping services.

Additionally, Volusion provides an option to generate and print a generic address label for orders shipped by carriers that lack supported label generation integrations. Click Address to access this option.

### **Items to Note**

In order to access label printing features for FedEx, USPS, or DHL, you must register your Volusion store for live rates with the respective service you wish to use. See the “Shipping” portion of this manual for more details.

Furthermore, the label generation features supported here only allow for the creation and printing of mailing labels. Currently, the purchase of postage or payment of shipping costs to supported carriers is not supported in Volusion except with US Postal Service and the Endicia integration (available for Volusion Gold stores and above). See the “API Integration” section of this manual for further details.

## **Step 4 – Send Emails**

Volusion automatically sends email notification to customers that their order has been shipped when you click the Complete Order button on the order details page. Once this step is complete, the order’s status is automatically updated to “shipped” and will no longer be visible in the Open Orders table of the Orders >> Overview. If you need to review a complete order, you can locate it through the table’s search functions, or change the View menu to display the Shipped Orders table.

The Email section of the order details page allows you to send a number of order-related emails. From the Send Email dropdown menu, you can send customer notification emails of shipment or partial shipment, or send an electronic copy of the order’s invoice to the customer or to yourself. Furthermore, if the order contains an electronic gift certificate or a downloadable product, you can manually send the email containing the related link.

Note that, as with the order’s shipping notification, the gift certificate and downloadable product emails are sent automatically after clicking Complete Order, but you can re-send them using this tool if the original message gets lost or blocked by the customer’s mail server. To send any email, select the type from the dropdown menu and click Send.

## **Bulk Order Processing**

Stores that process a high volume of orders may find the previous list of order processing steps too laborious and time-consuming. Fortunately, Volusion provides the ability to process your orders in bulk.

In the admin area, click Orders >> Overview. This display defaults to the Open Orders table. Near the top, you’ll see a section labeled Batch Order Processing. You can use the options available here to quickly collect payment and print invoices or packing slips for a group of orders.

## Creating a Batch

When processing groups of orders, you must first assign a number of orders to a group or “batch.”

- Click the checkbox to the left of any order ID within the Open Orders table to select it for inclusion.

**Orders** | **Reports** | **Inventory** | **Marketing** | **Customers** | **Design** | **Settings**

Overview | Phone Orders | Recurring Billing | Returns / RMAs | Point of Sale | Abandoned / Live Carts

### Review & Process Orders

**Batch Order Processing** Choose Batch: 1004 (0.00 of 14,382.18 received in 5 orders) Choose Action: [GO](#)

[Search](#) [Quick Search](#) [Filter Orders](#)

Quick Edit | View: Open Orders | Results 1 - 21 of 21 | Page 1 of 1

Batch Number	Batch <input type="checkbox"/>	Order ID	Order Date	Payment Amount	Payment Authorized	Payment Received	Payment Method	Billing Company Name	Billing First Name	Billing Last Name	Email	Qty	Qty On Back Order
	<input checked="" type="checkbox"/>	<a href="#">1039</a>	8/15/2009 2:56PM	\$149.94	\$0.00	\$0.00	Check by Mail		test	name	<a href="mailto:test1@example.com">test1@example.com</a>	2	0
	<input checked="" type="checkbox"/>	<a href="#">1035</a>	8/12/2009 5:46PM	\$26.00	\$0.00	\$26.00	Check by Mail		test	name	<a href="mailto:test1@example.com">test1@example.com</a>	3	1
	<input checked="" type="checkbox"/>	<a href="#">1033</a>	7/21/2009 6:18PM	\$0.00	\$0.00	\$0.00	Check by Mail		test	name	<a href="mailto:test1@example.com">test1@example.com</a>	0	0
	<input type="checkbox"/>	<a href="#">1032</a>	7/21/2009 6:17PM	\$78.88	\$0.00	\$0.00	Check by Mail		test	name	<a href="mailto:test1@example.com">test1@example.com</a>	0	0
	<input type="checkbox"/>	<a href="#">1030</a>	1/9/2009 11:59AM	\$148.10	\$0.00	\$0.00	Purchase Order Number	John	Doe		<a href="mailto:test4@example.com">test4@example.com</a>	4	0
1004	<input type="checkbox"/>	<a href="#">1029</a>	1/9/2009 11:56AM	\$194.33	\$0.00	\$0.00	Money Order	John	Doe		<a href="mailto:test4@example.com">test4@example.com</a>	19	0
1004	<input type="checkbox"/>	<a href="#">1028</a>	1/9/2009 11:57AM	\$8,404.89	\$0.00	\$0.00	Check by Mail	Palak	Shah		<a href="mailto:test2@example.com">test2@example.com</a>	5	0
1004	<input type="checkbox"/>	<a href="#">1027</a>	1/9/2009 11:56AM	\$5,670.22	\$0.00	\$0.00	Check by Mail	John	Doe		<a href="mailto:test4@example.com">test4@example.com</a>	4	0
1004	<input type="checkbox"/>	<a href="#">1026</a>	1/9/2009 11:55AM	\$78.93	\$0.00	\$0.00	Check by Mail	Palak	Shah		<a href="mailto:test2@example.com">test2@example.com</a>	4	0
1004	<input type="checkbox"/>	<a href="#">1025</a>	1/9/2009 11:54AM	\$33.81	\$0.00	\$0.00	Check by Mail	Jane	Doe		<a href="mailto:test3@example.com">test3@example.com</a>	8	0
	<input type="checkbox"/>	<a href="#">1024</a>	1/9/2009 11:52AM	\$61.68	\$0.00	\$0.00	Cash	Palak	Shah		<a href="mailto:test2@example.com">test2@example.com</a>	5	0
1003	<input type="checkbox"/>	<a href="#">1023</a>	1/9/2009 11:50AM	\$553.90	\$0.00	\$0.00	Check by Mail	John	Doe		<a href="mailto:test4@example.com">test4@example.com</a>	3	0
	<input type="checkbox"/>	<a href="#">1022</a>	1/9/2009 11:50AM	\$489.10	\$0.00	\$0.00	Cash	Jane	Doe		<a href="mailto:test3@example.com">test3@example.com</a>	7	0
1003	<input type="checkbox"/>	<a href="#">1021</a>	1/9/2009	\$119.93	\$0.00	\$0.00	Check by	Palak	Shah		<a href="mailto:test2@example.com">test2@example.com</a>	4	0

[Save](#) or [Cancel](#)

- Click the Save at the bottom of the page to assign all selections to a batch. In the left-most table column, you should see a batch number next to each selected order. Also, in the first dropdown menu in the Batch Order Processing section labeled Choose Batch, you'll see the batch number, the number of included orders, and their price total.

**Orders** Reports Inventory Marketing Customers Design Settings

Overview Phone Orders Recurring Billing Returns / RMAs Point of Sale Abandoned / Live Carts

## Review & Process Orders

**Batch Order Processing** Choose Batch 1005 (26.00 of 175.94 received in 3 orders) Choose Action **GO**

Search Quick Search Filter Orders

Batch Number	Batch	Order ID	Order Date	Payment Amount	Payment Authorized	Payment Received	Payment Method	Billing Company Name	Billing First Name	Billing Last Name	Email	
1005	<input type="checkbox"/>	1039	8/15/2009 2:56PM	\$149.94	\$0.00	\$0.00	Check by Mail		test	name	test1@example.com	2
1005	<input type="checkbox"/>	1035	8/12/2009 5:46PM	\$26.00	\$0.00	\$26.00	Check by Mail		test	name	test1@example.com	3
1005	<input type="checkbox"/>	1033	7/21/2009 6:18PM	\$0.00	\$0.00	\$0.00	Check by Mail		test	name	test1@example.com	0
	<input type="checkbox"/>	1032	7/21/2009 6:17PM	\$78.88	\$0.00	\$0.00	Check by Mail		test	name	test1@example.com	0
	<input type="checkbox"/>	1030	1/9/2009 11:59AM	\$148.10	\$0.00	\$0.00	Purchase Order Number		John	Doe	test4@example.com	4

## Processing a Batch

Use the Choose Action menu in the Batch Order Processing section to select the action you wish to perform (collect payment, print packing slip, or print invoices), and press Go.

If you've created multiple order batches, you'll first need to select the correct batch from the Choose Batch dropdown menu.

## Notes on Bulk Payment Collection

When using the bulk payment collection option, your Volusion store will attempt to collect payment for all orders within your chosen batch. Once the Open Orders table reloads, the batch option listed in the Choose Batch menu updates to show the total amount of funds collected for the total amount of orders included. Review these totals to ensure that all funds have been collected for your batch's orders. If funds for some orders weren't collected, we recommend examining the orders individually for declined credit card transactions.

Note that it is still a best practice to examine each order individually before collecting payment. Batch processing without examining your orders greatly increases your risk of facilitating credit card fraud.

Also, note that batches created by the Volusion system are not necessarily equivalent to batches submitted by your gateway service to your processor for settlement. While all transactions in a Volusion batch will normally appear in a processor's batch, the processor's batch may contain additional transactions processed prior to or after payment collection of the Volusion batch.

## Note on Bulk Invoice/Packing Slip Printing

Once you've selected either the bulk invoice or packing slip print option, the invoices or packing slips will appear in your web browser. You can then print them using your browser's built-in print functionality.

## Processing Returns

Like all successful business owners, you'll occasionally have to deal with some unsatisfied customers who wish to return products they've ordered from your online store. Fortunately, Volusion provides a way for you to generate RMAs (Returned Merchandise Authorizations) and return products to your inventory.

### Creating an RMA

If a customer contacts you by email requesting a refund or an exchange:

- In the admin area, click Orders >> Overview >> Search.
- Search by order ID number, customer name, or email address to locate the order.
- Click the order number.
- In the Items portion of the Details section, click Edit.

Details

Items

[Edit](#)
[Add](#)

This order's Stock Priority
3 - Normal
(All un-shipped orders will reallocate "On Hold" inventory on Save)

View	Product Code	Name / Options	Taxable	Backordered	Lbs.	Price	Qty	Total
<a href="#">View</a>	Angle_Brush	Perfect Angle Liner Brush by Paula Dorf	Y	N	0.5	\$24.00	1	<b>\$24.00</b>

☐ Remove items with Qty set to 0.

Discounts

[Add](#)

There are currently no discounts applied to this order.

Items Subtotal:

\$24.00

+ Tax (8.3%)

8.30 %

\$1.99

\* (0.5 lbs) Shipping & Handling:

0.00

Grand Total:

\$25.99

Total Authorized:

\$0.00

Total Received:

\$25.99

Total Due:

\$0.00

In edit mode, the settings for each product are divided into two rows.



- Find the text box located at the far right of the second row within each product labeled Qty to Return.

**Details**

Items [List](#) | [Add](#) This order's Stock Priority: 3 - Normal (All un-shipped orders will reallocate "On Hold" inventory on Save)

View	Stock	Product Code	Product Name	Lbs.	FxtShip	Price	Qty	Total	Drop Ship	Back Order	Inventory Pend.	Packing SlipQty
ID	Gift Wrap	Options		Free Ship	FxtShip OutReg	AfilCom Value	Taxable	WRHS	Notes			Qty to Return
<a href="#">View</a>	10 (Hist)	Angle_Brush	Perfect Angle Liner Brush by Paula Dorf	0.5		24.00	1	\$24.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0	1
82	0.00			<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>					<input type="text" value="1"/>

☐ Remove items with Qty set to 0.

**Discounts** [Add](#)

There are currently no discounts applied to this order.

Items Subtotal: **\$24.00**

+ Tax (8.3%) (8.30 %): **\$1.99**

- Enter the quantity returned and click Save at the bottom.

This creates the initial RMA. You can view the basic information within the RMA section of the order details page (only visible if an RMA has been generated for the order, near the bottom of the page).

**RMA**

RMA# (date requested)	Deadline	RMA ID	Order DetailID	ProductCode	Qty	Refund Type	Exchange for OrderID	Lost Value	QtyReceived Sellable	QtyReceived Damaged
<a href="#">2</a> (8/17/2009)	9/16/2009	<a href="#">2</a>	82	<a href="#">Angle_Brush</a>	1	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	0	0

## Processing an RMA

The RMA displays the date it was created, its number (for your reference as well as your customers'), and the product code of the product to be returned. You can select the return type from the Refund Type menu (a refund, exchange, or issuing of store credit). You can also enter the code of any product selected for exchange, the resalable or unsellable portion of the returned order, or any monetary loss due to a product defect.

## Note on RMA Settings

The settings in the RMA section of the order details page exist for your recordkeeping

convenience. Choosing to issue store credit or entering information into this table will not fully process the RMA.

## Completing the RMA

To view a comprehensive list of all of your store's currently open RMAs, click Orders >> Returns/RMAs.

**Manage Returns / RMAs**

Quick Edit View **RMAs** Results 1 - 2 of 2 Page 1 of 1

RMA #	Date Requested	Order	Status	Deadline	Notes	Last Modified	Delete
<a href="#">2</a>	8/17/2009	<a href="#">1037</a>	WAITING	9/16/2009		8/17/2009 1:48PM	<input type="checkbox"/>
<a href="#">1</a>	7/7/2009	<a href="#">1017</a>	RECEIVED	8/6/2009		7/7/2009 4:01PM	<input type="checkbox"/>

Results 1 - 2 of 2 Page 1 of 1

Here, you can click an RMA number to process it, or view or edit its settings, such as the date requested, the associated order ID number, or its status (received or waiting).

**RMA# 2**

Search Add Delete Back to List | Next >> Expand All | Collapse All

[Inventory: Receive Returns for RMA# 2](#)

**Details**

RMA Number **2** RMA Status **WAITING**

Order ID **1037** Date Requested **08/17/2009**

RMA Deadline **09/16/2009**

RMA Notes

Last Modified **8/17/2009 1:48:00 PM** Last Mod By **[1] test name**

To process any waiting RMA:

- Click **Inventory: Receive Returns for RMA** near the top of the page.

Orders Reports Inventory Marketing Customers Design Settings

Overview Phone Orders Recurring Billing Returns / RMAs Point of Sale Abandoned / Live Carts

## RMA# 2

Search Add Delete Back to List Next >> Expand All Collapse All

[Inventory: Receive Returns for RMA# 2](#)

### Details

RMA Number 2 RMA Status WAITING  
 Order ID 1037 Date Requested 08/17/2009  
 RMA Deadline 09/16/2009  
 RMA Notes  
 Last Modified 8/17/2009 1:48:00 PM Last Mod By [1] test name

This will load the RMA into Inventory >> Receiving in a highlighted green area.

Orders Reports Inventory Marketing Customers Design Settings

Categories Products Options Import / Export Vendors Purchase Orders Receiving Product Key Distribution Warehouses

## Prepare Shipments & Receiving

RMA# < > Qty 1 Return View Receiving

**WAITING RMA# 2 Deadline: 9/16/2009 (in 30 days)**

RMA# 2 Items

ID	ProductCode	Order DetailID	RMA ID	Qty	Qty Sellable	Qty Damaged	ProductName
1037	Angle_Brush	82	2	1	+0	+0	Perfect Angle Liner Brush by Paula Dorf
<b>RMA Totals:</b>				1	0	0	

Save

- Enter quantity values into the Qty Sellable and Qty Damaged fields as needed and click Save. The page will reload, changing the green section to red. This indicates that the RMA has now been processed.

Orders Reports Inventory Marketing Customers Design Settings

Categories Products Options Import / Export Vendors Purchase Orders Receiving Product Key Distribution Warehouses

## Prepare Shipments & Receiving

RMA# < > Qty 1 Return View Receiving

**RECEIVED RMA# 2 Deadline: 9/16/2009 (in 30 days)**

RMA# 2 Items

ID	ProductCode	Order DetailID	RMA ID	Qty	Qty Sellable	Qty Damaged	ProductName
1037	Angle_Brush	82	2	1	+1	+0	Perfect Angle Liner Brush by Paula Dorf
<b>RMA Totals:</b>				1	1	0	

Save

- If you entered a value in the Qty Sellable field, click Return to return that quantity to the product's stock amount in your Volusion store.

## Store Credit and Refunds

From time to time, you'll most likely have to issue store credits or refunds due to RMA, or in order to satisfy otherwise-unsatisfied customers.

### Issuing Store Credit

The easiest and most convenient way to credit a customer is to issue them store credit. This applies funds toward a future purchase, and works particularly well in conjunction with an RMA. Note that in order to utilize this feature, the customer must have a registered account with your store.

- Click Orders >> Overview.
- Locate the order by selecting Shipped Orders from the View menu, or through the search functions provided in the table
- Click the order's ID number.
- From the Choose Payment menu in the Payments section, select Store Credit / Gift Certificates.

Payments

Payments & Credits

Current Method (Check by Mail)

DEBIT

0.00

Receive

Choose Payment

Store Credit / Gift Certificate

Amount

Send to Email

myrewards@volusion.com

Send to Name

myrewards test

Gift Message

(optional)

Send via Email Now

☒

For RMA

☐

Apply Credit

Payment Log

Payment Date	Payment Type	Payment Amount	Paid Via
8/12/2009 5:56:00 PM	DEBIT	\$25.99	Check by Mail

- Enter the amount you wish to issue for store credit, as well as the email address to which you wish to send notification.
- Check the For RMA option to notate that the store credit is associated with an RMA.

Payments

Payments & Credits

Current Method (Check by Mail)

DEBIT

0.00

Receive

Choose Payment

Store Credit / Gift Certificate

Amount

25.99

Send to Email

myrewards@volusion.com

Send to Name

myrewards test

Gift Message

test message here

(optional)

Send via Email Now

☒

For RMA

☒

Apply Credit

Payment Log

Payment Date	Payment Type	Payment Amount	Paid Via
8/12/2009 5:56:00 PM	DEBIT	\$25.99	Check by Mail

- Check Send via Email Now to immediately send the store credit notification email to the customer.
- When finished, click Apply Credit.

Once the store credit is issued, it will be logged in the Details section of the order details page. Each instance of store credit is assigned an auto-generated code. Clicking the code will redirect you to the Marketing >> Gift Certificates table where you can view all instances of store credit (either issued by you, or generated by your customers purchasing with electronic gift certificates).

Details

Items

Edit

Add

This order's Stock Priority

3 - Normal

(All un-shipped orders will reallocate "On Hold" inventory on Save)

View	Product Code	Name/Options	Taxable	Backordered	Lbs.	Price	Qty	Total
<a href="#">View</a>	Angle_Brush	Perfect Angle Liner Brush by Paula Dorf	Y	N	0.5	\$24.00	1	\$24.00
	GFT	Store Credit (\$25.99)	N	N	0	\$0.00	1	\$0.00
<div>Gift Code: <a href="#">KZQW-ZX6HS-WX5K</a>   Gift Amount Left: <b>\$25.99</b></div> <div>Date Created: 8/17/2009 2:21PM   Active?: Yes</div>								

☐ Remove items with Qty set to 0.

Discounts

Add

There are currently no discounts applied to this order.

Items Subtotal:

\$24.00

+ Tax (8.3%)

(8.30 %):

\$1.99

\* (0.5 lbs) Shipping & Handling:

0.00

Grand Total:

\$25.99

Total Authorized:

\$0.00

Total Received:

\$25.99

Total Due:

\$0.00

Last Updated: October 2009

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## Using Store Credit

Store credit uses the system's electronic gift certificate functionality. Once you've applied the store credit to a customer's account, they'll have the option to spend all or part of the credit during their next purchase. Any additional credit remaining on the account will carry over to the next purchase until all credit has been redeemed.

## Issuing Refunds

Some merchants have strict return policies of issuing only store credit to customers. Other merchants may offer customers a choice of refund or store credit.

If you wish to refund all or part of a credit/debit card purchase back to a customer, you can always do so from your gateway's console. Some gateways, however, offer an integration level that supports issuing credits directly from Volusion's order details page. Visit our website to view a list of available payment commands for each integrated gateway.

## Refunding a Credit/Debit Card through Volusion

- In your admin area, click Orders >> Overview.
- Select Shipped Orders from the View dropdown menu, or use the table's search functions to locate the order.
- Click the order's ID number.
- Locate the capture/debit in the payment log, and verify or manually change the amount you'd like to credit in the text box.
- Click Apply next to the default Credit – Adjustment option in the dropdown, or select Credit – for RMAs and click Apply (the former affects the order's Total Due, the latter doesn't).
- If successful, the payment log will automatically update with a "credit" entry.
- If unsuccessful, you'll receive an error message and the payment log will display a "declined" entry.

## Note on Credits and Voids

You must wait until your gateway has submitted the captured funds to the processor for settlement before you can issue credit. This usually happens less than 24 hours after capture, but depends on your gateway service. Regardless of when this step occurs, the "void" option will display as the default command on every capture/debit for 24 hours by default, even though the funds may have already been submitted to the processor. As a general rule of

thumb, you can only “void” a transaction on the date of capture, and you can only “credit” the day after, regardless of which option shows as the default option in the payment log.

## **Refunding a Credit/Debit Card through Your Gateway**

When supported, we recommend always issuing credit/debit card refunds through the order details page for record-keeping purposes. This will automatically update your gateway records. If you choose to process a credit/debit card refund directly through your gateway, this won't update your order details page. In these cases, you can select Offline Payment Record from the Choose Payment dropdown menu and generate a “credit” payment log entry to update the payment activity records.

You can also use this method to restore deleted log entries, regardless of the command, or keep track of refunds issued through self-arranged means on payments made by PayPal, Google Checkout, electronic check, check by mail, cash, wire transfer, money order, COD, and purchase order. Note that offline payment commands require additional arrangements on your part and offer no guarantee of accuracy.

## **Backorders & Partial Orders**

If one or more items in an order are on backorder status, or if you use multiple shipments to fulfill a single order, Volusion provides functionality to partially process orders.

### **Backorder Status**

Any time a customer orders a product with a stock value of 1 or less that is enabled to allow backorder status, the Volusion system applies that product to the order on backorder status; you won't be able to ship it to the customer until you've replenished stock. Backorders give you the flexibility to take orders for popular merchandise even after you run out of stock, provided that your customers are willing to wait. To learn more about configuring your store's products to allow backorder status, see the ??? section of this manual.

### **Processing Partial Orders**

If you receive an order for a product you believe to be out of stock, you can confirm this by clicking the ID number from the Orders >> Overview table and locating the Details section of the page. Any item on backorder status will display “Y” in the Backorder column. If you click Edit, this column will display the backorder quantity.

**Details**

**Items** [Edit](#) | [Add](#) This order's Stock Priority 3 - Normal (All un-shipped orders will reallocate "On Hold" inventory on Save)

View	Product Code	Name/Options	Taxable	Backordered	Lbs.	Price	Qty	Total
<a href="#">View</a>	501-0002	Touch_Color_501 - Goldmine - Mocha	N	<input checked="" type="checkbox"/>	3	\$12.50	2	<b>\$25.00</b>
	SETUP		N	<input checked="" type="checkbox"/>	0	\$1.00	1	<b>\$1.00</b>

☐ Remove items with Qty set to 0.

**Discounts** [Add](#)

There are currently no discounts applied to this order.

Items Subtotal: **\$26.00**

+ Tax  %: **\$0.00**

\* (3 lbs) Shipping & Handling: **0.00**

Grand Total: **\$26.00**

Note that the Volusion system won't allow you to fully process an order that includes one or more items on backorder. If you attempt to complete an order with one or more backordered products, the system will display a notification at the top of the order details page stating which products are currently at zero or negative stock.

**Orders** **Reports** **Inventory** **Marketing** **Customers** **Design** **Settings**

Overview Phone Orders Recurring Billing Returns / RMAs Point of Sale Abandoned / Live Carts

OrderID #1040 Quick Jump:  [GO](#)

This order (#1040) only has 0 of "501-0002" allocated. You tried to ship 2.

[Search](#) Back to List | Next >> Expand All | Collapse All

[Lock Order](#) [Complete Order](#) Status New Placed today

Order Total **\$26.00**

Customer ID#: 1 placed 7 orders totaling \$295.81.

Print [Invoice](#) [Packing Slip](#)

Shipping Labels [FedEx](#) [DHL](#) [USPS](#) [Address](#)

## Partially Shipping an Order

When you receive an order with one or more products on backorder while one or more products are ready to ship, you can ship the available products immediately:

- On the order details page, set the Status menu to Partially Shipped.



OrderID #1040

Quick Jump: 1040 **GO**

Search

Back to List | Next >>

Expand All | Collapse All

**Lock Order** **Complete Order** Status: **New** Placed today

Order Total  
**\$26.00**

Customer ID#: 1 placed 7 orders totaling \$295.81.  
This order was placed via ONLINE via IP Address 69.36.65.82

**Billing** [Edit](#) | [Map It](#)

test name  
123 fake lane  
fake land, AZ 99999  
United States  
8888888888  
[test1@example.com](mailto:test1@example.com)

**Shipping** [Edit](#) | [Map](#)

test name  
123 fake lane  
fake land, AZ 99999  
United States  
8888888888  
(Residential Address)

Print  
[Invoice](#) [Packing Slip](#)

Shipping Labels  
[FedEx](#) [DHL](#) [USPS](#) [Address](#)

Email  **Send**

**Order Notes** [Private Notes](#) [Account](#)

Payments

- If the order used a credit/debit card as the payment method, you have the option of receiving all or part of the funds due.
- Within the Details portion of the order, click Edit.
- For each product you intend to ship immediately, enter the quantity in the Packing Slip Qty field (on the far right of the table within each product row).
- Click Save.

You can return to the order's details page at any time to print packing slips or invoices you may need for shipment. After editing the Packing Slip Qty using the steps outlined above, only the products you've selected for immediate shipment will display on the order's packing slip.

You can also use any of the available shipping label integration options to print required shipping materials and assign tracking numbers as needed. We also recommend notifying the customer that a portion of the order will be shipped by selecting the Partially Shipped option from the Send Email menu and clicking Send.

## Notes on Collecting Payment for Partially Shipped Orders

- If you decide to capture the full amount before fulfilling the full order, we strongly recommend advising your customer of this beforehand. Most card issuers allow cardholders to dispute charges within 180 days of capture/debit. Confusion over partial

fulfillment may lead the cardholder to dispute at least part of the charge, which can lead to extra expenses and paperwork processing on your part.

- If you decide not to capture any of the funds until all products have been shipped, note that card issuers set deadlines for capturing authorized payments. If you attempt to capture after the issuer's deadline has passed, you may receive a chargeback for "late presentment," regardless of whether or not you shipped all or part of the order.
- If you decide to capture only enough funds to cover product price and shipping costs for shipped items, note that you won't be able to capture the remainder at a later date through the same method. You'll have to contact your customer and have them re-enter the payment card details (be sure the order is unlocked), or re-enter them yourself over the phone, to obtain a new authorization. This may seem inconvenient, but it is actually a simpler and safer process than the charge dispute procedure.

## Completing a Partially Shipped Order

Once you've replenished stock on the backordered item(s), you'll first need to update your inventory. You can do so by receiving stock from a purchase order, manually updating stock values on the product records, or even importing stock updates using Volusion's Import/Export tool.

Once a backordered product's stock status has been updated, use the steps outlined above to complete any partially shipped orders. Be sure to verify the backorder status on the Details section of the order details page before shipping.

## Managing Stock Priority

When managing products on backorder status, you may encounter a situation where stock replenishment doesn't fulfill the total product quantity on backorder. By default, all orders have a stock priority setting of 3 (normal). Whenever you update the stock value on backordered products, the system automatically distributes stock to pending orders based on the chronology of when they were placed.

You can preempt this stock distribution using the Stock Priority menu in the Details section of the order details page. Available values range from "1" (very low priority) to "5" (urgent priority). Simply select your desired priority and click Save to apply.

Details

Items [Edit](#) | [Add](#)

This order's Stock Priority

3 - Normal

1 - Very Low

2 - Low

3 - Normal

4 - High

5 - Urgent

(All un-shipped orders will reallocate "On Hold" inventory on Save)

View	Product Code	Name/Options	Backordered	Lbs.	Price	Qty	Total
<a href="#">View</a>	501-0002	Touch_Color_501 - Goldmine - Mocha	Y	3	\$12.50	2	<b>\$25.00</b>
	SETUP		N	0	\$1.00	1	<b>\$1.00</b>

☐ Remove items with Qty set to 0.

Discounts [Add](#)

There are currently no discounts applied to this order.

Items Subtotal:

**\$26.00**

+ Tax  %:

**\$0.00**

\* (3 lbs) Shipping & Handling:

**0.00**

Grand Total:

**\$26.00**

Using this method, you can ensure that a VIP customer receives the product before another customer who has been waiting longer by setting the stock priority of the VIP's order to "5." In this case, the system will fulfill the VIP's order first, and then all other orders containing the backordered item chronologically by placement date.

## Additional Order Processing Features

### Adding Products to an Order

- In the admin area, click Orders >> Overview.
- Locate the order in the table and click the ID number.
- In the Details area, click Add.
- Fields will appear that allow you to configure the type of product you wish to add to the order.

Details

Items

[Edit](#)
[Add](#)

This order's Stock Priority
3 - Normal
(All un-shipped orders will reallocate "On Hold" inventory on Save)

Product Code

Product Weight

Product Price

Gift Wrap ☐

Free Shipping ☐

Taxable Product ☐

Product Name

Fixed Shipping Cost

Quantity

Product Options

Shipping Cost Outside Local Region

Affiliate Commissionable Value

Save

Cancel

View	Product Code	Name/Options	Taxable	Backordered	Lbs.	Price	Qty	Total
<a href="#">View</a>	501-0002	Touch_Color_501 - Goldmine - Mocha	N	Y	3	\$12.50	2	\$25.00
	SETUP		N	N	0	\$1.00	1	\$1.00

Discounts

[Add](#)

There are currently no discounts applied to this order.

Items Subtotal:

\$26.00

+ Tax

(0.00 %)

\$0.00

\* (3 lbs) Shipping & Handling:

0.00

Grand Total:

\$26.00

Total Authorized:

\$0.00

Total Received:

\$0.00

☐ Remove items with Qty set to 0.

- Enter any values you require for the product you wish to add. The only required field is the product code.
- Click Save within the Items section when finished.

You can add any product in your store's products table, or any custom product settings you prefer. The cost of the product will be added to the order's subtotal. Note that since you cannot capture more than the authorized amount, you'll have to contact the customer to have them update their payment method in their store account (make sure the order is unlocked), or edit it yourself internally to obtain a new authorization.

## Editing Products on an Order

To make further adjustments to the products on an order, click Edit in the Details section. This opens a new table with two rows of text boxes for each item that correspond to the headings layout in the blue section. Click Save when finished. You can always close the Edit table by clicking the List link.

## Adding Discounts to an Existing Order

On the order details page, locate the Discounts section and click Add.

Details

Items

Edit | Add

This order's Stock Priority: 3 - Normal (All un-shipped orders will reallocate "On Hold" inventory on Save)

View	Product Code	Name/Options	Taxable	Backordered	Lbs.	Price	Qty	Total
<a href="#">View</a>	501-0002	Touch_Color_501 - Goldmine - Mocha	N	Y	3	\$12.50	2	\$25.00
	SETUP		N	N	0	\$1.00	1	\$1.00
<a href="#">View</a>	501-0001	Touch_Color_501 - Goldmine - Coppertone	N	N	1.5	\$12.50	1	\$12.50

☐ Remove items with Qty set to 0.

Discounts

Add

Code

DSC-00

Name

Special Discount

Affects Tax

☒

Discount Value

-

Apply Discount

Cancel

There are currently no discounts applied to this order.

Items Subtotal:

\$38.50

+ Tax

( 0.00 ) %:

\$0.00

\* (4.5 lbs) Shipping & Handling:

0.00

Grand Total:

\$38.50

Here, you can enter a specific discount code, name, and amount for a discount, or simply enter any custom values you wish. Note that you can specify whether or not the discount applies to the overall tax. When finished, click Save.

Details

Items
[Edit](#)
[Add](#)
This order's Stock Priority 3 - Normal (All un-shipped orders will reallocate "On Hold" inventory on Save)

View	Product Code	Name/Options	Taxable	Backordered	Lbs.	Price	Qty	Total
<a href="#">View</a>	501-0002	Touch_Color_501 - Goldmine - Mocha	N	Y	3	\$12.50	2	\$25.00
	SETUP		N	N	0	\$1.00	1	\$1.00
<a href="#">View</a>	501-0001	Touch_Color_501 - Goldmine - Coppertone	N	N	1.5	\$12.50	1	\$12.50
<a href="#">View</a>	501-0001	Touch_Color_501 - Goldmine - Coppertone	N	Y	1.5	\$12.50	1	\$12.50

☐ Remove items with Qty set to 0.

Discounts
[Add](#)

Code	Name	Affects Tax?	Discount Value
DSC-00	Special Discount	Y	-\$5.00

Items Subtotal: **\$51.00**  
Discounts: **-\$5.00**  
+ Tax  %: **\$0.00**  
\* (6 lbs) Shipping & Handling: **0.00**  
Grand Total: **\$46.00**  
  
Total Authorized: **\$0.00**  
Total Received: **\$0.00**  
**Total Due: \$46.00**

To remove a discount from an order, click the X icon to the far right of the discount's listing in this area.

Details

Items
[Edit](#)
[Add](#)
This order's Stock Priority 3 - Normal (All un-shipped orders will reallocate "On Hold" inventory on Save)

View	Product Code	Name/Options	Taxable	Backordered	Lbs.	Price	Qty	Total
<a href="#">View</a>	501-0002	Touch_Color_501 - Goldmine - Mocha	N	Y	3	\$12.50	2	\$25.00
	SETUP		N	N	0	\$1.00	1	\$1.00
<a href="#">View</a>	501-0001	Touch_Color_501 - Goldmine - Coppertone	N	N	1.5	\$12.50	1	\$12.50
<a href="#">View</a>	501-0001	Touch_Color_501 - Goldmine - Coppertone	N	Y	1.5	\$12.50	1	\$12.50

☐ Remove items with Qty set to 0.

Discounts
[Add](#)

Code	Name	Affects Tax?	Discount Value
DSC-00	Special Discount	Y	-\$5.00

Items Subtotal: **\$51.00**  
Discounts: **-\$5.00**  
+ Tax  %: **\$0.00**  
\* (6 lbs) Shipping & Handling: **0.00**  
Grand Total: **\$46.00**  
  
Total Authorized: **\$0.00**  
Total Received: **\$0.00**  
**Total Due: \$46.00**

### Items to Note

If you intend to apply a discount to an order, do so before collecting payment from your customer. Discounts will only modify the total due for an order; they will not automatically refund or credit customers funds.

## Custom Fields

The “Selling Customizable Products” section of this manual describes how to use Volusion’s Custom Fields page to create customization options assigned to appear on any order. These fields can be used to collect useful information or feedback from your customers, or to allow them to individualize product details. These details appear in the Marketing section of the order details page.

## Updating Shipping Information

Within the Customer portion of the Order Details page, click Edit next to the Shipping title headings to edit the related fields (you can also edit the billing address fields in this manner).

OrderID #1040

<input type="text"/> Search		<a href="#">Back to List</a>	
<input type="checkbox"/> Order Locked	<input checked="" type="checkbox"/> Complete Order	Status	New

Order Total

**\$46.00**

Customer ID#: [1](#) placed [7 orders](#) totaling \$315.81.

This order was placed via ONLINE via IP Address [69.36.65.82](#).

Billing [Edit](#) | [Map It](#)

test name  
123 fake lane  
fake land, AZ 99999  
United States  
8888888888  
[test1@example.com](mailto:test1@example.com)

Shipping [Edit](#) | [Map It](#)

test name  
123 fake lane  
fake land, AZ 99999  
United States  
8888888888  
(Residential Address)

To change the actual shipping method currently applied to an order, click Edit in the Tracking section.

Tracking

Current Selected Method: Free Shipping (7 Day Ground) [Edit](#)

Tracking #

Date
(ex: 10-08-2008)

Shipping Method

Cost

[Save](#)
[Cancel](#)

Next, select the shipping method you wish to apply to the order from the drop down menu.

If you select a more expensive shipping method than the one selected by the customer, note that you cannot capture more than the authorized amount. In this case, you'll have to contact the customer to have them update their payment method in their store account (make sure the order is unlocked), or edit it yourself internally to obtain a new authorization.

## Applying Tracking Numbers

To apply a tracking number to an order, locate the Tracking section of the order details page. Here, you can enter a tracking number for an order, select the applied shipping method, and enter a shipping date and cost. When finished, click Save.

Tracking

Current Selected Method: Free Shipping (7 Day Ground) [Edit](#)

Tracking #

Date
(ex: 10-08-2008)

Shipping Method

Cost

[Save](#)
[Cancel](#)

Ship Date	Tracking #	Gateway	Shipping Method	Cost
8/17/2009	<a href="#">123456789</a>	FEDEX	141 : FedEx Ground	\$2.50 <a href="#">x</a>

Once a tracking number has been applied to an order, customers can view it from their store account page.




**My Account**

[Return to My Account](#)

**Order Details**


[Click here to download the files you've purchased.](#)

[Need to print an Invoice?](#)

**Order#:** 1040      **Order Placed:** August 17, 2009 at 2:38:00 PM PST

**Order Status:** New

Your items shipped on Mon Aug 17 00:00:00 PDT 2009 via FEDEX : FEDEXGROUND  
[TRACK YOUR PACKAGE](#) with tracking # 123456789

<b>Ship To:</b> test name 123 fake lane fake land, AZ 99999 United States 8888888888	<b>Items Ordered:</b> <ul style="list-style-type: none"> <li>1 of :</li> <li>1 of : <a href="#">Touch_Color_501 - Goldmine - Coppertone</a></li> <li>1 of : <a href="#">Touch_Color_501 - Goldmine - Coppertone</a></li> <li>2 of : <a href="#">Touch_Color_501 - Goldmine - Mocha</a></li> </ul>	<b>Price: Status:</b> \$1.00 Shipped \$12.50 Processing \$12.50 Processing \$25.00 Processing
---	---	---

**Shipping Speed:**  
 Free Shipping (7 Day Ground)

**Payment Information**

<b>Bill To:</b> test name 123 fake lane fake land, AZ 99999 United States 8888888888	<b>Payment:</b> Check by Mail <a href="#">Change</a>	<b>Order Summary:</b> Product Subtotal: \$51.00 Tax: \$0.00 Shipping & Handling: \$0.00 Discounts: -\$5.00 <b>Grand Total:</b> \$46.00
---	--	---

**NOTE:** This order has already shipped or has reached the final stages of processing. Therefore this order is no longer editable.

Looking for the order confirmation page that was displayed after checkout? [Click here to view it again.](#)

Note that this portion of the order details page cannot generate tracking numbers. This information must be obtained directly from your chosen carrier. If you've integrated your store with any of the shipping carriers that support label printing (FedEx, DHL, USPS), you can use label generation/printing features on this page to generate tracking numbers from these carriers. Click the related carrier's link within the Print area in the top right to access these options.

## Managing Orders with Recurring Payments

As described previously in the "Advanced" portion of this manual, your Volusion store supports selling products that bill your customers on a recurring basis. When managing orders that contain products configured for recurring billing, Volusion will need to maintain some basic payment information to regularly capture funds.

By default, your Volusion store is configured to purge credit card data at the moment of successful authorization, and any remaining data after 30 days regardless. While this configuration is the most secure setting recommended by the PCI Security Consortium, it will interfere with your store's ability to collect recurring payments.

If selling products configured with recurring billing, you'll need to modify these settings:

- In the admin area, click Settings >> Payment.
- Locate the Credit Card Storage Policies section and uncheck Use most secure settings.
- Change the default Authorize setting to Never (when the system automatically purges data during payment processing).
- Enter a numeric value into the text box below these options to define the number of days you wish to retain credit card data. This value only needs to be one day longer than the time for which you plan to receive payments for each order, but if your product has no expiration or deadline, make sure to include a number of days longer than the validity term of any credit major card.

Note that you if you capture CVV2 data, you won't be able to store it per PCI Security Consortium guidelines.

## Referrals and Affiliates

Within the Marketing section of the order details page (Orders >> Overview >> click an order ID number), you'll find a table that contains a list of referrals related to that order, including any website domain names visited, the date of the visit, and the IP address of the website.

At first glance, this information may not appear to be valuable, but if you happen to notice certain domain names appearing repeatedly, it could mean that a specific website(s) or forum(s) are driving traffic toward your store. You can use this feature to scout for potential affiliates to increase your online presence and sales.

The Affiliate Referral History table contains a list of any active affiliates that, through the use of their affiliate links, have directed customers to your store resulting in the generation of an order. It displays the affiliate name and the commission amount they should receive for the qualifying portion of the order.

For more information on affiliate system, see the "Marketing" section of this manual.

## Managing Customers, Administrators & More

This portion of the Volusion manual details how to use admin functions to manage your store's customers, including how customers sign up for accounts, how you can access their information, how to manage reviews they submit, and how to use the customer relationship management (CRM) system.

### Customers

The data entered by any customer that registers with your store is held in an admin table located at Customers >> Accounts. Here, you can manage their account information, grant them access to affiliate or administrator status, and much more.

Orders	Reports	Inventory	Marketing	Customers	Design	Settings
CRM System	Accounts	Customer Reviews	Administrators	Admin History	Knowledge Base	

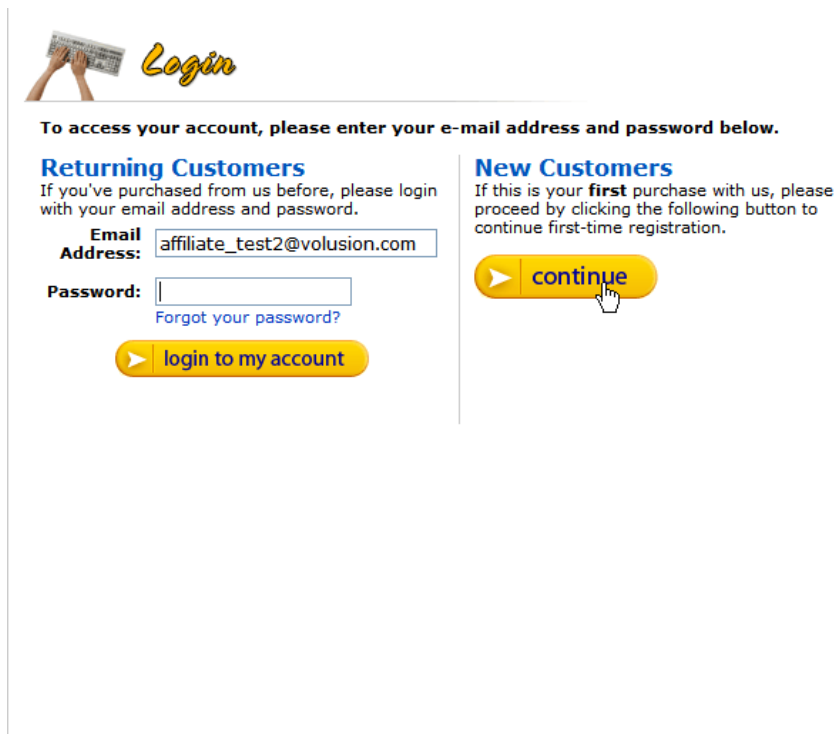
Manage Customer Accounts									
<input type="text"/> Search <input type="button" value="Add"/>		<a href="#">Customize</a>   <a href="#">Bulk Updates</a>   <a href="#">Export Results</a>   <a href="#">Bookmark Results</a>							
Quick Edit									
Results 1 - 8 of 8 Page 1 of 1									
Customer	Last Name	First Name	Company	Email Address	Website Address	State	Country	Last Modified	Delete
<a href="#">20</a>	test	affiliate		<a href="mailto:affiliate_test@volusion.com">affiliate_test@volusion.com</a>	<a href="http://affiliatetest.com">affiliatetest.com</a>	FL	United States	8/15/2009 11:12AM	<input type="checkbox"/>
<a href="#">19</a>	test	myrewards		<a href="mailto:myrewards@volusion.com">myrewards@volusion.com</a>		CA	United States	8/12/2009 6:34PM	<input type="checkbox"/>
<a href="#">17</a>				<a href="#">anonymous_user</a>					<input type="checkbox"/>
<a href="#">14</a>	Doe	John		<a href="mailto:test5@example.com">test5@example.com</a>					<input type="checkbox"/>
<a href="#">13</a>	Doe	John		<a href="mailto:test4@example.com">test4@example.com</a>		CA	United States	8/17/2009 11:41AM	<input type="checkbox"/>
<a href="#">12</a>	Doe	John		<a href="mailto:test3@example.com">test3@example.com</a>		CA	United States	8/10/2009 9:55AM	<input type="checkbox"/>
<a href="#">8</a>	Doe	John		<a href="mailto:test2@example.com">test2@example.com</a>		TX	United States	1/9/2009 11:57AM	<input type="checkbox"/>
<a href="#">1</a>	name	test		<a href="mailto:test1@example.com">test1@example.com</a>	<a href="http://testing123.com">testing123.com</a>	AZ	United States	8/17/2009 2:38PM	<input type="checkbox"/>
Results 1 - 8 of 8 Page 1 of 1									


### Creating a Customer Account

Only standard customer accounts can be created from the Volusion storefront. Once your customers create accounts, they can apply to become affiliates.

From any location on the Volusion storefront, you'll find the My Account link (typically in the upper right corner). Visitors can click this link to log into their store accounts. Visitors without customer accounts will be prompted to create one:

- Click Continue under New Customers.



 **Login**

To access your account, please enter your e-mail address and password below.


**Returning Customers**

If you've purchased from us before, please login with your email address and password.

Email Address:


Password:

[Forgot your password?](#)

 login to my account

**New Customers**

If this is your **first** purchase with us, please proceed by clicking the following button to continue first-time registration.



- Enter an email address and password.

#### New to Fake Beauty Store Get started below...

My e-mail address is:

Type it again:


**Protect your information with a Password**

This will be your only Fake Beauty Store password.

Enter a new password:

Type it again:

☒ I wish to receive occasional newsletter emails from Fake Beauty Store.

 continue

This will become the username and password used for account login.

- The newsletter update opt-in is checked by default. To opt out, simply uncheck and click Continue.
- Fill out the personal information fields and click Continue.

---

**Enter a new shipping address...**

---

**First Name:**

**Last Name:**

**Company:**

**Address:**

**City:**

**Country:**  ▼

**State:**  ▼

**Zip / Postal Code:**

**Phone Number:**

**Fax:**

**Is this address also your billing address?** ☒ **Yes**  
☐ **No** (If not, we'll ask you for it in a moment)

 **continue**

Note that you can specify your shipping address as your billing address, or enter a separate billing address by selecting No before clicking Continue.

## Customer Account Settings

Each customer registered with a Volusion store can view and manage their account by logging in through the My Account link on the storefront. For customers already logged in, clicking this link will automatically direct them to the account management interface.



## My Account

**Welcome to your account** . You may use this page to manage your orders, payments, and other information, all in one place.

My Orders	
<a href="#">Review orders / track packages</a>	<a href="#">Change quantities / cancel orders</a>
<a href="#">Change shipping address</a>	<a href="#">Print invoices</a>
<a href="#">Change billing address</a>	<a href="#">Return items</a>

Personal Information	
<a href="#">Change e-mail address, or password</a>	<a href="#">Manage your billing addresses</a>
<a href="#">Change my e-mail preferences</a>	<a href="#">Manage your shipping addresses</a>

Payment Settings	
<a href="#">Edit or delete a credit / debit card</a>	<a href="#">View gift certificate balance</a>
	<a href="#">Apply a gift certificate to your account</a>

Other Features	
<a href="#">Edit a review that I wrote</a>	<a href="#">View my Wish List</a>
<a href="#">My Rewards</a>	

[I'm done managing my account, log me out.](#)

### My Orders

Links provided in this section allow customers to review order status, find return policy information, track package shipment, edit shipping or billing addresses, print order invoices, change product quantities within orders, and even cancel orders (unless you've locked or shipped them).

### Personal Information

Links provided in this section allow customers to change their email address, password, add or configure new billing and shipping addresses, or unsubscribe from the store's automated email campaigns.

### Payment Settings

Links provided in this section allow customers to edit or add credit/debit card entries, view their gift certificate balance, or apply gift certificates to their next purchase by entering the related 13-digit code.

## Other Features

Links provided in this section allow customers to edit product reviews they've submitted on the website, edit wish lists they've created, and view & redeem MyRewards points (if you use the program).

## Affiliate Statistics

When affiliates log in to this area, clicking Visit My Affiliate Page redirects them to their affiliate stats, such as the number of sales they've referred and commission totals they or sub-affiliates should receive. They can also generate banner ads to promote your website, and obtain their unique affiliate URL.



**Welcome to your account affiliate test2.** You may use this page to manage your orders, payments, and other information, all in one place.

My Orders	
<a href="#">Review orders / track packages</a>	<a href="#">Change quantities / cancel orders</a>
<a href="#">Change shipping address</a>	<a href="#">Print invoices</a>
<a href="#">Change billing address</a>	<a href="#">Return items</a>

Personal Information	
<a href="#">Change e-mail address, or password</a>	<a href="#">Manage your billing addresses</a>
<a href="#">Change my e-mail preferences</a>	<a href="#">Manage your shipping addresses</a>

Payment Settings	
<a href="#">Edit or delete a credit / debit card</a>	<a href="#">View gift certificate balance</a>
	<a href="#">Apply a gift certificate to your account</a>

Other Features	
<a href="#">Edit a review that I wrote</a>	<a href="#">View my Wish List</a>
<a href="#">My Rewards</a>	

Affiliate Statistics	
<a href="#">Visit My Affiliate Page</a>	

[I'm done managing my account, log me out.](#)

Customers can also use the My Account page to obtain downloadable products and product keys.

When finished managing their accounts, customers can click I'm done managing my account, log me out.

## Customer Account Settings

Store administrators can view and edit any customer's account settings in the admin area at Customers >> Accounts by clicking on the account's ID number (or Customers >> Administrators for administrators). You can also create new accounts by clicking Add. Each customer account contains a wide variety of settings, but only the email address is required. To view the full list of customer account settings, see this manual's "Customer Settings" appendix.

## Administrators

You can view a list of all store administrator accounts at Customers >> Administrators.

Orders

Reports

Inventory

Marketing

Customers

Design

Settings

CRM System

Accounts

Customer Reviews

Administrators

Admin History

Knowledge Base

# Update Administrators

Search

+

Add

Customize

Bulk Updates

Export Results

Bookmark Results

Quick Edit

Results 1 - 3 of 3

Page 1 of 1

<div>▲ Customer</div>	<div>▼ Last Name</div>	<div>▼ First Name</div>	<div>▼ Company</div>	<div>▼ Email Address</div>	<div>▼ Website Address</div>	<div>▼ State</div>	<div>▼ Country</div>	<div>▼ Last Modified</div>	<div>Delete</div>
<div>14</div>	Doe	John		<a href="#">test5@example.com</a>					<div><input type="checkbox"/></div>
<div>8</div>	Doe	John		<a href="#">test2@example.com</a>		TX	United States	1/9/2009 11:57AM	<div><input type="checkbox"/></div>
<div>1</div>	name	test		<a href="#">test1@example.com</a>	<a href="#">testting123.com</a>	AZ	United States	8/17/2009 2:38PM	<div><input type="checkbox"/></div>

Results 1 - 3 of 3

Page 1 of 1

If you've already examined the Customers table and any customer accounts, you'll notice that administrators are merely customers with special account privileges.

## Assigning Administrator Access

By default, each store has a primary administrator account known as the "super admin." This will typically be customer ID #1 listed in both the Customers >> Accounts table and the Customers >> Administrators table. Only the super admin can grant additional customer accounts administrator access.

- To grant an existing customer account administrator access, click its ID number at Customers >> Accounts.
- To create a new administrative account, go to Customers >> Accounts or Customers >> Administrators and click Add.
- If creating a new administrative account, fill in the email address and any other desired fields.



- In the Access Key menu, select Administrator.
- Click Update.

CRM System Accounts Customer Reviews Administrators Admin History Knowledge Base

## Customers | 12

Search Add Delete << Previous | Back to List | Next >> Expand All | Collapse All

This customer has placed [5 orders](#) totaling **\$698.43**, with the first order on 12/27/2008 10:46:00 AM.

Login As This Customer

### Basic Customer Info

ID 12

First Name John

Last Name Doe

Company Name

Address Line 1 123 Any St

Address Line 2

City Los Angeles

State or Province CA

Postal Code 92030

Country United States

Notes

Access Key Customer

E-mail Address Customer

Password Partner / Affiliate

Phone Number Administrator

Fax Number Membership Pending

Website Address Cancelled / No Access

Sales Rep

- A link will appear just above below the Access Key field: Edit Customer Access Rules.

CRM System Accounts Customer Reviews Administrators Admin History Knowledge Base

## Customers | 17

Search Add Delete Back to List Expand All | Collapse All

This customer has placed [0 orders](#)

Login As This Customer

### Basic Customer Info

ID 17

First Name Alpha

Last Name Echo

Company Name ABZ Inc

Address Line 1 12345 Volsuion

Address Line 2

City Chatsworth

State or Province CA

Postal Code 30066

Country United States

Notes

Access Key Administrator

E-mail Address Volusion.tech@aol.com

Password Alpha02

Phone Number 888.566.2653

Fax Number

Website Address http://www.Volusion.com

Sales Rep [1] John Doe

[Edit Cust#17 Access Rules](#)

By default, new administrator accounts have no special privileges. Click this link to view a table

of rights, and use the checkboxes to enable access to various pages of the admin area.

**Orders Reports Inventory Marketing Customers Design Settings**

CRM System Accounts Customer Reviews Administrators Admin History Knowledge Base

### Administrative Access Rules Alpha Echo (CustomerID #17)

Check the boxes below to enable access to certain sections of the administration area.

Database Tables	
<input checked="" type="checkbox"/>	<b>Check All</b>
<input type="checkbox"/>	<b>Products</b> Ability to view / edit Products
<input type="checkbox"/>	<b>Product_Keys</b> Ability to view / edit Product Keys
<input type="checkbox"/>	<b>Discounts</b> Ability to view / edit Discounts / Coupons
<input type="checkbox"/>	<b>GiftCards</b> Ability to view / edit Gift Certificates
<input type="checkbox"/>	<b>Customers</b> Ability to view / edit all customer accounts, except administrators
<input type="checkbox"/>	<b>LoginAsCustomer</b> Ability to login as a customer + view customer password.
<input type="checkbox"/>	<b>Reviews</b> Ability to view / edit Customer Reviews
<input type="checkbox"/>	<b>Affiliates</b> Ability to view / edit Affiliate System Setup + Stats
<input type="checkbox"/>	<b>ConfigSetup</b> Ability to view / edit All configuration variables
<input type="checkbox"/>	<b>PaymentMethods</b> Ability to view / edit Payment Methods (Credit / Debit Cards, PayPal, eCheck settings)
<input type="checkbox"/>	<b>Vendors</b> Ability to view / edit Vendors
<input type="checkbox"/>	<b>POs</b> Ability to view / edit POs
<input type="checkbox"/>	<b>Orders</b> Ability to view / edit Orders
<input type="checkbox"/>	<b>Credit / Debit Cards</b> Ability to view complete Credit / Debit Card / eCheck details of an order
<input type="checkbox"/>	<b>Articles</b> Ability to view / edit Articles (Site Content)
<input type="checkbox"/>	<b>Newsletters</b> Ability to view / edit Newsletters / Promotional Emails
<input type="checkbox"/>	<b>Categories</b> Ability to view / edit Categories + Subcategories
<input type="checkbox"/>	<b>Specials</b> Ability to view / edit Navigation Menu Promotions
Admin Area Sections	
<input type="checkbox"/>	<b>Import</b> Ability to Import Data
<input type="checkbox"/>	<b>Export</b> Ability to Export Data
<input type="checkbox"/>	<b>AdminHistory</b> Ability to view Administration Area Access History
<input type="checkbox"/>	<b>LiveEdit</b> Ability to use LiveEdit™ File Editor and edit any website files.
<input type="checkbox"/>	<b>Inventory</b> Ability to use Inventory Management : Shipping & Receiving
<input type="checkbox"/>	<b>ShippingMethods</b> Ability to view / edit / test Shipping Methods
<input type="checkbox"/>	<b>Locations</b> Ability to view / edit / Locations (Countries / States / Provinces)
<input type="checkbox"/>	<b>Tax</b> Ability to view / edit Tax Rates

Granting access to all portions of the admin area will effectively make an account a super admin. For security purposes, use caution when editing access rules.

## Customer Reviews

Volusion allows you to offer your customers a simple, intuitive product feedback system that enables your customers to leave comments on products that you can manage from the admin area at Customers >> Customer Reviews.

**Orders Reports Inventory Marketing Customers Design Settings**

CRM System Accounts Customer Reviews Administrators Admin History Knowledge Base

### Manage Customer Reviews

Search

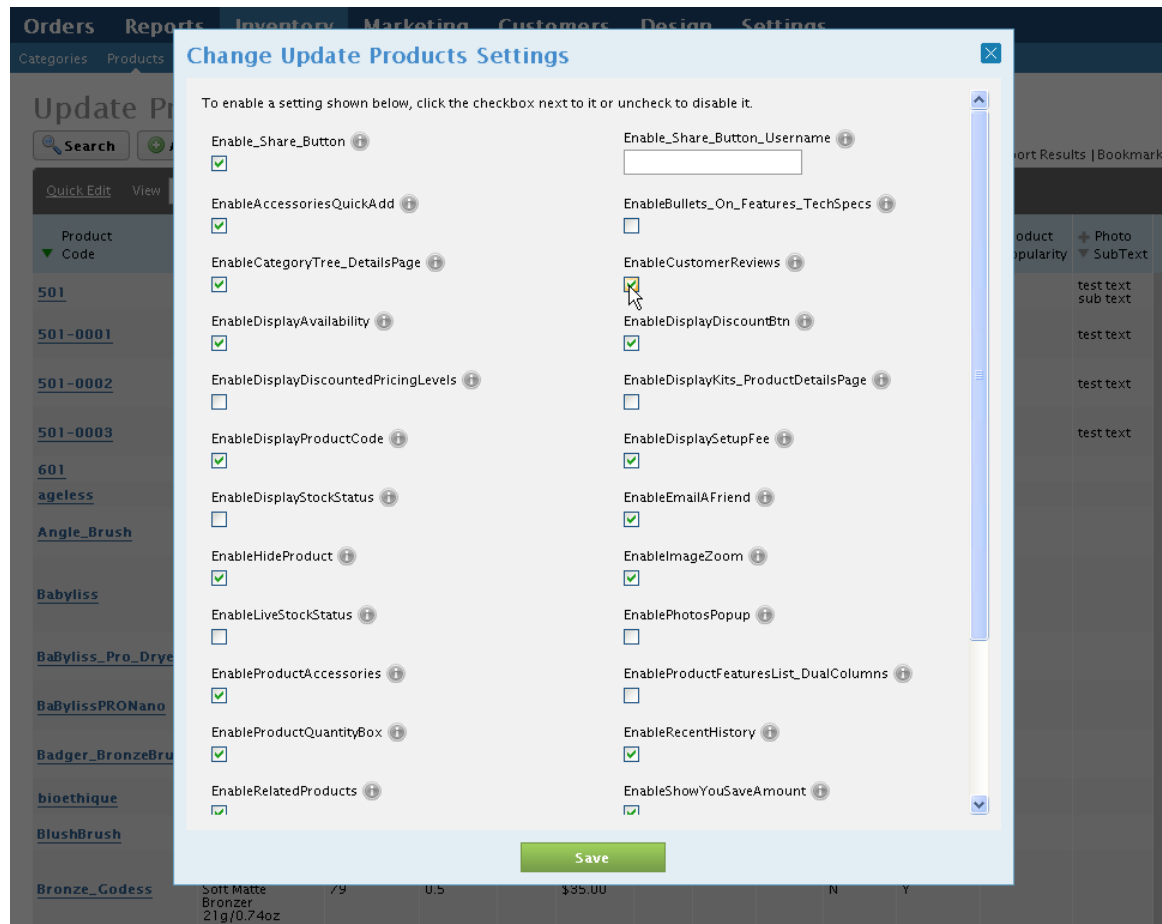
Customize | Bulk Updates | Export Results | Bookmark Results

No records match your query.

## Activating Customer Reviews

To enable your customers to submit product reviews from the storefront:

- In the admin area, click Inventory >> Products >> Settings.
- Click EnableCustomerReviews.
- Click Save.



## Submitting a Customer Review

Volusion customers can post product reviews from the product's details page by clicking Be the first to write a review (if none exist) or Write a review (if one or more have already been submitted) below the product's description.

Customers must log in to their accounts to access the review form, which is pre-populated with their name and location (if provided at registration). Customers can edit this information, title the review, comment on the product or service, and rate it from 1-5.



## Write a Review

Product:	CHI Original Flat Iron 1"
Your rating	Please Select ▾
Review Title / Subject:	<input type="text"/>
Type your Review...	<input type="text"/>
Name to display:	Your name: <input type="text" value="test name"/> (Leave this field blank to remain Anonymous)
Your location:	<input type="text" value="fake land, AZ United States"/>
	<input type="button" value="Submit Review"/>

When posted to the product, each review displays just below the Write a review link with the rating, title and comment. Other visitors can provide feedback about whether or not they found the review helpful by clicking Yes or No.

**Features of Products**

- \* High Grade Ceramic Heating Elements \* Ceramic Elements repair and seal the follicle, locking in internal moisture. \* Ceramic Elements protect and preserve hair coloring, from bleaching and fading. \* Ceramic Elements cause none of the damage associated with traditional products \* Intuitive Ergonomic Design \* Professional length 10 foot heavy duty power cord \* 360° orbiting swivel power cord functionality provides a complete range of motion \* Integrated Power Switch \* Constant 370°F Temperature \* Constructed with space age composite materials, for an ultra lightweight design \* Easily fits in a standard curling iron station Energy \* Flash Heat Technology; raises to full temperature in seconds \* Low electricity consumption, consumes just 35 watts of electricity Functionality \* Perfect straight hair \* Crimping \* Curls \* Flips

**Average Customer Review:** ★★★★★ **Based on 1 reviews** [Write a review.](#)

0 of 0 people found the following review helpful:

★★★★★ **awesome product!** August 17, 2009

*Reviewer: test name from fake land, AZ United States*


this is a great product. I highly recommend you purchasing one today!

Thank you for your feedback on this review. We appreciate your input!


**Browse for more products in the same category as this item:**


[Hair Care > Hair Care Product Line](#)


[Hair Care > Hair Care Product Line > Flat Irons](#)


 **My Recent History**


- ☒ Perfect Angle Liner Brush by Paula Dorf **\$24.00**
-


**BaByliss PRO TT**  
**Our Price: \$69.99**  
Add ☐ 





**Corioliss SXE Silver Flat Iron**  
**Our Price: \$124.95**  
Add ☐ 



**Proactive Renewing Cleanser**  
**Our Price: \$99.95**  
Add ☐ 



**CoriolissZebra**  
**Our Price: \$129.99**  
Add ☐ 



These ratings display above the review title. Above that, an average rating displays.

Note that customers must be logged in to their store accounts to access all ratings functions.

## Review Content Filter

If someone leaves a rude or derogatory comment within a review that may damage others' shopping experience or negatively impact sales, you can edit, deactivate, or delete the offending content in the admin area at Customers >> Customer Reviews.

To prevent offensive reviews from being posted at all, click Manage Filters. Here, you'll find a table of default entries of potentially-offensive words. You can edit or delete these entries, or create your own filters by clicking Add.

When a customer posts a review containing one or more filtered words, the review will be recorded in the Customer Reviews table, but it will be set as inactive by default, hiding it from

public view. You can locate these reviews by clicking List Offensive Reviews at the top of the table.

## CRM System

Managing correspondence from customers about their orders and about your business can become a daunting task. Volusion's customer relationship management (CRM) system is designed to help you out. It allows you to manage email delivery and receipt in a variety of ways.

### Configuring the CRM

CRM system configuration settings are located in the admin area at Customers >> CRM System.

### Configuring CRM Departments

One of CRM system's main functions is to act as a filter for incoming email by routing messages sent to specific store addresses to various pre-configured department headings. You can establish multiple departments, each handling a single address. To create a department:

- In the admin area, click Customers >> CRM System >> Manage Departments.

**Manage CRM: Ticket Types**

Tickets | Audit Reps | **Manage Departments** | Ticket Classifications | POP3 Settings | Point System | Inbound Rules

[Search](#) [Add](#) [Customize](#) [Bulk Updates](#) [Export Results](#) [Bookmark Results](#)

[Quick Edit](#) Results 1 - 3 of 3 Page 1 of 1

Type	Private Name	Public Name	Last Modified	Delete
1	Sales	Sales	1/8/2009 11:05AM	<input type="checkbox"/>
3	Services	Services	1/8/2009 11:06AM	<input type="checkbox"/>
2	Support	Support	1/8/2009 11:05AM	<input type="checkbox"/>

Results 1 - 3 of 3 Page 1 of 1

- Click Add.
- Enter a Private Name (only shown to administrators) and a Public Name (shown to customers) for each department.

- Click Save.

The screenshot shows the Volusion CRM interface. At the top, there is a navigation bar with tabs: Orders, Reports, Inventory, Marketing, Customers, Design, and Settings. Below this is a sub-navigation bar with links: CRM System, Accounts, Customer Reviews, Administrators, Admin History, and Knowledge Base. The main heading is 'CRM\_TicketTypes | Add New'. Below the heading is a search bar and a 'Back to List' link. The 'Details' section contains the following fields:

- ID**: A field with a plus icon.
- Private Name**: A text input field containing 'Customer Service'.
- Public Name**: A text input field containing 'Customer Service'.
- Last Modified**: A field with a plus icon.
- Last Mod By**: A field with a plus icon.

At the bottom of the form, there is a 'Save' button (highlighted with a mouse cursor) and a 'Cancel' button. To the right of these buttons are three radio buttons with the following labels:

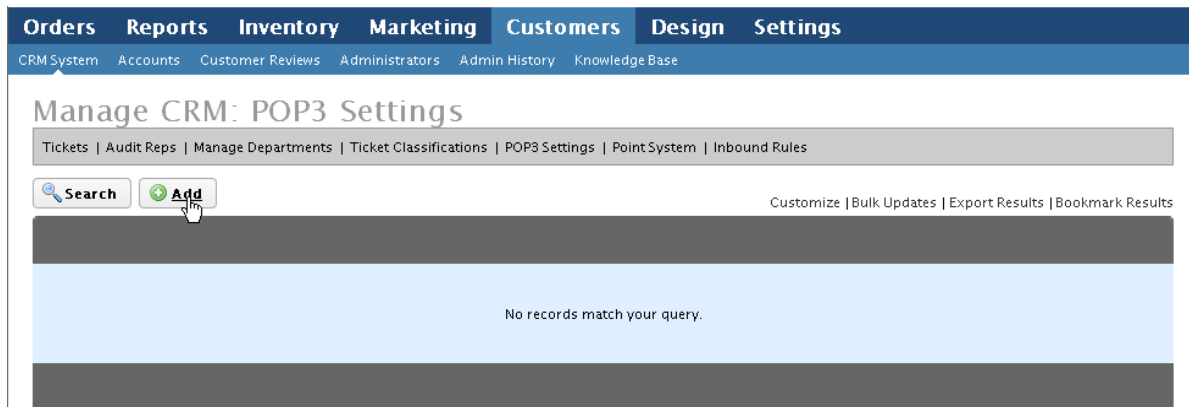
- ☒ Add + View Record in edit mode
- ☐ Add + View Record in add mode
- ☐ Add + View List

Repeat these steps to create as many departments as you need, up to 40 total. Volusion merchants usually use these to categorize types of incoming messages (e.g. sales, returns, customer service, etc.).

## Configuring CRM E-Mail Settings

To configure the Volusion CRM with one or more email accounts:

- In the admin area, click Customers >> CRM System >> POP3 Settings.



Here, you'll see a table listing all CRM system email rules.

- Click Add.

Below are the CRM system email rules settings:

## POP3 Settings

Email Address\*

In this field, enter the address of the live email account to use with the system. In most cases, this will be a Volusion-hosted email address (e.g. sales@yourdomain.com).

Email Username\*

In this field, enter the address's account username (for login). Often, this is will be the account's address.



Email Password*	In this field, enter the address's account password (for login).
Email Server*	In this field, enter the server name that hosts the email account. For Volusion-hosted accounts, enter "pop.emailsrvr.com." If using an older Volusion email setup, contact Technical Support.
TicketType*	Assign a department you've previously created with this menu.
Email Reply Footer	In this field, enter text to create a footer message automatically included on every response from this address.
Auto-Reply Subject	In this field, enter text to configure a subject line for an automatic reply to every message sent to this address.
Auto-Reply Body	In this field, enter text of an automatic reply to every message sent to this address.

\* Required fields.

- When finished, click Save.

Note that when configuring email accounts within the CRM system, a valid email account, username and password must be entered. Each attempt to create a new record in the POP3 Settings table will attempt to log in to the specified email address. Failure to provide accurate information here will result in an error.

### Note Regarding POP3 SSL Certificates

Some email systems such as Google's Gmail require special security elements such as a Secure Sockets Layer (SSL) certificate in order to communicate with third party mail systems. The Volusion CRM does not support SSL integration and therefore cannot be used with such email systems. If you use a third party email system, contact your provider to determine any such requirements before configuring CRM system email addresses.

## Viewing and Replying to Tickets

Once you've configured departments and email accounts, any message sent to email addresses connected to the CRM system will be logged under their related department headings. Administrators can then view and reply to these messages (called "tickets") from the admin area at Customers >> CRM System.

Any new CRM system ticket is assigned a 7-digit ID number used for administrator and

customer reference, and represents a historical record of correspondence between the business and the customer. A ticket displays all communications between both parties, as well as internal administrative notes.

The default CRM system table view shows each ticket ID number, title, the number of messages sent between the two parties, the address the ticket originated from, and the time elapsed since the ticket's last reply. Clicking the ticket ID number will show its full contents:

Ticket	
Ticket Number	The unique, automatically-generated ID number.
ActionItem DueDate	Any ticket with a scheduled action item will display the item and its due date. See Part III for more information.
Ticket Classification	Store administrations can configure ticket classifications to arrange tickets within a department by type. See Part V for more information.
Locked By	Administrators with CRM system access can reserve a ticket. This field displays the administrator name, informing other administrators that the ticket is being addressed.
Subject	This is the subject line of the ticket as entered by the author of the initial email.
Total Replies	The total number of messages sent between the two parties.
Hours Ago	The number of hours passed since the last message sent between parties.
CustID	If the ticket was issued by a customer registered with the Volusion store, their customer account ID displays here.
Name	If the ticket was issued by a customer registered with the Volusion store, their name displays here.
Email Address	This field displays the inbound address the ticket was initially sent from (if initiated by the customer) or to (if initiated by a store administrator).

When you click a ticket number to view its contents, additional information areas appear.

Orders Reports Inventory Marketing Customers Design Settings
CRM System Accounts Customer Reviews Administrators Admin History Knowledge Base

## CRM Ticket #4323587

Customer Information

Tickets (2 Open)

Customer Group

view

Customer Name

test name \_

E-mail

.com

Orders

2 (\$315.81)

, First 7/21/2009

Notes

Save

Billing Address:

test name

123 fake lane

fake land, AZ 99999

United States

8888888888

Notify me when solution is found | Link to Ticket | Delete Ticket

### Ticket Correspondence

Department

Sales

Add

Status

Open

Subject

Question on Roofing Screws

Classification

Add

Ticket Notes

Add Notes

Save

Post Reply

Add Private Note

Claimed By: John Doe

Release

Post Reply

Each ticket is divided into two main areas: the customer information area, and the ticket correspondence area.

## Customer Information

Within each ticket, clicking Customer Information reveals sender details (if that sender has registered as a store customer), including name, email address, customer group, account notes, and number of tickets, including tickets still open (pending response from store administrators).

Orders	Reports	Inventory	Marketing	Customers	Design	Settings
CRM System	Accounts	Customer Reviews	Administrators	Admin History	Knowledge Base	

## CRM Ticket #4323587

Customer Information

Tickets (2 Open)

<b>Customer Group</b> <input type="text"/> <a href="#">view</a> <b>Customer Name</b> test name <a href="#">1</a> <b>E-mail</b> <a href="#">[REDACTED].com</a> <b>Orders</b> <a href="#">2</a> (\$315.81), First 7/21/2009 <b>Notes</b> <input type="button" value="Save"/>	<b>Billing Address:</b> test name 123 fake lane fake land, AZ 99999 United States 8888888888
---	---

Notify me when solution is found | [Link to Ticket](#) | [Delete Ticket](#)

If a ticket has been sent from an individual or organization not registered with the store, you can click Assign a CustomerID to this Email to create an account for that email address.

## Ticket Correspondence

This area contains the majority of controls and settings for each ticket:

Ticket Correspondence

Department
Sales
Add

Status
Open

Subject
Question on Roofing Screws

Classification
Add

Ticket Notes
Add Notes

Save

Post Reply | Add Private Note | Claimed By: John Doe Release

Post Reply

Add Signature

Add Attachment

Add More Attachments

Ticket Status After Post
Closed

Keep this in "My Tickets"

Add Follow-Up

Post

Find the answer in the KnowledgeBase
Search

History

221 days ago (5312hrs ago) [1/8/2009 11:15AM] by John Doe

Phone Call
00:00:42

## Ticket Correspondence

Department	This menu displays the administrator-defined department to which the ticket was sent. Administrators can reassign tickets by choosing a different department from this menu. Add provides a shortcut to create additional departments.
Status	In this field, each ticket is assigned one of three possible values. Open tickets are awaiting replies from store administrators. Closed tickets have received replies and will remain closed unless the customer responds again. On Hold tickets are stored in a special table, logged under the administrator account that placed the ticket on hold. You can change the status of a ticket by selecting a different option from the menu and clicking Save.
Subject	This field contains the ticket's email subject line as entered by the ticket's author. You can edit this subject in this text field. Click

	Save when finished.
Classification	Optionally, administrators can create classifications for tickets within a department for data gathering. This is helpful when departments receive large numbers of similar inquiries. This menu allows you to choose and assign a classification. Add allows you to create additional classifications quickly.

## Additional Ticket Correspondence Fields

### Notes

Enter anonymous internal text memos in this portion of the ticket for admin use. These entries display both on the ticket settings page and in the main CRM system table view.

### Notifications

Click Notify me when solution is found above the Ticket Correspondence header on the right to receive an email to your administrator account address the next time a reply is posted to the ticket.

The screenshot displays the CRM interface for Ticket #4323587. At the top is a navigation bar with tabs: Orders, Reports, Inventory, Marketing, Customers (selected), Design, and Settings. Below this is a sub-menu bar with links: CRM System, Accounts, Customer Reviews, Administrators, Admin History, and Knowledge Base. The main header reads "CRM Ticket #4323587". The content area is divided into two tabs: "Customer Information" (active) and "Tickets (2 Open)". Under "Customer Information", there are fields for "Customer Group" (with a dropdown and a "view" link), "Customer Name" (test name 1), "E-mail" (redacted), "Orders" (Z (\$315.81), First 7/21/2009), and "Notes" (with a "Save" button). To the right, the "Billing Address:" section shows: test name, 123 fake lane, fake land, AZ 99999, United States, 8888888888. At the bottom right of the form, there are links: "Notify me when solution is found" (with a mouse cursor pointing to it), "Link to Ticket", and "Delete Ticket". Below the form is a "Ticket Correspondence" section with a "Department" dropdown (set to "Sales") and an "Add" button.

### Linking

Next to the notification function, click Link to this ticket to open it in customer view.

Your customers can also use the “/Ticket\_New.asp” file to send you tickets. To view this page on your storefront, go to [http://www.YourDomain.com/Ticket\\_New.asp](http://www.YourDomain.com/Ticket_New.asp). If you decide to offer this page, you'll have to code it into the corresponding website area of your HTML file.

[Create New Ticket](#) | [View My Existing Tickets](#)

### Create New Ticket

**General Information:**

Category:

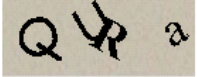
**Message Details:**

My E-mail Address:

Subject:

Description / Question:

Please enter the following code into the box provided:



☐ E-mail me a copy of this ticket

Submit

## Deletion

Next to the link function, click Delete This Ticket to remove it from the CRM system table.

## Claiming a Ticket

To claim a ticket and notify other CRM system administrators that you're reviewing it, click Make this My Ticket. The ticket will appear under the My Tickets table (select this option from the View menu at Customers >> CRM System). Also, your name will display in the Locked By field of the system's main table view.

**Ticket Correspondence**

**Department**  

Sales

▼

Add

**Status**  

Open

▼

**Subject**  

Question on Roofing Screws

**Classification**  

▼

Add

**Ticket Notes**

Save

[Post Reply](#) | 
 [Add Private Note](#) | 
 [Make This My Ticket](#)

**Post Reply**  

Spell Check

[Add Signature](#)   
[Add Attachment](#)

## History

Below the Post button, you'll find the entire correspondence history associated with the ticket. Each message is listed in descending chronological order with the total of days / hours passed since that message was sent, as well as a time stamp and the name of the sender.

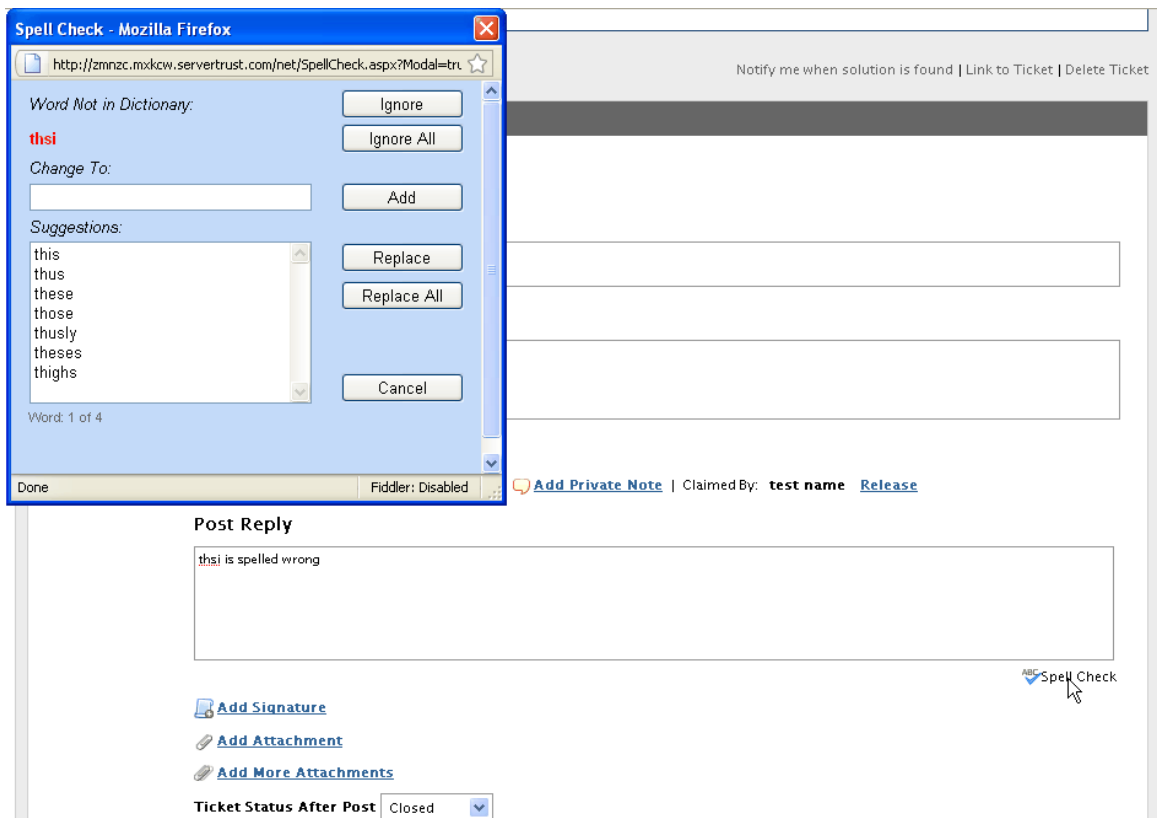
## Ticket Replies

### By Email

To add a sender-viewable message to the ticket and simultaneously email them, click a ticket's ID number at Customers >> CRM System, type message text into the Post Reply box, and click Post.

Add Signature allows you to append a pre-configured footer to the email (you can also configure a signature to post automatically to all of your ticket responses). Add Attachment and Add More Attachments allow you to attach a file(s) that the recipient can download from their email client or from the ticket view page. You can also use the Spellcheck function located at the bottom right of the text reply box.





By default, the ticket status will change to Closed once you post. You can alter this from the Ticket status after this post menu, which includes Open, On Hold, and Unchanged (for any of the three options).

Ticket Correspondence

Department  [Add](#)  
 Status   
 Subject   
 Classification  [Add](#)  
 Ticket Notes   

Save

[Post Reply](#) | [Add Private Note](#) | Claimed By: **test name** [Release](#)

Post Reply

thsi is spelled wrong

ABC Spell Check

[Add Signature](#)  
[Add Attachment](#)  
[Add More Attachments](#)

Ticket Status After Post

☐ Keep this in "My Tickets"

[Add Follow-Up](#)

Post

Closed

Unchanged

Open

On Hold

Closed

Find the answer in the KnowledgeBase

[Search](#)

History

Keep this ticket in My Tickets lists the ticket ID in the My Tickets table regardless of the status.

## Private Notes

Click Add Private Notes to add a ticket post that will not generate an email or appear to the customer. CRM administrators can use this feature for more extensive notes and communications than the Notes field.

When creating a private note, you can also define the source of the note information from the three radio buttons available: Other, Phone Call or Live Chat.

**Ticket Correspondence**

**Department** Sales [Add](#)

**Status** Open

**Subject** Question on Roofing Screws

**Classification** [Add](#)

**Ticket Notes**

Save

[Post Reply](#) | [Add Private Note](#) | Claimed By: test name [Release](#)

**Post Private Notes**  
 Regarding a recent

this is spelled wrong

Spell Check

[Add Signature](#)  
[Add Attachment](#)  
[Add More Attachments](#)

**Ticket Status After Post** Closed   
☐ Keep this in "My Tickets"

[Add Follow-Up](#)

Post


Find the answer in the KnowledgeBase  
 [Search](#)


History


Note that, by default, posting private notes will close the ticket. In many cases, you may want to change the Ticket Status After Post field to Open or On Hold when posting private notes.

## Action Items

You can also add action items to tickets as reminders to CRM administrators to take specific actions on a particular ticket. Click Add Follow-Up above the Post button to add an action item and deadline for completion using the available fields.

 [Add Signature](#)


 [Add Attachment](#)

 [Add More Attachments](#)

**Ticket Status After Post**

Closed

☐ Keep this in "My Tickets"

 [Add Follow-Up](#)

**Follow-up Action Item**

**Follow-up Date/Time**

Post

Find the answer in the KnowledgeBase

[Search](#)

Once the ticket reply has been posted, any configured action item will display in the ticket content area, as well as in the Follow-Up Action Item and Follow-Up Due Date field columns in the main CRM system table view.



# Additional Marketing Features

The “Getting Started Guide” portion of this manual provided an overview of some of Volusion’s basic marketing functions. In this section of the manual, we’ll cover the more advanced functions available in the admin area’s Marketing tab.

## Nav Menu Promotions

The Nav Menu Promotions page comes equipped with a number of pre-programmed promotions to use in the navigation menu space on the home page.

Orders Reports Inventory **Marketing** Customers Design Settings







Coupons / Discounts Nav Menu Promotions MyRewards Newsletters Gift Certificates SEO Affiliates In-Stock Requests

### Manage Promotions







Search Add

Customize | Bulk Updates | Export Results | Bookmark Results

Quick Edit View: All Results 1 - 19 of 19 Page 1 of 1

Special	Notes	Body	Hidden	Order	Delete
		Special Sale!	<input type="checkbox"/>		<input type="checkbox"/>
<a href="#">1</a>		Announce special sale events here	<input checked="" type="checkbox"/>	50	<input type="checkbox"/>
<a href="#">6</a>		Shopping Cart By: 	<input checked="" type="checkbox"/>	100	<input type="checkbox"/>
<a href="#">8</a>		powered by 	<input checked="" type="checkbox"/>	100	<input type="checkbox"/>
<a href="#">9</a>			<input checked="" type="checkbox"/>	100	<input type="checkbox"/>
<a href="#">10</a>		Powered By 	<input type="checkbox"/>	100	<input type="checkbox"/>
<a href="#">11</a>		Reviewed by 	<input checked="" type="checkbox"/>	100	<input type="checkbox"/>
<a href="#">12</a>			<input checked="" type="checkbox"/>	100	<input type="checkbox"/>
<a href="#">13</a>		  <form name="MailingList" method="post" action="MailingList_subscribe.asp"> <h5>Join our mailing list</h5> <input type="text" style="font-size: 11px;" name="emailaddress" size="19" maxlength="50">   <center> <input type="submit" name="Submit" value="Join Now" style="margin-top: 25em;"> </center> </form>  	<input type="checkbox"/>	100	<input type="checkbox"/>

You can display any of these promotions on the storefront by disabling their Hidden settings.

Orders Reports Inventory Marketing Customers Design Settings					
Coupons / Discounts Nav Menu Promotions MyRewards Newsletters Gift Certificates SEO Affiliates In-Stock Requests					
Manage Promotions					
<div> <div>Search</div> <div>Add</div> </div> <div>Customize   Bulk Updates   Export Results   Bookmark Results</div>					
<div> <div>Quick Edit</div> <div>View All</div> <div>Results 1 - 19 of 19</div> <div>Page 1 of 1</div> </div>					
Special	Notes	Body	Hidden	Order	Delete
1		Special Sale! Announce special sale events here	<input checked="" type="checkbox"/>	50	<input type="checkbox"/>
6		Shopping Cart By: 	<input checked="" type="checkbox"/>	100	<input type="checkbox"/>
8			<input checked="" type="checkbox"/>	100	<input type="checkbox"/>
9			<input checked="" type="checkbox"/>	100	<input type="checkbox"/>
10		Powered By 	<input type="checkbox"/>	100	<input type="checkbox"/>
11			<input checked="" type="checkbox"/>	100	<input type="checkbox"/>
12			<input checked="" type="checkbox"/>	100	<input type="checkbox"/>

You can also edit these entries, or create your own.

## Creating a Nav Menu Promotion

To create your own storefront promotion, click Marketing >> Nav Menu Promotions >> Add, and configure the following settings:

Orders Reports Inventory Marketing Customers Design Settings					
Coupons / Discounts Nav Menu Promotions MyRewards Newsletters Gift Certificates SEO Affiliates In-Stock Requests					
Specials   Add New					
<div> <div>Search</div> <div>Back to List</div> <div>Expand All   Collapse All</div> </div>					
Details					
ID					
Group					
Private Notes (Notes will not be publically displayed)					
Body HTML Editor					
Special Order					
Hidden					
Last Modified					
Last Mod By					

<b>Specials</b>	
Group	This optional field allows you to assign the promotion to one of three groups within the system for organizational purposes: SSL Seals, Powered By and Misc. This can be especially helpful if you create a large number of promotions.
Notes	This optional field allows you to enter internal notes for each promotion.
Body	In this box, enter any text or HTML for public display.
SpecialOrder*	This field contains a numerical value by which the promotion will be ordered within the storefront's navigation menu. The lower the number, the higher up the promotion will appear in the menu (e.g. the default search box promotion has a SpecialOrder of 10. To assign a promotion to display below the search box, assign its SpecialOrder to 11 or higher. To display above, assign 9 or lower).
Hidden	This field hides/displays the promotions on the storefront.

\* Required field.

Once you've configured the settings for a promotion, click Save to finish. If the promotion's Hidden setting is unchecked, it'll immediately appear on the storefront at the location specified in the SpecialOrder setting.

## Linking to Volusion Live Chat

Volusion Live Chat is an Internet chat program that you can use to communicate with customers via text messaging in real time. The Basic Edition is free for download and the Premium Edition is available for an additional monthly fee. With both versions, your customers access the program by clicking an image icon on your homepage, available at Marketing >> Nav Menu Promotions. To display one, click Add, complete the fields listed above, and in the Body article, enter:

```
<div align="center" id="VolusionLiveChat">
<a href=http://www.volusion.com/livechat_software.asp>
Live Chat Software</a></div>
<script defer type="text/javascript"
src=https://livechat.volusion.com/script.aspx?id=XXXXXX>
</script>
```



Replace “XXXXX” with your Live Chat ID, obtained from the program’s settings. Once you click Save, the image will appear on your website. For more information on Volusion’s Live Chat program, to download the Basic Edition, or to purchase the Premium Edition, visit Volusion’s Live Chat homepage online at [www.volusion.com/livechat\\_software.asp](http://www.volusion.com/livechat_software.asp).

## SSL Seals

If you plan to accept payment via credit/debit card, electronic check, or Google Checkout, you’ll be required by your provider to use a Secure Sockets Layer (SSL) certificate to encrypt sensitive data for safe transmission from your customers’ web browsers to the Volusion server. You can purchase SSL certificates from our website at [http://www.volusion.com/ssl\\_certificate.asp](http://www.volusion.com/ssl_certificate.asp).

You may also want to advertise the fact your store is SSL-secured to reassure shoppers that purchasing from your site is safe. Volusion provides a number of built-in promotions to display on the storefront for this purpose. Clicking the image will even display verification information so visitors can verify that the store’s security measures are up to date. Once you’ve purchased an SSL certificate, you’ll find the SSL promotions in articles #29 and #30 in the Nav Menu Promotions list. Click the number of the icon you’d like to display and uncheck the Hidden option. Then, in the Body, locate the portion of the code that includes a domain name. If it reads “www.YourDomain.com”, replace it with your actual domain name and click Update.

The screenshot shows the Volusion 'Specials' management interface. At the top is a navigation bar with tabs: Orders, Reports, Inventory, Marketing, Customers, Design, and Settings. Below this is a sub-navigation bar with links: Coupons / Discounts, Nav Menu Promotions, MyRewards, Newsletters, Gift Certificates, SEO, Affiliates, and In-Stock Requests. The main heading is 'Specials | 29'. Below the heading are buttons for Search, Add, and Delete, and navigation links: << Previous, Back to List, Next >>. There is also a link to Expand All | Collapse All. The 'Details' section shows the following information:

- ID:** 29
- Group:** SSL Seals (dropdown menu)
- Private Notes:** (Notes will not be publically displayed)
- Body:** HTML Editor showing the following code:
 

```
<style type="text/css">#volusion_ssl_seal { behavior: url(/a/(iepngfix.htc)); }</style><br /><a href="javascript:void(0);" onclick="window.open('https://www.volusion.com/ssl.asp?url=www.YourDomain.com','volusionSSL','top=10,left=10,menubar=0,resizable=0,scrollbars=0,width=467,height=467')"></a><br />
```
- Special Order:** 100
- Hidden:** ☒
- Last Modified:** 2/13/2006 11:16:00 PM
- Last Mod By:** [1] test name

# Store Affiliates

## Marketing with Store Affiliates

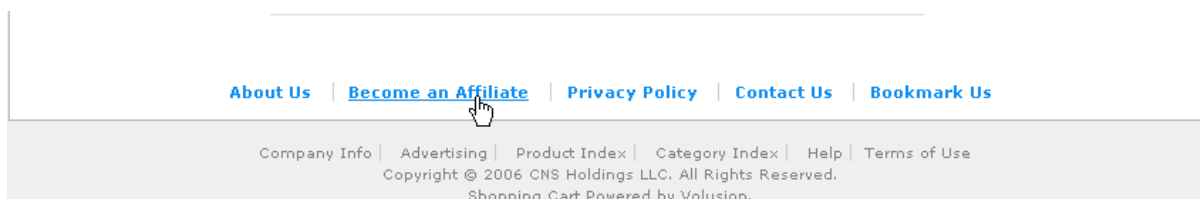
Volusion provides functionality for third parties to register with store owners to become affiliates. These affiliates extend your advertising reach by serving as a network of advertisers, advocates, and bloggers that can help drive traffic to your store. Volusion's tools help you manage, analyze and even reward these affiliates.

### Affiliate Signup


An affiliate is a special type of store customer that uses a custom URL linked to their affiliate account ID that can be placed in online marketing materials to drive traffic to your website. The Volusion system then records all visits, orders and sales through this URL, allowing you to track the affiliate's effectiveness.

Visitors can sign up for affiliate status as follows:

- Near the bottom of the Volusion storefront, click [Become an Affiliate](#) (your store link/footer may appear different from the screen shot).




- Log in to your customer account to access the signup form.
- If you don't have a customer account, you'll be prompted to create one.
- After login, you'll be prompted to enter your website address and a tax ID number (in most cases, a social security or EIN number) so that the store owner can verify the address specified for payments.



## Affiliate Program

Confirm your information below to complete the signup process.

<b>Website Address:</b>	<input style="width: 90%;" type="text"/>
<b>Please type your Tax ID#: (required for tax purposes)</b>	<input style="width: 90%;" type="text"/> <i>(i.e. your SSN# or EIN#)</i>
<b>We will make your checks payable to your current billing address:</b>	test name 123 fake lane fake land, AZ 99999 <a href="#" style="color: #000080; text-decoration: none;">Change</a>



- Click Continue. You'll receive a notice stating that your affiliate account will be activated after a 24 hour approval process.



## Affiliate Program

Thank you for your interest!

Please allow 24 hours for your account to be approved and fully activated.


### Items to Note

Customers who arrive at your store through an affiliate link and sign up for affiliate status become sub-affiliates. Customers who arrive at your store through a sub-affiliate's link and sign up for affiliate status likewise become sub-affiliates. The system tracks affiliate levels in this manner up to 5 levels deep.

## Affiliate Approval

In reality, all affiliate signups are immediately active. If the applicant accesses the My Account page, an Affiliate Statistics section will appear at the bottom with a Visit My Affiliate Page

option.



**Welcome to your account affiliate test.** You may use this page to manage your orders, payments, and other information, all in one place.

My Orders	
<a href="#">Review orders / track packages</a>	<a href="#">Change quantities / cancel orders</a>
<a href="#">Change shipping address</a>	<a href="#">Print invoices</a>
<a href="#">Change billing address</a>	<a href="#">Return items</a>

Personal Information	
<a href="#">Change e-mail address, or password</a>	<a href="#">Manage your billing addresses</a>
<a href="#">Change my e-mail preferences</a>	<a href="#">Manage your shipping addresses</a>

Payment Settings	
<a href="#">Edit or delete a credit / debit card</a>	<a href="#">View gift certificate balance</a>
	<a href="#">Apply a gift certificate to your account</a>

Other Features	
<a href="#">Edit a review that I wrote</a>	<a href="#">View my Wish List</a>
<a href="#">My Rewards</a>	

Affiliate Statistics	
<a href="#">Visit My Affiliate Page</a>	

[I'm done managing my account, log me out.](#)

The Volusion system offers no additional pre-programmed functionality that allows you to inform affiliates of account approval, but you can manually send each affiliate an approval notice with login instructions, an overview of account features, and their individual URL. You'll also find the customer listed in the table at Marketing >> Affiliates. If you click the ID number, you'll see their customer account page with the Access Key set to Affiliate / Partner. You can still access this page from Customers >> Accounts, but this key setting determines inclusion in the Affiliates table. If you don't wish for the applicant to have affiliate status, you can always change this setting back to Customer, or delete the customer record entirely.

## Affiliate Account Functions

The Visit My Affiliate Page option in the customer account area allows affiliates to access reports on click-throughs, sales, and the commission they've earned, as well as statistics on as many as 4 sub-affiliates registered under them.



## My Account

Choose the time period you wish to view: All

Level	People in level	Click-throughs	Sales	Commission
<b>You</b> (5.00%)	1	0	0	\$0.00
<b>1</b> (3.00%)	0	0	0	\$0.00
<b>2</b> (2.00%)	0	0	0	\$0.00
<b>3</b> (2.00%)	0	0	0	\$0.00
<b>4</b> (2.00%)	0	0	0	\$0.00
<b>Total:</b>	<b>1</b>	<b>0</b>	<b>0</b>	<b>\$0.00</b>

**Advertising Tools**  
[Generate Banner Ads](#)

**Helpful Reminders**  
 Your Link: <http://zmnzc.mxkcv.servertrust.com/?Click=20>  
 Anyone who visits "Your Link" will be tracked, and you will get credit. Place your link anywhere: In e-mails, banner ads, on your website, etc.

The Generate Banner Ads option allows affiliates to quickly create HTML banner ads for use on websites and in emails. They work just like the text link (which also displays on this page): they link back to the store in a manner that generates reporting in the Volusion system.

## Affiliate Settings

In order for the program to function, you'll have to set a customized commission structure. Click Marketing >> Affiliates and choose Affiliate Settings from the View menu.

**Orders Reports Inventory Marketing Customers Design Settings**  
 Coupons / Discounts Nav Menu Promotions MyRewards Newsletters Gift Certificates SEO Affiliates In-Stock Requests

Configuration : Affiliate System Setup

Customize | Bulk Updates | Export Results | Bookmark Results

Quick Edit View **Affiliate Settings** Results 1 - 7 of 7 Page 1 of 1

Name	Value	Last Modified
<a href="#">Config_AffiliateMinimumCheck</a>	<input type="text" value="50.00"/>	2/10/2006
<a href="#">Config_AffiliateTrackDays</a>	<input type="text" value="7"/>	2/10/2006
<a href="#">Config_PercentLevel1</a>	<input type="text" value="0.05"/>	2/10/2006
<a href="#">Config_PercentLevel2</a>	<input type="text" value="0.03"/>	2/10/2006
<a href="#">Config_PercentLevel3</a>	<input type="text" value="0.02"/>	2/10/2006
<a href="#">Config_PercentLevel4</a>	<input type="text" value="0.02"/>	2/10/2006
<a href="#">Config_PercentLevel5</a>	<input type="text" value="0.02"/>	2/10/2006

Results 1 - 7 of 7 Page 1 of 1

Note that all fields in this table must be configured in order for the affiliate system to function:

## Affiliate System Setup

Config_Affilaite_MinimumCheck	The minimum amount of commission an affiliate can be paid at a given time. For example, with this value set to 50.00, any affiliate that has earned at least \$50 in commission by the normal payment date will be paid. Any affiliate earnings shy of the minimum will be held over for future payout periods until meeting the qualifying minimum.
Config_AffilaiteTrackDays	The number of days a new affiliate will be tracked.
Config_PercentLevel1	The percentage paid in commissioned sales to a level 1 (primary) affiliate. This value must be zero or higher and represented in numerals up to 2 decimal places (e.g. 0.01, 0.05, 0.10, etc.).
Config_PercentLevel2	The percentage paid in commissioned sales to a level 2 affiliate (sub-affiliate). This value must be zero or higher and represented in numerals up to 2 decimal places (e.g. 0.01, 0.05, 0.10, etc.).
Config_PercentLevel3	The percentage paid in commissioned sales to a level 3 affiliate (sub-affiliate). This value must be zero or higher and represented in numerals up to 2 decimal places (e.g. 0.01, 0.05, 0.10, etc.).
Config_PercentLevel4	The percentage paid in commissioned sales to a level 4 affiliate (sub-affiliate). This value must be zero or higher and represented in numerals up to 2 decimal places (e.g. 0.01, 0.05, 0.10, etc.).
Config_PercentLevel5	The percentage paid in commissioned sales to a level 5 affiliate (sub-affiliate). This value must be zero or higher and represented in numerals up to 2 decimal places (e.g. 0.01, 0.05, 0.10, etc.).

The settings in this table only determine initial settings for new signups. To modify settings for existing affiliates, see below.

## Affiliate Payouts

At Marketing >> Affiliates, if you select Affiliate Payouts from the View menu, you'll find a table containing specific affiliate settings for all active store affiliate accounts listed by ID number, including their commission level. There are 5 levels that signify affiliate status (primary affiliate or sub-affiliate).

Orders	Reports	Inventory	Marketing	Customers	Design	Settings
Coupons / Discounts	Nav Menu Promotions	MyRewards	Newsletters	Gift Certificates	SEO	Affiliates

### Affiliate Payouts

Search Add Customize | Bulk Updates | Export Results | Bookmark Results

Quick Edit View Affiliate Payouts Affiliates Affiliate Settings Pay Affiliates

Affiliate	P	Track	Type	Percent1	Percent2	Percent3	Percent4	Percent5	Last Modified	Delete
0	0	360	O	0	0	0	0	0	4/29/2004	<input type="checkbox"/>
1	0			0.05	0.03	0.02	0.02	0.02		<input type="checkbox"/>
2	0	365	C	0	0	0	0	0		<input type="checkbox"/>
3	0	365	C	0	0	0	0	0		<input type="checkbox"/>
9	0	30	N	0	0	0	0	0		<input type="checkbox"/>
18	0	30	N	0	0	0	0	0		<input type="checkbox"/>
20	0			0.05	0.03	0.02	0.02	0.02		<input type="checkbox"/>
21	0			0.05	0.03	0.02	0.02	0.02		<input type="checkbox"/>

Results 1 - 8 of 8 Page 1 of 1

This table contains the following settings:

Affiliate Payouts	
Percent1 *	The percentage paid in commissioned sales to a level 1 (primary) affiliate. This value must be zero or higher and represented in numerals up to 2 decimal places (e.g. 0.01, 0.05, 0.10, etc.).
Percent2 *	The percentage paid in commissioned sales to a level 2 affiliate (sub-affiliate). This value must be zero or higher and represented in numerals up to 2 decimal places (e.g. 0.01, 0.05, 0.10, etc.).
Percent3 *	The percentage paid in commissioned sales to a level 3 affiliate (sub-affiliate). This value must be zero or higher and represented in numerals up to 2 decimal places (e.g. 0.01, 0.05, 0.10, etc.).
Percent4 *	The percentage paid in commissioned sales to a level 4 affiliate (sub-affiliate). This value must be zero or higher and represented in numerals up to 2 decimal places (e.g. 0.01, 0.05, 0.10, etc.).
Percent5 *	The percentage paid in commissioned sales to a level 5 affiliate (sub-affiliate). This value must be zero or higher and represented in numerals up to 2 decimal places (e.g. 0.01, 0.05, 0.10, etc.).
Group_Title	If a single company or entity is conducting several affiliate campaigns, you can use this field to group them under a single label.
AffiliateID *	The ID number of the affiliate (also matches the customer account ID).
ParentID *	When a sub-affiliate signs up to become a store affiliate through another affiliate's URL, the ID number of their primary affiliate displays in this field.

DaysToTrack	This field can be configured to track an affiliate for a specific number of days. For regular affiliates, this field is empty, allowing the system to track the affiliate's activity indefinitely.
AffiliateType	Select one of the four affiliate types from this list: Regular Affiliates, Newsletters, Ad Campaigns or Other.
News_ID	If the affiliate entry corresponds to an email newsletter (Affiliate Type of Newsletter), you can list the newsletter ID here.

## Paying Affiliates

The primary incentive for affiliates to register with and help direct traffic (and sales) to an online store is the commissioned payments they receive from referrals. You can track accrued commissions and pay them out at Marketing >> Affiliates by selecting Pay Affiliates from the View menu.

Orders Reports Inventory Marketing Customers Design Settings

Coupons / Discounts Nav Menu Promotions MyRewards Newsletters Gift Certificates SEO Affiliates In-Stock Requests

### PayChecks for Affiliates

Period Ending Date: 08/31/2009 Automated Check Printing: [Click here to print all checks for the selected period.](#)

Customize | Bulk Updates | Export Results | Bookmark Results

View Pay Affiliates

No records match your query.

Here, you'll find the following settings:

PayChecks for Affiliates	
AffiliateID	The affiliate's unique ID number.
Name	The affiliate's name.
Company Name	If the affiliate has entered a company name in their profile, it displays here.
Total Earnings	The total sum of commission owed to the affiliate, based on your program settings.



Last Paid	The date you last paid the affiliate.
Date of Most Recent Sale	The date of the most recent sale generated through the affiliate's tracking URL.

To pay accrued commissions to affiliates listed in the table, use the text box near the top to define the date up to when commissioned sales will be paid and click Go. This reloads the table and displays the commission data. Next, click the Click here to print all checks for the selected period link.

You'll arrive at the Print Affiliate Checks page, where you can configure and print checks to issue.

To generate checks for payable commissions, enter a check date, a memo (optional), select whether to print 1 or 3 checks per page, and click Print Checks. Once checks are printed, click the web browser's Back button to return to this page. Click Yes, I printed ALL the checks to update the Pay Affiliates table data. Note that once you've completed this step, you won't be able to reprint checks. Be sure to print all necessary checks before completing this step.

## Checking Affiliate Stats

At Reports >> Affiliate Stats, you'll find a list of all orders generated after visits through affiliate

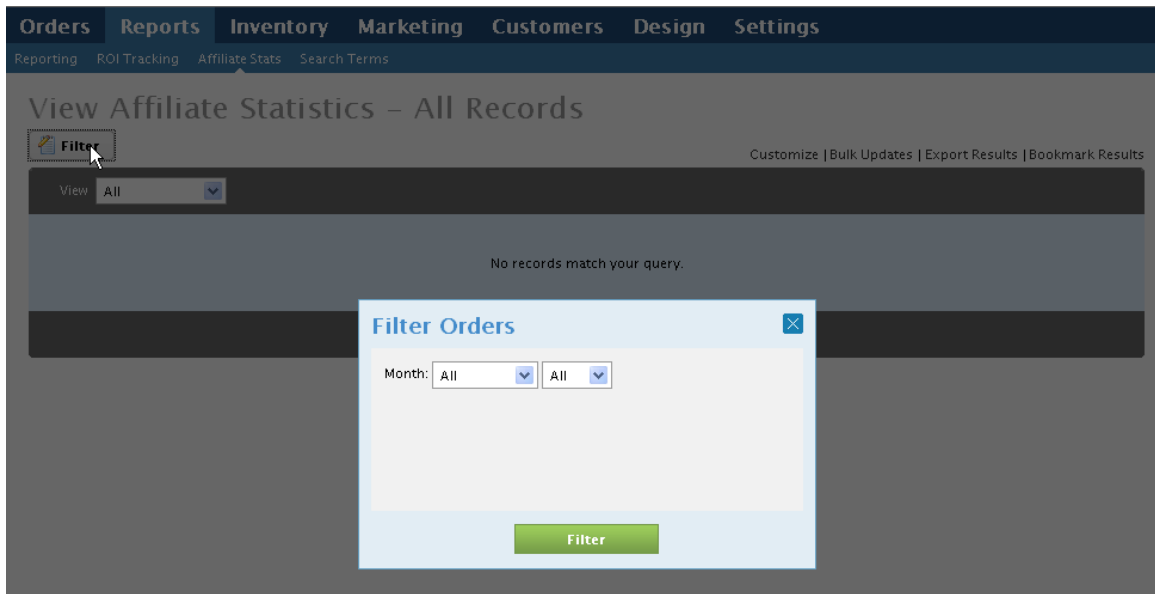
URLs or automated referral programs such as Google Adwords. You can use this information to determine an affiliate's marketing value. This table contains the following settings:

### Affiliate Statistics

Affiliate ID	The affiliate account ID attached to the order. Any order not generated through an affiliate link will have an affiliate ID of zero.
First Name	The first name of the related affiliate. For orders with an affiliate ID of zero, this field contains the customer's first name.
Last Name	The last name of the related affiliate. For orders with an affiliate ID of zero, this field contains the customer's last name.
Company Name	The information entered in the company name field corresponding to the affiliate or customer account.
OrderID	The order ID number generated during sale. Click this number to view the order's details page.
Order Value	The order's grand total amount.
Affiliate Commissionable Value	The amount of the order for which an affiliate is eligible to receive commission. This is essentially the order's subtotal, excluding tax, shipping and handling charges, and discounts.
Percentage	The percentage of the Affiliate Commissionable Value at which the affiliate earns commission, based on your affiliate settings.
Total Earnings	The total monetary earnings an affiliate should receive based on the Affiliate Commissionable Value and Percentage fields.
Date of Sale	The date the order was generated.

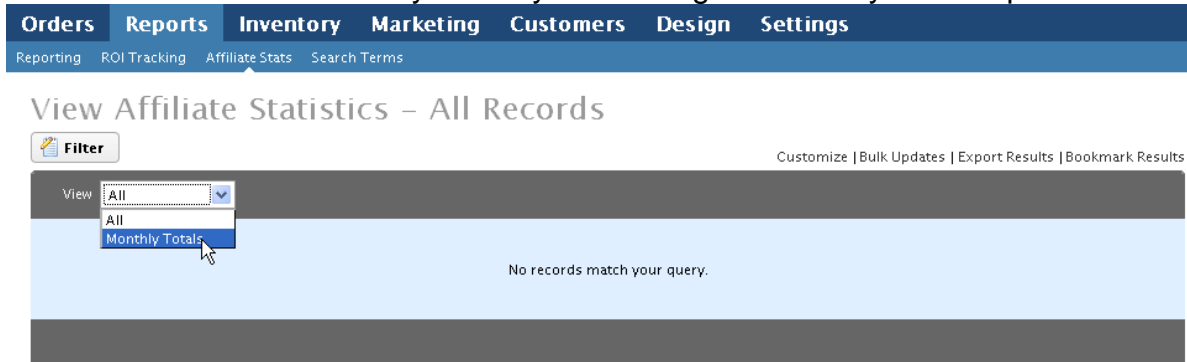
### Utilizing the Affiliate Stats Page

You can customize the Affiliate Stats page by clicking the Filter button at the top of the table.



Here, you can select a particular month and/or year to narrow the data display. To update the table, simply select your desired time period and click Filter near the bottom of the pop-up menu.

You can also sort the table by monthly stats using the Monthly Totals option in the View menu.



## In Stock Requests

Volusion allows you to email customers when an out-of-stock item they want is back in stock by configuring Marketing >> In-Stock Requests.

**View In-Stock Requests**

Settings Customize | Bulk Updates | Export Results | Bookmark Results

Request	Product Code	Email Address	Date Requested	Active Requests	Delete
1	HW-LACSCREW	palak_shah@volusion.com	1/8/2009 1:40PM	1	<input type="checkbox"/>

Results 1 - 1 of 1 Page 1 of 1

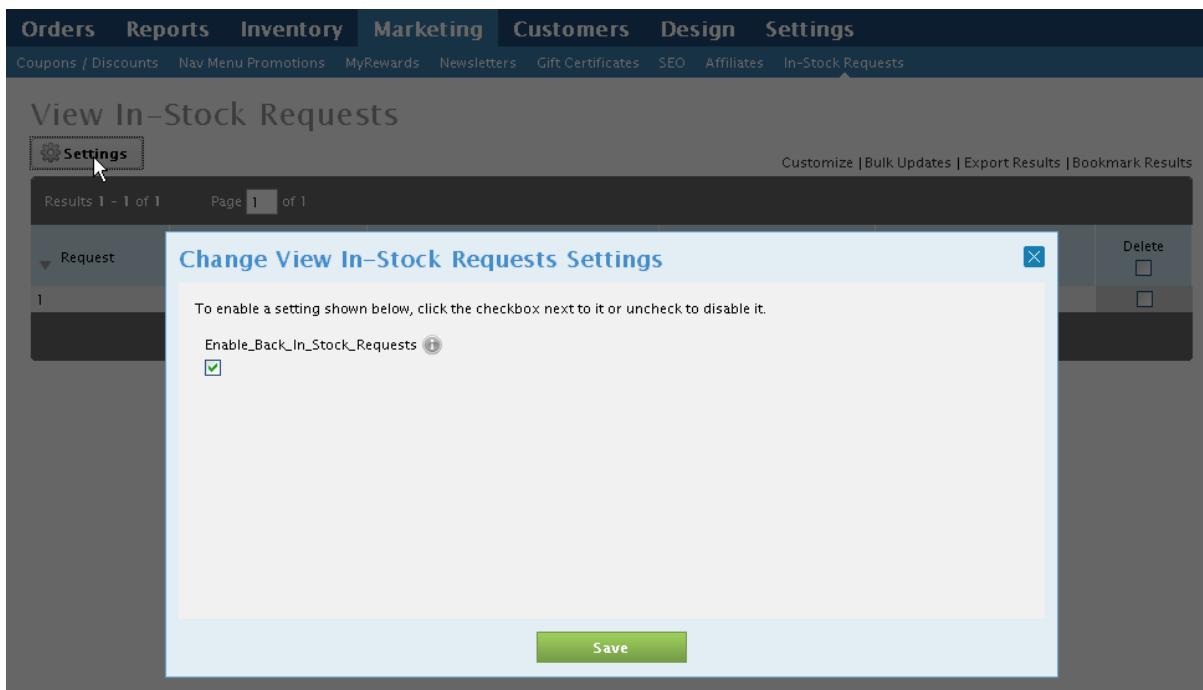
Here, you can view a list of out-of-stock products with in-stock email notification requests.

## Requirements

When configured properly, Volusion's inventory system can process requests for in-stock notification automatically.

## Activate In-Stock Requests

First, activate the feature at Marketing >> In-Stock Requests >> Settings. Check the Enable\_Back\_In\_Stock\_Requests option and click Save.



## Assign Stock Values

To make a product eligible to receive notification requests, it must have a stock value assigned. By default, each product has no starting stock value. You can set one as follows:

- In the admin area, click Inventory >> Products.
- Click the product code you wish to edit.
- Locate the Vendor Information section, and enter a value in Stock Status.
- Click Update.

The screenshot shows the 'Vendor Information' form. The 'Stock Status' field is highlighted with a yellow box and contains the value '100'. Other fields include 'UPC Code', 'Stock Low Qty Alarm', 'Stock Re-Order Qty', 'Do Not Allow Backorders', 'Auto Drop Ship', 'Vendor Part #', 'Vendor Price', 'Book ISBN', 'Add To PO Now', 'Last PO Qty', and 'Last PO Date'.

This allows the system to update the stock status of the product automatically when ordered or returned.

## Disable Backorder Status

Eligible products must not allow backorder status, because the system will always treat the product as “in-stock.” To disable this feature, check the DoNotAllowBackOrders option in the Vendor Information section of the product record and click Update.

**Vendor Information**

Stock Status  + (Hist) +1 On Hold

[Generate Barcode] UPC Code

Stock Low Qty Alarm

Stock Re-Order Qty

Do Not Allow Backorders ☒

Auto Drop Ship ☐

Inventory: Verify Qty On Hand

Inventory: Last Verified

Last Modified

Vendor Part #

Vendor Price

Book ISBN

Add To PO Now ☐

Last PO Qty

Last PO Date

Share Stock Status With

Product ID

Last Mod By

Additionally, make sure products are not set to automatically hide when out-of-stock. This will prevent customers from reaching the product details page, where the request mechanism resides. This setting is located in the Advanced Options section of each product edit page.

**Advanced Options**

VAT Percentage

Home Page Section

Taxable Product

[Upload Logo] Manufacturer

List Price Name

Product Price Name

Sale Price Name

Setup Cost Name

AddtoCartBtn Replacement Text

Product Popularity

Display Begin Date

Display End Date

Gift Wrap Cost

Free Shipping Item ☒

Hide Product ☐

Hide When Out Of Stock ☒

Enable Multi Child Add To Cart ☐

Private Section Customers Only ☐

Hide You Save ☐

Allow Price Edit ☐

Price Sub Text

Price Sub Text Short

Min Qty

[Upload File] Download Filename

## In-Stock Request Settings

Each entry in the Marketing >> In-Stock Requests table contains several settings that cannot be modified. Because the notification system is automatic, it requires no management, and supplies this data for informational purposes only:

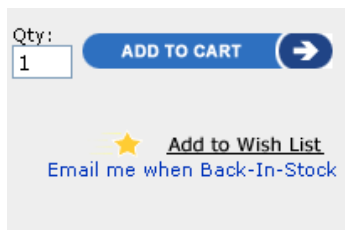
## In-Stock Requests

ProductCode	The product code of the product for which the request was made.
EmailAddress	The email address entered by the customer when they requested notification.
Date Requested	The date of the request.
Active In-Stock Requests	The total number of active In-Stock Requests in the table.

## The In-Stock Request Process

Once all setup requirements are met, the notification system functions as follows:

- Any eligible product, when ordered, will lead to a reduction in the stock status.
- Once the stock status reaches zero, customers will no longer be able to order the product (if they attempt to add it to the cart, an error message will state, "Sorry, the following item is currently out of stock:").
- On the product details page, an Email me when Back-In-Stock link will appear below the Add to Cart button.



- Clicking this link displays an email address entry form a customer can use to receive the notification.

Please enter your email to be notified when this item is back in stock.

Email Address:

☐ Signup for our newsletter

- Once the customer enters their email address here and clicks Submit, the entry appears at Marketing >> In-Stock Requests.
- The entry remains in the table until the related product's stock status is adjusted to a positive value.
- At that time, the customer receives an automatically-generated email notifying them that the product is back in stock.

#### **Items to Note**

We recommend reviewing the In-Stock Requests table before updating stock in the event that you've received more notification requests than units in your delivery. This will help you prevent sending out more in-stock notifications than you can honor through orders.



# MyRewards & AddThis™ Program

## MyRewards Program

The newest addition to Volusion's marketing functions in Winter '09 is the MyRewards Program. This feature was built to help increase sales by offering loyal customers points toward store credit on future orders. The program allows you to award points by amount spent, or for purchasing specific products. Customers can view and redeem these points directly from the My Account area.

To activate the program, go to Marketing >> MyRewards in the admin area.

The screenshot shows the 'MyRewards' configuration page in the Volusion admin interface. The top navigation bar includes 'Orders', 'Reports', 'Inventory', 'Marketing' (selected), 'Customers', 'Design', and 'Settings'. Below this, a sub-menu shows 'Coupons / Discounts', 'Nav Menu Promotions', 'MyRewards' (highlighted with a mouse cursor), 'Newsletters', 'Gift Certificates', 'SEO', 'Affiliates', and 'In-Stock Requests'.

The 'MyRewards' section is titled 'MyRewards' and contains two main sections: 'Configuration' and 'Redemption'.

**Configuration:**

- MyRewards Setup:** Includes an information icon and a dropdown menu set to 'Points for Product'.

**Redemption:**

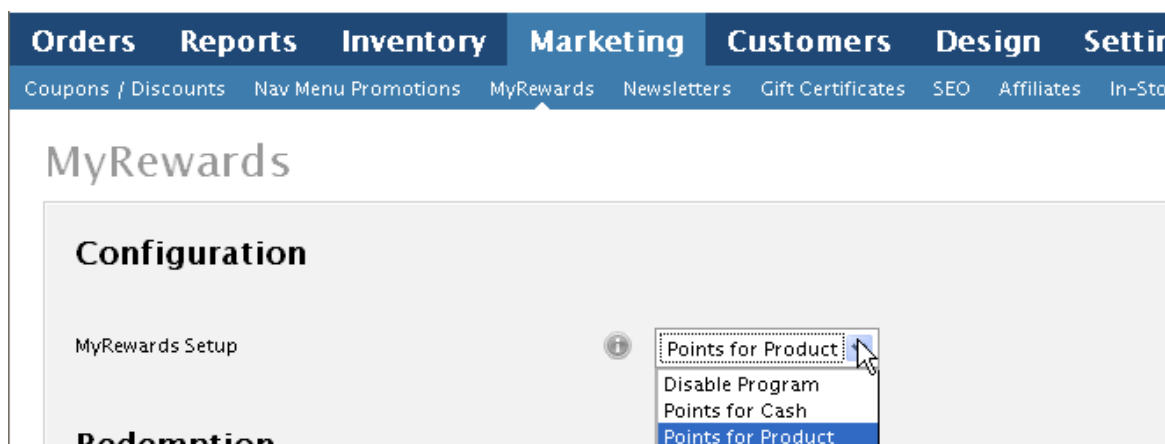
- Points Redeemed per Currency Unit:** 50
- Minimum Points Required to Redeem:** 0
- Time until Rewards are Redeemable (days):** 0
- Time Rewards are redeemable (days):** 365

A green 'Save' button is located at the bottom of the form.

The wizard has two sections: Configuration and Redemption.

## Configuration

By default, the program is disabled. To enable it, choose either Points for Cash or Points for Product.



## Points for Cash

This setting awards points based on the amount of money spent on orders. It uses order subtotals (prior to tax and shipping) for point calculation. If you choose this option, you'll have to define a value for Points Earned per Currency Unit. This field instructs the system how many points to award for each currency unit spent. If you use USD, one unit is equal to one dollar. If you enter 5 in this field, the system will award five points for each dollar spent.

### Items to Note

This configuration doesn't inform customers of points earned. When using it, you must dispense all program information manually.

## Points for Product

This setting awards a specific number of points for specific products. If you choose this option, you'll have to define point values for one or more products:

- In the admin area, click Inventory >> Products.
- Click the product code of the product to which you'd like to assign points.
- Locate the Advanced Options section and enter a number in Reward Points Given For Purchase.

After assigning points, return to the MyRewards wizard to complete program setup.

### Items to Note

When you assign points to a product, they display on the storefront's product details page under the price as, "You'll earn X points."

## Redemption

This portion of the MyRewards wizard requires setup of 4 variables for either configuration:

- **Points Redeemed per Currency Unit:** This field determines how many points are redeemed in the awarding of each reward currency unit. For example, if I use USD and enter 50 in this field, one reward dollar will redeem 50 points. You can also think of this field as the number of points required to redeem an award currency unit. Note that the value you enter here controls the default value displayed in the customer's redemption text field.

## MyRewards - Reap the rewards with every purchase

It pays to go with MyRewards. Every time you make a purchase with [your company or website's name], you'll receive points [if product based, then] for the product(s) you purchase [if total amount of purchase, then] based on your total purchase amount. It's a great way to save on your next purchase whether it's for you or someone special.

### Here's how it works:

1. Once you've placed your order and it has shipped, your MyRewards Point will be redeemable in [X] days.
2. To view your MyRewards, simply go to [MyRewards](#).
3. Enter the total amount (in points) you'd like to redeem below (X points = \$X).
4. When you're done, a confirmation will be sent to your email address.
5. You're now ready to save on your next purchase. Upon placing your order, your available MyRewards will automatically be deducted from the total purchase amount.

Available Points: 0

Pending Points: 0

 **redeem now**

Want to learn more about MyRewards? For more MyRewards information, see the [Terms & Conditions](#).

- **Minimum Points Required to Redeem:** The value set in the previous field acts as a minimum accrual amount before any points can be redeemed, but if you wish to require accrual of a higher dollar total before allowing point redemption, enter a larger number here. For example, if you enter 50 in the previous field and 100 in this field, the customer will earn a reward dollar after accruing 50 points, but won't be able to redeem those points until 100 points have been accrued (2 reward dollars).
- **Time until Rewards are Redeemable (days):** If you wish to set a time frame in days that customers must wait between the earning of points and the awarding of points for redemption, use this field.
- **Time Rewards are redeemable (days):** If you'd like awarded points to expire after a certain number of days, use this field.

### Items to Note

The program cannot award partial points or partial currency units. You can use decimal values in the configuration fields, but when confronted with situations where settings determine awarding of partial units, the system resorts to rounding. Use care in setting configuration parameters to prevent awarding/redeeming of more or less points/currency units than you intend.

## Redeeming Points

Once you've configured the program, customers can view and redeem points, as well as review program terms and conditions, at My Account >> My Rewards (under Other Features).



### My Account

Welcome to your account test name. You may use this page to manage your orders, payments, and other information, all in one place.

My Orders	
<a href="#">Review orders / track packages</a>	<a href="#">Change quantities / cancel orders</a>
<a href="#">Change shipping address</a>	<a href="#">Print invoices</a>
<a href="#">Change billing address</a>	<a href="#">Return items</a>
Personal Information	
<a href="#">Change e-mail address, or password</a>	<a href="#">Manage your billing addresses</a>
<a href="#">Change my e-mail preferences</a>	<a href="#">Manage your shipping addresses</a>
Payment Settings	
<a href="#">Edit or delete a credit / debit card</a>	<a href="#">View gift certificate balance</a>
	<a href="#">Apply a gift certificate to your account</a>
Other Features	
<a href="#">Edit a review that I wrote</a>	<a href="#">View my Wish List</a>
<a href="#">My Rewards</a>	



[I'm done managing my account, log me out.](#)

To redeem points, customers enter the number of points they wish to redeem from their available points and click Redeem Now. If they're attempting to redeem a non-qualifying point total, they'll receive an error message with the minimum requirements. If they redeem their points successfully, they'll receive notification of the number of points successfully redeemed.

This automatically generates a gift certificate in the admin area attached to the customer's account. The next time they place an order, the gift certificate automatically applies.

### Items to Note

- The system doesn't consider points as earned until you've marked the order as "shipped."
- For a customer to receive and redeem points, they must be registered with your store.

-You can customize the program's terms and conditions text at Design >> Site Content >> article #144.

-You can customize the text on the My Rewards page of the My Account area using article #145.

-You can view and edit a customer's accrued points in the Special Privileges section of their account record in the Award Points field.

-Disabling the program deletes all accrued reward points from the system.

-Removed from Rewards (in the same area as Award Points) allows you to disqualify a customer from earning additional points. This is useful if you want to set a program deadline past which additional points cannot be accrued without deleting all unredeemed points. You cannot remove all customers from the rewards program at once globally.

## AddThis™ Share It Program

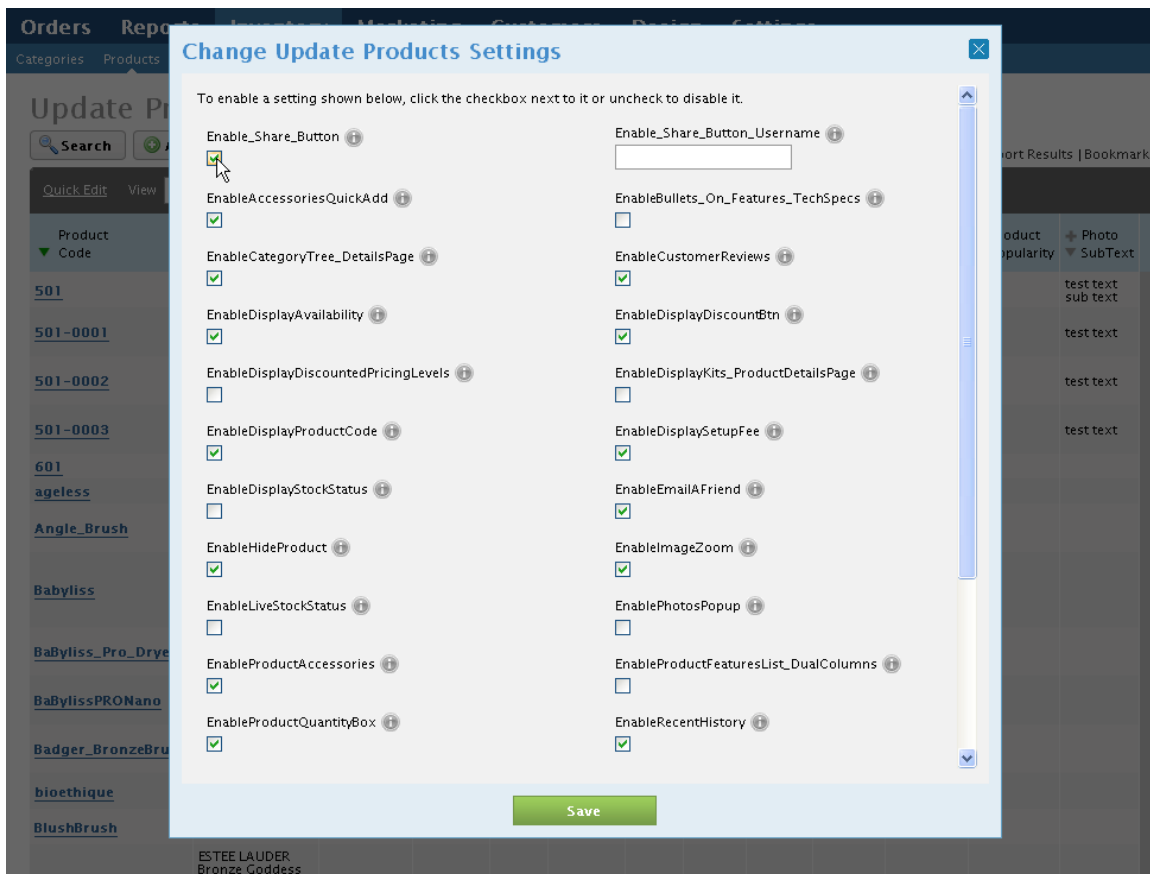
Another new marketing feature in Winter '09 is integration with the popular third party program AddThis™. When enabled, it adds a link on your product pages for customers to bookmark and share on more than 50 social networking sites including Twitter, AIM, Facebook, Blogger, Bebo, and Kaboodle.



If you have an AddThis™ account, you can also use their analytics program. To turn on this feature:

- In the admin area, click Inventory >> Products >> Settings.

- Choose Enable\_Share\_Button.
- Click Save.



- If you have an AddThis™ account, enter your username in the Enable\_Share\_Button\_Username field to turn on your analytics.

For more information on registration and analytics information, visit AddThis™ here: <http://www.addthis.com/>





# Reporting Guide

Volusion allows you to obtain reporting on a wide range of store variables and activities. This section of the manual details a number of these features.

In the admin area, click Reports >> Reporting.

Year	Orders	Payment Amount	Payment Authorized	Payment Received	Sales Tax1	Sales Tax2	Sales Tax3	Shipping Cost	OrderDetails	Quantity	COGS	Profit	Profit Margin
2008	4	960.02	0.00	25.00	54.42	0.00	0.00	225.00	9	82	229.46	426.14	66.3%
2009	26	16,742.19	0.00	145.92	405.50	0.00	0.00	5,941.57	78	94	3,483.36	6,349.89	66.2%
<b>TOTALS:</b>	<b>30</b>	<b>\$17,702.21</b>	<b>\$0.00</b>	<b>\$170.92</b>	<b>\$459.92</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$6,166.57</b>	<b>87</b>	<b>176</b>	<b>\$3,712.82</b>	<b>\$6,776.03</b>	<b>0%</b>
<b>AVERAGES:</b>	<b>15</b>	<b>\$8,851.11</b>	<b>\$0.00</b>	<b>\$85.46</b>	<b>\$229.96</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$3,083.29</b>	<b>44</b>	<b>88</b>	<b>\$1,856.41</b>	<b>\$3,388.02</b>	<b>0%</b>

This page is divided into 3 sections: the generator, the graphs, and the table. From the Generate Reports area, the Create Report button allows you to select the type and criteria of the report you'd like to generate.

Orders Reports Inventory Marketing Customers Design Settings

Reporting ROI Tracking Affiliate Stats Search Terms

## Generate Reports

Create Report

Saved Reports: Select Display Rows: 50 Page 1 of 1

**Create Report**

Choose Report: Orders

Based On: ☒ OrderDate ☐ ShipDate

Order Status:

Time Period: or From To

By: Year

☐ Save New Report?

[Advanced Options](#)

Generate

Year	Orders	Payment Amount	Payment Authorized	Payment Received	Sales Tax1	Sales Tax2	Sales Tax3	Shipping Cost	OrderDetails	Quantity	COGS	Profit	Profit Margin
2008	4	960.02	0.00	25.00	54.42	0.00	0.00	225.00	9	82	229.46	426.14	66.3%
2009	26	16,742.19	0.00	145.92	405.50	0.00	0.00	5,941.57	78	94	3,483.36	6,349.89	66.2%
<b>TOTALS:</b>	<b>30</b>	<b>\$17,702.21</b>	<b>\$0.00</b>	<b>\$170.92</b>	<b>\$459.92</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$6,166.57</b>	<b>87</b>	<b>176</b>	<b>\$3,712.82</b>	<b>\$6,776.03</b>	<b>0%</b>
<b>AVERAGES:</b>	<b>15</b>	<b>\$8,851.11</b>	<b>\$0.00</b>	<b>\$85.46</b>	<b>\$229.96</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$3,083.29</b>	<b>44</b>	<b>88</b>	<b>\$1,856.41</b>	<b>\$3,388.02</b>	<b>0%</b>

The graphs portion and table portion of the page display the data returned by the report(s) you've created.

Orders Reports Inventory Marketing Customers Design Settings

Reporting ROI Tracking Affiliate Stats Search Terms

## Generate Reports

Create Report

Saved Reports: Select Display Rows: 50 Page 1 of 1

**Orders**

[Orders By Orders:Year - No Date Specified]

Year	Orders	Payment Amount	Payment Authorized	Payment Received	Sales Tax1	Sales Tax2	Sales Tax3	Shipping Cost	OrderDetails	Quantity	COGS	Profit	Profit Margin
2008	4	960.02	0.00	25.00	54.42	0.00	0.00	225.00	9	82	229.46	426.14	66.3%
2009	26	16,742.19	0.00	145.92	405.50	0.00	0.00	5,941.57	78	94	3,483.36	6,349.89	66.2%
<b>TOTALS:</b>	<b>30</b>	<b>\$17,702.21</b>	<b>\$0.00</b>	<b>\$170.92</b>	<b>\$459.92</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$6,166.57</b>	<b>87</b>	<b>176</b>	<b>\$3,712.82</b>	<b>\$6,776.03</b>	<b>0%</b>
<b>AVERAGES:</b>	<b>15</b>	<b>\$8,851.11</b>	<b>\$0.00</b>	<b>\$85.46</b>	<b>\$229.96</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$3,083.29</b>	<b>44</b>	<b>88</b>	<b>\$1,856.41</b>	<b>\$3,388.02</b>	<b>0%</b>

Choose the first graph icon to view a bar graph, or the second to view a pie chart.

You can report on orders, order details, RMAs, products, categories and CRM tickets. You can also create a fully-customized report.

The following section details how to conduct each of the 7 report types, as well as some helpful tips.

## How to Execute Specific Reports

### Orders Reports

At Reports >> Reporting >> Create Report, select Orders from the Choose Report menu and configure the following:

**Create Report** [X]

**Choose Report** [Orders] ▼

**Based On** [Orders] ▼

**Order Status** [RMAs] ▼

**Time Period** [CategoryViews] ▼ or **From** [ ] [ ] **To** [ ] [ ]

**By** [Custom] ▼

☐ Save New Report?

[Advanced Options](#) +

**Generate**

Orders Reports	
Based on OrderDate	This option instructs the generator to create the report using the date orders were placed.
Based on ShipDate	This option instructs the generator to create the report using the date orders were shipped.
Order Status	Select one of the four available order statuses to restrict reporting to that one status only.
Time Period	Use this field to restrict the time frame used by the generator.
To / From	When your desired reporting range is not available in the Time Period field, specify start and end dates.

By

You can apply up to three filters for this report type. The order of selection affects data display within the results.

Once you've selected your options, click Generate. The report automatically displays results in the table view. Click the graph icons to review the results in graph form.

## Order Details Reports

This report type is similar to the orders report type, but provides filtering options by product code, manufacturer, or both.

## RMA Reports

You can generate RMA reports based on reporting table number, their ID number, or by the product code of the items within them. As with orders and order details, all date range functionality is included.

## Product View Reports

This report type allows you to obtain results about product detail page views to help you determine which products are most popular. Like the order details report type, this report type allows you to filter by product code, manufacturer, or both.

## Category View Reports

Similar to the product view report type, this report type allows you to determine which categories are most popular. You can filter results by the category ID number, category name, or both.

## CRM Ticket Reports

This report type allows you to pull ticket data from the CRM system table.

## Advanced Options

In addition to the basic filtering options, click Advanced Options to reveal a list of further customization variables:

**Create Report**

☐ Save New Report

**Advanced Options** -

Column Name	Color	Alignment	Axis Title	Format
Total_Replies	#0088bb	Side		Number
	#5050ff	Side		
	#ff0000	Side		
	#cccccc	Side		

Chart Title:

Bar Width:  px

Chart Height:  px

**Generate**

## Column Name

Within the first dropdown for each advanced filter, you can choose 1 of 14 values corresponding directly to specific fields within the store's database. You can choose up to 4 of these variables for each report.

## Color

For the purpose of distinguishing different sets of information displayed on the bar graph or pie chart, you can enter a standard HTML-based color value, or use the selection button to choose and assign a color to the variable assigned in the Column Name.

## Alignment

Using this field, you can specify the axis location of the filtering variable on the graph (side, top, bottom).

## Axis Title

This text field allows you to name the variable as it displays on the graph.

## Format

You can choose whether numeral-based results display in numerical or currency format.

## Additional Advanced Options

You can also title the chart and specify its height, as well as specify the width of bars on the graph.

## Custom Reports

The custom report type is the most powerful because of the range of specification it allows. All reports created by the generator are based on an SQL query. The custom report type allows fine tuning of reports, or even creation of custom SQL. To create a custom report:

- Select Custom from Choose Report menu in the generator.

### Create Report

**Choose Report**

Custom

For custom reports, you must:

- 1) Click Generate Report
- 2) Select your X-Axis Labels
- 3) Choose your Advanced Options columns
- 4) Click Generate Report.

```

SELECT (c.FirstName + ' ' + c.LastName) AS CustomerName, (SELECT COUNT(ID)) FROM CRM_TicketReplies WHERE
LastModBy = c.[CustomerId] AND Interaction_Medium = 'E' AND '8/18/2008' <= LastModified AND LastModified
<= '8/18/2009') AS Total_Replies, (SELECT SUM(Points) FROM CRM_TicketReplies WHERE LastModBy =
c.[CustomerId] AND '8/18/2008' <= LastModified AND LastModified <= '8/18/2009') AS Total_Points, (SELECT
COUNT(ID)) FROM CRM_TicketReplies WHERE LastModBy = c.[CustomerId] AND Interaction_Medium = 'P' AND
'8/18/2008' <= LastModified AND LastModified <= '8/18/2009') AS Total_Calls, (SELECT CONVERT(REAL(4),
AVG(Call_Duration)) / 60 FROM CRM_TicketReplies WHERE LastModBy = c.[CustomerId] AND Interaction_Medium =
'P' AND '8/18/2008' <= LastModified AND LastModified <= '8/18/2009') AS Avg_Call_Time FROM Customers AS c
WHERE c.AccessKey = 'A' ORDER BY CustomerName ASC

```

☐ Save New Report?

Column Name	Color	Alignment	Axis Title	Format
Total_Replies	#0088bb	Side		
	#5050ff	Side		
	#ff0000	Side		
	#cccccc	Side		

Chart Title

Bar Width

Chart

Generate

A text box will appear displaying the SQL query from the last report executed within the system.

- Click Generate.
- Click Create Report again.
- Select an option from the X-Axis Labels menu. This option will be the item reported in the horizontal axis of the graph generated.

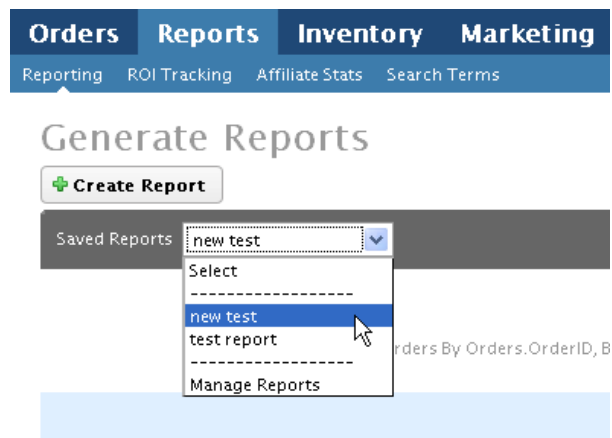
- Configure the Advanced Options for the report.
- Click Generate again.

## Bookmarking Reports

You can bookmark any report you generate for future access:

- During report generation, click Save New Report.
- Enter a custom name in the Name Save Report text field.
- Click Generate.

At the top of the Reports >> Reporting table, you'll find a Saved Reports menu, from which you can select previous report settings.



## Search Terms

Volusion's search features not only allow your customers to find what they're looking for quickly and efficiently, but they also show you what customers are trying to find and how they're trying to find it. This information is contained in a single report located at Reports >> Search Terms.

Orders	Reports	Inventory	Marketing	Customers	Design	Settings
Reporting	ROI Tracking	Affiliate Stats	Search Terms			

### Search Terms (Internal Website Search)

[Search](#) Customize | Bulk Updates | Export Results | Bookmark Results

Results 1 - 16 of 16 Page 1 of 1

Search Term	Total Searches	Most Recent Date
501	3	8/17/2009 2:37PM
601	2	7/22/2009 7:06PM
advanced	2	7/1/2009 3:42PM
asdf	2	7/1/2009 3:42PM
BM	1	3/10/2009 6:55PM
BM-Plywood	1	3/10/2009 5:53PM
building	1	3/10/2009 6:04PM
donation-1	1	8/15/2009 2:29PM
fea	1	3/10/2009 6:55PM
FEATURED3	1	3/10/2009 6:55PM
GUIDE-	1	3/10/2009 7:10PM
GUIDE-basic	1	3/10/2009 6:34PM
new	1	7/21/2009 6:31PM
testing	1	7/21/2009 6:31PM
Angle_Brush	1	8/12/2009 5:51PM
501-0002	1	8/12/2009 5:48PM

Results 1 - 16 of 16 Page 1 of 1

All terms entered by users into the Search field from the storefront are recorded in this table, along with basic statistics on their usage, such as number of searches and most recent date used.

## The Search Terms Table

The information displayed in this table is valuable because it tells you not only what visitors expect to find, but how they believe they should be able to find it. This, in turn, can teach you how to organize your content for maximum usability.

## Removing Search Terms

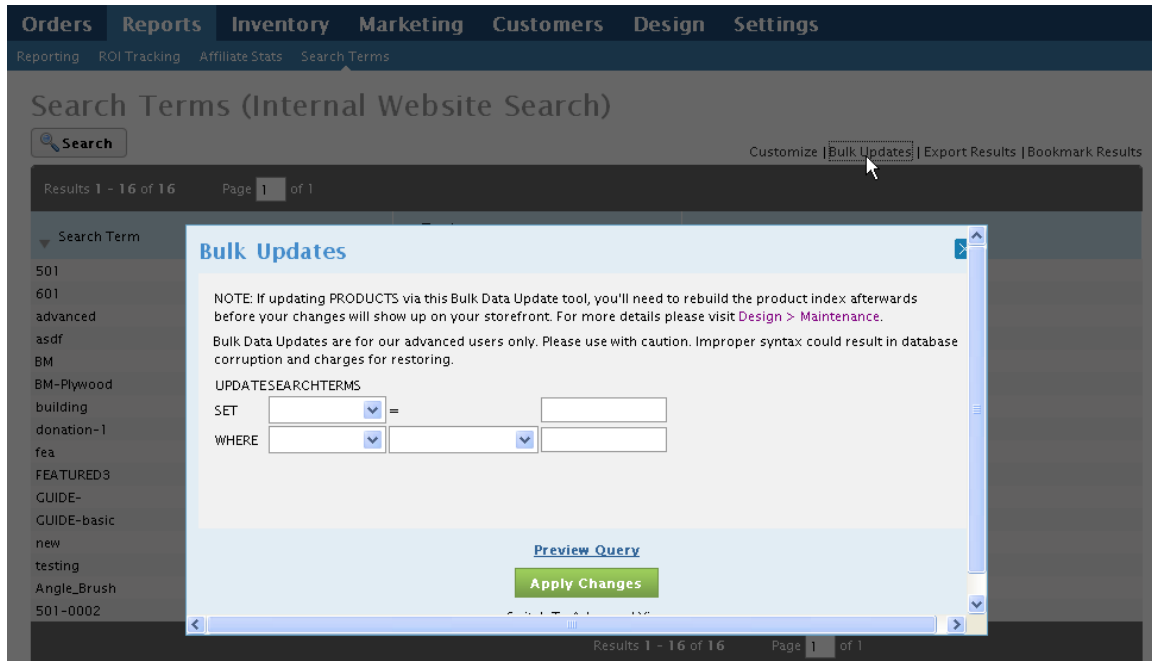
Since the search field is a simple text box that allows users to search by any terms they choose, you may find typographical errors and redundancies in the search terms table. Even automated web script "bots" can enter randomly generated terms.

Due to the nature of the feature, unfortunately you cannot prevent this from happening. You



can, however, eliminate entries you don't find useful. Using the Bulk Updates feature (above the table on the right), you can quickly prune the table as needed:

- When you choose this option, a dialog screen appears within the page.



- In the Set menu, select SearchTerm.
- In the Where menu, also select SearchTerm.
- From the menu below the “=” sign, select either Equals or Contains.
- In the field to the right of this menu, enter a word or phrase to be removed from the table.
- If you selected Equals, enter the exact term to be removed.
- If you selected Contains, enter a word or phrase common to all entries to be removed.

Orders

Reports

Inventory

Marketing

Customers

Design

Settings

ReportingROI TrackingAffiliate StatsSearch Terms

Search Terms (Internal Website Search)

Search

Customize | Bulk Updates | Export Results | Bookmark Results

Results 1 - 16 of 16Page 1 of 1

Search Term

501

601

advanced

asdf

BM

BM-Plywood

building

donation-1

fea

FEATURED3

GUIDE-

GUIDE-basic

new

testing

Angle\_Brush

501-0002

Bulk Updates

NOTE: If updating PRODUCTS via this Bulk Data Update tool, you'll need to rebuild the product index afterwards before your changes will show up on your storefront. For more details please visit [Design > Maintenance](#).

Bulk Data Updates are for our advanced users only. Please use with caution. Improper syntax could result in database corruption and charges for restoring.

UPDATESearchTerms

SETSearchTerm =

WHERESearchTerm EQUALS501-0002

Preview Query

Apply Changes

Results 1 - 16 of 16Page 1 of 1

# ROI Tracking

Volusion's ROI (return on investments) tracker provides an easy method for viewing data related to advertising campaigns, affiliates and more. In the admin area, click Marketing >> ROI Tracking.

**Orders**
**Reports**
**Inventory**
**Marketing**
**Customers**
**Design**
**Settings**

Reporting
ROI Tracking
Affiliate Stats
Search Terms

## Use ROI Tracker

This tracker allows you to closely monitor the ROI generated from all of your advertising campaigns. You can setup specific campaigns to accurately reflect referrals. To monitor all other traffic, you can view the default campaign labeled "Other". Please note that each newsletter you send out is automatically added as a new campaign.

Date Range
From 07/19/2009 To 08/18/2009

**Exclude**
☐ Free Orders

**Include**
☐ Regular Affiliates
☐ Advertising Campaigns
☐ Newsletters

**Group By**
Selected Date Range

**AffiliateID**
 (optional)

Generate Report

### ROI Tracker > All Campaigns

7/19/2009 through 8/18/2009, grouped by Past 30 Days

Affiliate Record	Customer Record	Group	Campaign	TrackingURL	Most Recent Click	Most Recent Sale	Conversion Rate	Total Clicks	Total Sales
			Other		8/18/2009	8/18/2009	200.00%	4	8
21	21		affiliate test2	http://zmnzc.mxkqw.servertrust.com/?Click=21	8/17/2009		0.00%	1	0
<b>Totals:</b>							<b>160.00%</b>	<b>5</b>	<b>8</b>

New / Inactive Campaigns... [Add](#)

Affiliate Record	Customer Record	Group	Campaign	TrackingURL	Most Recent Click	Most Recent Sale	Total Clicks	Total Sales	Conversion Rate
1	1		test name	http://zmnzc.mxkqw.servertrust.com/?Click=1			0	0	
18	18		Newsletter: Testing Newsletter -	http://zmnzc.mxkqw.servertrust.com/?Click=18			0	0	
20	20		affiliate test	http://zmnzc.mxkqw.servertrust.com/?Click=20			0	0	

This page is divided into three areas: the report generator, the results table, and the link generator. Using these tools, you can view and create reports based on any tracking URL your store has generated (for affiliates, newsletters, third party campaigns, etc.).

Information in this area is tied closely to the affiliates and newsletters portions of the Volusion system. Before proceeding, we recommend familiarizing yourself with the "Newsletters" and "Affiliates" portions of this manual.

## Understanding ROI Tracking Data

The primary portion of the ROI tracking page consists of the results table, which displays data from every affiliate or campaign registered with a tracking URL.

## ROI Tracker &gt; All Campaigns

7/19/2009 through 8/18/2009, grouped by Past 30 Days

Affiliate Record	Customer Record	Group	Campaign	TrackingURL	Most Recent Click	Most Recent Sale	Conversion Rate	Total Clicks	Total Sales
			<a href="#">Other</a>		8/18/2009	8/18/2009	200.00%	4	8
<a href="#">21</a>	<a href="#">21</a>		<a href="#">affiliate test2</a>	http://zmnzc.mxkcw.servertrust.com/?Click=21	8/17/2009		0.00%	1	0
<b>Totals:</b>							<b>160.00%</b>	<b>5</b>	<b>8</b>

New / Inactive Campaigns... [Add](#)

Affiliate Record	Customer Record	Group	Campaign	TrackingURL	Most Recent Click	Most Recent Sale	Total Clicks	Total Sales	Conversion Rate
<a href="#">1</a>	<a href="#">1</a>		<a href="#">test name</a>	http://zmnzc.mxkcw.servertrust.com/?Click=1			0	0	<a href="#">%</a>
<a href="#">18</a>	<a href="#">18</a>		<a href="#">Newsletter: Testing Newsletter -</a>	http://zmnzc.mxkcw.servertrust.com/?Click=18			0	0	<a href="#">%</a>
<a href="#">20</a>	<a href="#">20</a>		<a href="#">affiliate test</a>	http://zmnzc.mxkcw.servertrust.com/?Click=20			0	0	<a href="#">%</a>

Save

Here, you'll find the following fields:

## ROI Tracker Campaigns

Affiliate Record	Each affiliate or campaign is assigned an ID number. This number is related to the affiliate/campaign's tracking URL.
Customer Record	The ID for the customer account associated with the affiliate or campaign. This field is often identical to the Affiliate Record field. Note that campaigns automatically have a customer account and ID assigned to them. These types of accounts have no login ability, but are necessary for tracking campaign functionality.
Group	Optionally, you can apply a group label to a series of affiliates or campaigns.
Campaign	The actual campaign or affiliate name. Clicking the affiliate or campaign name will reload the ROI tracking table and display every entry in the Volusion system related to that affiliate/campaign's tracking URL.
Tracking URL	The actual tracking URL for each active affiliate/campaign. Tracking URLs are variants of the Volusion store's URL with the affiliate/campaign's unique tracking number appended. They allow the system to track visit activity for reporting on that affiliate/campaign.
Total Clicks	The total number of visits the affiliate/campaign's tracking URL has generated.

Total Sales	The total number of sales generated from visits to the store through the tracking URL. Click this total to view a table displaying information on each individual sale.
Conversion Rate	A percentage representing the ratio of click-throughs to purchases from a tracking URL.
Most Recent Click	A time stamp for the most recent visit through a particular tracking URL.
Most Recent Sale	A time stamp for the most recent purchase made during a visit through a particular tracking URL.

### Items to Note

This table is divided into two areas. The top portion contains affiliates or campaigns that have generated click-throughs or sales. The lower portion of the table, labeled New / Inactive Campaigns, lists any affiliate or campaign with a tracking URL that hasn't generated any sales or click-throughs.

Click the X icon at the end of each row to deactivate and remove the related tracking URL entry from the system. Only utilize this option if officially deactivating a campaign, as it not only prevents further data gathering through the URL, but also removes all related stored data.

## Generating ROI Reports

Sifting through the data in the ROI tracking table can be very time-consuming. If you'd like to obtain information on a specific affiliate/campaign only, or if you'd like to view simple data such as a list of tracking URLs that have generated sales in the last month, the page's report generator allows you to customize the table's content display to meet your needs.

### Use ROI Tracker

This tracker allows you to closely monitor the ROI generated from all of your advertising campaigns. You can setup specific campaigns to accurately reflect referrals. To monitor all other traffic, you can view the default campaign labeled "Other". Please note that each newsletter you send out is automatically added as a new campaign.

Date Range:  From: 07/19/2009 To: 08/18/2009

**Exclude** ☐ Free Orders  
**Include** ☐ Regular Affiliates  
☐ Advertising Campaigns  
☐ Newsletters

**Group By** Selected Date Range  
**AffiliateID**  (optional)

Generate Report

### Date Range

This menu allows you to specify a month, year, or series of days.

### From / To

These text fields allow you to refine date customizations beyond the date range selections.

### **Exclude**

Check this option to exclude all orders with a grand total of zero.

### **Include**

These series of options, when checked, allow you to include regular affiliates, advertising campaign-related affiliates, or newsletter-related affiliates in your results. You can select them individually, or in combination.

### **Group By**

This menu allows you to group report results based on the selected date range, the month, or the year.

### **Affiliate ID**

To create a report on a single campaign or affiliate, enter the affiliate ID number in this field.

Once you've configured report settings, click Generate Report. Results will display in the table once the page reloads.

## **Creating Custom Campaigns**

Aside from newsletters, registered affiliates, and third party campaigns like Google's AdWords, you can create your own custom campaigns and tracking URLs by clicking Add next to the New / Inactive Campaigns heading:

ROI Tracker > All Campaigns

7/19/2009 through 8/18/2009, grouped by Past 30 Days

Affiliate Record	Customer Record	Group	Campaign	TrackingURL	Most Recent Click	Most Recent Sale	Conversion Rate	Total Clicks	Total Sales
			<a href="#">Other</a>		8/18/2009	8/18/2009	200.00%	4	8
<a href="#">21</a>	<a href="#">21</a>		<a href="#">affiliate test2</a>	http://zmnzc.mxkcw.servertrust.com/?Click=21	8/17/2009		0.00%	1	0
<b>Totals:</b>							<b>160.00%</b>	<b>5</b>	<b>8</b>

New / Inactive Campaigns... [Add](#)

Group Title

Campaign Name

Days To Track

[Add New](#) [Cancel](#)

Affiliate Record	Customer Record	Group	Campaign	TrackingURL	Most Recent Click	Most Recent Sale	Total Clicks	Total Sales	Conversion Rate
<a href="#">1</a>	<a href="#">1</a>		<a href="#">test name</a>	http://zmnzc.mxkcw.servertrust.com/?Click=1			0	0	<a href="#">x</a>
<a href="#">18</a>	<a href="#">18</a>		<a href="#">Newsletter: Testing Newsletter -</a>	http://zmnzc.mxkcw.servertrust.com/?Click=18			0	0	<a href="#">x</a>

- In the first text box, you can define a group for the tracking URL (optional).
- In the next text box, assign a name to the tracking URL.
- In the Days to Track field, enter a number of days for the Volusion system to track this URL. By default, the field is set to 7.
- Click Add New.

When complete, the new entry will appear in the New / Inactive Campaigns section of the table.

## The “Other” Affiliate Campaign

The Other campaign type is a placeholder for any and all sales or click-throughs generated within the Volusion store that aren't assigned to a specific tracking URL. This amounts to a list of all non-affiliate related click-throughs or sales. Simply ignore this table entry when determining the overall effectiveness of campaigns or affiliates.

## ROI Tracker Direct Link Examples

At the bottom of the ROI tracking page, you'll find examples of various tracking links you can create.

ROI Tracker Link Generator

Gary text lskdfjksldfjk jsklfd ksljdf klsdfklsdjkl jskldf kjlsdfklsdfkjsdklfj skldfjkl dklfjksdjf lsd f. sdfkl sjdfkl jsdfkl sf .

**Select**  
Affiliate ID   
Product Code   
Category ID   
Search Term   
Article ID

Generate Links

**Links**  

Page	Example
Home Page	Affiliate ID was not available.
Product	Affiliate ID and Product Code were not available.
Shopping Cart	Affiliate ID and Product Code were not available.
Category	Affiliate ID and Category ID were not available.
Search	Affiliate ID and Search Term were not available.
Article	Article ID and Category ID were not available.

The default tracking URL the system generates is based store's URL. You can, however, create tracking URLs for products, categories, or articles.

## Example

An affiliate for the store, [www.yourdomain.com](http://www.yourdomain.com), uses a blog to promote a particular product offered by the store. Instead of providing this affiliate a standard tracking URL to the storefront, the merchant can provide a tracking URL to the product page.

If the affiliate's ID is 101 and the product code is 'ABC-Product,' the tracking URL would be formatted as follows:

<http://www.yourdomain.com/ProductDetails.asp?ProductCode=ABC-Product&Click=101>

When the affiliate posts this link to the blog, the Volusion system will track all click-throughs and sales as it would with a standard tracking URL.

## Items to Note

If you wish to use SEO-friendly URLs for affiliate tracking, this unfortunately cannot be done because the Volusion system requires the affiliate's original dynamic URL for tracking purposes.

## Installing Third Party JavaScripts

Many third party services you may wish to use in conjunction with your Volusion store will supply two chunks of JavaScript code for integration. One chunk often handles tracking functionality (you can place this anywhere in your template.html file, but toward the very bottom in the footer area often works best) while the other chunk is for a graphical icon, such as a click-to-chat button or a logo.

Generally, chat software requires placement of JavaScript code where you wish to display a clickable button, separate from another script. Regardless of the third party provider's



instructions, you can place all provided code in the same location.

Most stats codes can be placed in the template file right before the `</body>` tag.

Normally, ROI tracking software requires you to place a special script on the final page of the checkout process. If your tracking software requires additional variables to pull store data, here are some you can use:

- `$(CustomerID)`
- `$(OrderNo)`
- `$(SubTotal)`
- `$(ShippingCost)`
- `$(SalesTax)`
- `$(GrandTotal)`

You can use the above variables only in the OrderFinished.asp article at Design >> Site Content (article ID #130: "ROI\_Javascrpts"), as they are not ASP variables.

#### **Items to Note**

If a statistics / conversion tracking provider has supplied a JavaScript code, paste it into the body of this article.

You can find a great help article specifically on conversion tracking [here](#).



# Maintenance & Security

This portion of the manual will instruct you how to use different aspects of the Volusion system for upkeep and protection.

## Closing your Store for Maintenance

If you're operating on your domain name but aren't yet ready to open for business, or if you need to make extensive updates to your product database through an import, you may want to restrict access to your store to prevent customers from browsing and potentially placing orders. To close your store to the public:

- In the admin area, click Settings >> Maintenance.

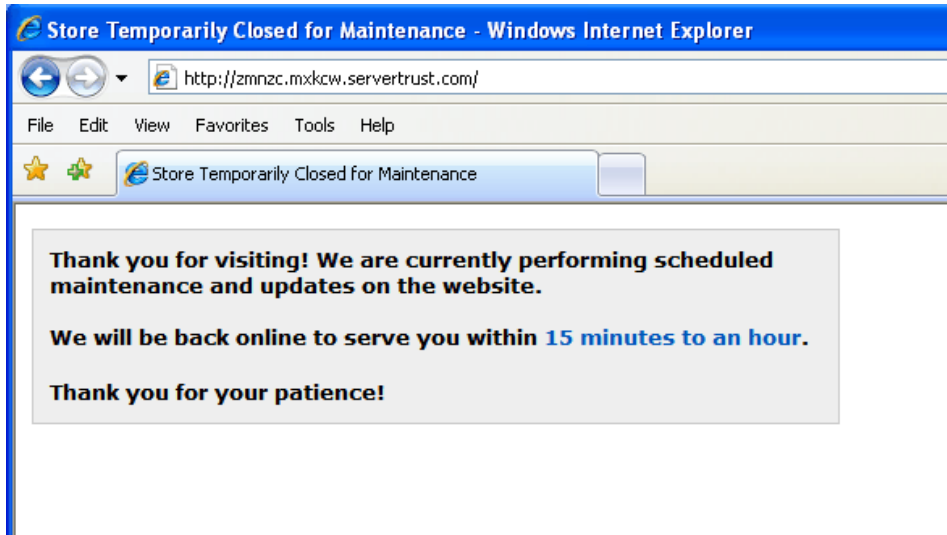
The screenshot shows the Volusion admin interface. The top navigation bar includes 'Orders', 'Reports', 'Inventory', 'Marketing', 'Customers', 'Design', and 'Settings'. Below this, a sub-menu shows 'Company', 'Shipping', 'Tax', 'Payment', 'Currency', 'IP Firewall', 'Config Variables', 'Custom Fields', and 'Maintenance'. The 'Maintenance' link is highlighted. The main content area is titled 'Manage Maintenance'. On the left, there is a 'Maintenance Toolbox' with links: 'Rebuild Product Index' (with a note 'You last indexed 862hrs ago.'), 'Rebuild Search Index', 'Reassign Inventory Control Grid', and 'Manage 301 Redirects'. Below these links is a button that says 'Close store to view more tools'. On the right, it says 'Your store is currently: OPEN' in a green box. Below this is a red link 'Close my store'. A paragraph explains that this page allows temporarily closing the store for maintenance, posting a notice to visitors, and that the store is 'temporarily closed for scheduled maintenance, please try back in 15 minutes to and hour. Thank your for your patience.' At the bottom of this section is a link 'Customize your maintenance message here.'

- Click Close my store.

This screenshot shows the same 'Manage Maintenance' page, but the store status is now 'CLOSED' in a red box. The 'Close my store' link has been replaced by a green link 'Open my store'. The rest of the interface, including the navigation bars and the Maintenance Toolbox, remains the same as in the previous screenshot.

- Click Open my store to re-open when ready.

Closing the store doesn't affect access to the admin area. While the store is closed, administrators will see a message at the top of the storefront stating that the store is currently closed to customers. Visitors to the store front, however, will be greeted with a default message stating that the site is temporarily down for maintenance and will be back online shortly.



To customize the contents of this message, click [Customize your maintenance message here](#).

## Closed-Store Options

Some options in the Maintenance Toolbox directly affect the orders database table and can only be used when the store is closed to prevent creation of new orders during usage.

### Auto-Increment Order, PO, RMA and Customer ID Numbers

Nearly every table entry in your database is assigned a unique ID number for tracking and identification. In most cases, these numbers are auto-assigned based on when the entry was created relative to other entries.

For marketing or organizational purposes, you may wish to change the starting number for some of these auto-assignments. When you close your store, you can access the Auto-Increment current OrderID numbers option. This tool offers two menus: Table and Numbers to add.

The screenshot shows the 'Settings' tab in the Volusion admin interface. Under the 'Settings' tab, there is a sub-menu 'Maintenance' which contains the 'Auto-Increment OrderID' tool. The tool's header reads 'Auto-Increment OrderID'. Below the header is a text box explaining that OrderID numbers start at #1 and can be incremented to start at a higher number (e.g., 100). It notes that once incremented, the numbers cannot be decremented and that the tool should be run before opening the store for business. Below this text is a grey box stating 'Next record created will be assigned ID: (visible after running this tool)'. There are two dropdown menus: 'Table' and 'Numbers to add'. The 'Table' dropdown is currently set to 'Orders'. The 'Numbers to add' dropdown is currently set to '1'. A green button labeled 'Add This Value' is positioned below the 'Numbers to add' dropdown.

From the Table menu, select the table for which you wish to alter the ID number of the next generated entry:

- Orders table
- Purchase Orders table
- RMA (Return Merchandise Authorization) table
- Customers table

You can add 1, 10, 100 or 1000 integers at a time to the most recently-generated ID number by selecting a value from Numbers to add and clicking Add this value. There is no effective limit to usage of this feature, but please note that you cannot decrement ID numbers.

As an example, if you have five administrative accounts and you wish to increment customer IDs to make it easier to differentiate between customer accounts and staff accounts when viewing the customers table, you might consider adding 1000 to the customers table before opening your store. Administrative accounts will remain as IDs 1-5, but when the first customer registers, ID assignments will begin at 1006. This example assumes you've created no test customer accounts.

## Remove Past Orders / Delete Sensitive Data

Closing the store also reveals the Remove past orders / delete sensitive data option.

Orders	Reports	Inventory	Marketing	Customers	Design	Settings		
Company	Shipping	Tax	Payment	Currency	IP Firewall	Config Variables	Custom Fields	Maintenance

## CleanSweep System Maintenance

You may use this page to delete past data that is stored in your system. This page is only intended for merchants who **do not** use the Volusion order processing system, and instead export all data on a daily basis, therefore keeping data in Volusion is not necessary in this case.

**NOTE: Data will be permanently erased by using this page.**

Remove

☐ Orders  
☐ Customers  
☐ Stored Payment Information  
☐ Stored Billing Addresses  
☐ Stored Shipping Addresses  
☐ Customer Accounts w/ Invalid Email Addresses

"Last Modified" on or before:

08/04/2009

MM/DD/YYYY

Delete All Data Now

Since it allows you to delete vital data from the database, we recommend refraining from usage unless absolutely necessary. The tool was designed for the following cases:

- To purge a large amount of test data before opening for business.
- For merchants who export all order data for processing into a thirty party system.

To use the tool:

- Under the Remove header, select the table you'd like to clear:
- Orders
- Customers
- Stored Payment Information
- Stored Billing Information
- Stored Shipping Addresses
- Customer Accounts w/ Invalid Email Addresses
- Optionally, you can use the Last Modified on or before option to delete records selectively.
- Click Delete All Data Now.

### Items to Note

Volusion does not take responsibility for data loss through misuse of this maintenance tool.

## **Rebuild Product Index**

After importing product data or making extensive updates to your products table, you may encounter some irregularities in product display (e.g. product photos not loading properly, general slowness in loading products pages in your web browser, etc.). Such issues usually occur because your store's product database index needs to be rebuilt.

The system uses an index to quickly find entries in your store's products table for display on the storefront or in the admin area. When making dramatic changes to the table, the index can become disordered. Rebuilding it re-orders the entries properly. You should perform this step after every import to the table, and after extensive changes through normal admin functions. Simply click Rebuild Product Index at Settings >> Maintenance (under the Maintenance Toolbox heading).

### **Items to Note**

Rebuilding the index can take as little as a few seconds and as long as several minutes, depending on the number of entries in the table. During this procedure, the storefront will be inaccessible.

## **Rebuild Search Index**

You may occasionally encounter a situation in which recently-added product categories don't display correctly on your storefront. The cause of this issue is similar to the cause of product display errors described above.

To re-order the index for the categories table, click Rebuild Search Index at Settings >> Maintenance (under the Maintenance Toolbox heading). As with the products table, you should rebuild the search index after performing an import to the categories table.

The length of this procedure also varies based on the size of your categories table. When complete, you'll arrive at Inventory >> Categories, where "Re-index Completed Successfully" displays at the top.

## **Reassigning Inventory Control Grid Order**

If you're unfamiliar with Volusion's inventory control grid and Smartmatch functions, please review the "Inventory Control Grid" portion of this manual's "Product Configuration Guide."

The Reassign Inventory Control Grid function allows you to better manage your variant (“child”) products created with the Smartmatch system by allowing you to reorganize the product listing order.

- In the admin area, click Settings >> Maintenance.
- Click Reassign Inventory Control Grid (under the Maintenance Toolbox heading).

**Orders Reports Inventory Marketing Customers Design Settings**

Company Shipping Tax Payment Currency IP Firewall Config Variables Custom Fields Maintenance

### Reassign Inventory Control Grid

☐ **Create All Inventory Control Grids**

**Create All Inventory Control Grids**  
This goes through every product in your database that has the field "EnableOptions\_InventoryControl" set to "Y" and makes sure each of these products has the grid created. This is useful if you do a bulk data import.  
**WARNING: This is extremely resource intensive and could take a very long time to run, which will make your store run very slow until it's finished. Only run this if absolutely necessary.**

☐ **Re-assign OrderBy for all Inventory Control Grids**

**Reassign Inventory Control Grid Order By**  
This allows you to reassign the order to all inventory control grids. This is useful if you've already generated lots of inventory control grids, and later change the "ArrangeOptionsBy" field of your options, or any other order of your Options or OptionCategories. If you only need to re-generate the inventory control grid for a single product, simply go edit the product directly and click the "Save Changes" button, which will always re-generate the inventory control grid automatically behind the scenes.

**Perform Maintenance Now**

- Check one or both of the options on the following page and click Perform Maintenance Now.

The first option, Create All Inventory Control Grids, instructs the system to locate all products with the inventory control grid option enabled and create the related grids. Note that this operation can be very resource-intensive and can cause a temporary drop in system performance.

The second option, Re-assign OrderBy for all Inventory Control Grids, re-orders all variant products created through use of the inventory control grid. This changes the order of product attribute display on the storefront for all such products.

Note that normal display order alteration is managed through the ArrangeOptionsBy field in each attribute (“product option”) record (see the “Products” portion of this manual for more details). In some cases, especially when performing product imports, products won’t properly update if the attribute order has been changed. This maintenance option effectively corrects this problem.



## Managing 301 Redirects

For those new to the concept, URL redirection allows one URL entry to automatically load another. Winter '09 supports one of the most-used URL redirection methods on the Internet: 301 redirects. This type of redirect is used when the location of a website has permanently moved to a new URL. Many webmasters and HTML programmers find it necessary to use this method when making updates or fully migrating websites.

- In the admin area, click Settings >> Maintenance.
- Click Manage 301 Redirects (under the Maintenance Toolbox heading).

OrdersReportsInventoryMarketingCustomersDesignSettings

CompanyShippingTaxPaymentCurrencyIP FirewallConfig VariablesCustom FieldsMaintenance

### 301 Redirect Manager

Enter the path of the non-existent page in the Source Path, and the page that you wish to redirect to in the target path. Ending a path with */\** will add a catch all for that directory. **Note:** This tool only works if the source path does not exist. If there are duplicates in the source path, only the last entry will be used.

#### Redirect Manager

Source Path	Target Path	Delete
<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="checkbox"/>

☐ Redirect .aspx pages to default.asp

Save

When importing XML, only the first 5000 redirects will be read. If you have more than 5000 redirects, then it will need to be uploaded in parts.

☐ Replace All Redirects

[Download the current xml file.](#)

- Upload a standard XML file of 301 redirects using the Browse and Upload buttons. Note that you can download the current list of 301 redirects within the Redirect Manager table by clicking Download the current XML file nearby. Once you've downloaded this file, you can edit it and upload it to your store's 301 redirect table.
- Click Save.

## Using the Redirect Manager

You can also enter 301 redirects line-by-line using text fields provided. Each entry offers 3 values:

### IP Address Security Rules

Source Path	This is where the original file or files were located. Note that only the path and file(s) that follow the domain name in the URL should be entered here.
Target Path	This is the destination for all requests for the file(s) listed in the Source Path field. Again, this generally will be the URL location without the domain name.
Delete	Checking this option and clicking Save at the bottom deletes the entry from the table.

### Items to Note

One last option, Redirect .aspx pages to default.asp, is available here. Checking it enables redirection from errors such as 404 (page not found) on custom ASP pages to the store's default.asp page (storefront).

## Redirecting to Your Store after Migrating to Volusion

If you've decided to migrate your existing ecommerce solution to Volusion, note that Volusion's file and directory structure won't be identical to that of your previous provider. If you've spent a great deal of time with that provider, there may be custom files, images, product links, etc. that have been indexed by search engines, blogged about by customers, and referenced by affiliates. Without redirecting visits to these items to the new location, the traffic will be lost.

Volusion's 301 redirect management page allows you to set up redirects to automatically forward visitors, customers, even search engine links to specific locations within your Volusion store.

### Example

You're a clothing retailer who provides a custom size chart to customers via a PDF file. This file was located within the previous provider's root directory at a different location than in the Volusion directory. If you want to ensure that any visitor or search engine referencing the file's previous link can still find it at its new location, perform the following steps:

- In the admin area, click Settings >> Maintenance.
- Click Manage 301 Redirects (under the Maintenance Toolbox heading).
- In Source Path, enter the original file location (in this case, /size\_chart.pdf).
- In Target Path, enter the new file location (in this case, /v/vspfiles/sizechart.pdf).
- Click Save.

### **Items to Note**

301 redirects will only function when there is no active file at the location provided in the Source Path field. If there is an active file here, the target path will be ignored in favor of the actual file at the source path location.

## **Using Wild Cards with 301 Redirects**

When setting up 301 redirects, some merchants need to redirect inbound visitors from an entire series of files to new locations. In Winter '09, it's not necessary to create a redirect for each file; you can simply use the wildcard character.

For example, if you need to redirect inbound links to hundreds of custom images on the previous site to the same images now hosted by Volusion, use the following method:

- In the admin area, click Settings >> Maintenance.
- Click Manage 301 Redirects (under the Maintenance Toolbox heading).
- In Source Path, enter the directory of the images' previous location, followed by the wildcard character (e.g. /images/.\*).
- In Target Path, enter the location of the directory currently containing the images, followed by the wildcard character (e.g. /v/vspfiles/images/.\*)
- Click Save.

### Items to Note

In V5, all sub-domain redirects were 302 redirects. In Winter '09, all sub-domain redirects are 301, which is generally better for SEO purposes.

## Managing Security with the IP Firewall

Conducting business online unfortunately exposes you to encounters with unsavory individuals. Volusion reduces the risks presented by these individuals dramatically by providing a secure, stable hosting platform. Additionally, Volusion provides a tool to further fine-tune store security: the IP firewall.

This tool allows you to restrict store visitor-specific access to both the storefront and admin area. You can also configure the system to allow a maximum number of transactions per visitor to protect against security breaches that typically require numerous transaction attempts. This portion of the manual details use of this tool, as well as some scenarios that may warrant its use.

### Creating an IP Security Rule

To create an IP security rule:

- In the admin area, click Settings >> IP Firewall.

Update Security Rules

Search Add Settings

Customize | Bulk Updates | Export Results | Bookmark Results

IP Rule	Beginning IP Range	End IP Range	Allow or Block	Admin Area Only	Last Modified	Delete
1	0.0.0.0	0.0.0.1	Block	N	1/8/2009 10:48AM	<input type="checkbox"/>
2	0.0.0.2	0.0.0.3	Block	Y	1/8/2009 10:49AM	<input type="checkbox"/>

Results 1 - 2 of 2 Page 1 of 1

- Click Add.

The IP security rules settings are as follow:

IP Address Security Rules	
IP_Range_Begin *	Here, enter the IP address or the beginning of the range of addresses for which you wish to block or allow access.
IP_Range_End	When defining a range of IP addresses, enter the last address in the series. When blocking or allowing access for a single address, leave this field blank.
Allow_or_Block *	This menu allows you to choose whether to allow or block access to the IP address or address range defined in the settings above.
Applies to Admin Area Only	This option allows you to apply the rule only to the admin area (access to the storefront for the address or range of addresses will not be affected).

\*Required fields.

### Items to Note

By default, any IP security rule you create will not be active unless you enable the `Enable_IP_Address_Security_Rules_On_Frontend` setting at Settings >> IP Firewall >> Settings (see below for details).

## Additional IP Security Rules Settings

At Settings >> IP Firewall >> Settings, you'll find the following options:

## Block\_All\_IP\_Addresses\_To\_Admin

Enabling this option blocks all incoming traffic to the admin area. Visitors attempting to log in will receive an “Access Denied” message. This setting applies to all traffic except IP addresses and ranges specifically allowed by entries in the Settings >> IP Firewall table.

### Items to Note

When using this setting, it is very important to first set up a valid security rule allowing store access for any and all IP addresses/ranges you use to access the admin area. Failure to do so will block your own access..

## Enable\_IP\_Address\_Security\_Rules\_On\_Frontend

By default, all rules established in the Settings >> IP Firewall table aren't active unless this option is enabled. Conversely, disabling this option disables all established IP security rules.

## Max\_Orders\_Per\_Day\_Per\_IP

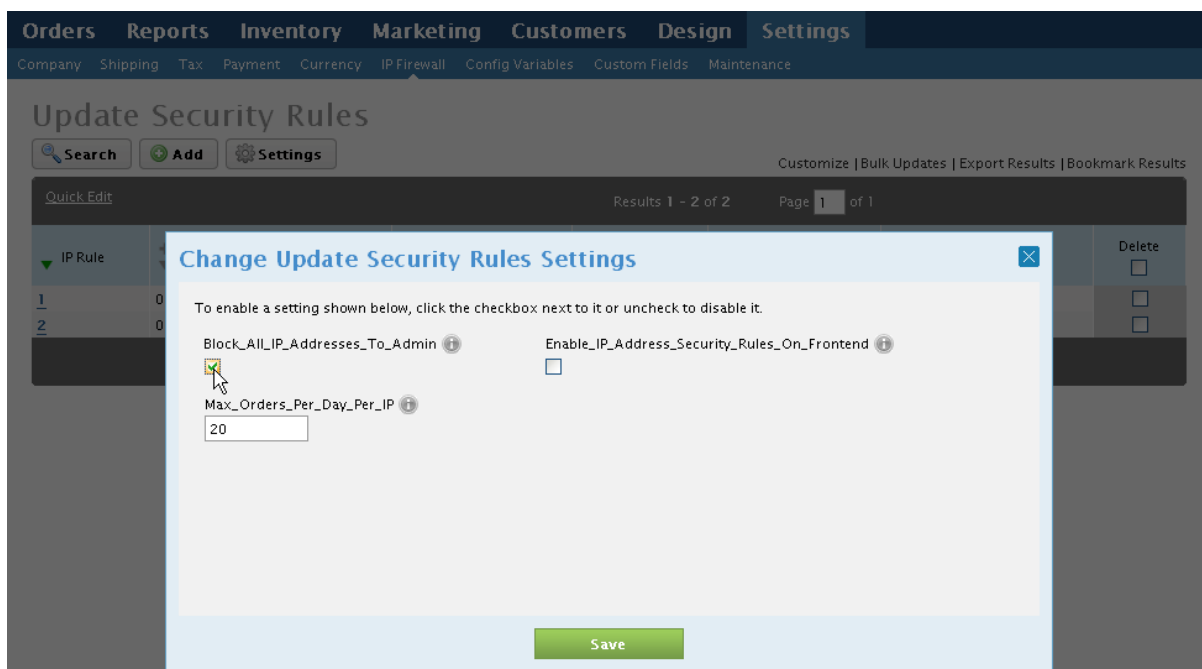
This field allows you to set a maximum number of orders placed from an individual IP address in a 24-hour period. By default, this value is set to 20. The purpose of this feature is to prevent credit/debit card data thieves from attempting a series of fraudulent orders to test the validity of stolen credit/debit card numbers. Such individuals usually place orders until they complete a successful transaction, which signifies that a particular credit/debit card number can be used for any desired purchase. This setting enables you to block store access for 24 hours after reaching the maximum threshold of failed order attempts allowed. The smaller the number specified here, the stronger your protection against this practice. Note, however, that it does not guarantee against the testing of stolen credit cards and generation of fraudulent orders, even if set to “1,” since a thief can potentially enter a valid credit card on the first attempt.

## Securing the Admin Area

If you find yourself in a situation where the security of your admin area's login information has been compromised, you can always change your passwords and purge extra administrative accounts (besides the super admin). The IP Firewall, however, can strengthen your store security:

- In the admin area, click Settings >> IP Firewall >> Add. Note that the IP address through which your local computer system is connecting to Volusion displays above the Details heading.
- If your work station uses a static IP address that doesn't change, you only need to know this single IP address. If your work station uses a dynamic IP (a range of addresses through which sessions alternate), you'll need to know the entire range.

- If you use multiple work stations (e.g. a home computer or laptop), you'll need to know their IPs/ranges as well.
- Set the IP or IP range within the IP\_Range\_Begin/\_End fields as needed.
- Set Allow\_Or\_Block to Allow.
- Click Save.
- Click Settings >> IP Firewall >> Settings.
- Check Block\_All\_IP\_Addresses\_To\_Admin and click Save.



Now, only the addresses/ranges you've specifically allowed will be able to access the admin area.

### Items to Note

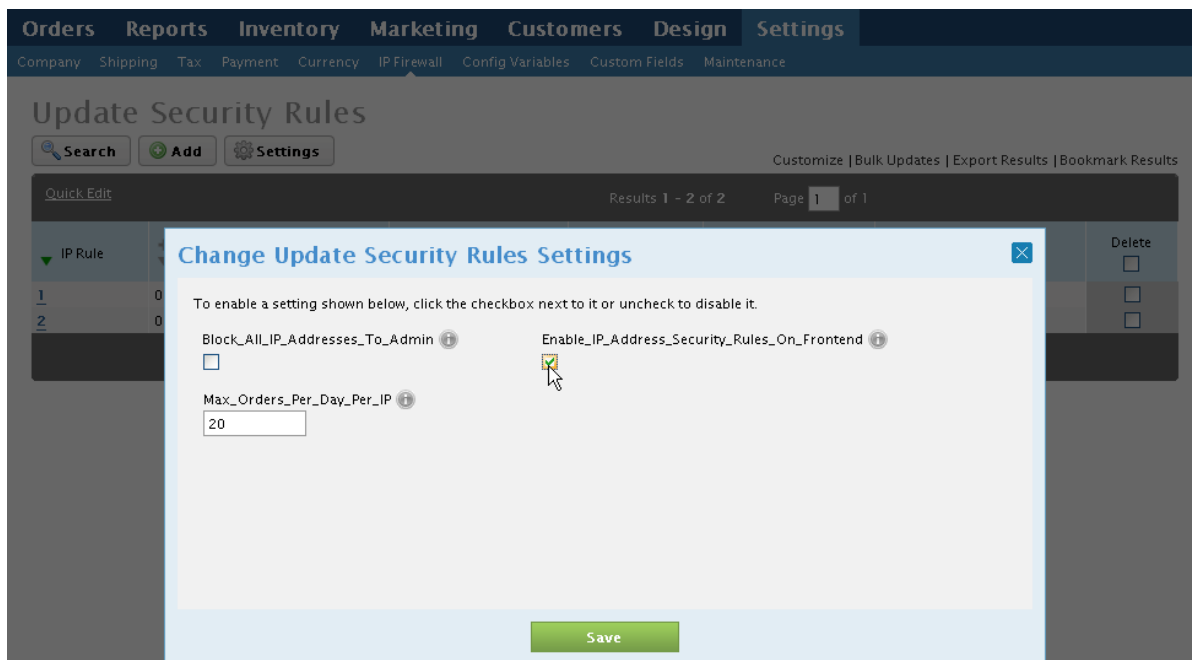
When using this type of security configuration, Volusion Technical Support will be unable to access your admin area for troubleshooting purposes.

## Restricting Access to Your Storefront

Some scenarios may require you to block storefront access to a problem customer or to a thief using your store to commit credit card fraud. In the same manner that you connect to your admin area from a single IP address or IP range, each customer generally connects to your store through a specific IP address or IP range. The Volusion system tracks this information in the order details pages (near the top, above the customer ID number), in the admin history log, and in the abandoned cart feature.

Once you've obtained an address or range you'd like to block:

- In the admin area, click Settings >> IP Firewall >> Add.
- Set the IP or IP range within the IP\_Range\_Begin/\_End fields as needed.
- Set Allow\_Or\_Block to Block.
- Click Save.
- Click Settings >> IP Firewall >> Settings.
- Make sure Enable\_IP\_Address\_Security\_Rules\_On\_The\_Frontend is checked. If not, check it and click Save.





## Items to Note

Blocking an IP address or range used by an individual doesn't guarantee that the individual is unable to access your storefront through another previously-unused IP address or range.

Certain countries or regions of the globe known for a high incidence of credit card fraud can sometimes be blocked through use of large IP ranges.

## Granting Storefront Access to Blocked Customers

If you've blocked an IP range (such as 12.345.67 – 12.345.67.89) to deny access to a problem customer and later realize you've blocked another legitimate customer who has placed several orders from an IP address that falls within the range (such as 12.345.67.50), you can simply create an additional security rule (using the procedure outlined above) that allows the legitimate customer's address while maintaining the rule that blocks the range used by the problem customer.

## Tracking Admin History

At Customers >> Admin History, you can find reporting on all store and admin area activity. This information can be useful in resolving security issues.

The screenshot shows the Volusion Admin History page. At the top is a navigation bar with tabs: Orders, Reports, Inventory, Marketing, Customers, Design, and Settings. Below this is a sub-navigation bar with links: CRM System, Accounts, Customer Reviews, Administrators, Admin History (highlighted), and Knowledge Base. The main heading is "View Admin Access" with a note: "This page helps you ensure your administration area is being used by authorized personnel only." There are two tables displayed.

**All Users Past 7 Days**

IP Address	Admin Email	Date/Time
[REDACTED]	test1@example.com	8/18/2009 5:24PM, today
[REDACTED]	[REDACTED]	8/18/2009 2:37PM, today
[REDACTED]	[REDACTED]	8/17/2009 4:27PM, yesterday
[REDACTED]	myrewards@volusion.com	8/13/2009 11:12AM, 5 days ago
[REDACTED]	test3@example.com	8/12/2009 5:40PM, 6 days ago
[REDACTED]	test4@example.com	8/12/2009 3:21PM, 6 days ago

**Most Recent 1000 hits – Past 7 Days**

IP Address	Admin Email	Date/Time	Pages Viewed
[REDACTED]	test1@example.com	8/18/2009 5:24PM	/admin/AccessManager.asp
[REDACTED]	test1@example.com	8/18/2009 5:16PM	/admin/TableView.asp?table=IP_Address_Security_Rules
[REDACTED]	test1@example.com	8/18/2009 5:12PM	/admin/AdminDetails_Generic.asp?Table=IP_Address_Security_Rules&ID=&SafeMode=ADD
[REDACTED]	test1@example.com	8/18/2009 5:09PM	/admin/TableView.asp?table=IP_Address_Security_Rules
[REDACTED]	test1@example.com	8/18/2009 5:03PM	/admin/RedirectManager.asp
[REDACTED]	test1@example.com	8/18/2009 5:02PM	/admin/Upgrade_Maintenance.asp
[REDACTED]	test1@example.com	8/18/2009 5:01PM	/admin/Maintenance_ReassignKitOrderBy.asp
[REDACTED]	test1@example.com	8/18/2009 4:56PM	/admin/Upgrade_Maintenance.asp

This page contains two tables: one for general access and one for admin access. Note that it provides only information (without settings or controls).

## All Users Past 7 Days

This table (at the top of the page) displays all unique users who've logged in to the Volusion store during the course of the last 7 days, including all customers, affiliates and administrators (includes admin area activity for administrators). It contains the following fields:

Access History	
IP Address	The unique IP address through which the user connected to the store. This string of numbers represents a location on the Internet from which the user's connection originated. Click it to view its entry at the popular whois.net website (an address data directory containing additional information about the location and condition of the IP address).
Admin Email	The user's account email address for store login. If this field is blank, it signifies an anonymous user or a user whose account has been deleted from the customers table. Click this address to view the account entry in the customers table.
Date/Time	The date and time the user logged in.
Pages Viewed	Available only in the Most Recent 1000 hits table, this column lists the pages within the Volusion admin accessed by the user.
ProductDescription	This field stores a basic product description and any html or image links you wish to display.
Category	This dropdown allows you to assign the product to a category or subcategory.

## Most Recent 1,000 Hits

The second table on this page contains a list of the last 1000 instances of access granted to the admin area over the course of the last 7 days. The data in this table is identical to that of the All Users Past 7 Days table, with the exception of the additional Pages Viewed field (described above).

Note that unlike the previous table, only administrator activity is reported here. Note also that the table only reports the portions of the admin area accessed by administrators, not the commands executed at those locations.



## **Third Party Integrations**

One of the many strengths of the Volusion ecommerce system is its ability to connect with other services and systems to extend your store's capabilities and logistical reach.

The following portion of the manual explains how you can use some of Volusion's integration features to connect with popular logistics software and services to take your store to the next level.

# Quickbooks Integration

## QuickBooks

Winter '09 allows you to use Intuit's QuickBooks software to manage order, product, and customer information in the QuickBooks interface.

### Choosing Your Integration Method

Volusion offers two methods of integration with QuickBooks: through IIF file export, and through Intuit's Web Connector software. Each method has its own set of benefits and configuration requirements. These factors should be weighed when choosing a method (you can find a comparison chart at [http://store.volusion.com/kb\\_results.asp?ID=323](http://store.volusion.com/kb_results.asp?ID=323)):

IIF File Export Integration	
Pros	Cons
Available for any Volusion store.	Doesn't fully import order or customer information into QuickBooks.
No usage limits.	Product information cannot be edited once imported.
Allows importing of orders, products and customers to QuickBooks.	Gift certificate and discount information is not reported properly.
Allows re-use of one QuickBooks account in mapping.	Import method requires manual action.
	Cannot send orders as invoices.

Export includes all customers and products, regardless of activity.
Doesn't track "Cost of Goods Sold."
Doesn't allow specification of separate item accounts for products.
Imports only the description of the first product in multi-product orders.
QuickBooks's Memo field contains product name of the first item on an order.

QuickBooks Web Connector Integration	
Pros	Cons
Offers automated data transfer from Volusion to QuickBooks.	Requires a Volusion Gold plan or above.
Imports order and customer information fully and accurately.	Connector can only be accessed 12 times per 24 hours.
Fully reports gift certificates and discounts.	Application only supported with Microsoft Windows.

Once imported, products can be edited in QuickBooks.	Requires installation of a valid SSL certificate.
Allows importing of orders as invoices or sales receipts.	Doesn't support the use of sub-accounts.
Allows importing of only active customer and product records.	Imports tax as an item.
Allows specification of separate item accounts for products.	Doesn't allow importing of negative totals (credits must be manually entered into QuickBooks).
Tracks "Cost of Goods Sold."	

## Setting up QuickBooks Mapping

Before you can use either of the QuickBooks integration methods, you must configure your QuickBooks mapping, which allows QuickBooks to properly read Volusion data and import it into the correct fields.

To configure mapping for IIF Export:

- In the admin area, click Inventory >> Import / Export.

Orders Reports **Inventory** Marketing Customers Design Settings

Categories Products Options Import / Export Vendors Purchase Orders Receiving Product Key Distribution Warehouses

## Import / Export Data

View:

### Standard Import / Export

**Data Import** Import data in bulk from an Excel Spreadsheet or CSV (comma delimited) text file.

**Data Export** Export data to an Excel Spreadsheet or CSV (comma delimited) text file.

### Other Import / Export Features

**QuickBooks Export** Export data to Quickbooks format.  
[Click here to configure QuickBooks mapping](#)

**Yahoo! Store Import** Import your Yahoo! Store products

**Volusion API** Import / Export your data in XML format.

- Choose Click here to configure QuickBooks mapping next to the QuickBooks Export button.

Orders Reports Inventory Marketing Customers Design **Settings**

Company Shipping Tax Payment Currency IP Firewall Config Variables Custom Fields Maintenance

## Configuration : QuickBooks

Search

Customize | Bulk Updates | Export Results | Bookmark Results

Quick Edit View:  Results 1 - 16 of 16 Page 1 of 1

Name	Value	Last Modified
<a href="#">Config_QuickBooks_Include_Shipped_Orders_Only</a>	<input checked="" type="checkbox"/>	2/10/2006
<a href="#">Config_QuickBooks_Include_with_Orders_Customer_Info</a>	<input checked="" type="checkbox"/>	2/10/2006
<a href="#">Config_QuickBooks_Include_with_Orders_Product_Info</a>	<input checked="" type="checkbox"/>	2/10/2006
<a href="#">Config_QuickBooks_Map_ITEM_ACCNT</a>	<input type="text" value="Volusion Income Account"/>	2/10/2006
<a href="#">Config_QuickBooks_Map_ITEM_ASSETACCNT</a>	<input type="text" value="Volusion Asset Account"/>	2/10/2006
<a href="#">Config_QuickBooks_Map_ITEM_COGSACCNT</a>	<input type="text" value="Volusion COGS Account"/>	2/10/2006
<a href="#">Config_QuickBooks_Map_SPL_ACCNT</a>	<input type="text" value="Volusion Bank Account"/>	2/10/2006
<a href="#">Config_QuickBooks_Map_SPL_NAME</a>	<input type="text" value="Volusion Shipping Charges"/>	2/10/2006
<a href="#">Config_QuickBooks_Map_SPL_Shipping_ACCNT</a>	<input type="text" value="Volusion Shipping Charges"/>	2/10/2006
<a href="#">Config_QuickBooks_Map_SPL_Shipping_INVITEM</a>	<input type="text" value="Volusion Shipping Charges"/>	2/10/2006
<a href="#">Config_QuickBooks_Map_SPL_Tax_ACCT</a>	<input type="text" value="Volusion Sales Tax Payable"/>	2/10/2006
<a href="#">Config_QuickBooks_Map_SPL_Tax_INVITEM</a>	<input type="text" value="Volusion Sales Tax Item"/>	2/10/2006
<a href="#">Config_QuickBooks_Map_SPL_Tax_NAME</a>	<input type="text" value="Volusion Sales Tax Vendor"/>	2/10/2006
<a href="#">Config_QuickBooks_Map_TRNSTYPE</a>	<input type="text" value="CASH SALE"/>	2/10/2006
<a href="#">Config_QuickBooks_Order_Date_Beg_Blank_For_All</a>	<input type="text" value="1/1/2000"/>	2/10/2006
<a href="#">Config_QuickBooks_Order_Date_End_Blank_For_All</a>	<input type="text"/>	2/10/2006

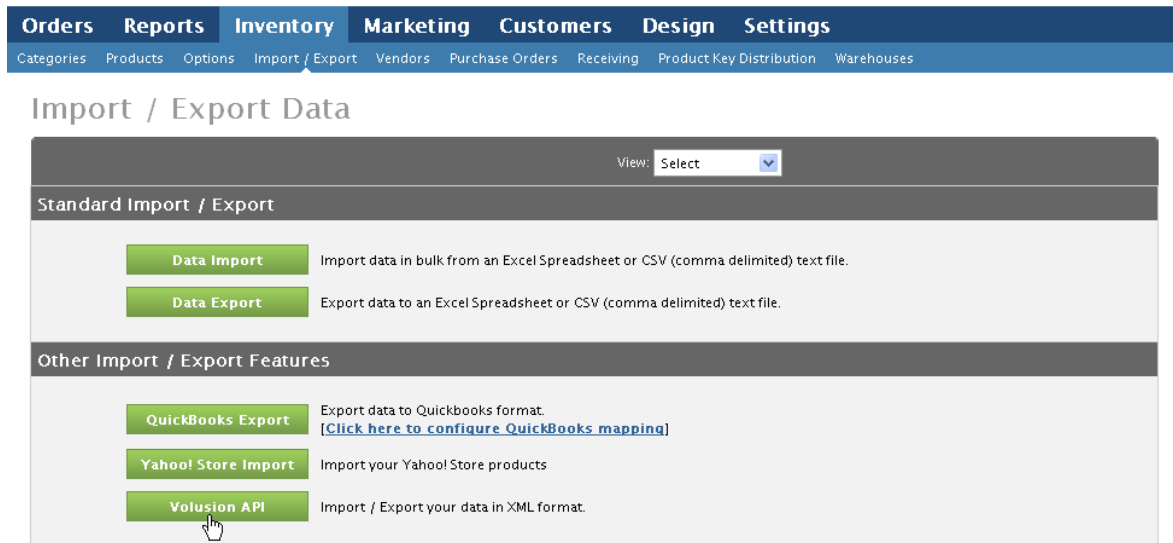
For full details on each value in both QuickBooks Mapping tables, see this manual's "QuickBooks Mapping Table Settings" appendix entry.



Once you've configured the mapping variables for your chosen QuickBooks integration method, click the Save.

To configure mapping for the Web Connector:

- In the admin area, click Inventory >> Import / Export.



- Click Volusion API.
- If this is your first use, click Enable.
- If you've already enabled the WebConnector, click Here next to "Manage QuickBooks Web Connector" under the Accounting heading.

Orders	Reports	Inventory	Marketing	Customers	Design	Settings		
Categories	Products	Options	Import / Export	Vendors	Purchase Orders	Receiving	Product Key Distribution	Warehouses

### Volusion API

☐ Enable public XML for Featured Products. Generated once a day. [Save](#) [Reset](#)

☐ Enable public XML for All Products. Generated once a day. [Save](#) [Reset](#)

### Accounting

Quickbooks [Manage QuickBooks Web Connector HERE](#)

### Generic

Generic	Google Base Integration
<a href="#">Run</a> Generic\Orders	Generic Orders
<a href="#">Run</a> Generic\Products	Generic Products
<a href="#">Run</a> Generic\Customers	Generic Customers

### Order Management

StoneEdge [Enable](#)

### Shipping

Shipping [Enable](#)

- On the following page, choose Click Here next to “To make changes to Config Variables such as Account names.”

Orders	Reports	Inventory	Marketing	Customers	Design	Settings		
Categories	Products	Options	Import / Export	Vendors	Purchase Orders	Receiving	Product Key Distribution	Warehouses

### QuickBooks Web Connector

■ A SSL is required to run QuickBooks Web Connector.

Choose which admin to use with your QWC file:  [Create](#)

To make changes to Config Variables such as Account names [Click Here](#)

Download the QuickBooks Web Connector Version 2.0 [Here](#)

---

☐ Send received xml as emails. Use semicolons to separate email addresses.  
*(Do not use without explicit permission from Kam!)*

[Save](#)

You should arrive at this page:

Orders Reports Inventory Marketing Customers Design **Settings**

Company Shipping Tax Payment Currency IP Firewall Config Variables Custom Fields Maintenance

## Configuration : QuickBooks

Search

Customize | Bulk Updates | Export Results | Bookmark Results

Quick Edit View Web Connector Results 1 - 17 of 17 Page 1 of 1

Name	Value	Last Modified
<a href="#">Config_QuickBooks_Map_ITEM_ACCNT</a>	Volusion Income Account	2/10/2006
<a href="#">Config_QuickBooks_Map_ITEM_ASSETACCNT</a>	Volusion Asset Account	2/10/2006
<a href="#">Config_QuickBooks_Map_ITEM_COGSACCNT</a>	Volusion COGS Account	2/10/2006
<a href="#">Config_QuickBooks_Map_SPL_ACCNT</a>	Volusion Bank Account	2/10/2006
<a href="#">Config_QuickBooks_Map_SPL_NAME</a>	Volusion Shipping Charges	2/10/2006
<a href="#">Config_QuickBooks_Map_SPL-Shipping_ACCNT</a>	Volusion Shipping Charges	2/10/2006
<a href="#">Config_QuickBooks_Map_SPL_Tax_ACCT</a>	Volusion Sales Tax Payable	2/10/2006
<a href="#">Config_QuickBooks_Map_SPL_Tax_INVITEM</a>	Volusion Sales Tax Item	2/10/2006
<a href="#">Config_QuickBooks_Map_SPL_Tax_NAME</a>	Volusion Sales Tax Vendor	2/10/2006
<a href="#">Config_QuickBooks_Order_Date_Beg_Blank_For_All</a>	1/1/2000	2/10/2006
<a href="#">Config_QuickBooks_QBWC_Discount_Account</a>	Volusion Advertising Acct	7/13/2007 3:44PM
<a href="#">Config_QuickBooks_QBWC_Discount_Item_Name</a>	Discount	7/13/2007 3:44PM
<a href="#">Config_QuickBooks_QBWC_Gift_Cert_Account</a>	Gift Certificate Account	7/13/2007 3:44PM
<a href="#">Config_QuickBooks_QBWC_Gift_Cert_Item_Name</a>	Gift Certificate	7/13/2007 3:44PM
<a href="#">Config_QuickBooks_QBWC_Only_Send_Customers_With_Orders</a>	<input type="checkbox"/>	7/13/2007 3:44PM
<a href="#">Config_QuickBooks_QBWC_Only_Send_Products_Which_Were_Ordered</a>	<input type="checkbox"/>	7/13/2007 3:44PM

For full details on each value in both QuickBooks Mapping tables, see this manual's "QuickBooks Mapping Table Settings" appendix entry.

## QuickBooks IIF Integration

This integration allows you to export Volusion store data in an IIF file (QuickBooks's proprietary file format) and import that file into QuickBooks. The following section details generation and use of this file.

### Accessing the IIF File Export Page

You can access Volusion's IIF file export functions as follows:

- In the admin area, click Inventory >> Import / Export.
- Click QuickBooks Export.

**QuickBooks Export**

[Read Quick Start Guide](#)

**Configure** [Set Up](#)

**Export All Customers** [Export](#)

**Export All Products** [Export](#)

**Export Orders**

**Earliest Order Date:**

**Latest Order Date:**

**Only Import Order Number:**

☒ Only Include Shipped Orders

☒ Include Customer Information

☒ Include Product Information

[Export Orders](#)

**Reset Export Status**

**Warning:** Using this feature could result in duplicate Invoices in QuickBooks.

QuickBooks only allows updates on customers and products; it does not allow updates on invoices; it will create duplicate invoices. This feature should only be used to recreate an export that has not already been successfully imported into QuickBooks

[Reset](#)

**New QuickBooks Export User?**

We recommend that the following sample QuickBooks DataBase be used to test the Volusion QuickBooks Export:

Download [Volusion Export Test Company for QuickBooks 2003.QBB](#)

## Testing the IIF File

Before generating your IIF file, we recommend testing it on Volusion's sample QuickBooks database to ensure functionality:

- At Inventory >> Import / Export >> QuickBooks Export, choose Click Here to Download Volusion\_Export\_test\_company\_for\_Quickbooks\_2003.QBB.
- Save this database to a local computer work station and open it in QuickBooks.
- In the Volusion QuickBooks export page, click Export All Customers or Export All Products (with the default settings).
- Once the export is generated, choose the Click here to download option in the message.
- Open this file in QuickBooks and import it to the sample database obtained from Volusion.

## Configuring the Export Page

At Inventory >> Import / Export >> QuickBooks Export, you can generate three different types of exports: Export All Customers, Export All Products and Export Orders. You can also reset the store's export status.

Choose one of these options to generate the appropriate IIF file and associated download link.

When exporting orders, you must first configure some additional mapping settings (Settings >> Import / Export >> [Click here to configure QuickBooks mapping](#)):

<b>Export Orders</b>	
Earliest Order Date	Specify a date (in mm/dd/yyyy format) to limit the number of orders included in the export file. Orders generated before the date defined in this field won't be included.
Latest Order Date	Specify a date (in mm/dd/yyyy format) to limit the number of orders included in the export file. Orders generated after this date won't be included.
Import this Order Number Only	Define a single order number to export to the IIF file. This field is most often used for testing purposes.
Only Include Shipped Orders	This option allows you to include only orders with a "shipped" status.
Include Customer Information	This option includes customer information on all exported orders (enabled by default).
Include Product Information	This option includes product information on all exported orders (enabled by default).

### **Items to Note**

You can reset export status at Inventory >> Import/Export >> QuickBooks Export. If you re-export data after this point, however, this can cause duplicate entries in your QuickBooks account. For this reason, we recommend only using this option when the export fails, and to always use caution. If you are uncertain, import the IIF file into a test account first.

## QuickBooks Web Connector Integration

This integration allows you to use Intuit's WebConnector application to automatically import data from Volusion to QuickBooks.

### Requirements

In addition to requirements already outlined in the pros & cons table above, note that Volusion's Web Connector integration only supports QuickBooks Home 2005, Pro 2005, or Premier 2005 editions or later.

The integration **does not support** the following versions of QuickBooks:

- QuickBooks Online Edition
- QuickBooks Point of Sale Edition
- QuickBooks UK or Canada editions
- QuickBooks Enterprise Edition
- QuickBooks Macintosh editions

#### Items to Note

You can obtain an SSL certificate (required for secure connection with QuickBooks) at Volusion's home page.

### Accessing the Web Connector Integration

- In the admin area, click Inventory >> Import / Export >> Volusion API.
- Under the Accounting heading, click Here next to "Manage QuickBooks Web Connector".

If you haven't yet installed the QuickBooks Web Connector software on your local computer work station, click Here next to "Download the QuickBooks Web Connector Version 2.0".

**Orders Reports Inventory Marketing Customers Design Settings**

Categories Products Options Import / Export Vendors Purchase Orders Receiving Product Key Distribution Warehouses

## QuickBooks Web Connector

■ A SSL is required to run QuickBooks Web Connector.

Choose which admin to use with your QWC file:  [Create](#)

To make changes to Config Variables such as Account names [Click Here](#)

Download the QuickBooks Web Connector Version 2.0 [Here](#)

☐ Send received xml as emails. Use semicolons to separate email addresses.  
(Do not use without explicit permission from Kam!)

[Save](#)

## Connecting to the QuickBooks Web Connector

After configuring your mapping and downloading the Web Connector application:

- Select your administrator account email address from the first menu.
- Click Create.
- Use the link provided to download the XML file to your local work station.
- With the Volusion QuickBooks integration page open, access both the QuickBooks Web Connector and the QuickBooks store account.
- Add the QWC file to your Web Connector program as an application. This allows the Web Connector to import Volusion store information.
- To run, click Update Selected in the Web Connector.

### Items to Note

The integration won't function properly unless you have the Volusion admin area, the QuickBooks Web Connector application, and the store's QuickBooks account file open on the same computer work station at once.

## Resetting Data for QuickBooks

Once you've generated the XML file within Volusion, the system flags all customers, products, and orders exported. These items cannot be exported again and should only be updated in QuickBooks through normal Web Connector connections. If, however, you maintain multiple QuickBooks accounts for your store, or if the initial export failed, you can reset the system flagging as follows:

- On the Web Connector management page, you'll find four dropdown menus for store mapping settings: Customers, Products, Orders and Config Variables.
- You can view the export date for that Volusion table by clicking the related menu. Choose the appropriate date from the menu and click the respective Reset button.

Once complete, all data for the reset export will be exported again on the Web Connector's next connection to QuickBooks.

### Items to Note

After resetting an export, be careful to not import duplicate data into the QuickBooks account. We recommend creating a new company file in QuickBooks if performing a 2nd XML file import.



# **Stone Edge Integration**

## **Stone Edge**

Stone Edge Technologies Inc. is a provider of ecommerce information management software that allows merchants to manage multiple streams of data in conjunction with various ecommerce solutions and service providers. Many online merchants use Stone Edge's products to help manage the complex logistics of fulfilling their online orders and delivering products to their customers.

Volusion provides integration with Stone Edge's Order Manager (SEOM) and Order Manager Enterprise software (version 5.007 or greater). This integration is provided through Volusion's API, with export settings created specifically for use with Stone Edge. Note that this integration is only provided for Volusion Gold plans and above.

Volusion's API provides three main exports for use in conjunction with SEOM: orders, customers and products. These exports are provided either as downloadable files, or through URLs provided by Volusion. See this manual's "Stone Edge Integration Export Table" appendix entry for full details of the values provided in the SEOM exports.

## **Generating Exports for Stone Edge**

The process for generating the initial Stone Edge export is identical for all three export types:

- In the admin area, click Inventory >> Import / Export >> Volusion API.
- Under the Order Management heading, click Run next to the appropriate Stone Edge export type.

Orders	Reports	Inventory	Marketing	Customers	Design	Settings
Categories	Products	Options	Import / Export	Vendors	Purchase Orders	Receiving
					Product Key Distribution	Warehouses

### Volusion API

☐ Enable public XML for Featured Products. Generated once a day. [Save](#) [Reset](#)

☐ Enable public XML for All Products. Generated once a day. [Save](#) [Reset](#)

### Accounting

Quickbooks	Manage QuickBooks Web Connector <a href="#">HERE</a>
------------	--

### Generic

Generic	<a href="#">Google Base Integration</a>
<a href="#">Run</a>	Generic\Orders      Generic Orders
<a href="#">Run</a>	Generic\Products      Generic Products
<a href="#">Run</a>	Generic\Customers      Generic Customers

### Order Management

<a href="#">Run</a>	StoneEdge\downloadcustomers      StoneEdge downloadcustomers
<a href="#">Run</a>	StoneEdge\downloadorders      StoneEdge downloadorders
<a href="#">Run</a>	StoneEdge\downloadprods      StoneEdge downloadprods

### Shipping

<a href="#">Run</a>	Shipping\Endicia      Endicia DAZzle Export
<a href="#">Run</a>	Shipping\Pitney_Bowes      Pitney Bowes

- On the next page, click Run. This will display a text field with a URL.
- Copy this URL and paste it into the appropriate field within Stone Edge.

## Using Stone Edge Exports

To connect your exports to the SEOM, you'll need to use the URL generated by the Volusion API. The following is an example of such a URL:

`http://www.mydomain.com/net/WebService.aspx?Login=username&EncryptedPassword=password&EDI_Name=StoneEdge\downloadorders`

Be sure to substitute `www.mydomain.com` with your Volusion store's actual domain name.

Stone Edge requires entry of the following information:

SEOM Field	
Store Name	Your Volusion store's domain name.

Cart Type	Select "Volusion" from this menu.
Cart ID / User Name	Your Volusion admin account's username. In the above URL example, this would be the text between "Login=" and "&EncryptedPassword".
Cart Password	Your admin account's password (encrypted for security purposes). This is located between "&EncryptedPassword" and "&EDI" in the link above.
Script URL	The URL of the actual script that generates the XML export. In the above example, it would be <a href="http://www.mydomain.com/net/WebService.aspx">http://www.mydomain.com/net/WebService.aspx</a> .
Note	Substitute <a href="http://www.mydomain.com">www.mydomain.com</a> with the actual domain of your Volusion store.

Unless extensive changes are made to Volusion's orders, products or customers tables, this procedure is a one-time requirement per export.

## Resetting the Stone Edge Export

As with many of the Volusion API integrations, once an export is generated, it cannot be re-generated unless the export is reset. You should generally only have to do this if you're testing the integration's functionality and haven't yet used Stone Edge in an operational manner. This can be done at Inventory >> Import/Export >> Volusion API:

- Click Run next to the export you'd like to reset.
- Here, you'll find a dropdown menu that lists each generated export with a time stamp. Select the export you'd like to reset.
- Use the IDs dropdown menu to choose a specific ID or All IDs.
- Click Reset Export.

## Additional Notes on Using the Stone Edge Integration

- SEOM supports payment processing functions similar to those provided in the Volusion admin area for fully integrated gateways. At this time, the only supported payment command in SEOM is capture of an authorized transaction. Other commands such as crediting and voiding are not supported.

- The Stone Edge integration is export-only. As such, capturing authorized payments in SEOM will not be reflected in the Volusion admin area. You can manually add offline payment commands to such orders.
- Volusion will export order data to SEOM for any entry in the orders table, provided that its Order Status value isn't set to New.
- As with all Volusion API exports, the system only exports up to 100 records at a time. Generating exports for more than 100 records requires multiple exports.
- Currently, SEOM doesn't support importing of text field-based data from Volusion. Because of this, data such as text-based product options are not imported to SEOM.

# **Endicia DAZzle Integration**

## **Endicia DAZzle**

Endicia's DAZzle is a software product and service that allows users to manage their shipping needs in conjunction with the United States Postal Service. Volusion's API allows Endicia users to generate an XML export for import into Endicia's DAZzle service, which offers the following functionality:

- Validate shipping addresses
- Design custom mailing labels
- Print mailing labels for orders
- Generate and purchase postage from USPS
- Share Volusion order information with Stone Edge Order Manager (visit [www.stoneedge.net](http://www.stoneedge.net) for more information)

## **Endicia Export Requirements**

- Endicia can only process orders from Volusion with a Ready to Ship status.
- Endicia only processes orders tied to a valid USPS shipping method.
- At least one valid USPS shipping method must be active in your admin area's settings.
- Active USPS methods must use the default service codes pre-programmed into the Volusion shipping table (shipping method IDs 201-217). As such, you must not delete or modify the codes in these method records.

## **Generating Endicia Exports**

To generate the initial export for the Endicia DAZzle integration:

- In the admin area, click Inventory >> Import / Export > Volusion API.

- Under the Shipping heading, click Run (next to “Shipping\Endicia”).

**Volusion API**

☐ Enable public XML for Featured Products. Generated once a day. [Save](#) [Reset](#)

☐ Enable public XML for All Products. Generated once a day. [Save](#) [Reset](#)

**Accounting**

[Quickbooks](#) [Manage QuickBooks Web Connector HERE](#)

**Generic**

[Generic](#) [Google Base Integration](#)

<a href="#">Run</a>	Generic\Orders	Generic Orders
<a href="#">Run</a>	Generic\Products	Generic Products
<a href="#">Run</a>	Generic\Customers	Generic Customers

**Shipping**

<a href="#">Run</a>	Shipping\Endicia	Endicia DAZzle Export
<a href="#">Run</a>	Shipping\Pitney_Bowes	Pitney Bowes

**Order Management**

[StoneEdge](#) [Enable](#)

- On the following page, click Run. This will display a text field with a URL that contains the XML export.

## Using Exports in Endicia

- Visit the URL displayed in Volusion’s Endicia export page to view the XML export.
- Save this export to a file on your local work station in the same directory where DAZzle is installed.
- Alternately, import the file from within DAZzle after launching the application.

Volusion’s Endicia export includes the following information:

Endicia Values	
PackageID	The order ID number in the Volusion orders database table.
Mail Class	The ShippingMethodName field in the Volusion shipping table (as populated from the ShippingMethodID field in the orders table). This is not the service code, but the name assigned to the shipping method within Volusion.
DateAdvance	No specific value is exported from Volusion for this Endicia field. It is always set to zero.
PackageType	By default, this field always reports RECTPARCEL unless a product within the shipment is configured to "ship by itself" as a special shipping restriction.
WeightOz	The sum total of values from the ProductWeight fields within the order details database table (as populated from the orders table via the related order ID values).
Value	The ProductPrice field within the order details database table (as populated from the orders table via the related order ID values).
Description	No specific value is exported from Volusion for this Endicia field. It is always "null."
ReferenceID	The order ID field in the Volusion orders database table.
ToName	The ShipFirstName and ShipLastName fields in the Volusion orders database table.
ToCompany	The ShipCountry field in the Volusion orders database table.
ToAddress1	The ShipAddress1 field in the Volusion orders database table.
ToAddress2	The ShipAddress2 field in the Volusion orders database table.

ToCity	The ShipCity field in the Volusion orders database table.
ToState	The ShipState field in the Volusion orders database table.
ToPostalCode	The ShipPostalCode field in the Volusion orders database table.
ToCountry	The ShipCountry field in the Volusion orders database table.
ToEmail	The EmailAddress field in the Volusion customers database table (as populated from the orders table via the customer ID field).
ToPhone	The ShipPhoneNumber field in the Volusion orders database table.

## Notes on Using the Endicia Integration

- Endicia's services and software offer a multitude of options for merchants shipping through the USPS. Currently, however, Volusion only supports Endicia's DAZzle application.
- The Volusion API's Endicia integration only supports export from Volusion to Endicia. It doesn't support import from Endicia to Volusion.
- The Volusion export for Endicia only provides information for users to create mailing labels and generate postage through Endicia. Volusion's XML integration doesn't provide additional related features.
- Users wishing to update Volusion orders with tracking information generated by DAZzle will have to import that information into Volusion either manually through standard admin commands, or using Volusion's bulk update or SQL query features. This cannot be done through the Volusion API.



## Using Custom Shipping Rates With Endicia

One of the strengths of Volusion is that it allows a great deal of shipping method customization. Merchants can use their custom methods in Endicia, but should keep the following in mind:

- Only custom rates that have valid, USPS-based Service Codes can be exported using Volusion's Endicia integration.
- When creating custom shipping methods to be used in Endicia, you must set the Service Code to one of the codes used in Volusion's shipping method IDs # 201-217.
- When creating custom shipping methods to be used in Endicia, you must use a Service Code similar to the custom method being created (e.g. don't use the Priority Mail International service code for a custom method that ships orders via a domestic, ground service).
- All other settings within the custom shipping method can be configured as desired.



## **Volusion Winter '09 Tips & Tricks**

This portion of the Winter '09 manual details store setup and maintenance information outside the scope of the “Getting Started Guide” and “Advanced Settings” portions of this manual. Its various sections correspond to the various parts of the admin area. Note that new information will be added to this section periodically, so be sure to check the online edition for updates.

# Settings

## Company

### Purchasing and Renewing Domain Names

Because Volusion is an ICANN-licensed domain name registrar, you can purchase domain name(s) for your stores(s), or even for other sites not hosted by Volusion, at our website ( <http://www.volusion.com/domain-name-registration/dsearch.aspx> ).

After registering a domain name, specify it on your store order form. Once the order has been processed, you can choose this name from the dropdown menu in the Company page. Note that this menu can only contain one domain or sub-domain option (besides the Servertrust address) at a time. It is possible to change the original listing, but you will have to request this as a ticket to the “customer care” category from <http://my.volusion.com>.

Additionally, you can renew any domain names you’ve purchased from Volusion, or transfer them to other registrars, at <http://my.volusion.com> under the My Domains section in the left-hand menu,

### Configuring Third Party Domain Names

If you’ve purchased a domain name through a third party registrar, you can either transfer registration to Volusion through <http://my.volusion.com>, or forward the name to the Volusion name servers from your current registrar. You should be able to do this by logging in to your domain registrar’s account (e.g. at <http://www.godaddy.com>) and set the name’s primary and secondary servers to “ns3.volusion.com” and “ns4.volusion.com” respectively. Allow 24-72 hours for this change to take effect. Once complete, log into your admin area and select the name from the menu at Settings >> Company.

### Hosting on a Sub-Domain

Some merchants prefer to keep a portion of their preexisting website hosted with a third party and provide a link or links from it to the Volusion store. In some cases, these merchants specify a separate but related domain name for the Volusion part of the website (such as “[www.yourdomainstore.com](http://www.yourdomainstore.com)”), but others prefer a more seamless-looking transition from the third party server to the Volusion server. For this, you can use a sub-domain such as “[store.yourdomain.com](http://store.yourdomain.com)” (when the preexisting website is hosted at “[www.yourdomain.com](http://www.yourdomain.com)”). Note, however, that this configuration requires additional setup.

It isn’t possible to forward domain name records to the name servers of both a third party DNS

host and Volusion. If you specify a third party DNS host for “www.yourdomain.com,” you must create a CNAME with this company for the desired sub-domain that forwards to your Volusion Servertrust address (available in the welcome email and in the dropdown menu at Settings >> Company). Your domain host should provide an online management console for this functionality. For Volusion-registered domain names, this functionality is available at <http://my.volusion.com>. Choose DNS under the My Store heading.

Note that you cannot host your Volusion store on a subdirectory (e.g. “www.yourdomain.com/store”) of a domain name forwarded to a third party DNS host.

## Note on Domain Names and SSL Certificates

All ecommerce sites should have an SSL (Secure Sockets Layer) certificate for encryption of credit card and order data (most payment processors require them). SSL certificate functionality is tied directly to the domain/sub-domain name on which the website is hosted. Because of this, the certificate won't become active until you've completed the above domain name configuration steps.

To obtain an SSL certificate for your store, you can purchase one online from Volusion here: [http://www.volusion.com/ssl\\_certificate.asp](http://www.volusion.com/ssl_certificate.asp). Note that you can change the domain name specified for a Volusion-issued SSL certificate at any time by submitting a ticket to the “customer care” category from <http://my.volusion.com>.

## Tax

### Tips

- The manner in which your store applies tax is controlled from Settings >> Tax.

Are you based in the United States?: ☒ Yes ☐ No

**Tax Settings** [Add](#) Results 1 - 1 of 1 Page 1 of 1 [Advanced Edit](#)

	Country	State / Province	Postal Code	Tax Rate	
<a href="#">Edit</a>	United States	CA		8.35%	<a href="#">X</a>

- The system applies tax rules to orders established here. If no match is found, tax is not applied.
- The postal code setting within a tax rule overrides the state or province code settings. For example, a tax rule applying to California and then set to apply to the postal code 91210 will only apply to orders shipping to the 91210 postal code (as opposed to all of California).
- If you have any specific questions on what sales or consumption taxes you are required to collect for your online store, be sure to contact the local tax authority for the region in which your business is located.

For full details on the tax table, please refer to this section of the manual.

## Payment

### Gateway Certificate Installation

In addition to the fields in the admin setup page (Settings >> Payment), some gateway services (Linkpoint, Paypal Pro and CyberSource) require installation of an additional security certificate. In the same way that an SSL certificate authenticates each session between a web browser and the host server of the page(s) it displays, these certificates authenticate each session between the merchant's hosting environment and the gateway's server.

When you obtain the certificate from your provider, you must supply it to Volusion for installation by attaching it to a ticket sent from <http://my.volusion.com> to the "support" category. Within the ticket, include in the subject line, "Security certificate installation request – X," where "X" is the gateway type (e.g. Paypal Pro). Once installation is complete, Volusion Technical Support will respond to the ticket to notify you.

### Notes on Credit Card Payment Settings

By default, all Volusion stores are configured to use the most secure credit/debit card storage settings at the highest level of compliance with the Payment Card Industry Security Consortium's electronic data security guidelines. These settings govern whether credit/debit card data is retained or purged when you execute certain payment commands, and/or how long the data can be stored in the Volusion database.

Volusion does not recommend altering these settings, but provides the ability to do so to accommodate special requirements of various partially-integrated gateways. When you uncheck Use most secure settings at Settings >> Payment, you'll find the following options, which determine the point at which the system automatically purges stored data (to review payment command terminology, see this section of the "Order Processing Guide" portion of this manual):

Credit Card Storage Policy Settings	
Authorize	Deletes credit/debit card data immediately after successful authorization. For fully-supported gateways, you can still capture, credit, and void transactions after this point. This is the most secure setting and the one that Volusion recommends using.
Capture	Retains credit/debit card data beyond authorization, but deletes it after funds have been captured. Some gateways require this setting.
Ship	Retains credit/debit card data until the order has been marked as "shipped." Since this status option isn't automatically tied to the execution of any payment commands, (it only updates through

	the Complete Order button and the status selection menu on the order details page), data may be retained beyond capture, but can also be deleted prior to authorization, or between authorization and capture. A small number of gateways may require this setting. Volusion only recommends using it if absolutely necessary.
Never	Deletes credit/debit card data after the number of days specified in the text field below these options. This setting is the least secure and compliant with the PCI Security Consortium's policies. Volusion provides this feature as-is and recommends only using it if absolutely necessary.

## Setting up Google Checkout

Google Checkout is Google's new electronic payment service similar to PayPal. Note that it is currently only available for the US merchants. To configure:

- Register for a Google Checkout account at <http://checkout.google.com/sell>.
- Once registered, log into Google Checkout.
- Under Account Information link, retrieve your Merchant ID and Merchant Key.
- In the Volusion admin area, click Settings >> Payment.
- Check the Google Checkout option on this page and enter your settings in the provided text fields.
- Click Save.
- Click Configure shipping methods for Google Checkout.

**Accepted Payment**  
[Edit All](#)

☐ Other ☒ **VISA** ☐ **PayPal** ☐ **MasterCard**

☒ **Google** ☒ **DISCOVER** ☒ **AMERICAN EXPRESS** ☒ **Check by Mail**

☒ **Electronic Check** ☐ **Purchase Order Number**

Google Checkout Merchant ID

Google Checkout Merchant Key

[Configure Shipping Methods](#)



- Click Add.

- Settings for your Google Checkout shipping method are as follows:

## Google Checkout: Shipping Rates

Name\*

The name for the Google Checkout shipping method(s).

Cost\_Base\_Rate

The base shipping charge on all orders using Google Checkout as the payment method.

Cost_Per_Pound	Additional amount charged per pound on all orders using Google Checkout as the payment method.
ApplyTo_States	Choose which US states apply to this shipping method.

\* Required field.

Click Save. If you wish, you can create additional Google Checkout shipping methods by clicking Add.

Once you've completed setup, a Google Checkout button will appear within the checkout process. When customers click this button, they'll be redirected to Google Checkout to complete their orders.

YOUR CART 1 PAGE CHECKOUT RECEIPT

[shop for more items](#)

ITEM DESCRIPTION	QTY	EACH	TOTAL
Turbo Power Diffuser	1	\$12.99	\$12.99

Click to remove an item from your cart  
[Empty My Entire Cart](#)

Coupon code? Enter it here:  [Apply](#)

**Calculate Shipping Rates:**

Country:

State / Province:

Zip / Postal Code:

Tax (8.35%): \$1.08

**Total: \$14.07**

[Recalculate](#)

**proceed to checkout**  
 Click Proceed to Checkout to complete your order now.

On the next page you'll be able to create a personal account or checkout anonymously.

**returning customers**  
 Sign In for Faster Checkout

Email Address

Password

[Forgot your password?](#)

**proceed to checkout** **login & checkout**

☐ Show gift options during checkout

**Google Checkout**  
 Fast checkout through Google

This process won't function properly, however, until you configure Google Checkout account to communicate with Volusion as follows:

- In your Google Checkout account, click Settings >> Integration.
- On the next page, check the Shopping cart post security option.
- In the API Callback URL field, enter `https://domainname/net/Webservice_Google_Checkout.aspx` (replace “domainname” with your store’s actual domain name).
- In the Callback method field, select XML.
- Navigate to Advanced Settings and ensure that none of the advanced options are selected.

## Notes on Using Google Checkout

Google Checkout not only collects payment, it also processes shipping. Due to the special nature of the service, Google Checkout requires its own Volusion shipping method configurations. The Google Checkout shipping methods described in the instructions above are independent of other shipping settings and apply exclusively to Google Checkout orders.

Google Checkout requires order processing exclusively from their online console. This means that Volusion can send initial order information to Google Checkout, but all processing functions thereafter are not reported back to Volusion.

## Gateway-Specific Issues with Recurring Billing

If using Volusion’s recurring billing features, be aware that some integrated payment gateways such as PSIGate don’t support recurring billing. Additionally, merchants using PayPal’s Pro gateway service may encounter errors when attempting to process recurring payments in their Volusion store through PayPal’s gateway. To resolve this:

- Log into your PayPal Pro account and click My Account.
- Click Profile in the PayPal menu bar.
- Within the Payment Receiving Preferences page, find the Block Accidental Payments option.
- Enable the No, allow multiple payments per invoice ID option.
- Save your changes.

## Config Variables

### “Members Only” Configurations

You can restrict your website to “members only” in two different ways:

### “Members Only” Purchasing

This level of exclusivity requires all customers to register for a store account before they can make a purchase. Furthermore, product pricing won't display until a customer has logged in. At Settings >> Config Variables, check the Config\_EnableMembersOnlyWebsite option and click Save.

Quick Edit View General variables Results 1 - 53 of 53 Page 1 of 1

Name	Value	Last Modified
<a href="#">Config_CRM_Plugin_URL</a>	<input type="text"/>	
<a href="#">Config_DateFormat</a>	MM/DD/YYYY	2/13/2006
<a href="#">Config_DidYouMean_Enable</a>	<input checked="" type="checkbox"/>	8/18/2009 6:36PM
<a href="#">Config_Donations_Suggested_Amounts</a>	50.00:Bronze Donor 100.00:Sil	7/13/2007 3:44PM
<a href="#">Config_Enable_Publish_Always_By_Default</a>	<input checked="" type="checkbox"/>	7/21/2009 6:27PM
<a href="#">Config_Enable24HourTime_Without_AMPM</a>	<input type="checkbox"/>	2/13/2006
<a href="#">Config_EnableAccessoriesBelowShoppingCart</a>	<input checked="" type="checkbox"/>	2/10/2006
<a href="#">Config_EnableDiscounts_With_SpecialPricing</a>	<input checked="" type="checkbox"/>	2/10/2006
<a href="#">Config_EnableDisplayEstimatedShipping</a>	<input checked="" type="checkbox"/>	2/10/2006
<a href="#">Config_EnableDisplayOptionProducts</a>	<input type="checkbox"/>	2/10/2006
<a href="#">Config_EnableFaxNumber</a>	<input checked="" type="checkbox"/>	2/10/2006
<a href="#">Config_EnableGiftCertificates</a>	<input checked="" type="checkbox"/>	2/10/2006
<a href="#">Config_EnableMaximumOrderQty</a>	<input type="checkbox"/>	2/10/2006
<a href="#">Config_EnableMembersOnlyBrowsing</a>	<input type="checkbox"/>	8/19/2009 4:27PM
<a href="#">Config_EnableMembersOnlyWebsite</a>	<input checked="" type="checkbox"/>	2/10/2006
<a href="#">Config_EnableMembersOnlyWebsite_TaxID</a>	<input checked="" type="checkbox"/>	2/10/2006
<a href="#">Config_EnableMinimumOrderQty</a>	<input checked="" type="checkbox"/>	2/10/2006
<a href="#">Config_EnableOptions_DisplayPopup</a>	<input checked="" type="checkbox"/>	2/10/2006
<a href="#">Config_EnableOptions_InventoryControl</a>	<input checked="" type="checkbox"/>	2/10/2006

Save or Cancel

### “Members Only” Browsing

This level of exclusivity requires all customers to register for a store account before they can view products. Visitors will be greeted with a login screen and a simple message stating that registration is required for browsing. Returning customers can simply log in and shop. At

Settings >> Config Variables, check the Config\_EnableMembersOnlyBrowsing option and click Save.

Quick Edit View General variables ▾			Results 1 - 53 of 53	Page 1 of 1
Name	Value	Last Modified		
<a href="#">Config_CRM_Plugin_URL</a>	<input type="text"/>			
<a href="#">Config_DateFormat</a>	MM/DD/YYYY ▾	2/13/2006		
<a href="#">Config_DidYouMean_Enable</a>	<input checked="" type="checkbox"/>	8/18/2009 6:36PM		
<a href="#">Config_Donations_Suggested_Amounts</a>	50.00:Bronze Donor 100.00:Sil	7/13/2007 3:44PM		
<a href="#">Config_Enable_Publish_Always_By_Default</a>	<input checked="" type="checkbox"/>	7/21/2009 6:27PM		
<a href="#">Config_Enable24HourTime_Without_AMPM</a>	<input type="checkbox"/>	2/13/2006		
<a href="#">Config_EnableAccessoriesBelowShoppingCart</a>	<input checked="" type="checkbox"/>	2/10/2006		
<a href="#">Config_EnableDiscounts_With_SpecialPricing</a>	<input checked="" type="checkbox"/>	2/10/2006		
<a href="#">Config_EnableDisplayEstimatedShipping</a>	<input checked="" type="checkbox"/>	2/10/2006		
<a href="#">Config_EnableDisplayOptionProducts</a>	<input type="checkbox"/>	2/10/2006		
<a href="#">Config_EnableFaxNumber</a>	<input checked="" type="checkbox"/>	2/10/2006		
<a href="#">Config_EnableGiftCertificates</a>	<input checked="" type="checkbox"/>	2/10/2006		
<a href="#">Config_EnableMaximumOrderQty</a>	<input type="checkbox"/>	2/10/2006		
<a href="#">Config_EnableMembersOnlyBrowsing</a>	<input checked="" type="checkbox"/>	8/19/2009 4:27PM		
<a href="#">Config_EnableMembersOnlyWebsite</a>	<input type="checkbox"/>	2/10/2006		
<a href="#">Config_EnableMembersOnlyWebsite_TaxID</a>	<input checked="" type="checkbox"/>	2/10/2006		
<a href="#">Config_EnableMinimumOrderQty</a>	<input checked="" type="checkbox"/>	2/10/2006		
<a href="#">Config_EnableOptions_DisplayPopup</a>	<input checked="" type="checkbox"/>	2/10/2006		
<a href="#">Config_EnableOptions_InventoryControl</a>	<input checked="" type="checkbox"/>	2/10/2006		
Save or Cancel				

## Exclusive Tax IDs

You can also require all customers to enter a Tax ID value upon registration (whether or not you're using one of the above configurations). At Settings >> Config Variables, check the Config\_EnableMembersOnlyWebsite\_TaxID option and click Save.

Quick Edit View General variables			Results 1 - 53 of 53	Page 1 of 1
Name	Value	Last Modified		
<a href="#">Config_CRM_Plugin_URL</a>	<input type="text"/>			
<a href="#">Config_DateFormat</a>	MM/DD/YYYY	2/13/2006		
<a href="#">Config_DidYouMean_Enable</a>	<input checked="" type="checkbox"/>	8/18/2009 6:36PM		
<a href="#">Config_Donations_Suggested_Amounts</a>	50.00:Bronze Donor 100.00:Sil	7/13/2007 3:44PM		
<a href="#">Config_Enable_Publish_Always_By_Default</a>	<input checked="" type="checkbox"/>	7/21/2009 6:27PM		
<a href="#">Config_Enable24HourTime_Without_AMPM</a>	<input type="checkbox"/>	2/13/2006		
<a href="#">Config_EnableAccessoriesBelowShoppingCart</a>	<input checked="" type="checkbox"/>	2/10/2006		
<a href="#">Config_EnableDiscounts_With_SpecialPricing</a>	<input checked="" type="checkbox"/>	2/10/2006		
<a href="#">Config_EnableDisplayEstimatedShipping</a>	<input checked="" type="checkbox"/>	2/10/2006		
<a href="#">Config_EnableDisplayOptionProducts</a>	<input type="checkbox"/>	2/10/2006		
<a href="#">Config_EnableFaxNumber</a>	<input checked="" type="checkbox"/>	2/10/2006		
<a href="#">Config_EnableGiftCertificates</a>	<input checked="" type="checkbox"/>	2/10/2006		
<a href="#">Config_EnableMaximumOrderQty</a>	<input type="checkbox"/>	2/10/2006		
<a href="#">Config_EnableMembersOnlyBrowsing</a>	<input type="checkbox"/>	8/19/2009 4:27PM		
<a href="#">Config_EnableMembersOnlyWebsite</a>	<input checked="" type="checkbox"/>	2/10/2006		
<a href="#">Config_EnableMembersOnlyWebsite_TaxID</a>	<input checked="" type="checkbox"/>	2/10/2006		
<a href="#">Config_EnableMinimumOrderQty</a>	<input checked="" type="checkbox"/>	2/10/2006		
<a href="#">Config_EnableOptions_DisplayPopup</a>	<input checked="" type="checkbox"/>	2/10/2006		
<a href="#">Config_EnableOptions_InventoryControl</a>	<input checked="" type="checkbox"/>	2/10/2006		
Save or Cancel				

This setting can be useful if you sell mostly to non-profit organizations or other customers with tax-free status.

### Items to Note

By default, Volusion is configured to require customers to register for a customer account with your store when they make their initial purchase, or log in to their account when placing subsequent orders. This differs from the “members only” configurations in that all visitors can view products and their prices without logging in to their accounts.

## Configuring Anonymous Checkout Options

You can allow, or even require, anonymous customer checkout as follows:

- In the admin area, click Settings >> Config Variables.

Orders Reports Inventory Marketing Customers Design Settings

Company Shipping Tax Payment Currency IP Firewall Config Variables Custom Fields Maintenance

## Update Configuration : General Variables

Search Customize

Quick Edit View **General variables** Results 1 - 53 of 53 Page 1 of 1

Name	Value	Last Modified
<a href="#">Config_CRM_Plugin_URL</a>	<input type="text"/>	
<a href="#">Config_DateFormat</a>	<input type="text" value="MM/DD/YYYY"/>	2/13/2006
<a href="#">Config_DidYouMean_Enable</a>	<input checked="" type="checkbox"/>	8/18/2009 6:36PM
<a href="#">Config_Donations_Suggested_Amounts</a>	<input type="text" value="50.00:Bronze Donor 100.00:Sil"/>	7/13/2007 3:44PM
<a href="#">Config_Enable_Publish_Always_By_Default</a>	<input checked="" type="checkbox"/>	7/21/2009 6:27PM
<a href="#">Config_Enable24HourTime_Without_AMPM</a>	<input type="checkbox"/>	2/13/2006
<a href="#">Config_EnableAccessoriesBelowShoppingCart</a>	<input checked="" type="checkbox"/>	2/10/2006
<a href="#">Config_EnableDiscounts_With_SpecialPricing</a>	<input checked="" type="checkbox"/>	2/10/2006
<a href="#">Config_EnableDisplayEstimatedShipping</a>	<input checked="" type="checkbox"/>	2/10/2006
<a href="#">Config_EnableDisplayOptionProducts</a>	<input type="checkbox"/>	2/10/2006
<a href="#">Config_EnableFaxNumber</a>	<input checked="" type="checkbox"/>	2/10/2006
<a href="#">Config_EnableGiftCertificates</a>	<input checked="" type="checkbox"/>	2/10/2006
<a href="#">Config_EnableMaximumOrderQty</a>	<input type="checkbox"/>	2/10/2006
<a href="#">Config_EnableMembersOnlyBrowsing</a>	<input checked="" type="checkbox"/>	2/10/2006
<a href="#">Config_EnableMembersOnlyWebsite</a>	<input type="checkbox"/>	2/10/2006
<a href="#">Config_EnableMembersOnlyWebsite_TaxID</a>	<input checked="" type="checkbox"/>	2/10/2006

- Choose Checkout Variables from the View menu.

Orders Reports Inventory Marketing Customers Design **Settings**

Company Shipping Tax Payment Currency IP Firewall Config Variables Custom Fields Maintenance

## Update Configuration : General Variables

Search Customize

Quick Edit View **General variables** Results 1 - 53 of 53 Page 1 of 1

Name	Value	Last Modified
<a href="#">Config_CRM_Plugin_URL</a>	<input type="text"/>	
<a href="#">Config_DateFormat</a>	MM/DD/YYYY	2/13/2006
<a href="#">Config_DidYouMean_Enable</a>	<input checked="" type="checkbox"/>	8/18/2009 6:36PM
<a href="#">Config_Donations_Suggested_Amounts</a>	50.00:Bronze Donor 100.00:Sil	7/13/2007 3:44PM
<a href="#">Config_Enable_Publish_Always_By_Default</a>	<input checked="" type="checkbox"/>	7/21/2009 6:27PM
<a href="#">Config_Enable24HourTime_Without_AMPM</a>	<input type="checkbox"/>	2/13/2006
<a href="#">Config_EnableAccessoriesBelowShoppingCart</a>	<input checked="" type="checkbox"/>	2/10/2006
<a href="#">Config_EnableDiscounts_With_SpecialPricing</a>	<input checked="" type="checkbox"/>	2/10/2006
<a href="#">Config_EnableDisplayEstimatedShipping</a>	<input checked="" type="checkbox"/>	2/10/2006
<a href="#">Config_EnableDisplayOptionProducts</a>	<input type="checkbox"/>	2/10/2006
<a href="#">Config_EnableFaxNumber</a>	<input checked="" type="checkbox"/>	2/10/2006
<a href="#">Config_EnableGiftCertificates</a>	<input checked="" type="checkbox"/>	2/10/2006
<a href="#">Config_EnableMaximumOrderQty</a>	<input type="checkbox"/>	2/10/2006
<a href="#">Config_EnableMembersOnlyBrowsing</a>	<input type="checkbox"/>	8/19/2009 4:27PM

- Check the `Config_EnableAnonymousCheckout_Optional` option to allow customers to check out without registering or logging in.

Orders Reports Inventory Marketing Customers Design **Settings**

Company Shipping Tax Payment Currency IP Firewall Config Variables Custom Fields Maintenance

## Update Configuration : Checkout

Search Customize

Quick Edit View **Checkout variables** Results 1 - 21 of 21 Page 1 of 1

Name	Value	Last Modified
<a href="#">Config_AlwaysDisplayDifferentShipToAddressFields</a>	<input type="checkbox"/>	7/13/2007 3:44PM
<a href="#">Config_ContinueShoppingPage</a>	default.asp	2/10/2006
<a href="#">Config_Credit_Card_Issue_Date_SideNotes</a>	<input type="text"/>	2/13/2006
<a href="#">Config_Credit_Card_Issue_Number_SideNotes</a>	<input type="text"/>	2/13/2006
<a href="#">Config_Enable_Credit_Card_Issue_Date</a>	<input type="checkbox"/>	2/13/2006
<a href="#">Config_Enable_Credit_Card_Issue_Number</a>	<input type="checkbox"/>	2/10/2006
<a href="#">Config_Enable_Payments_CheckingAccountType</a>	<input checked="" type="checkbox"/>	2/10/2006
<a href="#">Config_Enable_Payments_CheckNumber</a>	<input checked="" type="checkbox"/>	2/10/2006
<a href="#">Config_Enable_Payments_CVV2</a>	<input checked="" type="checkbox"/>	2/10/2006
<a href="#">Config_Enable_ShipAddress_Validation</a>	<input type="checkbox"/>	
<a href="#">Config_EnableAllowBackOrders</a>	<input checked="" type="checkbox"/>	2/10/2006
<a href="#">Config_EnableAnonymousCheckout_Forced</a>	<input type="checkbox"/>	2/13/2006
<a href="#">Config_EnableAnonymousCheckout_Optional</a>	<input checked="" type="checkbox"/>	2/13/2006

[Save](#) or [Cancel](#)



- Check the `Config_EnableAnonymousCheckout_Forced` option to require anonymous checkout.

Orders Reports Inventory Marketing Customers Design **Settings**

Company Shipping Tax Payment Currency IP Firewall Config Variables Custom Fields Maintenance

### Update Configuration : Checkout

Search

Customize

Name	Value	Last Modified
<a href="#">Config_AlwaysDisplayDifferentShipToAddressFields</a>	<input type="checkbox"/>	7/13/2007 3:44PM
<a href="#">Config_ContinueShoppingPage</a>	<input type="text" value="default.asp"/>	2/10/2006
<a href="#">Config_Credit_Card_Issue_Date_SideNotes</a>	<input type="text"/>	2/13/2006
<a href="#">Config_Credit_Card_Issue_Number_SideNotes</a>	<input type="text"/>	2/13/2006
<a href="#">Config_Enable_Credit_Card_Issue_Date</a>	<input type="checkbox"/>	2/13/2006
<a href="#">Config_Enable_Credit_Card_Issue_Number</a>	<input type="checkbox"/>	2/10/2006
<a href="#">Config_Enable_Payments_CheckingAccountType</a>	<input checked="" type="checkbox"/>	2/10/2006
<a href="#">Config_Enable_Payments_CheckNumber</a>	<input checked="" type="checkbox"/>	2/10/2006
<a href="#">Config_Enable_Payments_CVV2</a>	<input checked="" type="checkbox"/>	2/10/2006
<a href="#">Config_Enable_ShipAddresss_Validation</a>	<input type="checkbox"/>	
<a href="#">Config_EnableAllowBackOrders</a>	<input checked="" type="checkbox"/>	2/10/2006
<a href="#">Config_EnableAnonymousCheckout_Forced</a>	<input checked="" type="checkbox"/>	2/13/2006
<a href="#">Config_EnableAnonymousCheckout_Optional</a>	<input type="checkbox"/>	2/13/2006

[Quick Edit](#) View [Checkout variables](#) Results 1 - 21 of 21 Page 1 of 1

[Save](#) or [Cancel](#)

- Click Save.

# **Inventory**

## **Products**

### **Note on Creating Products**

Your main Products table comes with a selection of pre-programmed records based on choices you made during the 14-day free trial registration or store purchase process. These products are provided as examples of what a fully-configured product might look like; they are not meant to be sold. You can edit these products by clicking on their product codes.

Some products you sell may require simple configurations, others may require use of numerous optional settings. You can find detailed information on all product settings options in the “Product Settings” entry in this manual’s appendix. Additionally, you can learn more about each field or setting by clicking the nearby information icon.

### **A Note on SEO**

As mentioned in the “Getting Started Guide” portion of this manual, configuring meta tags is an important part of helping your store appear in search engine queries. It’s nearly as important, however, to configure richly-detailed text in your product descriptions and features sections.

### **Multi-Child Add to Cart**

Volusion’s multi-child add to cart feature enables you to display product attribute options on a base product’s details page with quantity specification fields.

[Home >](#)**MY Shoe Product**

Bookmark and Share  
Alternative Views:



This is a shoe

Item#	Item Name	Our Price	Qty	Add
SHOE01-0001	MY Shoe Product - Black - 10	\$20.00	<input type="text" value="1"/>	<input type="checkbox"/>
SHOE01-0002	MY Shoe Product - Black - 8	\$20.00	<input type="text" value="1"/>	<input type="checkbox"/>
SHOE01-0003	MY Shoe Product - Black - 9	\$20.00	<input type="text" value="1"/>	<input type="checkbox"/>
SHOE01-0004	MY Shoe Product - Blue - 10	\$20.00	<input type="text" value="1"/>	<input type="checkbox"/>
SHOE01-0005	MY Shoe Product - Blue - 8	\$20.00	<input type="text" value="1"/>	<input type="checkbox"/>
SHOE01-0006	MY Shoe Product - Blue - 9	\$20.00	<input type="text" value="1"/>	<input type="checkbox"/>
SHOE01-0007	MY Shoe Product - Red - 10	\$20.00	<input type="text" value="1"/>	<input type="checkbox"/>
SHOE01-0008	MY Shoe Product - Red - 8	\$20.00	<input type="text" value="1"/>	<input type="checkbox"/>
SHOE01-0009	MY Shoe Product - Red - 9	\$20.00	<input type="text" value="1"/>	<input type="checkbox"/>
Check the items you wish to purchase, then click				<input type="button" value="ADD TO CART"/> <input type="button" value="→"/>

Share your knowledge of this product with other customers... [Be the first to write a review](#)

The can be quite useful for wholesalers or bulk sellers who offer various versions of the same product, such as a running shoe that comes in three colors and six sizes. Instead of requiring customers to navigate through the shopping cart pages numerous times to add a quantity of each variant to the cart separately, multi-child add to cart allows customers to specify the number of units for each variant and add them all to the cart at once from the same storefront grid.

## Enabling Multi-Child Add to Cart

- After creating option categories, such as size and color (from the above example), apply them to the base product from its record in the Option ID(s) field of the Product Options heading.
- Create your attribute options, such as “red” and “9,” and apply each to the proper option category.
- On the base product’s edit page, check Enable Options Inventory Control under the Product Options heading to create the variant product records.

**Inventory Control Grid for "SHOE01"**

Useful Links [\(View All Options\)](#) | [\(View All Child Products\)](#)

Displaying 18 Records

Option ID	Option Category	Option Description	Option OrderBy	Option PriceDiff	Grid PriceDiff	Product Price	Stock Status	Inventory Grid ProductCode	
109	[26] Shoe Color	Black		\$0.00		20.00	+	SHOE01-0001	<a href="#">Edit</a>
105	[25] Shoe Size	10		\$0.00				A	
109	[26] Shoe Color	Black		\$0.00		20.00	+	SHOE01-0002	<a href="#">Edit</a>
103	[25] Shoe Size	8		\$0.00				A	
109	[26] Shoe Color	Black		\$0.00		20.00	+	SHOE01-0003	<a href="#">Edit</a>
104	[25] Shoe Size	9		\$0.00				A	
108	[26] Shoe Color	Blue		\$0.00		20.00	+	SHOE01-0004	<a href="#">Edit</a>
105	[25] Shoe Size	10		\$0.00				A	
108	[26] Shoe Color	Blue		\$0.00		20.00	+	SHOE01-0005	<a href="#">Edit</a>
103	[25] Shoe Size	8		\$0.00				A	
108	[26] Shoe Color	Blue		\$0.00		20.00	+	SHOE01-0006	<a href="#">Edit</a>
104	[25] Shoe Size	9		\$0.00				A	
106	[26] Shoe Color	Red		\$0.00		20.00	+	SHOE01-0007	<a href="#">Edit</a>
105	[25] Shoe Size	10		\$0.00				A	
106	[26] Shoe Color	Red		\$0.00		20.00	+	SHOE01-0008	<a href="#">Edit</a>
103	[25] Shoe Size	8		\$0.00				A	
106	[26] Shoe Color	Red		\$0.00		20.00	+	SHOE01-0009	<a href="#">Edit</a>
104	[25] Shoe Size	9		\$0.00				A	

[Save Changes](#)

- Under the Advanced Settings heading, check EnableMultiChildAddToCart, and click Update.

**Advanced Options**

VAT Percentage <input type="text" value=""/>	Free Shipping Item <input checked="" type="checkbox"/>
Home Page Section <input type="text" value=""/>	Hide Product <input type="checkbox"/>
Taxable Product <input type="text" value=""/>	Hide When Out Of Stock <input type="checkbox"/>
<a href="#">[Upload Logo]</a> Manufacturer <input type="text" value=""/>	Enable Multi Child Add To Cart <input checked="" type="checkbox"/>
List Price Name <input type="text" value=""/>	Private Section Customers Only <input type="checkbox"/>
Product Price Name <input type="text" value=""/>	Hide You Save <input type="checkbox"/>
Sale Price Name <input type="text" value=""/>	Allow Price Edit <input type="checkbox"/>
Setup Cost Name <input type="text" value=""/>	Price Sub Text <input type="text" value=""/>
AddtoCartBtn Replacement Text <input type="text" value=""/>	Price Sub Text Short <input type="text" value=""/>
Product Popularity <input type="text" value=""/>	Min Qty <input type="text" value=""/>
Display Begin Date <input type="text" value=""/>	<a href="#">[Upload File]</a> Download Filename <input type="text" value=""/>
Display End Date <input type="text" value=""/>	Accessory(s) <input type="text" value=""/>
Gift Wrap Cost <input type="text" value=""/>	Reward Points Given For Purchase <input type="text" value=""/>
Uses Product Key Type(s) <input type="text" value=""/>	
Free Accessory(s) <input type="text" value=""/>	
Use Same Photos As ProductCode <input type="text" value=""/>	Hide Free Accessories <input type="checkbox"/>
Photo URL Small <input type="text" value=""/>	
Photo URL Large <input type="text" value=""/>	
Additional Product Keyword(s) <input type="text" value=""/>	
Is Child Of Product Code <input type="text" value=""/>	Affiliate Commissionable Value <input type="text" value=""/>
Order Finished Note <a href="#">HTML Editor</a>	

[Update](#) or [Cancel](#) ☐ Save + View Record ☒ Save + View List


- Remove all options and disable inventory control to prevent product details page display conflict, and click Update again.

### Items to Note




This is the quickest way to create a large number of variant products. You can also create them one-by-one, which won't require use of the inventory control grid or application of options to the product.

If using the Dropdown Smartmatch display type for option categories, the product details page will display dropdown selection menus for each category, as well as the multi-child add to cart grid. In this case, neither will function properly.

[Home >](#)  
**MY Shoe Product**



[Larger Photo](#)  
[Email a Friend](#)  
[Bookmark and Share](#)

Alternative Views:  




Choose your options...  
 Shoe Color\*:   
 Shoe Size\*:   
 Qty: 

[ADD TO CART](#)
[Add to Wish List](#)

This is a shoe

Item#	Item Name	Our Price	Qty	Add
SHOE01-0001	MY Shoe Product - Black - 10	\$20.00	<input type="text" value="1"/>	<input type="checkbox"/>
SHOE01-0002	MY Shoe Product - Black - 8	\$20.00	<input type="text" value="1"/>	<input type="checkbox"/>
SHOE01-0003	MY Shoe Product - Black - 9	\$20.00	<input type="text" value="1"/>	<input type="checkbox"/>
SHOE01-0004	MY Shoe Product - Blue - 10	\$20.00	<input type="text" value="1"/>	<input type="checkbox"/>
SHOE01-0005	MY Shoe Product - Blue - 8	\$20.00	<input type="text" value="1"/>	<input type="checkbox"/>
SHOE01-0006	MY Shoe Product - Blue - 9	\$20.00	<input type="text" value="1"/>	<input type="checkbox"/>
SHOE01-0007	MY Shoe Product - Red - 10	\$20.00	<input type="text" value="1"/>	<input type="checkbox"/>
SHOE01-0008	MY Shoe Product - Red - 8	\$20.00	<input type="text" value="1"/>	<input type="checkbox"/>
SHOE01-0009	MY Shoe Product - Red - 9	\$20.00	<input type="text" value="1"/>	<input type="checkbox"/>

Check the items you wish to purchase, then click
 [ADD TO CART](#)

## Setting Up Tax Exempt Products

- Click on the product code you wish to edit at Inventory >> Products.

Orders Reports **Inventory** Marketing Customers Design Settings

Categories Products Options Import / Export Vendors Purchase Orders Receiving Product Key Distribution Warehouses

Products | BabyLiss

Search Add Delete << Previous | Back to List | View Live | Next >> Expand All | Collapse All

Image Management +

Basic Product Info -

Product Code

Product Name

Product Price

Product Weight

[Edit](#) Product Description [HTML Editor](#)

Apply To CategoryID(s)  [Click To Edit](#)

The following additional categories are automatically assigned to this product: [Learn more](#)

Search Engine Optimization +

Pricing Options +





































Shipping Options +

Product Descriptions +

Advanced Options -

- Under the Advanced Options section, set the Taxable Product menu to “N.”

**Advanced Options**

VAT Percentage 	<input type="text" value=""/>	Free Shipping Item 	<input checked="" type="checkbox"/>
Home Page Section 	<input type="text" value=""/>	Hide Product 	<input type="checkbox"/>
Taxable Product 	<input type="text" value=""/>	Hide When Out Of Stock 	<input type="checkbox"/>
<a href="#">[Upload Logo]</a> Manufacturer 	<input type="text" value="Y"/>	Enable Multi Child Add To Cart 	<input type="checkbox"/>
List Price Name 	<input type="text" value="N"/>	Private Section Customers Only 	<input type="checkbox"/>
Product Price Name 	<input type="text" value=""/>	Hide You Save 	<input type="checkbox"/>
Sale Price Name 	<input type="text" value=""/>	Allow Price Edit 	<input type="checkbox"/>
Setup Cost Name 	<input type="text" value=""/>	Price Sub Text 	<input type="text" value=""/>
AddtoCartBtn Replacement Text 	<input type="text" value=""/>	Price Sub Text Short 	<input type="text" value=""/>
Product Popularity 	<input type="text" value=""/>	Min Qty 	<input type="text" value=""/>
Display Begin Date 	<input type="text" value=""/>	<a href="#">[Upload File]</a> Download Filename 	<input type="text" value=""/>
Display End Date 	<input type="text" value=""/>	Accessory(s) 	<input type="text" value=""/>
Gift Wrap Cost 	<input type="text" value=""/>	Reward Points Given For Purchase 	<input type="text" value="10"/>
Uses Product Key Type(s) 	<input type="text" value=""/>	Free Accessory(s) 	<input type="text" value=""/>
Use Same Photos As ProductCode 	<input type="text" value=""/>	Hide Free Accessories 	<input type="checkbox"/>
Photo URL Small 	<input type="text" value=""/>	Additional Product Keyword(s) 	<input type="text" value=""/>
Photo URL Large 	<input type="text" value=""/>	Is Child Of Product Code 	<input type="text" value=""/>
Order Finished Note 	<div><a href="#">HTML Editor</a></div>		
CUSTOM METATAGS OVERRIDE 	<div>(Leave blank for most cases)</div>		

- Click Update.

This configuration pre-empts all other tax settings that would normally apply to the product.

## Import / Export

### Advanced Debugging

In the admin area, click Inventory >> Import / Export >> Data Import >> Advanced Debugging.

Orders

Reports

Inventory

Marketing

Customers

Design

Settings

Categories

Products

Options

Import / Export

Vendors

Purchase Orders

Receiving

Product Key Distribution

Warehouses

## Data Import Wizard

View: Import Wizard

Upload your file...

Table

File Name

Browse...

(max 10MB)

Overwrite Existing Data?

☐ No, do not change any records already in my database.
 ☒ Yes, replace any existing data with my new updated data.
 ☐ Clear entire table (delete all records), and replace with this import file

Test Mode?

☒ Go ahead and import my data.
 ☐ Test my file; do not import it yet.

[Advanced Debugging](#) (Tools to debug your import file)

Upload My Files

**ESTIMATED PROCESSING TIME:** (after your file has been uploaded)

100 Products = approx. 30 seconds

1000 Products = approx. 3 minutes

(Maximum 2 hours at a time.)

**Notes:**

You may generate new templates from the [Export Wizard](#) page. Then input all of your data into spreadsheets (csv file). Once you've added your data to the templates, follow the instructions below...

Products created in Volusion V5 have Free Shipping eligibility enabled. Users importing new products into their store that will not be eligible for free shipping will need to mark the FreeShippingItem column for each new product to 'N' before they import new products into the system.

**How to import a CSV file:**

- 1) Open your Microsoft Excel spreadsheet.
- 2) Go to File > Save As > and save as type "CSV (Comma Delimited)"
- 3) The filename may be anything as long as you give it a ".csv" extension.

**Other Helpful Notes:**

**How to convert from MDB to CSV:**

- Open your Microsoft Access database
- Right-Click on the table and choose "Export"
- Save as type: "Text Files"
- Click EXPORT to continue
- Now in the Export Text Wizard, choose "Delimited"
- Click NEXT to continue
- Choose "Comma" as the delimiter.
- Check the box "Include Field Names On First Row"
- Set Text Qualifier to double quotation marks "
- Click NEXT then FINISH

This reveals two checkbox options that allow you to modify some the system's information output in the event of a failed import.



## Data Import Wizard

View: Import Wizard

Upload your file...

Table

File Name

Browse...

(max 10MB)

Overwrite Existing Data?

☐ No, do not change any records already in my database.  
☐ Yes, replace any existing data with my new updated data.  
☒ Clear entire table (delete all records), and replace with this import file

Test Mode?

☒ Go ahead and import my data.  
☐ Test my file; do not import it yet.

Advanced Debugging

(Tools to debug your import file)

☒ Turn off friendly errors and show pure ASP errors.  
☒ Show debugging code (Only upload less than 500 records when using this feature. It will tell you EXACTLY what's wrong with your file, but may add a few minutes to the upload duration.)

Upload My Files

ESTIMATED PROCESSING TIME: (after your file has been uploaded)

100 Products = approx. 30 seconds

1000 Products = approx. 3 minutes

(Maximum 2 hours at a time.)

Notes:

You may generate new templates from the [Export Wizard](#) page. Then input all of your data into spreadsheets (csv file). Once you've added your data to the templates, follow the instructions below...

Products created in Volusion V5 have Free Shipping eligibility enabled. Users importing new products into their store that will not be eligible for free shipping will need to mark the FreeShippingItem column for each new product to 'N' before they import new products into the system.

How to import a CSV file:

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Other Helpful Notes:

How to convert from MDB to CSV:

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- Right-Click on the table and choose "Export"
- Save as type: "Text Files"
- Click EXPORT to continue
- Now in the Export Text Wizard, choose "Delimited"
- Click NEXT to continue
- Choose "Comma" as the delimiter.
- Check the box "Include Field Names On First Row"
- Set Text Qualifier to double quotation marks "
- Click NEXT then FINISH

Note that these options are for advanced users only, as they provide ASP code information which is very technical in nature.

### “Turn off friendly errors and show pure ASP errors”

Enabling this option removes basic error messages and instead displays the exact ASP scripting error produced by the system. You must be able to read and diagnose ASP to make use of this feature, as Volusion's Technical Support is unable to assist in reading the ASP.

### “Show Debugging Code”

Enabling this option provides the actual ASP program debugging log that shows the location of the error. Note that it only reports debugging messages for imports consisting of 500 records or fewer. Again, familiarity with ASP is required to make use of this option.

# Customers

## Accounts

### Creating Customers

Although most of your customer accounts will be automatically generated through the checkout functions, you can create all customer account types manually at Customers >> Accounts:

CRM System Accounts Customer Reviews Administrators Admin History Knowledge Base

**Orders Reports Inventory Marketing Customers Design Settings**

### Manage Customer Accounts

[Search](#) [Add](#) [Customize](#) | [Bulk Updates](#) | [Export Results](#) | [Bookmark Results](#)

Quick Edit Results 1 - 8 of 8 Page 1 of 1

Customer	Last Name	First Name	Company	Email Address	Website Address	State	Country	Last Modified	Delete
<a href="#">20</a>	test	affiliate		<a href="mailto:affiliate_test@volusion.com">affiliate_test@volusion.com</a>	<a href="http://affiliatetest.com">affiliatetest.com</a>	FL	United States	8/15/2009 11:12AM	<input type="checkbox"/>
<a href="#">19</a>	test	myrewards		<a href="mailto:myrewards@volusion.com">myrewards@volusion.com</a>		CA	United States	8/12/2009 6:34PM	<input type="checkbox"/>
<a href="#">17</a>				<a href="#">anonymous_user</a>					<input type="checkbox"/>
<a href="#">14</a>	Doe	John		<a href="mailto:test5@example.com">test5@example.com</a>					<input type="checkbox"/>
<a href="#">13</a>	Doe	John		<a href="mailto:test4@example.com">test4@example.com</a>		CA	United States	8/17/2009 11:41AM	<input type="checkbox"/>
<a href="#">12</a>	Doe	John		<a href="mailto:test3@example.com">test3@example.com</a>		CA	United States	8/10/2009 9:55AM	<input type="checkbox"/>
<a href="#">8</a>	Doe	John		<a href="mailto:test2@example.com">test2@example.com</a>		TX	United States	1/9/2009 11:57AM	<input type="checkbox"/>
<a href="#">1</a>	name	test		<a href="mailto:test1@example.com">test1@example.com</a>	<a href="http://testing123.com">testing123.com</a>	AZ	United States	8/17/2009 2:38PM	<input type="checkbox"/>

Results 1 - 8 of 8 Page 1 of 1

- Click Add.
- Define an email address for the account (all other settings are optional). Note that in order for a customer to sign in to the My Account area from your storefront, you must also define a password.

Orders Reports Inventory Marketing Customers Design Settings

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## Customers | Add New

Back to List Expand All | Collapse All

**Basic Customer Info**

**ID**
First Name
Last Name
Company Name
Address Line 1
Address Line 2
City
State or Province
Postal Code
Country
Notes

**Access Key**
**E-mail Address**
Password
Phone Number
Fax Number
Website Address
Sales Rep

Optional Fields
Special Privileges
Custom Fields
Newsletter Subscriptions & Interests [Edit](#)

- To define the customer account type, select an option from the Access Key menu.

**Basic Customer Info**


**ID**
First Name
Last Name
Company Name
Address Line 1
Address Line 2
City
State or Province
Postal Code
Country
Notes

**Access Key**
**E-mail Address**
Password
Phone Number
Fax Number
Website Address
Sales Rep

Optional Fields
Special Privileges
Custom Fields
Newsletter Subscriptions & Interests [Edit](#)


- Click Save.



## Customers | Add New

 **Search** Back to List Expand All | Collapse All

---

**Basic Customer Info**

**ID** ⓘ  
First Name ⓘ   
Last Name ⓘ   
Company Name ⓘ   
Address Line 1 ⓘ   
Address Line 2 ⓘ   
City ⓘ   
State or Province ⓘ   
Postal Code ⓘ   
Country ⓘ    
Notes ⓘ

**Access Key** ⓘ    
**E-mail Address** ⓘ   
Password ⓘ   
Phone Number ⓘ   
Fax Number ⓘ   
Website Address ⓘ   
Sales Rep ⓘ  

Optional Fields

Special Privileges

Custom Fields

☒ Add + View Record in edit mode  
☐ Add + View Record in add mode  
☐ Add + View List

or [Cancel](#)

## Logging into a Specific Customer Account

Administrators can view the website in customer mode to test an account or place an order for a customer. Click the desired account ID number at Customers >> Accounts and press Login as this Customer at the top.

**Orders Reports Inventory Marketing Customers Design Settings**

CRM System Accounts Customer Reviews Administrators Admin History Knowledge Base

## Customers | 13

Search Add Delete << Previous | Back to List | Next >> Expand All | Collapse All

This customer has placed **6 orders** totaling **\$7,544.24**, with the first order on 10/10/2008 10:46:00 AM.

[Login As This Customer](#)

### Basic Customer Info

ID	13	Access Key	Customer
First Name	John	E-mail Address	test4@example.com
Last Name	Doe	Password	123456
Company Name		Phone Number	5555555555
Address Line 1	123 Any St	Fax Number	
Address Line 2		Website Address	
City	Los Angeles	Sales Rep	
State or Province	CA		
Postal Code	92030		
Country	United States		
Notes	notes on this customer here		

Optional Fields

This will redirect you to the storefront as it would appear to the customer, and you can navigate and shop on their behalf.

## Incomplete Customer Account Fields

Volusion's system only requires a unique email address and ID number so that customers can check out anonymously if they prefer. You may also receive visitors who sign up for the store's automated newsletter without making a purchase (this would only require the additional configuration of the Email Subscriber setting).

**Orders Reports Inventory Marketing Customers Design Settings**

CRM System Accounts Customer Reviews Administrators Admin History Knowledge Base

## Manage Customer Accounts

Search Add Customize | Bulk Updates | Export Results | Bookmark Results

Quick Edit Results 1 - 12 of 12 Page 1 of 1

Customer	Last Name	First Name	Company	Email Address	Website Address	State	Country	Last Modified	Delete
24				mailinglisttest@volusion.com				8/19/2009 2:14PM	<input type="checkbox"/>

## Setting Up Tax Exempt Customers

If you sell to charities or non-profit organizations, they most likely have tax-exempt status. To automatically disable the application of tax to these customers' orders:

- In your admin area, click Customers >> Accounts.

CRM System Accounts Customer Reviews Administrators Admin History Knowledge Base

## Manage Customer Accounts

Search Add Customize Bulk Updates Export Results Bookmark Results

Quick Edit Results 1 - 8 of 8 Page 1 of 1

Customer	Last Name	First Name	Company	Email Address	Website Address	State	Country	Last Modified	Delete
20	test	affiliate		<a href="mailto:affiliate_test@volusion.com">affiliate_test@volusion.com</a>	<a href="http://affiliatetest.com">affiliatetest.com</a>	FL	United States	8/15/2009 11:12AM	<input type="checkbox"/>
19	test	myrewards		<a href="mailto:myrewards@volusion.com">myrewards@volusion.com</a>		CA	United States	8/12/2009 6:34PM	<input type="checkbox"/>
17				<a href="#">anonymous_user</a>					<input type="checkbox"/>
14	Doe	John		<a href="mailto:test5@example.com">test5@example.com</a>					<input type="checkbox"/>
13	Doe	John		<a href="mailto:test4@example.com">test4@example.com</a>		CA	United States	8/17/2009 11:41AM	<input type="checkbox"/>
12	Doe	John		<a href="mailto:test3@example.com">test3@example.com</a>		CA	United States	8/10/2009 9:55AM	<input type="checkbox"/>
8	Doe	John		<a href="mailto:test2@example.com">test2@example.com</a>		TX	United States	1/9/2009 11:57AM	<input type="checkbox"/>
1	name	test		<a href="mailto:test1@example.com">test1@example.com</a>	<a href="http://testing123.com">testing123.com</a>	AZ	United States	8/17/2009 2:38PM	<input type="checkbox"/>

Results 1 - 8 of 8 Page 1 of 1

- Click the ID number of the customer you wish to edit.

CRM System Accounts Customer Reviews Administrators Admin History Knowledge Base

## Customers | 12

Search Add Delete << Previous Back to List Next >> Expand All Collapse All

This customer has placed **5 orders** totaling **\$698.43**, with the first order on 12/27/2008 10:46:00 AM.

Login As This Customer

### Basic Customer Info

<b>ID</b> 12 <b>First Name</b> John <b>Last Name</b> Doe <b>Company Name</b> <b>Address Line 1</b> 123 Any St <b>Address Line 2</b> <b>City</b> Los Angeles <b>State or Province</b> CA <b>Postal Code</b> 92030 <b>Country</b> United States <b>Notes</b>	<b>Access Key</b> Customer <b>E-mail Address</b> test3@example.com <b>Password</b> 123456 <b>Phone Number</b> 5555555555 <b>Fax Number</b> <b>Website Address</b> <b>Sales Rep</b>
--	--

Optional Fields +

Special Privileges +

Custom Fields +

Newsletter Subscriptions & Interests Edit +

- Under the Special Privileges section, set the PaysStateTax menu to Tax Exempt/Does Not Pay Tax.

**Special Privileges**

Pays State Tax: **Tax Exempt / Does Not Pay Tax**

Pricing Discount Level: [ ]

Percent Discount: [ ]

Reward Points: 0

IsSuperAdmin (hidden)

Allow Access To Private\_Sections: [ ]

Removed From Rewards: [ ]

- Click Update.

This configuration pre-empts the application of tax by all other store tax settings to this customer's orders. For information on setting up tax exempt products, see the "Inventory" section of this portion of the manual.

## Customer Reviews

### Note on Filtered Customer Reviews

Volusion's review content filter automatically hides, but does not delete, reviews containing language restricted by the filtering system. This is to allow you to edit positive reviews that contain restricted language if you so choose.

You can view a list of filtered reviews by clicking Customers >> Customer Reviews >> List Offensive Reviews.

**Orders Reports Inventory Marketing Customers Design Settings**

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**Manage Customer Reviews**

Search Add Manage Filters List Offensive Reviews

Customize | Bulk Updates | Export Results | Bookmark Results

No records match your query.

To edit a filtered review, click its ID number, edit the text in the Review Description field as desired, check the Active setting, and click Update.

## **CRM System**

### **Note on CRM Email Content**

The CRM system doesn't allow the display of full HTML content within ticket replies or private notes, including images and flash. This helps ensure that messages aren't blocked or truncated by third party servers and networks. It also increases overall network bandwidth availability and reduces admin area storage needs.

### **Note on CRM Email Settings**

The Volusion CRM system is essentially a web-based email client. Any email account registered with the CRM's POP3 rules should be an account associated with your Volusion store and used only for the CRM system. Using an email address simultaneously configured for use with a third party client program such as Microsoft Outlook can cause severe delivery failure issues. This is because third party programs typically auto-download unread email messages from mail servers, which prevents proper forwarding to the CRM system.

### **Batch Processing CRM Tickets**

Similar to batch order processing from the orders table, you can also batch process CRM tickets.

The main table at Customers >> CRM System displays a checkbox to the left of each ticket number.



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**Customers**
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## Manage CRM: Tickets

Tickets | Audit Reps | Manage Departments | Ticket Classifications | POP3 Settings | Point System | Inbound Rules

Customize My Departments | Customize | Bulk Updates | Export Results | Bookmark Results

Quick Edit: Departments
All Departments
View
Open 4
Results 1 - 4 of 4
Page 1 of 1

Batch	Ticket #	Action Item DueDate	Locked By	Subject Notes	Total Replies & Hours Ago	CustomerID	Email Address	Orders
<b>Sales</b>								
<input checked="" type="checkbox"/>	<a href="#">4323587</a>			test name Question on Roofing Screws ...Preview	1 5357hrs	1	test name lisa@strategicrainmakers.com	8
<b>Services</b>								
<input type="checkbox"/>	<a href="#">8667711</a>	<b>Feb 5 2009 12:00AM</b> Call		Quote for Tool Repair - Hammer ...Preview	1 5357hrs	8	John Doe palak_shah@volusion.com	8
<b>Support</b>								
<input type="checkbox"/>	<a href="#">9413259</a>			testing ticket system ...Preview	1 44hrs	23	kristina_king@volusion.com	0
<input type="checkbox"/>	<a href="#">2990254</a>			Needs to know how to install outlets properly ...Preview	1 5357hrs	1	test name lisa@strategicrainmakers.com	8

Batch Action
Results 1 - 4 of 4
Page 1 of 1

or

Click this checkbox to group tickets into a batch, then choose an option from the Batch Action menu at the bottom of the table.

**Orders Reports Inventory Marketing Customers Design Settings**

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## Manage CRM: Tickets

Tickets | Audit Reps | Manage Departments | Ticket Classifications | POP3 Settings | Point System | Inbound Rules

Customize My Departments | [Customize](#) | [Bulk Updates](#) | [Export Results](#) | [Bookmark Results](#)

Quick Edit Departments All Departments View Open 4 Results 1 - 4 of 4 Page 1 of 1

Batch	Ticket #	Action Item DueDate	Locked By	Subject Notes	Total Replies & Hours Ago	CustomerID	Email Address	Orders
<b>Sales</b>								
<input checked="" type="checkbox"/>	4323587			Question on Roofing Screws .Preview	1 5357hrs	1	test name lisa@strategicrainmakers.com	8
<b>Services</b>								
<input type="checkbox"/>	8667711	Feb 5 2009 12:00AM Call		Quote for Tool Repair - Hammer .Preview	1 5357hrs	8	John Doe palak_shah@volusion.com	8
<b>Support</b>								
<input type="checkbox"/>	9413259			testing ticket system .Preview	1 44hrs	23	kristina_king@volusion.com	0
<input type="checkbox"/>	2990254			Needs to know how to install outlets properly .Preview	1 5357hrs	1	test name lisa@strategicrainmakers.com	8

Batch Action

- Transfer..
  - Customer Service
  - Sales
  - Services
  - Support
- Status...
  - Open
  - On Hold
  - Closed
  - Release
- DELETE
  - DELETE

Results 1 - 4 of 4 Page 1 of 1

or [Cancel](#)

From here, you can transfer all tickets to a specific department, change their status, or delete them outright. Click Save to perform the selected action.

## Customizing Your CRM Account

### My Departments

Some online stores may only need to configure a handful of CRM system departments while others may need many. If you don't process tickets for all store departments, you can customize your view to include only the department(s) relevant to your duties:

- Click Customize My Departments above the table to the right.

Orders Reports Inventory Marketing Customers Design Settings

CRM System Accounts Customer Reviews Administrators Admin History Knowledge Base

## Manage CRM: Tickets

Tickets | Audit Reps | Manage Departments | Ticket Classifications | POP3 Settings | Point System | Inbound Rules

Search Add Customize My Departments | Customize | Bulk Updates | Export Results | Bookmark Results

Quick Edit Departments All Departments View Open 4 Results 1 - 4 of 4 Page 1 of 1

Batch	Ticket #	Action Item DueDate	Locked By	Subject Notes	Total Replies & Hours Ago	CustomerID	Email Address	Orders
<b>Sales</b>								
<input type="checkbox"/>	4323587			test name Question on Roofing Screws Preview	1 5357hrs	1	test name lisa@strategicrainmakers.com	8
<b>Services</b>								
<input type="checkbox"/>	8667711	Feb 5 2009 12:00AM Call		Quote for Tool Repair - Hammer Preview	1 5357hrs	8	John Doe palak_shah@volusion.com	8
<b>Support</b>								
<input type="checkbox"/>	9413259			testing ticket system Preview	1 44hrs	23	kristina_king@volusion.com	0
<input type="checkbox"/>	2990254			Needs to know how to install outlets properly Preview	1 5357hrs	1	test name lisa@strategicrainmakers.com	8

Batch Action Results 1 - 4 of 4 Page 1 of 1

- From the full list of departments, select the one(s) you wish to include.
- Click Apply Changes.

Orders Reports Inventory Marketing Customers Design Settings

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## Manage CRM: Tickets

Tickets | Audit Reps | Manage Departments | Ticket Classifications | POP3 Settings | Point System | Inbound Rules

Search Add Customize My Departments | Customize | Bulk Updates | Export Results | Bookmark Results

Quick Edit Departments All Departments View Open 4 Results 1 - 4 of 4 Page 1 of 1

Batch	Ticket #	Action Item DueDate	Locked By	Subject Notes	Total Replies & Hours Ago	CustomerID	Email Address	Orders
<b>Sales</b>								
<input type="checkbox"/>	4323587			test name Question on Roofing Screws Preview	1 5357hrs	1	test name lisa@strategicrainmakers.com	8
<b>Services</b>								
<input type="checkbox"/>	8667711	Feb 5 2009 12:00AM Call		Quote for Tool Repair - Hammer Preview	1 5357hrs	8	John Doe palak_shah@volusion.com	8
<b>Support</b>								
<input type="checkbox"/>	9413259			testing ticket system Preview	1 44hrs	23	kristina_king@volusion.com	0
<input type="checkbox"/>	2990254			Needs to know how to install outlets properly Preview	1 5357hrs	1	test name lisa@strategicrainmakers.com	8

Batch Action Results 1 - 4 of 4 Page 1 of 1

**Choose Departments to View**

☐ Customer Service ☐ Sales

☐ Services ☐ Support

Apply Changes

Once finished, click the Departments dropdown menu at the top of the table to the right and select the My Departments option. To view all store departments again, choose All Departments from this list.

**Orders Reports Inventory Marketing Customers Design Settings**

CRM System Accounts Customer Reviews Administrators Admin History Knowledge Base

## Manage CRM: Tickets

Tickets | Audit Reps | Manage Departments | Ticket Classifications | POP3 Settings | Point System | Inbound Rules

Customize My Departments | Customize | Bulk Updates | Export Results | Bookmark Results

Quick Edit Departments **My Departments** View Open 4 Results 1 - 4 of 4 Page 1 of 1

Batch	Ticket #	Act Due	ked	Subject Notes	Total Replies & Hours Ago	CustomerID	Email Address	Orders
<b>Sales</b>								
<input type="checkbox"/>	<a href="#">4323587</a>		test name	Question on Roofing Screws Preview	1 5357hrs	1	test name lisa@strategicrainmakers.com	8
<b>Services</b>								
<input type="checkbox"/>	<a href="#">8667711</a>	Feb 5 2009 12:00AM Call		Quote for Tool Repair - Hammer Preview	1 5357hrs	8	John Doe palak_shah@volusion.com	8
<b>Support</b>								
<input type="checkbox"/>	<a href="#">9413259</a>			testing ticket system Preview	1 44hrs	23	kristina_king@volusion.com	0
<input type="checkbox"/>	<a href="#">2990254</a>			Needs to know how to install outlets properly Preview	1 5357hrs	1	test name lisa@strategicrainmakers.com	8

Batch Action  Results 1 - 4 of 4 Page 1 of 1

## Changing CRM Views

You can customize the CRM table to display only tickets of a certain status or within a certain department heading. From the View menu at the top (next to Departments), choose a status to reload the page with sorted results. You can also select My Tickets to view tickets you've claimed, or Solutions to Review to view tickets for which you've specified solution notification.

**Orders Reports Inventory Marketing Customers Design Settings**

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## Manage CRM: Tickets

Tickets | Audit Reps | Manage Departments | Ticket Classifications | POP3 Settings | Point System | Inbound Rules

Customize My Departments | Customize | Bulk Updates | Export Results | Bookmark Results

Quick Edit Departments My Departments View Open 4 Results 1 - 4 of 4 Page 1 of 1

Batch Ticket # Action Item DueDate Locked By My Tickets 1  
Open 4  
On Hold 1  
Closed 0  
Solutions To Review 0

Batch	Ticket #	Action Item DueDate	Locked By		Total Replies & Hours Ago	CustomerID	Email Address	Orders
<b>Sales</b>								
<input type="checkbox"/>	4323587		test name	Question on Roofing Screws Preview	1 5357hrs	1	test name lisa@strategicrainmakers.com	8
<b>Services</b>								
<input type="checkbox"/>	8667711	Feb 5 2009 12:00AM Call		Quote for Tool Repair - Hammer Preview	1 5357hrs	8	John Doe palak_shah@volusion.com	8
<b>Support</b>								
<input type="checkbox"/>	9413259			testing ticket system Preview	1 44hrs	23	kristina_king@volusion.com	0
<input type="checkbox"/>	2990254			Needs to know how to install outlets properly Preview	1 5357hrs	1	test name lisa@strategicrainmakers.com	8

Batch Action Results 1 - 4 of 4 Page 1 of 1

The selection in this menu affects the options available in the Departments menu. Choose a department from the list to view all tickets of the type you've chosen from the View menu.

## Signatures

You can set up email signatures that automatically post to all CRM ticket replies, including basic greetings/closings, as well as relevant contact information and/or help links. To configure:

- Click Customers >> CRM System.

**Orders Reports Inventory Marketing Customers Design Settings**

[CRM System](#) | [Accounts](#) | [Customer Reviews](#) | [Administrators](#) | [Admin History](#) | [Knowledge Base](#)

## Manage CRM: Tickets

[Tickets](#) | [Audit Reps](#) | [Manage Departments](#) | [Ticket Classifications](#) | [POP3 Settings](#) | [Point System](#) | [Inbound Rules](#)

[Customize My Departments](#) | [Customize](#) | [Bulk Updates](#) | [Export Results](#) | [Bookmark Results](#)

[Quick Edit](#) Departments: **My Departments** View: **Open 4** Results: **1 - 4 of 4** Page: **1** of 1

Batch	Ticket #	Action Item DueDate	Locked By	Subject Notes	Total Replies & Hours Ago	CustomerID	Email Address	Orders
<b>Sales</b>								
<input type="checkbox"/>	<a href="#">4323587</a>			test name Question on Roofing Screws ... Preview	1 5357hrs	<a href="#">1</a>	test name lisa@strategicrainmakers.com	8
<b>Services</b>								
<input type="checkbox"/>	<a href="#">8667711</a>	Feb 5 2009 12:00AM Call		Quote for Tool Repair - Hammer ... Preview	1 5357hrs	<a href="#">8</a>	John Doe palak_shah@volusion.com	8
<b>Support</b>								
<input type="checkbox"/>	<a href="#">9413259</a>			testing ticket system ... Preview	1 44hrs	<a href="#">23</a>	kristina_king@volusion.com	0
<input type="checkbox"/>	<a href="#">2990254</a>			Needs to know how to install outlets properly ... Preview	1 5357hrs	<a href="#">1</a>	test name lisa@strategicrainmakers.com	8

Batch Action  Results: **1 - 4 of 4** Page: **1** of 1

- Click the ID number of any ticket to view its content.
- Below the ticket reply text box, click the Add Signature link.

### Ticket Correspondence

Department: **Support**

Status: **Open**

Subject:

Classification:

Ticket Notes: [Add Notes](#)

[Post Reply](#) | [Add Private Note](#) | [Make This My Ticket](#)

**Post Reply**

[Add Signature](#)

[Add Attachment](#)

[Add More Attachments](#)

Ticket Status After Post: **Closed**

☐ Keep this in "My Tickets"

[Add Follow-Up](#)

Find the answer in the KnowledgeBase

**History**

**2 days ago** (45hrs ago) [8/17/2009 7:40PM] by Customer

test [Public Note](#)

- Click Edit.

## Post Reply

[Add Signature](#)  
[edit](#)  
[Add Attachment](#)  
[Add More Attachments](#)  
**Ticket Status After Post** Closed  
☐ Keep this in "My Tickets"  
[Add Follow-Up](#)  
Post

Find the answer in the KnowledgeBase  
[Search](#)

- Click Add.

[Orders](#) [Reports](#) [Inventory](#) [Marketing](#) [Customers](#) [Design](#) [Settings](#)

[CRM System](#) [Accounts](#) [Customer Reviews](#) [Administrators](#) [Admin History](#) [Knowledge Base](#)

### Manage CRM: Signatures

[Customize](#) | [Bulk Updates](#) | [Export Results](#) | [Bookmark Results](#)

No records match your query.

- Enter the customer ID of the administrator account to which the signature belongs.

[Orders](#) [Reports](#) [Inventory](#) [Marketing](#) [Customers](#) [Design](#) [Settings](#)

[CRM System](#) [Accounts](#) [Customer Reviews](#) [Administrators](#) [Admin History](#) [Knowledge Base](#)

### CRM\_Signatures | Add New

Back to List
Expand All | Collapse All

Details

**ID** ⓘ  
 Customer ID ⓘ   
**Title** ⓘ   
**Body** ⓘ

Make This My Default ⓘ ☐  
 Last Modified ⓘ Last Mod By ⓘ

- Enter a simple title for reference (e.g. "Bob's Default Signature").
- Enter the signature content in the Body field.

Last Updated: October 2009

411

- If you'd like this signature to appear automatically in the reply text boxes of all tickets (without having to select it from the Add Signature list), check Make This My Default.
- Click Save.

CRM\_Signatures | Add New

Search Back to List Expand All | Collapse All

**Details**

**ID** ⓘ

Customer ID ⓘ 1

**Title** ⓘ My Default Signature

**Body** ⓘ My Name Here  
Company Name  
My Job Title  
Phone Number + Ext  
Mailing Address Here

Make This My Default ⓘ ☒

Last Modified ⓘ

Last Mod By ⓘ

Save or Cancel

☒ Add + View Record in edit mode  
☐ Add + View Record in add mode  
☐ Add + View List

## Audit CRM Reps

The Audit Reps option above the main table allows you to view a list of all email replies and private notes created by administrators with CRM system access for quality control.



Orders Reports Inventory Marketing Customers Design Settings

CRM System Accounts Customer Reviews Administrators Admin History Knowledge Base

## Manage CRM: Tickets

Tickets | **Audit Reps** | Manage Departments | Ticket Classifications | POP3 Settings | Point System | Inbound Rules

Search Add Customize My Departments | Customize | Bulk Updates | Export Results | Bookmark Results

Quick Edit: Departments My Departments View Open 4 Results 1 - 4 of 4 Page 1 of 1

Batch	Ticket #	Action Item DueDate	Locked By	Subject Notes	Total Replies & Hours Ago	CustomerID	Email Address	Orders
<b>Sales</b>								
<input type="checkbox"/>	4323587			test name Question on Roofing Screws Preview	1 5358hrs	1	test name lisa@strategicrainmakers.com	8
<b>Services</b>								
<input type="checkbox"/>	8667711	Feb 5 2009 12:00AM Call		Quote for Tool Repair - Hammer Preview	1 5358hrs	8	John Doe palak_shah@volusion.com	8
<b>Support</b>								
<input type="checkbox"/>	9413259			testing ticket system Preview	1 46hrs	23	kristina_king@volusion.com	0
<input type="checkbox"/>	2990254			Needs to know how to install outlets properly Preview	1 5358hrs	1	test name lisa@strategicrainmakers.com	8

Batch Action Results 1 - 4 of 4 Page 1 of 1

- From the Representative menu, choose the administrator you'd like to audit.

Orders Reports Inventory Marketing Customers Design Settings

CRM System Accounts Customer Reviews Administrators Admin History Knowledge Base

## Manage CRM: Replies By Representative

Tickets | Audit Reps | Manage Departments | Ticket Classifications | POP3 Settings | Point System | Inbound Rules

Customize | Bulk Updates | Export Results | Bookmark Results

Representative

Start Date   Hours  Minutes

End Date   Hours  Minutes

No records match your query.

- Use the starting and ending date fields and/or the hours and minutes fields to restrict the audit to a certain time period. Leave these fields blank to audit the administrator's entire reply history.
- Click Submit to generate the report.

The report lists the ticket number, amount of time passed since the last response, the reply type (email or private note), and the post content.

**Orders Reports Inventory Marketing Customers Design Settings**

CRM System Accounts Customer Reviews Administrators Admin History Knowledge Base

## Manage CRM: Replies By Representative

Tickets | Audit Reps | Manage Departments | Ticket Classifications | POP3 Settings | Point System | Inbound Rules

Representative: **John Doe**

Start Date: **11/01/2008** Hours: Minutes:

End Date: **08/19/2009** Hours: Minutes:

**Submit**

Customize | Bulk Updates | Export Results | Bookmark Results

Quick Edit Results 1 - 4 of 4 Page 1 of 1

Ticket Number	Last Modified (Hours Ago)	Reply Type	Call Duration	Body
<a href="#">2990254</a>	5358hrs	Private Note		chatted on livechat. not sure what they are looking for. they will recontact us with clarification.
<a href="#">4323587</a>	5358hrs	Call Ticket	00:00:42	Talked to customer about what they needed and they are making decision. Followup needed based on size of nail.
<a href="#">8667711</a>	5358hrs	Email		Hi Palak, Your hammer is fairly well damaged but we can repair it! We are sending you a free shipping box and label. Please send it back to us with the hammer and we'll get it repaired.  Thanks, Building Supply Inc.
<a href="#">3112266</a>	5358hrs	Private Note		talked about insulation options and what was needed for their house.

Results 1 - 4 of 4 Page 1 of 1

Click a ticket number to view its full contents.

## CRM Ticket Classifications

You can apply classifications to tickets to organize them by topic within a department. To do so:

- Click Ticket Classifications above the default CRM system table.

**Orders Reports Inventory Marketing Customers Design Settings**

CRM System Accounts Customer Reviews Administrators Admin History Knowledge Base

## Manage CRM: Tickets

Tickets | Audit Reps | Manage Departments | Ticket Classifications | POP3 Settings | Point System | Inbound Rules

Search Add

Customize My Departments | Customize | Bulk Updates | Export Results | Bookmark Results

Quick Edit Departments: My Departments View: Open 4 Results 1 - 4 of 4 Page 1 of 1

Batch	Ticket #	Action Item Due Date	Locked By	Subject Notes	Total Replies & Hours Ago	CustomerID	Email Address	Orders
<b>Sales</b>								
<input type="checkbox"/>	<a href="#">4323587</a>			test name Question on Roofing Screws Preview	1 5358hrs	1	test name lisa@strategicrainmakers.com	8
<b>Services</b>								
<input type="checkbox"/>	<a href="#">8667711</a>	Feb 5 2009 12:00AM Call		Quote for Tool Repair - Hammer Preview	1 5358hrs	8	John Doe palak_shah@volusion.com	8
<b>Support</b>								
<input type="checkbox"/>	<a href="#">9413259</a>			testing ticket system Preview	1 46hrs	23	kristina_king@volusion.com	0
<input type="checkbox"/>	<a href="#">2990254</a>			Needs to know how to install outlets properly Preview	1 5358hrs	1	test name lisa@strategicrainmakers.com	8

Batch Action Results 1 - 4 of 4 Page 1 of 1

- Click Add.

Orders Reports Inventory Marketing Customers Design Settings

CRM System Accounts Customer Reviews Administrators Admin History Knowledge Base

## Manage CRM: Ticket Classifications

Tickets | Audit Reps | Manage Departments | Ticket Classifications | POP3 Settings | Point System | Inbound Rules

Search Add Customize | Bulk Updates | Export Results | Bookmark Results

Quick Edit Results 1 - 3 of 3 Page 1 of 1

Classification	Ticket Type	Name
2		Consulting
3		Purchase
1		Tool Repair

Results 1 - 3 of 3 Page 1 of 1

- Assign the classification a name.

Orders Reports Inventory Marketing Customers Design Settings

CRM System Accounts Customer Reviews Administrators Admin History Knowledge Base

## CRM\_TicketClassifications | Add New

Search Back to List Expand All | Collapse All

Details

ID

Name Service

Ticket Type(s)

Switch to Advanced View

Click To Edit

- In the TicketTypes menu, select any department(s) for which you'd like the classification to appear.

Orders Reports Inventory Marketing Customers Design Settings

CRM System Accounts Customer Reviews Administrators Admin History Knowledge Base

## CRM\_TicketClassifications | Add New

Search Back to List Expand All | Collapse All

Details

ID

Name Service

Ticket Type(s)

Switch to Advanced View

Services (3)

Click To Hide

Select from the list below to Add or Remove from the list above.

Customer Service (4)  
Sales (1)  
Support (2)

Save or Cancel

☒ Add + View Record in edit mode  
☐ Add + View Record in add mode  
☐ Add + View List

- Click Save.

You can create and assign as many ticket classifications as you wish.

## CRM Inbound Rules

The Volusion CRM system allows you create rules that filter different types of incoming email messages.

### Creating an Inbound Rule

- Click Customers >> CRM System.

**Orders Reports Inventory Marketing Customers Design Settings**

**CRM System** Accounts Customer Reviews Administrators Admin History Knowledge Base

### Manage CRM: Tickets

Tickets | Audit Reps | Manage Departments | Ticket Classifications | POP3 Settings | Point System | Inbound Rules

[Search](#) [Add](#) [Customize My Departments](#) | [Customize](#) | [Bulk Updates](#) | [Export Results](#) | [Bookmark Results](#)

[Quick Edit](#) Departments **My Departments** View **Open 4** Results **1 - 4 of 4** Page **1** of 1

Batch	Ticket #	Action Item DueDate	Locked By	Subject Notes	Total Replies & Hours Ago	CustomerID	Email Address	Orders
<b>Sales</b>								
<input type="checkbox"/>	<a href="#">4323587</a>			test name Question on Roofing Screws ... Preview	1 5357hrs	<a href="#">1</a>	test name lisa@strategicrainmakers.com	8
<b>Services</b>								
<input type="checkbox"/>	<a href="#">8667711</a>	<b>Feb 5 2009 12:00AM</b> Call		Quote for Tool Repair - Hammer ... Preview	1 5357hrs	<a href="#">8</a>	John Doe palak_shah@volusion.com	8
<b>Support</b>								
<input type="checkbox"/>	<a href="#">9413259</a>			testing ticket system ... Preview	1 44hrs	<a href="#">23</a>	kristina_king@volusion.com	0
<input type="checkbox"/>	<a href="#">2990254</a>			Needs to know how to install outlets properly ... Preview	1 5357hrs	<a href="#">1</a>	test name lisa@strategicrainmakers.com	8

Batch Action **▼** Results **1 - 4 of 4** Page **1** of 1

- Click Inbound Rules above the table.

Orders Reports Inventory Marketing Customers Design Settings

CRM System Accounts Customer Reviews Administrators Admin History Knowledge Base

## Manage CRM: Tickets

Tickets | Audit Reps | Manage Departments | Ticket Classifications | POP3 Settings | Point System | Inbound Rules

Search Add Customize My Departments | Customize | Bulk Updates | Export Results | Bookmark Results

Quick Edit Departments My Departments View Open 4 Results 1 - 4 of 4 Page 1 of 1

Batch	Ticket #	Action Item DueDate	Locked By	Subject Notes	Total Replies & Hours Ago	CustomerID	Email Address	Orders
<b>Sales</b>								
<input type="checkbox"/>	4323587			test name Question on Roofing Screws ...Preview	1 5358hrs	1	test name lisa@strategicrainmakers.com	8
<b>Services</b>								
<input type="checkbox"/>	8667711	Feb 5 2009 12:00AM Call		Quote for Tool Repair - Hammer ...Preview	1 5358hrs	8	John Doe palak_shah@volusion.com	8
<b>Support</b>								
<input type="checkbox"/>	9413259			testing ticket system ...Preview	1 46hrs	23	kristina_king@volusion.com	0
<input type="checkbox"/>	2990254			Needs to know how to install outlets properly ...Preview	1 5358hrs	1	test name lisa@strategicrainmakers.com	8

Batch Action Results 1 - 4 of 4 Page 1 of 1

- Click Add.

Orders Reports Inventory Marketing Customers Design Settings

CRM System Accounts Customer Reviews Administrators Admin History Knowledge Base

## Manage CRM: Ticket Inbound Rules

Tickets | Audit Reps | Manage Departments | Ticket Classifications | POP3 Settings | Point System | Inbound Rules

Search Add Customize | Bulk Updates | Export Results | Bookmark Results

View Inbound Rules

No records match your query.

- Enter values in the five available fields and click Save.

Orders Reports Inventory Marketing Customers Design Settings

CRM System Accounts Customer Reviews Administrators Admin History Knowledge Base

## CRM\_Inbound\_Rules | Add New

Search Back to List Expand All | Collapse All

Details

ID

Field

Operator

Value

Action

Department

Inbound rules act as email filters by searching for specific content in an incoming email and applying a specified action to matches. Each inbound rule contains the following settings:

Inbound Rule	
Field	Select the portion of the email that this rule will scan for content. You can specify the from address, subject or body.
Operator	This menu defines how the rule uses the Value entry. You can set the field to search for text that begins with, ends with, contains, or is an exact match of the Value.
Value	This field contains the text the rule will search for within the chosen email field, in the manner specified in the Operator field.
Action	This menu defines the action the rule takes when it finds an email with content that matches the above settings. A rule can move a ticket to a different department, close it, or delete it.
Department	If you choose MoveToDept from the Action menu, specify a department from this menu.

You can use inbound rules to curtail incoming spam or other forms of undesired email. You can also use this feature to automatically send all messages from a specific address to a specific department (e.g. all email from a specific vendor to the Receiving department). To view a historical record of all cases of inbound rule actions enforced on tickets, choose Inbound Rules Log from the View menu on the inbound rules table.

[Orders](#)
[Reports](#)
[Inventory](#)
[Marketing](#)
[Customers](#)
[Design](#)
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[CRM System](#)
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## Manage CRM: Ticket Inbound Rules

[Tickets](#) | [Audit Reps](#) | [Manage Departments](#) | [Ticket Classifications](#) | [POP3 Settings](#) | [Point System](#) | [Inbound Rules](#)

[Customize](#) | [Bulk Updates](#) | [Export Results](#) | [Bookmark Results](#)

View

Inbound Rules
Inbound Rules
Inbound Rules Log

No records match your query.

## **Marketing**

### **Nav Menu Promotions**

#### **Embedding an Image into a Promotion**

When creating your own promotions, you'll perhaps want to use an image in the same manner as most of the system's default promotions. To do this, connect to the Volusion store through FTP and upload your image to any accessible directory. Next, edit or create a nav menu promotion and enter relevant code in the Body field. As an example, uploading image promotion1.jpg to the /vspfiles/images directory for attachment to article ID number 121 would require the following code:

```
<a href="/Articles.asp?ID=121"></a>
```

This script will create a hypertext link to site content article ID 121 and display the promotion1.jpg image file. Visitors clicking on the image will be redirected to the article.

### **Coupons / Discounts**

#### **Free Shipping Coupons**

The system's shipping settings don't allow you to offer free shipping on an entire order whenever a customer includes one or more items that don't qualify for free shipping. You can, however, create a coupon that overrides these settings to offer free shipping on an entire order whenever a specific product is ordered.

Free shipping coupons can be configured like any other discount within Marketing >> Coupons / Discounts. Simply click Add from the main table, fill out the fields as normal, apply the coupon/discount to the product(s) of your choice, set the Discount Type to Free Shipping on ENTIRE ORDER, and click Save.

For more information on setting up coupons, see this manual's "Coupons / Discounts" section.

#### **Note on Discounts Configured with Parent/Child Products**

Use care when assigning coupons or discounts to categories that include products with a parent/child relationship as created by the inventory control grid (see the "Product Configuration" section of this manual for more information). By default, child products (variants

of the base product) don't have category assignments. If creating a coupon or discount to apply to an entire category, make sure to apply all variant products to the appropriate category manually.

## Note on One-Time-Use Coupons

Volusion tracks each use of one-time-use coupons by the customer's IP address. This may be problematic if multiple store customers with unique accounts attempt to apply the same one-time-use discount from the same computer or network IP address. In this case, the first customer will receive the discount, but subsequent customers won't.

## Note on Assigning Coupon Codes

When assigning codes to coupons, be sure that each coupon has a unique code. Duplicating a coupon code – even one that has been discontinued or is inactive – can generate errors when applying that coupon to an order.

## Using Discount Settings to Create Surcharges

In addition to deducting dollar amounts or percentages from an order, you can also use coupons to add cost to an order. This can come in handy if, for example, you sell a product that requires a flat, one-time \$5 surcharge regardless of the quantity ordered. Configure as follows:

- In the admin area, click Marketing >> Coupons / Discounts >> Add.

Orders Reports Inventory **Marketing** Customers Design Settings

Coupons / Discounts Nav Menu Promotions MyRewards Newsletters Gift Certificates SEO Affiliates In-Stock Requests

### Update Coupons & Discounts

[Search](#) [Add](#)

Customize | Bulk Updates | Export Results | Bookmark Results

Quick Edit Results 1 - 3 of 3 Page 1 of 1

Discount	Discount Name	Coupon Code	Min Qty	Max Qty	Min Order Price	Max Order Price	Start Date	End Date	Type	Value	Span	One Time Use	Last Modified	Delete
1	10% off!		1						Percent	10	N	N	1/12/2009 4:58PM	<input type="checkbox"/>
2	90 Days FREE!		1						Per Unit	0			8/1/2002	<input type="checkbox"/>
3	August Promotion - \$10 off coupon	123	1						Per Order	10			8/1/2002	<input type="checkbox"/>

Results 1 - 3 of 3 Page 1 of 1

- Assign the name "\$5 Surcharge".
- From the DiscountType menu, select Dollar amount off ENTIRE ORDER.
- In the DiscountValue field, enter "-5".
- In the MinQty field, enter "1".



- Enable the Span option.
- In ApplyToProductCode(s), enter the product code of the product that bears the surcharge.
- Click Save.

**Orders Reports Inventory Marketing Customers Design Settings**

Coupons / Discounts Nav Menu Promotions MyRewards Newsletters Gift Certificates SEO Affiliates In-Stock Requests

## Discounts | Add New

[Back to List](#) [Expand All](#) | [Collapse All](#)

**Details**

ID

Coupon Code

**Name**

**Discount Type**

**Discount Value**

Begin Date

End Date

One Time Use Coupon ☐

Cannot Be Used With Any Other Coupon ☐

Apply To Category ID(s)

Apply To Product Code(s)

Min Qty

Max Qty

Span (ie Buy 10 of any product) ☒

Min Order Price

Max Order Price

Last Modified

Last Mod By

or

☒ Add + View Record in edit mode  
☐ Add + View Record in add mode  
☐ Add + View List

## Listing of Coupons / Discounts Settings

Coupons / Discounts	
ID	Each coupon/discount is automatically assigned an ID number by the Volusion system for identification purposes.
Coupon Code	Optionally, you can assign a coupon code to a coupon/discount. This code must be entered by a customer during the checkout process to apply the coupon/discount to an order. You can email it to customers directly, or even offer it in a print ad or email newsletter.
Name*	The title of the coupon/discount.

DiscountType*	This menu allows you to assign general behavioral parameters to the coupon/discount.
DiscountValue*	A numerical value to deduct either a price or percentage off the product or order, depending on the chosen DiscountType.
BeginDate	Allows you to disable usage of the coupon/discount prior to a certain date.
EndDate	Allows you to set a coupon/discount expiration date.
One Time Use Coupon	Restricts usage of the coupon/discount to one time per customer.
Cannot Be Used With Any Other Coupon	Restricts usage of the coupon/discount to orders to which no other coupons/discounts are applied.
ApplyToCategoryID(s)	Enter the category ID(s) to which you'd like to apply the coupon/discount, separating each ID by a comma.
ApplyToProductCode(s)	Enter the product code(s) to which you'd like to apply the coupon/discount, separating each code by a comma.
MinQty	For coupons/discounts for specific products that involve quantity restrictions, enter a minimum requirement here. Note that this field should always be set to a value of 1 or higher.
MaxQty	Similar to the MinQty field, set a numerical value here to limit the number of products to which a customer can apply the coupon/discount.
Span	Enable this option for any coupon/discount that applies to more than a single product.
MinOrderPrice	Restrict the coupon/discount to only orders with a grand total equal to or greater than this value.
MaxOrderPrice	Restrict the coupon/discount to only orders with a grand total equal to or lower than this value.

\* Required fields.

Once a discount or coupon's settings are configured, click Save.

## Newsletters

### Tracking Newsletter ROI

Volusion not only allows you to create newsletters to send to your customers, it also allows you track and measure their effectiveness.

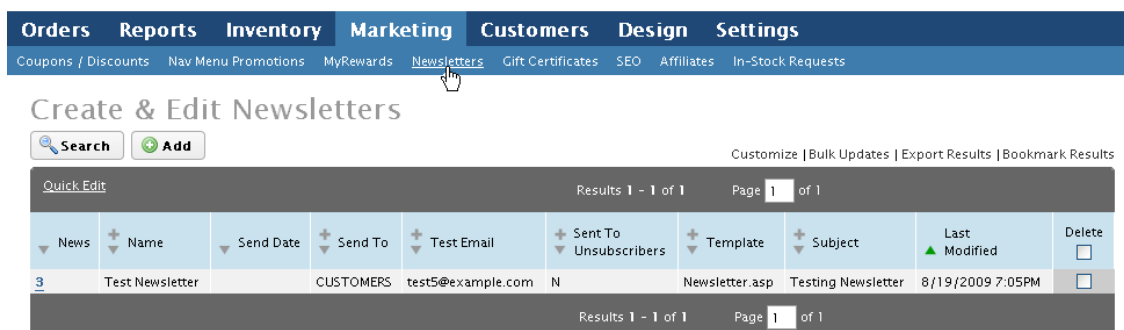
The system assigns each newsletter you create a tracking URL embedded in the logo or name listed at the top of the email. Any click-through or purchase activity generated from this URL is recorded in the ROI tracking report.

A tracking URL is a special version of your store's URL that, when used to access the store, allows the Volusion system to track the behavior of the visitor and report the results, such as the number of visits, the total orders placed, and the purchase amounts.

For more information on how Volusion's ROI system works, see the "ROI Tracking" section of "Reporting Guide" portion of this manual.

To view the ROI tracking information for each newsletter URL:

- In the admin area, click Marketing >> Newsletters.



The screenshot shows the Volusion admin interface. At the top, there is a navigation bar with tabs: Orders, Reports, Inventory, Marketing, Customers, Design, and Settings. Below this, a sub-navigation bar contains links: Coupons / Discounts, Nav Menu Promotions, MyRewards, Newsletters (highlighted with a mouse cursor), Gift Certificates, SEO, Affiliates, and In-Stock Requests. The main content area is titled 'Create & Edit Newsletters'. It includes a search bar with a magnifying glass icon and an 'Add' button. To the right of the search bar are links: Customize, Bulk Updates, Export Results, and Bookmark Results. Below these is a table with the following columns: News, Name, Send Date, Send To, Test Email, Sent To Unsubscribers, Template, Subject, Last Modified, and Delete. The table contains one row with the following data: 3, Test Newsletter, (blank), CUSTOMERS, test5@example.com, N, Newsletter.asp, Testing Newsletter, 8/19/2009 7:05PM, and a delete checkbox. At the bottom of the table, it says 'Results 1 - 1 of 1' and 'Page 1 of 1'.

- Click a newsletter ID number to view its settings.

[Orders](#)
[Reports](#)
[Inventory](#)
[Marketing](#)
[Customers](#)
[Design](#)
[Settings](#)

[Coupons / Discounts](#)
[Nav Menu Promotions](#)
[MyRewards](#)
[Newsletters](#)
[Gift Certificates](#)
[SEO](#)
[Affiliates](#)
[In-Stock Requests](#)

## newsletters | 3

[Search](#)
[Add](#)
[Delete](#)

[Send / View Stats](#)

Ready to send? Start here...

[Preview](#)

[Back to List](#)
[Expand All](#) | [Collapse All](#)

ROI Tracker > Newsletter

**Name:** Newsletter: Test Newsletter - [Edit](#)

**DaysToTrack:** 30 [Edit](#)

**TrackingURL:** http://zmnzc.mxkcw.servertrust.com/?Click=26

[View](#)

Details

ID 3

**Newsletter Name** Test Newsletter

[Edit](#) **Email Template** Newsletter.asp

**Send To** Only Customers

**Email Subject** Testing Newsletter

**Email Body (HTML Version)** Test Newsletter Body

[HTML Editor](#)

**Email Body (Text Only Version)** Test Newsletter Body

**Scheduled Send Date** (only for reference)

**Send Test Email To** test5@example.com

**Include people who un-subscribed** (i.e. for important news)

The ROI Tracker table is located on the top right.

ROI Tracker > Newsletter

**Name:** Newsletter: Test Newsletter - [Edit](#)

**DaysToTrack:** 30 [Edit](#)

**TrackingURL:** http://zmnzc.mxkcw.servertrust.com/?Click=26

[View](#)

- Click View to access the newsletter's entry in the ROI tracker.

## Use ROI Tracker

This tracker allows you to closely monitor the ROI generated from all of your advertising campaigns. You can setup specific campaigns to accurately reflect referrals. To monitor all other traffic, you can view the default campaign labeled "Other". Please note that each newsletter you send out is automatically added as a new campaign.

**Date Range**  **From**  **To**

**Exclude** ☐ Free Orders

**Include** ☐ Regular Affiliates ☐ Advertising Campaigns ☐ Newsletters

**Group By**

**AffiliateID**  (optional)

**Generate Report**

### ROI Tracker > All Campaigns

7/20/2009 through 8/19/2009, grouped by Past 30 Days

Affiliate Record	Customer Record	Group	Campaign	TrackingURL	Most Recent Click	Most Recent Sale	Conversion Rate	Total Clicks	Total Sales
			Other		8/18/2009	8/19/2009	225.00%	4	9
21	21		affiliate test2	http://zmnzc.mxkw.servertrust.com/?Click=21	8/17/2009	8/19/2009	100.00%	1	1
<b>Totals:</b>							<b>200.00%</b>	<b>5</b>	<b>10</b>

### New / Inactive Campaigns... [Add](#)

Affiliate Record	Customer Record	Group	Campaign	TrackingURL	Most Recent Click	Most Recent Sale	Total Clicks	Total Sales	Conversion Rate
1	1		test name	http://zmnzc.mxkw.servertrust.com/?Click=1			0	0	
18	18		Newsletter: Testing Newsletter -	http://zmnzc.mxkw.servertrust.com/?Click=18			0	0	
20	20		affiliate test	http://zmnzc.mxkw.servertrust.com/?Click=20			0	0	

- Alternately, click the pencil icons to edit the newsletter's settings in the ROI tracking database.

### ROI Tracker > All Campaigns

7/20/2009 through 8/19/2009, grouped by Past 30 Days

Affiliate Record	Customer Record	Group	Campaign	TrackingURL	Most Recent Click	Most Recent Sale	Conversion Rate	Total Clicks	Total Sales
			Other		8/18/2009	8/19/2009	225.00%	4	9
21	21		affiliate test2	http://zmnzc.mxkw.servertrust.com/?Click=21	8/17/2009	8/19/2009	100.00%	1	1
<b>Totals:</b>							<b>200.00%</b>	<b>5</b>	<b>10</b>

### New / Inactive Campaigns... [Add](#)

Affiliate Record	Customer Record	Group	Campaign	TrackingURL	Most Recent Click	Most Recent Sale	Total Clicks	Total Sales	Conversion Rate
1	1		test name	http://zmnzc.mxkw.servertrust.com/?Click=1			0	0	
18	18		Newsletter: Testing Newsletter -	http://zmnzc.mxkw.servertrust.com/?Click=18			0	0	
20	20		affiliate test	http://zmnzc.mxkw.servertrust.com/?Click=20			0	0	
26	26		Newsletter: Test Newsletter -	http://zmnzc.mxkw.servertrust.com/?Click=26			0	0	

**Save**

## Newsletters & Customers with Specific Interests

To narrow the focus of a newsletter to target customers with specific interests, locate the Send to Customers w/ the Following Interests Only section.

Orders Reports Inventory **Marketing** Customers Design Settings

Coupons / Discounts Nav Menu Promotions MyRewards Newsletters Gift Certificates SEO Affiliates In-Stock Requests

newsletters | 3

[Search](#) [Add](#) [Delete](#)

**Send / View Stats**

Ready to send? Start here...

[Preview](#)

[Back to List](#) [Expand All](#) | [Collapse All](#)

ROI Tracker > Newsletter

**Name:** Newsletter: Test Newsletter - [Edit](#)

**DaysToTrack:** 30 [Edit](#)

**TrackingURL:** <http://zmnzc.mxkdw.servertrust.com/?Click=26>

[View](#)

**Details** +

Send to customers w/ the following interests only [Edit](#) -

Monthly Newsletter <a href="#">i</a> <input type="checkbox"/>	Newsletter 11 <a href="#">i</a> <input type="checkbox"/>
Weekly Newsletter <a href="#">i</a> <input type="checkbox"/>	Newsletter 12 <a href="#">i</a> <input type="checkbox"/>
Quarter Newsletter <a href="#">i</a> <input type="checkbox"/>	Newsletter 13 <a href="#">i</a> <input type="checkbox"/>
Services <a href="#">i</a> <input type="checkbox"/>	Newsletter 14 <a href="#">i</a> <input type="checkbox"/>
New Hardware <a href="#">i</a> <input type="checkbox"/>	Newsletter 15 <a href="#">i</a> <input type="checkbox"/>
Best Practices <a href="#">i</a> <input type="checkbox"/>	Newsletter 16 <a href="#">i</a> <input type="checkbox"/>
Sales / Clearance Items <a href="#">i</a> <input type="checkbox"/>	Newsletter 17 <a href="#">i</a> <input type="checkbox"/>
Important Announcements <a href="#">i</a> <input type="checkbox"/>	Newsletter 18 <a href="#">i</a> <input type="checkbox"/>
Newsletter 9 <a href="#">i</a> <input type="checkbox"/>	Newsletter 19 <a href="#">i</a> <input type="checkbox"/>
Newsletter 10 <a href="#">i</a> <input type="checkbox"/>	Newsletter 20 <a href="#">i</a> <input type="checkbox"/>
Last Modified <a href="#">i</a> 8/19/2009 7:05:00 PM	Last Mod By <a href="#">i</a> [1] test name

Here, you'll find 20 options listed as Newsletter 1-20 that represent specific topics you can use. Click Edit next to the heading title to edit the option's title.

Orders		Reports		Inventory		Marketing		Customers		Design		Settings					
Company		Shipping		Tax		Payment		Currency		IP Firewall		Config Variables		Custom Fields		Maintenance	

## Configuration : Newsletter Titles

Customize | Bulk Updates | Export Results | Bookmark Results

Quick Edit Results 1 - 20 of 20 Page 1 of 1

Name	Value	Last Modified
<a href="#">Config_News1_Title</a>	<input type="text" value="Monthly Newsletter"/>	1/8/2009 11:21AM
<a href="#">Config_News10_Title</a>	<input type="text" value="Newsletter 10"/>	2/10/2006
<a href="#">Config_News11_Title</a>	<input type="text" value="Newsletter 11"/>	2/10/2006
<a href="#">Config_News12_Title</a>	<input type="text" value="Newsletter 12"/>	2/10/2006
<a href="#">Config_News13_Title</a>	<input type="text" value="Newsletter 13"/>	2/10/2006
<a href="#">Config_News14_Title</a>	<input type="text" value="Newsletter 14"/>	2/10/2006
<a href="#">Config_News15_Title</a>	<input type="text" value="Newsletter 15"/>	2/10/2006
<a href="#">Config_News16_Title</a>	<input type="text" value="Newsletter 16"/>	2/10/2006
<a href="#">Config_News17_Title</a>	<input type="text" value="Newsletter 17"/>	2/10/2006
<a href="#">Config_News18_Title</a>	<input type="text" value="Newsletter 18"/>	2/10/2006
<a href="#">Config_News19_Title</a>	<input type="text" value="Newsletter 19"/>	2/10/2006
<a href="#">Config_News2_Title</a>	<input type="text" value="Weekly Newsletter"/>	1/8/2009 11:21AM
<a href="#">Config_News20_Title</a>	<input type="text" value="Newsletter 20"/>	2/10/2006
<a href="#">Config_News3_Title</a>	<input type="text" value="Quarter Newsletter"/>	1/8/2009 11:21AM
<a href="#">Config_News4_Title</a>	<input type="text" value="Services"/>	1/8/2009 11:21AM
<a href="#">Config_News5_Title</a>	<input type="text" value="New Hardware"/>	1/8/2009 11:21AM

Clicking these boxes will send the newsletter only to customers with the corresponding options checked on their account pages in the Newsletter Subscriptions & Interests section. You can also edit these headings from here.

Orders	Reports	Inventory	Marketing	Customers	Design	Settings
CRM System	Accounts	Customer Reviews	Administrators	Admin History	Knowledge Base	

### Customers | 12

<< Previous | Back to List | Next >>
Expand All | Collapse All

This customer has placed [5 orders](#) totaling **\$698.43**, with the first order on 12/27/2008 10:46:00 AM.

[Login As This Customer](#)

Basic Customer Info	+
Optional Fields	+
Special Privileges	+
Custom Fields	+
Newsletter Subscriptions & Interests <a href="#">Edit</a>	-

Monthly Newsletter ☒
Weekly Newsletter ☒
Quarter Newsletter ☒
Services ☐
New Hardware ☒
Best Practices ☐
Sales / Clearance Items ☐
Important Announcements ☐
Newsletter 9 ☐
Newsletter 10 ☐
Last Modified ☐ 8/10/2009 9:55:00 AM

Newsletter 11 ☐
Newsletter 12 ☐
Newsletter 13 ☐
Newsletter 14 ☐
Newsletter 15 ☐
Newsletter 16 ☐
Newsletter 17 ☐
Newsletter 18 ☐
Newsletter 19 ☐
Newsletter 20 ☐
LastModBy ☐ [1] test name

## Unsubscribing from Newsletters

Due to the US CAN-SPAM Act of 2004 (link to <http://www.ftc.gov/bcp/edu/pubs/business/ecommerce/bus61.shtm>), you must provide your customers the ability to opt out of your store's email marketing.

Your customers can do this by logging into their store accounts, clicking Change my e-mail preferences



**My Orders**

<a href="#">Review orders / track packages</a>	<a href="#">Change quantities / cancel orders</a>
<a href="#">Change shipping address</a>	<a href="#">Print invoices</a>
<a href="#">Change billing address</a>	<a href="#">Return items</a>

**Personal Information**

<a href="#">Change e-mail address, or password</a>	<a href="#">Manage your billing addresses</a>
<a href="#">Change my e-mail preferences</a>	<a href="#">Manage your shipping addresses</a>

**Payment Settings**

<a href="#">Edit or delete a credit / debit card</a>	<a href="#">View gift certificate balance</a>
	<a href="#">Apply a gift certificate to your account</a>

**Other Features**

<a href="#">Edit a review that I wrote</a>	<a href="#">View my Wish List</a>
<a href="#">My Rewards</a>	

[I'm done managing my account, log me out.](#)

and pressing Remove me from the mailing list. This button automatically un-checks the Email Subscriber field in their customer account settings. For customers who don't have an account password, or who have directly requested to opt out of the newsletter list, you can manually edit this field at Customers >> Accounts. Using the search functions if necessary, locate and click their account ID number in the table and navigate to the Optional Fields section, uncheck the box, and press Update.

## Newsletter Limits

Each monthly pricing plan includes a number of newsletter emails you can send per month through the newsletter feature. Note that limits are reset on the first of each month regardless of your billing cycle dates (which are determined by the date your order is processed). If you place an order that is processed on the 15th of the month, for example, you'll pay for your 02/15/10 – 03/14/10 billing cycle on or shortly after 02/16/10, which includes newsletters sent 03/01/10 – 03/31/10.



Current newsletter limits (subject to change) are as follows:

Steel: 100 emails/month  
Bronze: 200 emails/month  
Silver: 200 emails/month  
Gold: 1000 emails/month  
Platinum: 2000 emails/month

Legacy limits (pre-08/24/09):

Steel: 200 emails/month  
Bronze: 250 emails/month  
Silver: 500 emails/month  
Gold: 2500 emails/month  
Platinum: 5000 emails/month  
Semi-Dedicated Standard: 10,000 emails/month  
Semi-Dedicated Premium: 15,000 emails/month

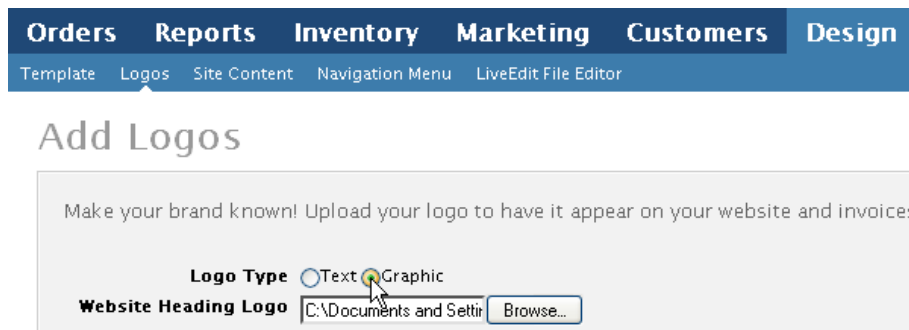
You can increase your newsletter email limit by paying an extra monthly fee. For upgrade options, log in at <http://my.volusion.com>, click Plan Usage in the left-hand menu (under the My Store heading), and click Add next to your current limit.

## Design

### Logos

#### A Note on Using Graphic Logos for Invoices

In order to display an uploaded graphic logo on invoices or emails generated by Volusion, the Logo Type must be set to the Graphic option.



Because of this, those wishing to implement a graphic logo for their invoice must also apply a graphic logo for their Volusion store's header as well. Note that only .GIF image file types are supported.

#### Adding a Favicon

Favicons are small images that display next to a website address in a web browser's address field and bookmark settings.



Adding a favicon to the Volusion store is optional, but can help provide an extra bit of polish to your overall site appearance. To do so:

- On the Logos page, click Have a favicon.ico below the invoice logo settings.

Orders Reports Inventory Marketing Customers Design Settings


Template Logos Site Content Navigation Menu LiveEdit File Editor

## Add Logos

Make your brand known! Upload your logo to have it appear on your website and invoices.


Logo Type ☐ Text ☒ Graphic

Website Heading Logo



Recommended Website Logo Graphic Size: 812 x 82

Invoice Logo



[Have a favicon.ico?](#)

- Enter the local path to the favicon file in the text box provided, or click browse to locate it on your hard drive.

Orders Reports Inventory Marketing Customers Design Settings


Template Logos Site Content Navigation Menu LiveEdit File Editor

## Add Logos

Make your brand known! Upload your logo to have it appear on your website and invoices.


Logo Type ☐ Text ☒ Graphic

Website Heading Logo



Recommended Website Logo Graphic Size: 812 x 82

Invoice Logo



Favorite Icons are rarely used, however if you have an advanced designer with time to spare, you can read how to create favorite icons here:  
<http://www.photoshopsupport.com/tutorials/jennifer/favicon.html>

- Click Save.

Favorite Icons are rarely used, however if you have an advanced designer with time to spare, you can read how to create favorite icons here:  
<http://www.photoshopsupport.com/tutorials/jennifer/favicon.html>

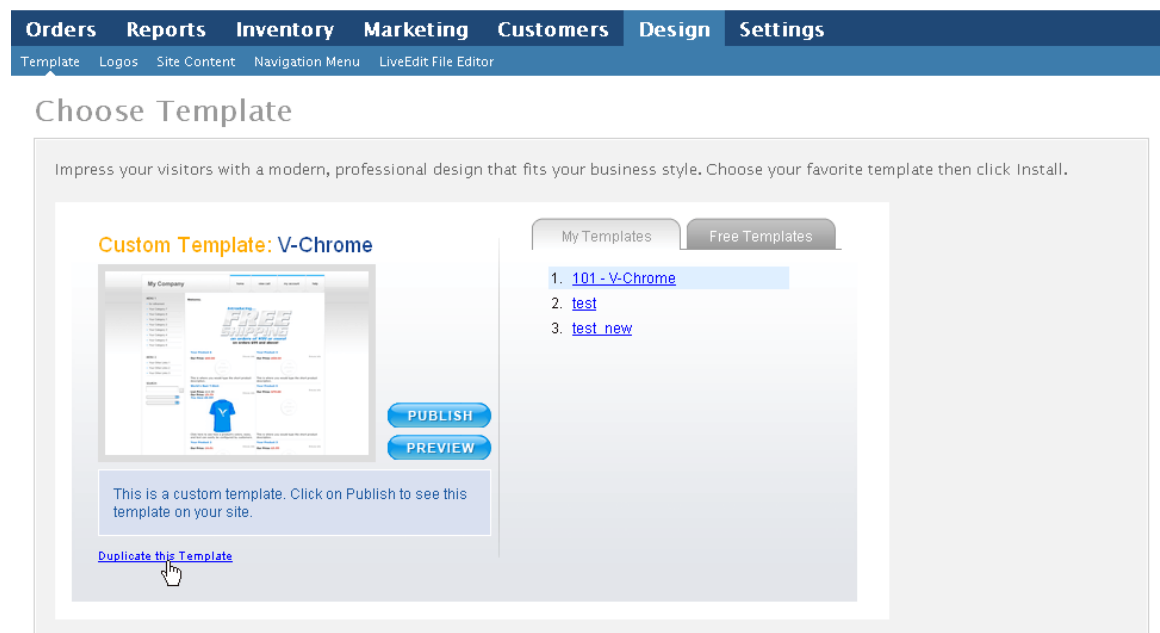
Note that all favicons must be an .ICO image file type. Image editors such as Adobe Photoshop and Photoshop Elements have the ability to save images in this format. Also note that favicons are traditionally small images. You should use a small, simple (but readable) image.

## Template

### Backing up a Template

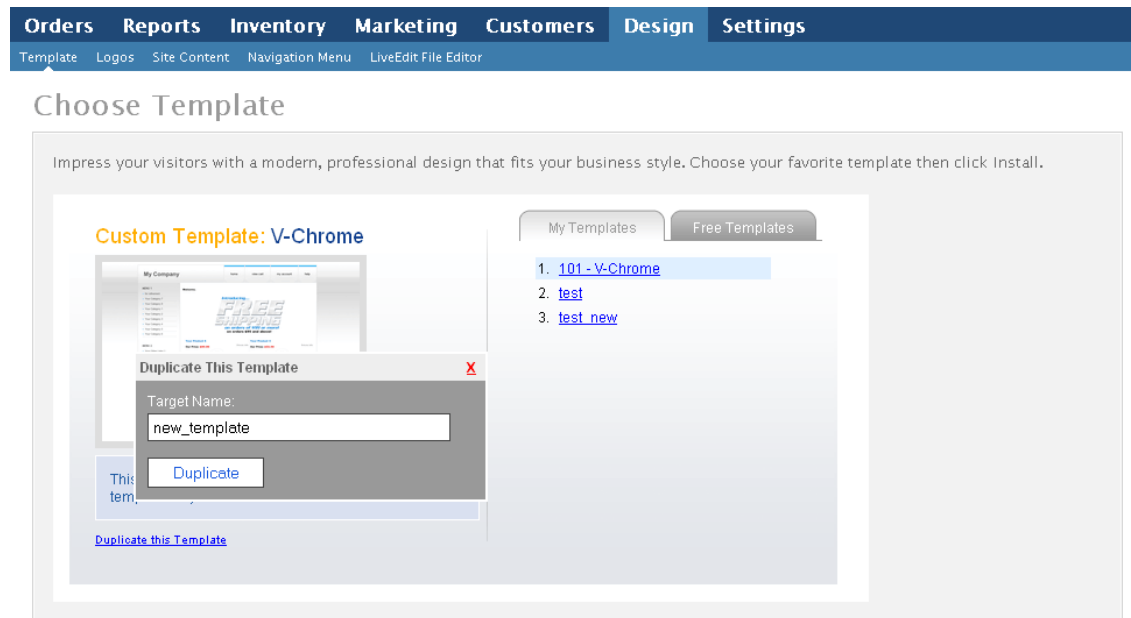
Volusion always recommends duplicating a template file for local storage before editing its code. This allows you to store the duplicate while editing the original, or preserve the original while editing the duplicate. In the event that you wish to undo changes, or if you make an error during editing that you don't know how to correct, you can simply re-load the unedited version to restore your settings.

To back up a template, click Design >> Template and select a template from the My Templates tab to load it into the template viewer window. Next, click Duplicate this Template at the bottom of the window.



You'll be prompted to enter a name for the duplicate. After doing so, click the Duplicate button.

The duplicate will then appear in the My Templates tab, where you can preview or publish it like any other template.



Any changes made to the original template won't affect the duplicate template and vice versa. Many advanced Volusion merchants create their own custom templates by duplicating a free template in this fashion.

## Note on Previewing Templates

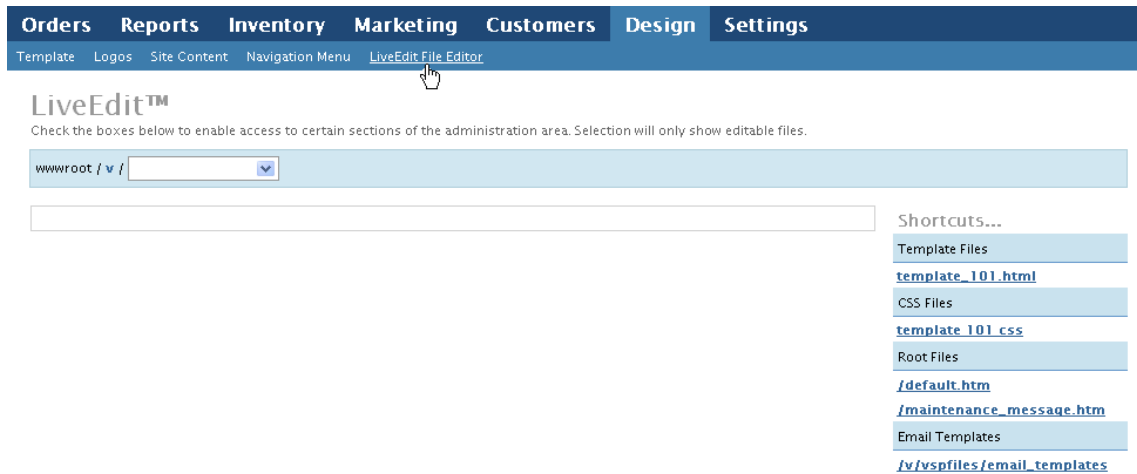
When previewing some templates, you might notice some anomalies such as mismatched images in some portions of the navigation menus. In these instances, the template preview system does provide a useful, if incomplete, view of what a template will look like if applied to your store. To view a complete version, however, simply publish the template to your site. As always, you can quickly and easily change the template using the steps described in the "Design" section of the "Getting Started Guide" portion of this manual.

## LiveEdit File Editor

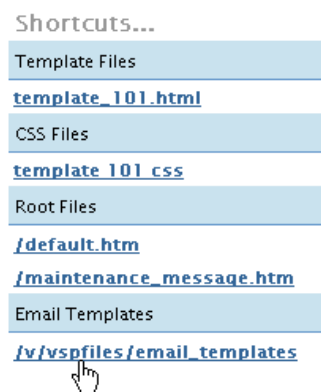
## Modifying the Back-in-Stock Notification Email

When active, the in-stock requests notification system automatically emails any customer who requests notification when a particular product is back in stock. This email, like others in the system, is generated from an HTML template that you can modify. To access it:

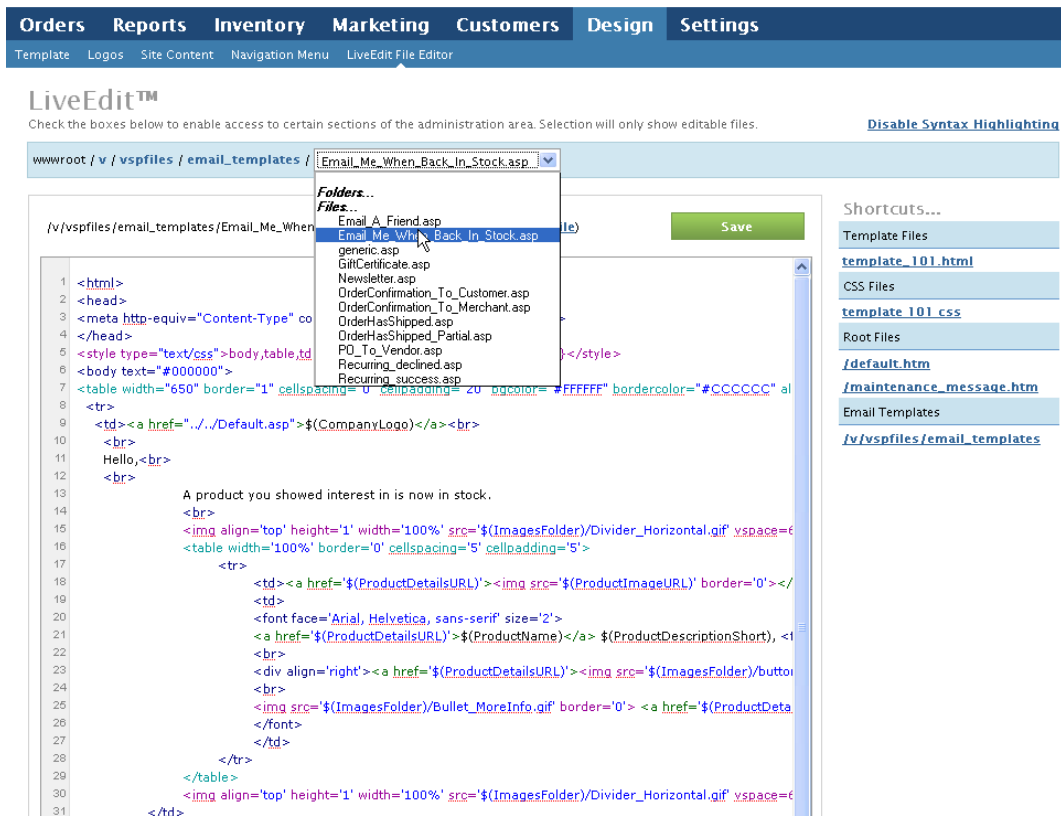
- In the admin area, click Design >> LiveEdit File Editor.



- Click /v/vspfiles/email\_templates in the Shortcuts menu.



- Just above the edit area, locate the dropdown menu and select Email\_Me\_When\_Back\_In\_Stock.asp.

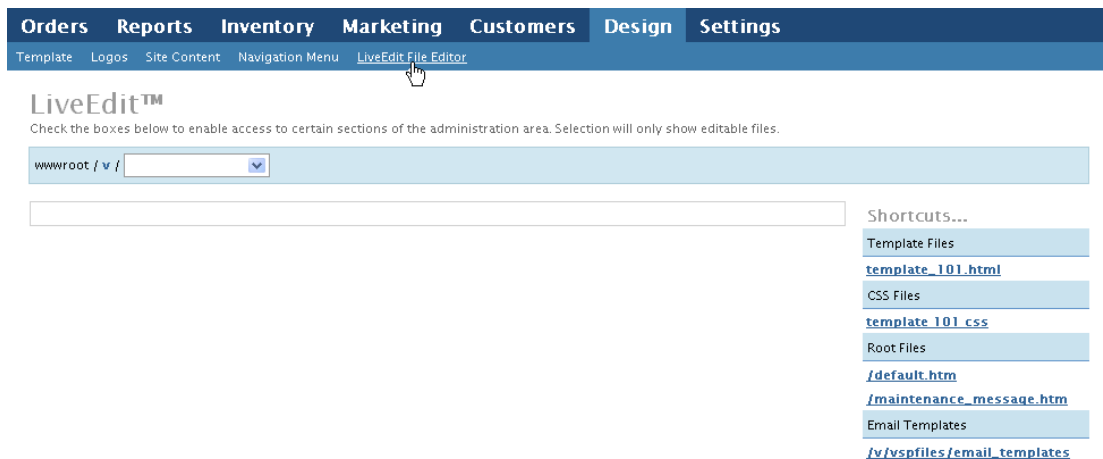


Edit the HTML within this template and click Save. As with all cases when editing the system's default HTML, we highly recommend copying the full content and saving it locally before making any modifications. This practice allows you to restore the page to its original form in the event of a mistake. Knowledge of HTML coding is required to make such modifications.

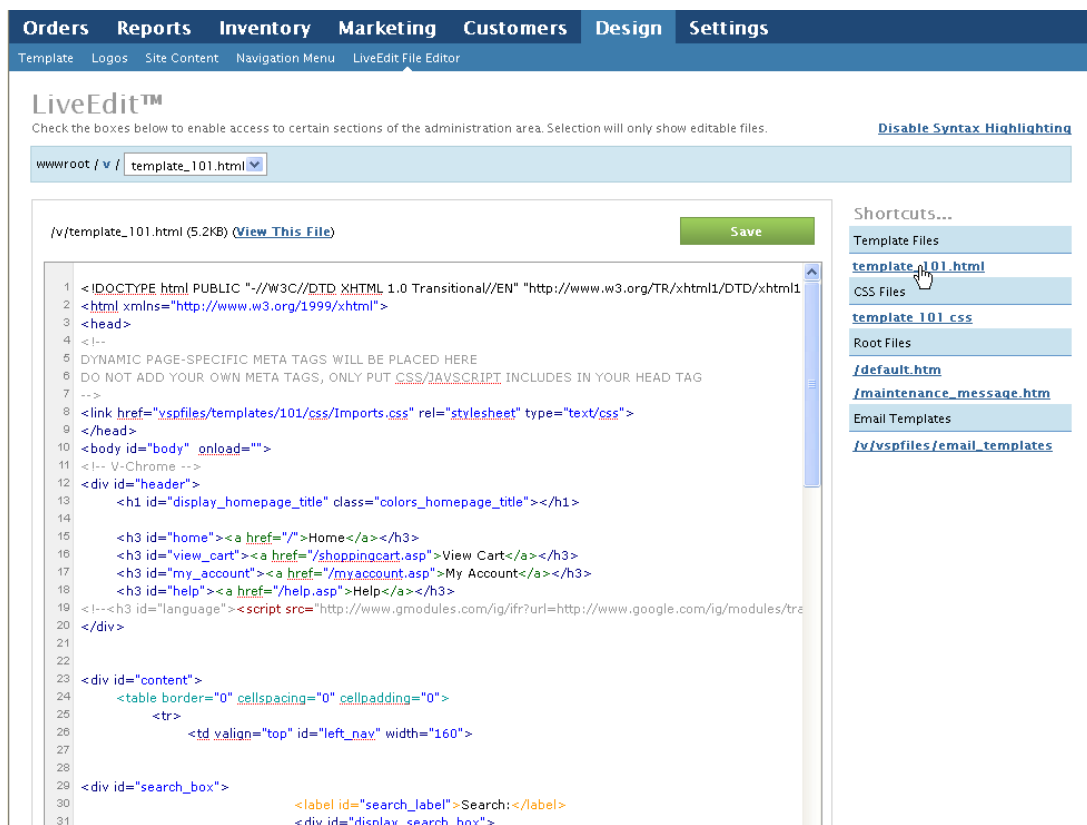
## Setting up an Exchange Rate Menu

If you've configured your Volusion store for more than one currency, you can add a custom dropdown menu to your store's template to allow your customers to choose different currency types for product price display. Note, however, that Volusion can only accept payments using a single currency type (the default currency type configured). The settings described here function only as an alternate way to display product prices to customers:

- In the admin area, click Design >> LiveEdit File Editor.



- On the following page, click template\_X.html (where X is equivalent to the template ID number published on your store).





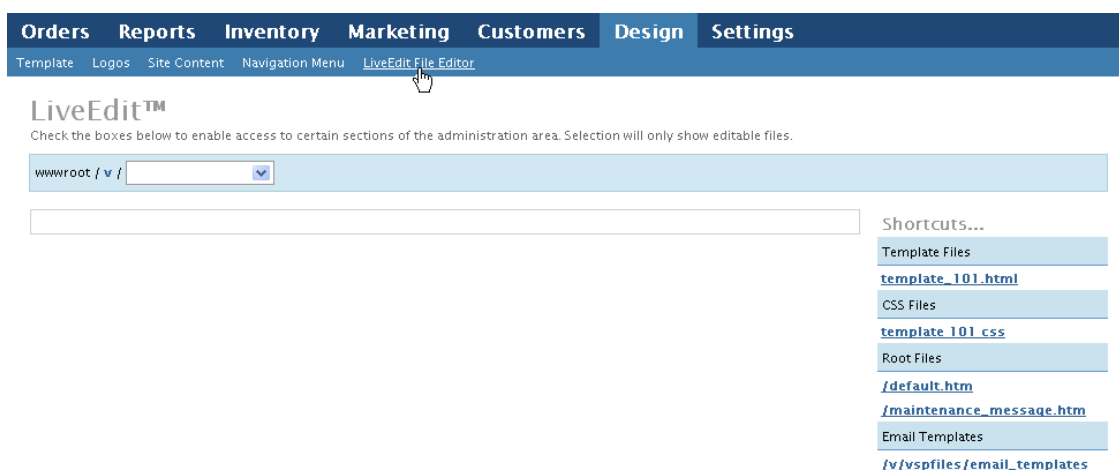
- This HTML tag displays a dropdown menu that allows customers to manually select the different currency types configured within the Volusion currency wizard. Note that you may have to modify your store's CSS or HTML to integrate this currency menu with your store's overall design.

## Creating Custom Error Pages

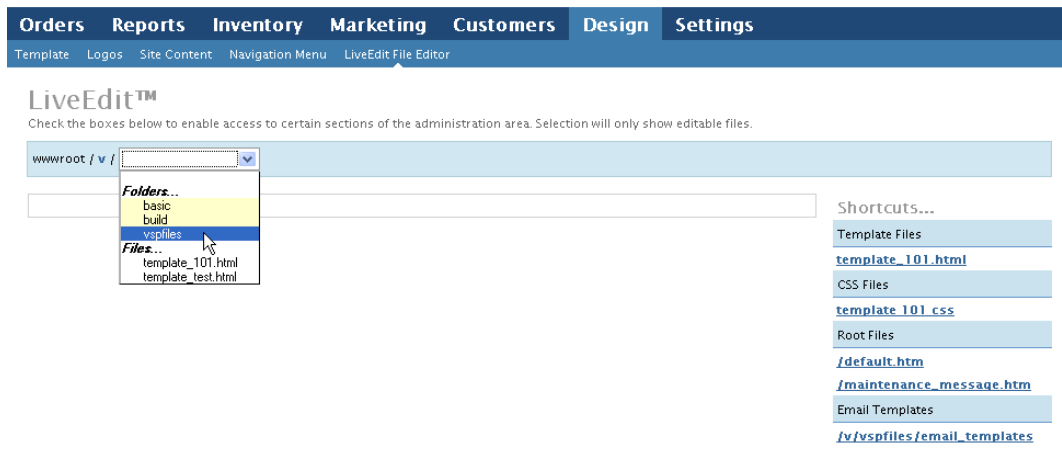
Volusion enables you to create your own custom 404 and 500 error pages. A 404 error displays when visitors attempt to access an unavailable website or file. This can result if the web server is completely offline, or if the website has changed locations. A 500 error displays during internal web server problems when the server has no additional information to provide.

Both error types generally display using simple text and no background. If you'd like to customize the style or content of these messages, you can do so:

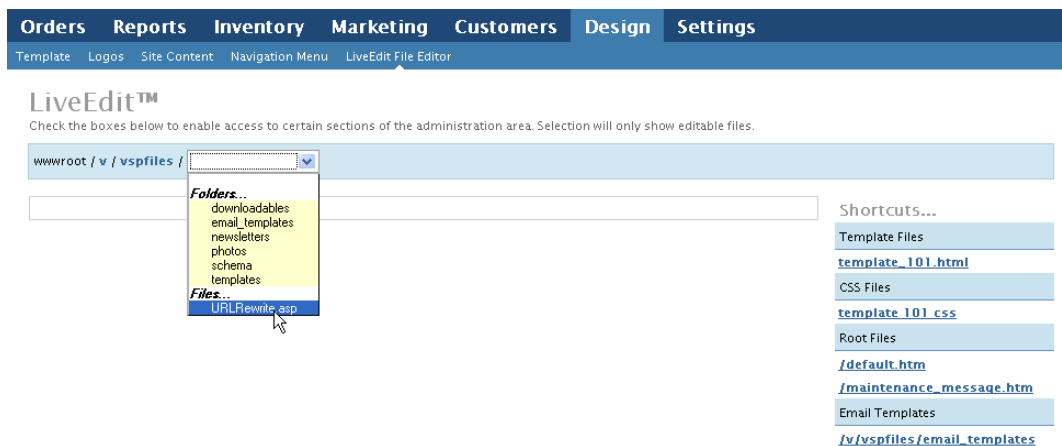
- In the admin area, click Design >> LiveEdit File Editor.



- From the dropdown menu, select /vspfiles.



- Once the page reloads, select URLRewrite.asp from the dropdown menu.



This page contains a series of web scripts that generate 404 and 500 error messages.

- Edit the contents as needed and click Save.

[Orders](#)
[Reports](#)
[Inventory](#)
[Marketing](#)
[Customers](#)
[Design](#)
[Settings](#)

[Template](#)
[Logos](#)
[Site Content](#)
[Navigation Menu](#)
[LiveEdit File Editor](#)

**LiveEdit™**  
 Check the boxes below to enable access to certain sections of the administration area. Selection will only show editable files.
 [Disable Syntax Highlighting](#)

wwwroot / v / vspfiles /

/v/vspfiles/URLRewrite.asp (6.4KB) [\(View This File\)](#)

Save

```

1  <%@LANGUAGE="VBScript"%>
2  <%
3  Option Explicit
4
5  Dim ShowErrorDetails, RedirectToPage
6  ShowErrorDetails = False 'Set to true for debugging errors
7  RedirectToPage = "" 'If this is filled in, this is the page to redirect to in case of a 404 error
8
9
10 Dim ASPErr
11 Set ASPErr = Server.GetLastError()
12 If ASPErr.Description <> "" Then
13     If ShowErrorDetails Then
14         Response.Write(Server.HtmlEncode(ASPErr.Category) & " error " & Server.HtmlEncode(ASPErr.Description) & "
15         Response.Write(Server.HtmlEncode(ASPErr.Description) & "<br><br>")
16         Response.Write(Server.HtmlEncode(ASPErr.File) & ", line " & Server.HtmlEncode(ASPErr.Line))
17         Response.End()
18     Else
19         %>
20     <!DOCTYPE HTML PUBLIC "-//W3C//DTD HTML 3.2 Final//EN">
21     <html dir=ltr>
22
23     <head>
24     <style>
25     a:link           {font:8pt/11pt verdana; color:FF0000}
26     a:visited        {font:8pt/11pt verdana; color:#4e4e4e}
27     </style>
28
29     <META NAME="ROBOTS" CONTENT="NOINDEX">
30
31     <title>The name cannot be displayed</title>

```

Shortcuts...

- Template Files
  - [template\\_101.html](#)
- CSS Files
  - [template\\_101.css](#)
- Root Files
  - [/default.htm](#)
  - [/maintenance\\_message.htm](#)
- Email Templates
  - [/v/vspfiles/email\\_templates](#)

### Items to Note

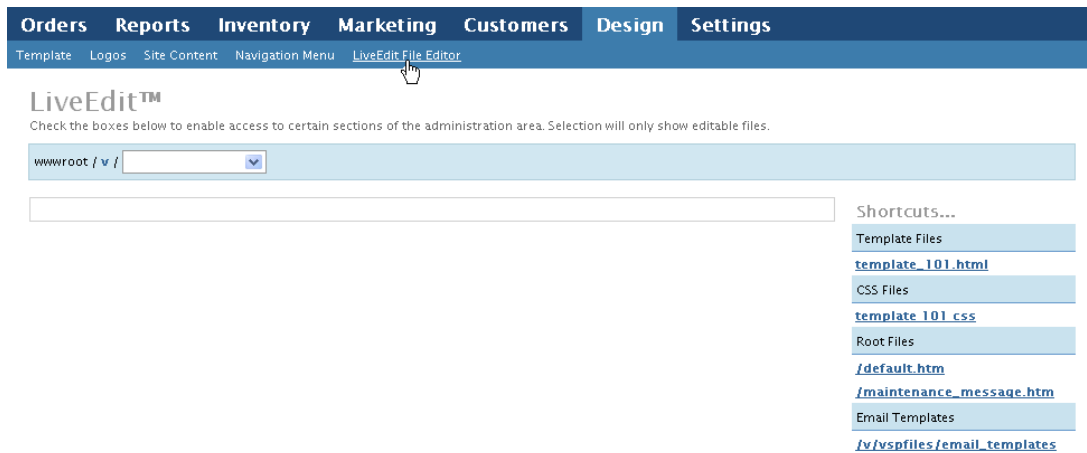
This page only controls 404 and 500 errors for pages within the store's /v directory. Modifications won't affect pages or links external to the /v directory.

This feature was designed specifically to provide web designers with thorough knowledge of HTML the ability to further customize their stores. It is only recommended for advanced users.

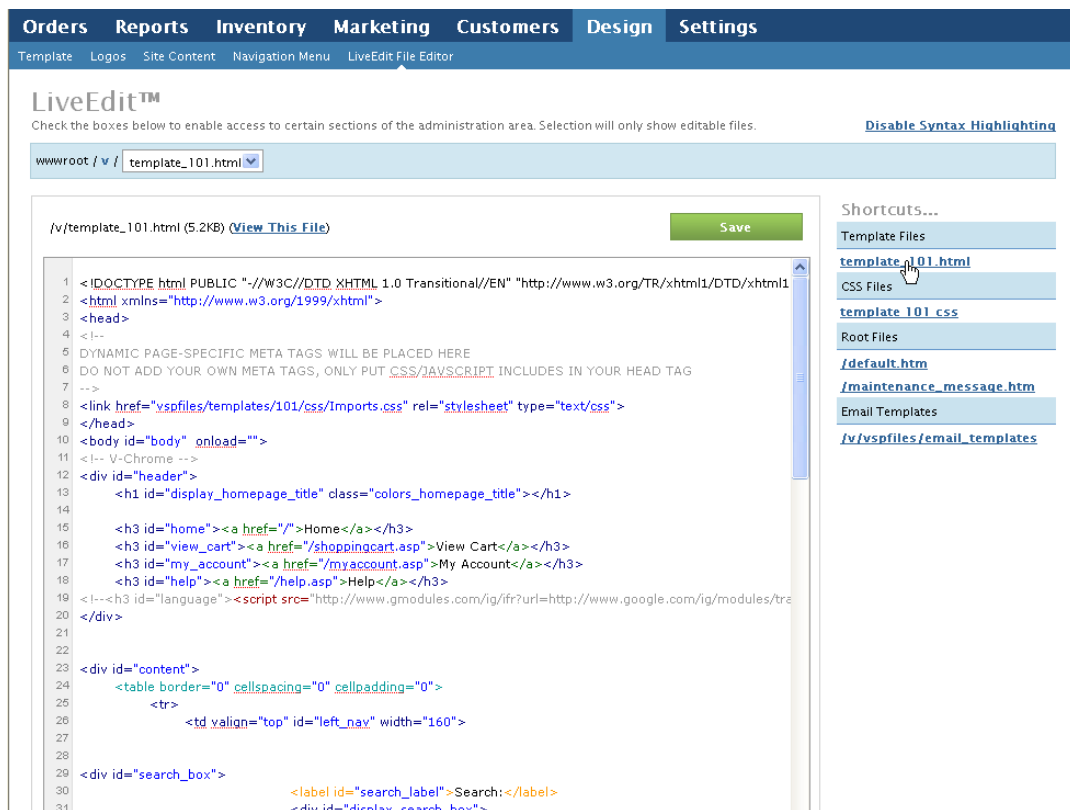
## Enabling Additional Navigation Menus

Volusion allows the creation and display of product categories in a maximum of 8 navigational menus on the storefront. By default, most templates have only the first 2 - 3 navigational menus active. Any categories configured to display in other menus won't appear on the storefront until the following modifications are made:

- In the admin area, click Design >> LiveEdit File Editor.



- In the Shortcuts table on the right, click `template_X.html`, where “X” is the ID number corresponding to your published template.



This displays the template’s HTML in the editor window. As always, we recommend saving a local copy of this code before modification in the event of a mistake.

- Search the template code for `display_menu_1`. This text is surrounded by a large block of HTML code that creates each navigational menu (note that not all templates will display identical code):

```

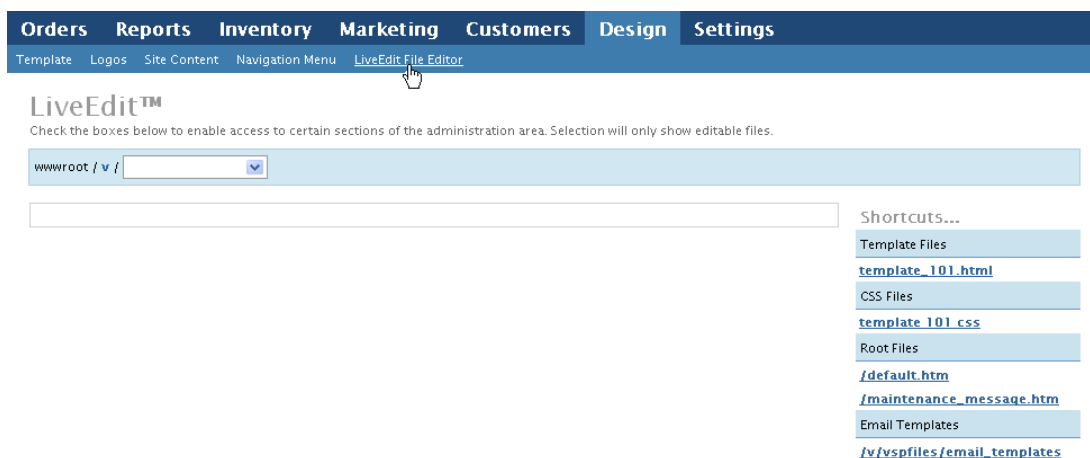
<div id="display_promotions_20">Display_Promotions</div>
  <table width="155" border="0" cellspacing="0" cellpadding="0">
    <tr>
      <td width="155" height="22" align="right" class="navtitle colors_menutitletext"
        bgcolor="Menu1_Title_BgColor"> Menu2_Title</td>
    </tr>
    <tr>
      <td width="155">
        <div id="display_menu_1">Display_Menu 1</div>
      </td>
    </tr>
  </table>

```

- Copy this code and paste it below the last line of the code snippet corresponding to the last navigational menu already configured within the template.
- Change the numeral in the text (display\_menu\_1) to reflect the navigation menu you wish to configure (3-8).
- Click Save.

Once these changes are published, you may notice that the style properties of the menu(s) don't match those of the default menus. If this is the case, you can correct it by altering your CSS as follows:

- Return to Design >> LiveEdit File Editor.

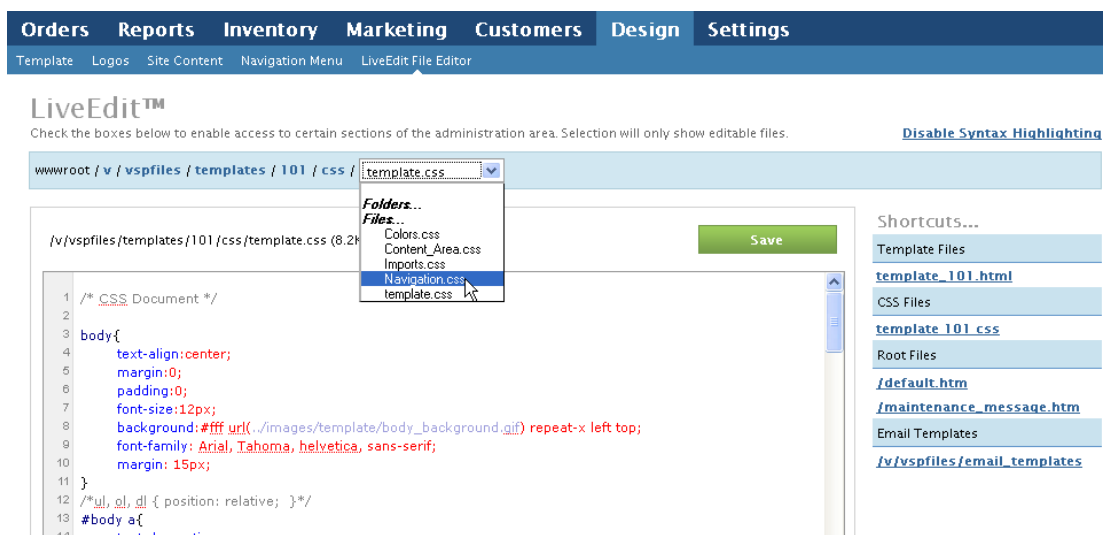


- In the Shortcuts table on the right, click template X css, where “X” is the ID number corresponding to your published template.

## Shortcuts...

[Template Files](#)  
[template\\_101.html](#)  
[CSS Files](#)  
[template\\_101.css](#)  
[Root Files](#)  
[/default.htm](#)  
[/maintenance\\_message.htm](#)  
[Email Templates](#)  
[/v/vspfiles/email\\_templates](#)

- Use the dropdown menu above the editor to choose Navigation.css.



Below the menu, you should now see `wwwroot/v/vspfiles/templates/X/css/Navigation.css`.

## LiveEdit™

Check the boxes below to enable access to certain sections of the administrati

wwwroot / v / vspfiles / templates / 101 / css / [Navigation.css](#)

The editor now displays a series of 1-line CSS code definitions that begin “#display\_menu\_x.nav...” where “X” represents a nav menu number.

- Highlight and copy each line of CSS code that pertains to a particular navigational menu (e.g. all lines of CSS that pertain to nav menu 1).
- Paste this code below the last line of code in this page.
- Rename the “#display\_menu\_x” within each newly-pasted line to refer to the new nav menu’s number.

- Click Save.

### **Items to Note**

To implement style attributes in additional nav menus different from the default menus, you'll have to edit the CSS values for each nav menu contained in the Navigation.css file.

## **Navigation Menu**





### **Additional Navigation Menu Settings**





At Design >> Navigation Menu, you can configure navigation settings for each template loaded in the My Templates list at Design >> Template. These settings remain independent of each other. You can change navigation menu settings using the View Menus For Template dropdown menu near the top of the page. Simply select your desired template to adjust its settings.

Orders	Reports	Inventory	Marketing	Customers	Design	Settings
Template	Logos	Site Content	Navigation Menu	LiveEdit File Editor		

## Update Navigation Menu

View Menus For Template: [101] V-Chrome

Menu 1	Template Variable
<b>Menu Title:</b> <input type="text" value="QUICKLINKS"/>	Menu1_Title
<b>Title Text Color:</b> <input type="text" value="#84c220"/>  <a href="#">color map</a>	Menu1_Title_TextColor
<b>Title Background Color:</b> <input type="text" value="#1e90ff"/>  <a href="#">color map</a>	Menu1_Title_BgColor
<b>Menu Type:</b> <input type="text" value="Tree Always Expand"/>	
<b>Divider:</b> <input type="text" value="none"/>	
<b>Text Color:</b> <input type="text" value=""/>  <a href="#">color map</a>	
<b>Text Color Hover:</b> <input type="text" value=""/>  <a href="#">color map</a>	

Menu 2	Template Variable
<b>Menu Title:</b> <input type="text" value="CONTACT"/>	Menu2_Title
<b>Title Text Color:</b> <input type="text" value="#73ba00"/>  <a href="#">color map</a>	Menu2_Title_TextColor
<b>Title Background Color:</b> <input type="text" value="#1e90ff"/>  <a href="#">color map</a>	Menu2_Title_BgColor
<b>Menu Type:</b> <input type="text" value="Links"/>	
<b>Alignment:</b> <input type="text" value="vertical"/>	
<b>Divider:</b> <input type="text" value="divider"/>	
<b>Text Color:</b> <input type="text" value=""/>  <a href="#">color map</a>	
<b>Text Color Hover:</b> <input type="text" value=""/>  <a href="#">color map</a>	

Save

## Uploading Images for BG Image Menu Types

When choosing a Menu Type from Design >> Navigation Menu, the Rollover Images, Rollover BG Images, and BG Images options call image files (that do not yet exist) from a specific FTP directory. Once you've set one of these menu types, broken image links will appear on the storefront in these image areas. Right click a broken image and view its properties to determine the image name and directory location.

Next, log in to your FTP account and navigate to that directory, then copy your custom image and paste it in this location, renaming it according to the default settings on the broken image.



## Site Content

Websites are essentially collections of text, presented in a specific manner to anyone accessing that site from the Internet with web browsing software. Websites contain text - even online stores. Whether to explain return policies, provide a list of contact information or simply to say something about the online business itself, online merchants will need to edit the text that is displayed within their store's website.

This could involve a lot of hard work editing and keeping track of various HTML files. However, Volusion has done one better and provides an easy way for merchants to manage text within their online store.

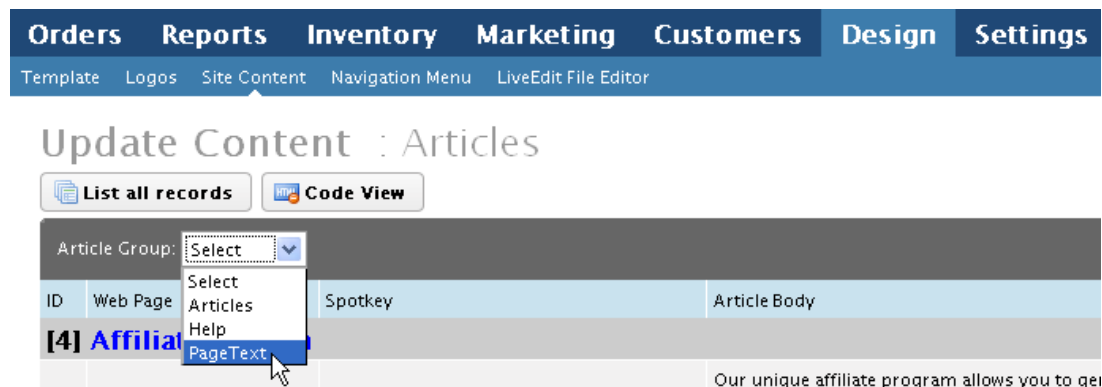
Merchants can manage text information displayed on their Volusion store by using the *Site Content* functions within the Volusion Administration Page.

The *Site Content* functions within the Volusion *Admin Page* can be found by clicking on the *Design* tab and then clicking on the *Website Text* link within the *Design* tab's blue menu bar.



From the *Site Content* page, users can view, add or modify articles within their Volusion store's database. These articles can be displayed in different portions of the Volusion store and can contain text, images or HTML.

By default, each Volusion store is configured with 132 different website articles. These articles cover everything from displaying information to visitors on the store's checkout page, displaying help information, return policies, marketing blurbs about the business itself as well as most of the text displayed on the storefront, under *PageText*.



## Part I - Editing Articles:

Merchants are encouraged to modify text within their store's pre-generated website text articles to customize their store to their needs.

Each pre-generated article within the Volusion *Site Content* page has its own, specific purpose. There are 2 specific articles merchants will want to edit - the "*Home Page Article*" and the "*About Us Article*".

The "*Home Page Article*" displays text or HTML within the central portion of the Volusion storefront home page. This article is a prominent area that visitors see as soon as they arrive at the online store. Using HTML, this can often be used to display an eye-catching image in the central field of the store homepage.

The *About Us* article contains any text that is displayed to visitors when they click on the *About Us* link, located on in the Volusion storefront.

As these articles are either prominently displayed or contain store-specific information to visitors, Volusion merchants will want to modify these articles to specifically fit their store needs. Follow these steps to edit these articles:

- Log into the Volusion *Administration Page* and click on the *Design* tab.
- Click on the *Site Content* link in the blue menu bar.
- Locate the article you wish to edit (For example, the homepage article is ID 2 and named "Default.asp"). The "Spot Key" will tell you where the article displays on the storefront. The homepage article's Spot Key is "Above\_Featured\_Products"
- Hover over any column on the article table in the row for your article and click to edit.
- This will take you to that specific articles edit page. Use the article body field to edit the content in the article. If you are not familiar with HTML, use the HTML Editor.
- Make sure to Copy HTML to parent window if you are using the HTML Editor and Save your changes.

## Part II - Creating a New Article:

The "*Home Page Article*" and "*About Us Article*" are only two of the many articles to modify within the *Website Text* page. Within the initial *Advanced Mode* of this page, users have the ability to create a completely custom article. Here's how:

- Within the Site Content page, click the "*List All Records*" link near the top left of the page.
- Click the *Add* button to begin creating a new article

- Assign a category to the new article, enter the article title, body and any other settings needed.
- Click the *Save Changes* button when finished.
- Once the article is saved, users can click the "*View Live Article Page*" link near the top of the newly created article to view the article as it will appear within the Volusion storefront.

Each website article will have the following settings:

Details	
ID	This field contains an automatically-assigned number to identify each website article by.
PageName **	Specific articles will be embedded within certain pages within the Volusion storefront. If this is the case, the page name itself will be listed here. Note that this value cannot be modified.
SpotKey **	In some cases, multiple articles are displayed within a single page on the Volusion storefront. If this is the case, each article is assigned a "SpotKey" to determine which area of the page the article will appear in (e.g. "Above the Shopping Cart" or "Below the Shopping Cart").
CategoryID*	Each article must be assigned to an article category. The category the article is assigned to can be chosen from this drop-down field.
ArticleTitle	Users can define the title of the article here.
ArticleCaption	An optional article caption can be entered here. This caption will display below the article's title.
ArticleBody	The actual article contents can be entered here. The "ArticleBody" can contain text or HTML.

Search Engine Optimization	
Meta Tag Title	Enter a title in this field for the article's meta tag title. Users will want to set this field as it will assist in having the article referenced by various web search engines.
Meta Tag Description	In this field, enter a brief description of the article which will be referenced by search engines. This will assist in the article being better referenced and found by search engines such as Google and Yahoo!
Meta Tag Keywords	Here, enter keywords to reference the article by. These keywords will be indexed by website search engines. Values entered here can then be used to better search for the article via search engines such as Google or Yahoo!
Custom Metatags Override	This field overrides all meta data settings for the article. This field is designed specifically for merchants with knowledge of SEO techniques and functions. It is recommended for use only by advanced users.

\* This field is required for each Website Text article.

\*\* These fields are only available for certain Website Text articles.

Once an article is created, it can be linked to portions of the Volusion storefront in a variety of ways. The most common method to displaying an article to customers is through the use of product categories within the Volusion storefront's navigation area.

### Part III - Article Categories:

An additional feature within the *Site Content* portion of Volusion is the ability to configure categories to organize the store's articles. As noted in Part II of this chapter, each article must be assigned to a specific category.

Each Volusion store comes pre-programmed with a series of website categories that merchants can use. Additionally, merchants can create their own custom *Site Content* categories through the following steps:

- Log into the Volusion *Administration Page* and click on the *Design* tab.
- Click on the *Site Content* link in the blue menu bar.
- Click on the *View All* link near the top left of the page.
- In the Website Text's *View All* page, choose *Article Categories* from the available dropdown field.
- In the *Article Categories* page, click the *Add* button.

- Enter values for the *CategoryName* and *CategoryOrder*.
- Next, choose 1 of 3 options for the *Category Type*.
- Click the **Save** button to complete the category's configuration.

Once a new article category has been created, *Site Content* articles can be assigned to the category.

Note that when assigning the *CategoryType*, any category assigned to the type, Help can be displayed within the Volusion *Admin Page* by clicking on the Help tab within the main *Site Content* page. Please see Part IV of this chapter for more information.

## Part IV - Help Text:

The *Help* area is a special, reserved portion of the *Site Content* page within Volusion Winter '09. This portion of the page will contain all *Site Content* categories that are configured as *CategoryType: Help*, along with all articles contained within those categories. This special page allows users to easily organize all help articles they may have configured within their Volusion store.

This portion of the *Site Content* page contains what is essentially the FAQ or Frequently Asked Questions to be displayed within the Volusion storefront. This can range from topics on return policies, shipping restrictions or any notices that merchants would want/need to make their customers aware of.

Help articles can be viewed from the *Admin Page* just as any other article or by visiting the special *Help* tab within the *Site Content* page. Help articles can be created or edited in similar fashion to regular articles. The only exception in this case is that any article set to be a Help article must be assigned to a category configured as a *Help* category.

Note that all active *Help* articles can be viewed by visitors to the Volusion storefront by clicking on the default Help link that will be displayed within the Volusion storefront header (or footer - depending on the store template being used).

## Dealing with Spotkeys:

*Spotkeys* and the *PageName* settings they are associated with are specifically coded within certain articles within the Volusion system. The *Spotkey* or *PageName* settings cannot be modified within the Volusion system. New articles cannot have *Spotkeys* assigned to them, nor can users remove these settings from exiting articles. These articles however can be repurposed if needed by simply modifying that article's caption, body or other settings.

## Deactivating Newsletter Functionality

If you choose not to offer any form of automated newsletter email to your customers, you can deactivate the opt-in field displayed to customers as follows:

- In the admin area, click Design >> Site Content.

Update Content : Articles

List all records Code View

Article Group: Select

ID	Web Page	Spotkey	Article Body
<b>[4] Affiliate System</b>			
8	Affiliate_info.asp		Our unique affiliate program allows you to generate a solid income, with little work by you. We provide you with the tools you need to be successful. You will receive your own unique URL which will automatically generate banner ads and text links that you can just choose your way to success today, signup now!
9	Affiliate_signup.asp		Confirm your information below to complete the signup process. Thank you for your interest!
10	Affiliate_thankyou.asp		<b>Please allow 24 hours for your account to be approved and activated.</b>
<b>[2] Checkout Process</b>			
65	GiftOptions.asp	GiftOptions	If your items are a gift, we can wrap them for you. We will also print your gift note on a card with your item. (Even if you do not purchase gift wrap, simply enter your FREE gift note below, and we will print it on the packing slip.)
93	Login.asp	CheckoutProcess_Introduction	The checkout process is quick & easy. Let's begin by asking if you're a new or returning customer.
96	Login.asp	Login_Anonymous	If you do not wish to register, you may instead place this order as a guest.
95	Login.asp	Login_New_Customers	If this is your <b>first</b> purchase with us, please proceed by clicking the following button to complete your registration.
94	Login.asp	Login_Returning_Customers	If you've purchased from us before, please login with your email address and password.
98	PlaceOrder.asp	Choose_Shipping	Please choose a shipping method below. You will be able to change it later if you wish.
63	PlaceOrder.asp	PlaceOrder	Please review your order below. If everything looks good, click the "Place Order" button to complete your purchase. You may easily change anything on this page by clicking the associated "change" button.
60	SearchResults.asp	NoSearchResults	
64	ShoppingCart.asp	Above_ShoppingCart	

- From the Article Group dropdown menu, select PageText.
- Here, choose Checkout from the Category dropdown menu.
- Locate the last field on this page, ID # 694.
- Enter a single space character in the text field.
- Click Save.

In this scenario, any new customer making their initial purchase from your store won't be registered to receive newsletters, and won't receive the option to sign up for them. If a visitor registers for a customer account before going through the purchase process, however, the default newsletter functionality is not affected by this configuration.

## Text/Article Management

You can edit many default text articles at Design >> Site Content. This table is divided into three sections: Articles (default), Help and PageText. You can switch views using the Article Group menu at the top of the table. In all areas, click an ID number to edit the related article, or Add to create a new one. Be sure to set the Category ID to the section to which you'd like to add the article.

You can also edit some site content directly from the storefront when logged in as an administrator by hovering over the text you wish to edit and clicking Edit. Within this table, use the dropdown selections to narrow the results display.

When you edit /add articles, you cannot specify your own article page names or spotkeys; these are pre-existing naming patterns assigned by Volusion. You should only edit the Article Body field, which is the actual text that displays on the related area of the storefront. Also, when adding a new article, it won't automatically appear on the store. You'll need to code a link to it where you'd like it to display in the LiveEdit File Editor. An example of this type of link:

```
<a href="/articles.asp?id=123">Your Link Title Here</a>
```

Be sure to update "123" with the actual ID number of your article.

There is no limit to the number of articles you can create.

## Other Design Settings

### Redirecting to Custom Articles

When a customer visits an article created through the Site Content table, its URL contains an ASP suffix and the article's ID number by default.

Orders Reports Inventory Marketing Customers Design Settings

Template Logos Site Content Navigation Menu LiveEdit File Editor

## Update Content : Articles

List all records Code View

Article Group: Select

ID	Web Page	Spotkey	Article Body
<b>[4] Affiliate System</b>			
8	Affiliate_info.asp		Our unique affiliate program allows you to generate a solid income, with little work by you the tools you need to be successful. You will receive your own unique URL which will auto generate. We even provide you with banner ads and text links that you can just choose your way to success today, signup now!
9	Affiliate_signup.asp		Confirm your information below to complete the signup process.
10	Affiliate_thankyou.asp		Thank you for your interest!  <b>Please allow 24 hours for your account to be approved and activated.</b>
<b>[2] Checkout Process</b>			
65	GiftOptions.asp	GiftOptions	If your items are a gift, we can wrap them for you. We will also print your gift note on a card item. (Even if you do not purchase gift wrap, simply enter your FREE gift note below, and write note on the packing slip.)
93	Login.asp	CheckoutProcess_Introduction	The checkout process is quick & easy. Let's begin by asking if you're a new or returning customer. If you do not wish to register, you may instead place this order as a guest.
96	Login.asp	Login_Anonymous	If this is your <b>first</b> purchase with us, please proceed by clicking the following button to complete registration.
95	Login.asp	Login_New_Customers	If you've purchased from us before, please login with your email address and password.
94	Login.asp	Login_Returning_Customers	Please choose a shipping method below. You will be able to change it later if you wish.
98	PlaceOrder.asp	Choose_Shipping	Please review your order below. If everything looks good, click the "Place Order" button to confirm. You may easily change anything on this page by clicking the associated "change" button.
63	PlaceOrder.asp	PlaceOrder	
60	SearchResults.asp	NoSearchResults	
64	ShoppingCart.asp	Above_ShoppingCart	

For example, you've created article 101 to explain customs guidelines to overseas customers:

<http://www.yourdomain.com/Articles.asp?ID=101>.

They find it intimidating and/or difficult to remember. If you wish to modify this URL to give it a more user-friendly appearance, Volusion doesn't provide this capability. You can, however, create a friendlier URL that redirects visitors to the article, as follows:

- In the admin area, click Settings >> Maintenance.

Orders Reports Inventory Marketing Customers Design Settings

Company Shipping Tax Payment Currency IP Firewall Config Variables Custom Fields Maintenance

## Manage Maintenance

**Maintenance Toolbox**

[Rebuild Product Index](#) You last indexed 862hrs ago.

[Rebuild Search Index](#)

[Reassign Inventory Control Grid](#)

[Manage 301 Redirects](#)

[Close store to view more tools](#)

Your store is currently: **OPEN**

[Close my store](#)

This page allows you to temporarily close your store for maintenance. For example if you need to perform modifications on your database or files, closing your store will post a notice on your website telling your visitors the store is "temporarily closed for scheduled maintenance, please try back in 15 minutes to an hour. Thank you for your patience."

[Customize your maintenance message here.](#)

- Click Manage 301 Redirects and create a 301 redirect for the article.



## Manage Maintenance

- In Source Path, enter “/customs”.
- In Target Path, enter “/Articles.asp?=101”.
- Click Save.

You can now provide customers <http://www.yourdomain.com/customs>, which will redirect them to the article. Note that this technique may not be fully optimized for search engines.

## Enhanced Language Customization

Winter '09 allows additional customization over some of the previously hard-coded text such as the default wording on checkout pages. Hover over the text you wish to change and click Edit. Use the HTML popup window for adjustments.

You can also edit storefront language in your Admin area at Design >> Site Content >>PageText. From here you can choose a specific storefront page(s) to edit the text on that specific page, or group of pages.

You can also customize your site for web-safe languages such as Spanish and French. This functionality is not automated, so you will have to translate all text areas manually. Volusion Technical Support is unable to assist with this type of customization.



# **Volusion Winter '09 Manual Appendix**

## **Product Settings**

Each entry in the Inventory >> Products table contains a wide variety of configurable settings (see this manual's section on "Products" for more information):

<b>Image Management</b>	
Product Photo	Using the Browse and Upload buttons, a product photo can be added for display on the product's storefront details page.

<b>Basic Product Info</b>	
Product Code *	The unique reference code for the table entry. It can contain letters, numbers, hyphens or periods. Note that this field cannot contain other punctuation marks and must be unique for each product.
Product Name *	The product's name, as displayed on the storefront.
Product Price *	The product's price.
Product Weight	The product's weight (in units defined in Settings >> Shipping >> More Shipping Settings >> Weight Units). Although not required for product creation, it is required for shipping settings functionality. Only leave this field blank in the case of a downloadable product or gift certificate.
Product Description	A basic description of the product, including any HTML or image links, as displayed on the storefront.
Apply To CategoryID(s)	The storefront category(s) or sub-category(s) under which the product is listed.

\*Required fields.

## Search Engine Optimization

Product Name Short	A shortened version of the ProductName used for display in the Top Sellers, Today's Super Deal and New Products storefront sections, used for indexing and reference by search engines.
Photo_AltText	Alternate text for product images displayed in most browsers when visitors mouse over the product image, used for indexing and reference by search engines.
Meta Tag Title	Meta tag for the product name displayed in the title bar of the web browser when viewing the product's storefront details page, used for indexing and reference by search engines.
Meta Tag Description	A short description of the product used for indexing and reference by search engines.
Meta Tag Keywords	Key words for the product (such as brand, part number, etc.) used for indexing and reference by search engines for the keyword queries.

## Pricing Options

List Price	Displays next to the Product Price on the product details page, used only as a comparison with (higher) industry/competitor prices. The difference between this field and the Product Price also displays as "You save" when EnableShowYouSaveAmount is enabled (at Inventory >> Products >> Settings).
Setup Cost	An additional charge applied after the Product Price, often used on recurring billing products.
Sale Price	Can be used to override the Product Price (must be lower), and affects the "You save" total.
SetupCost_Title	Allows you to rename the Setup Cost on the storefront.
How to get Sale Price	Replaces the Sale Price with instructions on how to receive the sale price. Add to Cart displays the sale price after adding the item to the shopping cart, and Email Better Price prompts the customer to enter an email address, to which the system emails the sale price. Labeling for this option can be changed by clicking Edit next to the field title.

Shipping Options	
Availability	A summary of the product's estimated time of arrival from the order date (not related to stock status availability). Note that you can enter custom text by clicking the link to the right of the dropdown menu.
Fixed Shipping Cost	A price added to the overall cost of shipping (as calculated by configured shipping settings). See this manual's section on "Shipping" for more information.
Fixed Shipping Cost (Outside Local Region)	Similar to the Fixed Shipping Cost, this entry only applies when the shipping location is a country or state not defined as Country Is Local Region or State Is Local Region at Settings >> Shipping >> Edit Countries / Edit States.
WarehouseIDs	Apply one or more warehouses to a product to properly calculate shipping charges from warehouses or fulfillment centers. See the "Warehouses" portion of this manual for more information.
Ships By Itself	Allows live rate shipping calculation separate from any/all other products in the order (often used for products with unique size or shape that require special shipping charges/arrangements).

Product Descriptions	
Product Description Short	A shortened description of the product, used in condensed product displays such as search results pages. This entry is required if you wish to use the Email a Friend feature. You can use text or HTML.
Specs	Allows you to list product features in a separate section on the product details page beneath the description. By default, each line of text is displayed as an item in a bullet list. You can rename this field by clicking Edit next to the field name.
Technical Specs	Text or HTML entered here displays in a clickable tab next to the description. Each line is displayed in a bullet list. You can rename this field by clicking Edit next to the field name.
More Info	Text or HTML entered here displays in a clickable tab next to Technical Specs. You can rename this field by clicking Edit next to the field name.
Product Description Above Pricing	Text or HTML entered here displays just above the price on the product's details page.
Photo Sub Text	Text or HTML entered here displays below the product's 2T image, just above the

Larger Photo and Email a Friend links.

## Advanced Options

VAT Percentage	For non-US merchants who've configured their store to use VAT (Value Added Tax), this field overrides the store VAT percentage for this specific product.
Home Page Section	Adds the product to a list from which the system randomly assigns members for display in one of several special promotional home page sections.
Free Shipping Item	When the free shipping method is activated and properly configured, this feature makes the product eligible for free shipping. Note that products marked as eligible for free shipping will only ship free if all items in the order are also eligible for free shipping. Please see this manual's "Shipping" section for more information.
Taxable Product	Determines whether or not the product obeys the store's tax settings. The default setting is "Y" (yes). Set to "N" to ignore global tax settings.
Hide Product	Hides the product from store visitors through normal navigational channels. Note that, when hidden, the product can still be accessed by its direct URL.
Manufacturer	Allows you to specify the product's manufacturer. Using Upload Logo to the left of this field allows you to add a graphic file for the manufacturer's logo.
Hide When Out Of Stock	Sets the product to "hidden" when the stock status reaches zero. Note that the stock status must be initialized for this option to work.
List Price Name	Allows you to rename the List Price on the storefront.
Enable Multi Child Add To Cart	Displays any/all variant products on the base product's details page in a grid that allows customers to specify quantities of multi variants for global addition to the shopping cart.
Product Price Name	Allows you to rename the Product Price on the storefront.
Sale Price Name	Allows you to rename the Sale Price on the storefront.
Hide You Save	When EnableShowYouSaveAmount is enabled (at Inventory >> Products >> Settings) and you fill in the Product Price and List Price fields, the system automatically displays a "You save" comparison on the

	product details page. This option allows you to disable this comparison at the individual product level (as opposed to globally disabling on all products through EnableShowYouSaveAmount).
Setup Cost Name	Allows you to rename the Setup Cost on the storefront.
Allow Price Edit	Allows customers to edit the Product Price before placing the order (useful for merchants selling gift certificates or accepting donations).
AddtoCartBtn Replacement Text	Replaces the Add to Cart button on the product details page with text specified here. Note that this disables customers from adding the product to the shopping cart for checkout.
Price Sub Text	Text or HTML entered here displays next to the price fields on the product details page.
Product Popularity	Allows you to control product display order within a category page when a visitor selects the Display by Most Popular category filter option. The higher the number value, the higher the product displays on the popularity list.
Price Sub Text Short	Text entered here displays next to prices that don't apply to a customer's order (e.g. List Price and Sale Price).
Display Begin Date	Hides a product until the date specified (useful for forthcoming product release or seasonal products).
Min Qty	Requires customers to add a minimum number of product units to the cart in order to purchase.
Display End Date	Hides a product after the date specified (useful for limited-time-only products).
Download File Name	The file name of a downloadable product. Use Upload File to the left of this field to attach the product for download. Note that only one file can be attached at a time.
Gift Wrap Cost	Enables a gift wrapping option for the product and defines the related price.
Accessory(s)	The product codes of accessories for this product. If you sell a stereo system, for example, you can encourage the purchase of accessories such as headphones, audio cables, batteries, etc. List products separated by commas. Do not use spaces.
Uses Product Key Type(s)	The product key(s) configured in your admin area for distribution with this product. See this manual's section on "Product Key Distribution" for more information.
Reward Points Given For Purchase	The amount of points you wish to award a customer for purchasing this product, used in conjunction with the Points for Product configuration at Marketing >> MyRewards.

Free Accessory(s)	To offer a free item or items with a product, enter the product code(s) here for simultaneous addition to the shopping cart. List products separated by commas. Do not use spaces. Enter (X) after the product code to include multiple units of the free product, where "X" is the number of included units. Example: ProductC(2),ProductD(4).
Use Same Photos As ProductCode	Enter a product code to share its image with this product.
Hide Free Accessories	Prevents Free Accessory(s) from displaying on the product details page (does not deactivate them).
Photo URL Small	Overrides the product's default thumbnail image (after upload). If hosting product images with a third party, enter the URL to link to the image. You can also use this field to specify product images in CSV, MDB, and other file formats when performing complex product imports.
Photo URL Large	Overrides the product's default main image (after upload). If hosting product images with a third party, enter the URL to link to the image. You can also use this field to specify product images in CSV, MDB, or other file formats when performing complex product imports.
Additional Product Keywords(s)	Applies additional keywords to a product for use in customer searches from the storefront.
Is Child Of Product Code	Assign the product as a variant of a main product by entering the main product's code here (if you do not use the inventory control grid / Smartmatch features).
Affiliate Commissionable Value	Determines the percentage of a sale on which an affiliate is eligible to receive commission. See this manual's section on "ROI Tracking" for more information.
Order Finished Note	Text or HTML entered here displays after completing an order.
Custom MetaTags Override	Overrides all SEO settings. Intended only for advanced users with extensive knowledge of SEO settings and practices.

## Product Options

OptionID(s)	Allows you to add attributes configured at Inventory >> Options to the product. Switch to Advanced View (below the field title) reveals a text field in which you can enter option ID numbers separated by commas. Do not use spaces.
Use Same Options As ProductCode	Enter a product code to automatically apply that product's assigned attributes to this product.



Enable Options Inventory Control	Activates the inventory control grid. If the store's product settings are configured for automatic creation of variant products, the system will create product records for all assigned attributes. See this manual's section on the "Smartmatch System" for more information.
SelectedOptionID(s)	When attributes are assigned to the product, this field allows you to control which attributes appear in the option selection menus by default. If entering multiple attribute option ID(s), use commas to separate. Do not use spaces.
Edit Options Currently Applied	Displays a table that lists all attributes currently applied to the product. You can edit the attribute records by clicking on their product option ID numbers.

### 3rd Party Specific Fields

Shopping.com Category	Allows you to assign the product to a Shopping.com category (not a Volusion store category) for export to their ecommerce service.
Yahoo! Shopping Category	Allows you to assign the product to a category for reporting in the Yahoo! merchant feed.
Yahoo! Shopping Medium	Allows you to define a medium for export to the Yahoo! Shopping system.
Estimated Shipping – Ground	Allows you to define a ground shipping charge for use with a third party ecommerce system. This value is not calculated in the overall shipping charges by Volusion and is provided for export purposes only.
Estimated Shipping – 2nd Day	Allows you to define a 2nd day shipping charge for use with third party ecommerce system. This value is not calculated in the overall shipping charges by Volusion and is provided for export purposes only.
Estimated Shipping – Overnight	Allows you to define an overnight shipping charge for use with third party ecommerce system. This value is not calculated in the overall shipping charges by Volusion and is provided for export purposes only.
Product Condition	You can enter a value for product condition (e.g. "Mint," "New," "Used," etc.) for integration with third party services such as Ebay. This field has no function within Volusion and is provided for export purposes only.
Google Product Type	Allows you to define a category for Google's Google Base and Froogle services. Please refer to Google's online documentation for information on proper categorization.

Quickbooks Item Acct	By default, all products exported to QuickBooks are reported under the account defined in the QuickBooks mapping fields (see this manual's section on QuickBooks for more information). If you'd like to report a specific product to a different item account than the one defined in your mapping, you can enter that name here.
Quickbooks Item Asset Acct	By default, all products exported to QuickBooks are reported under the account defined in the QuickBooks mapping fields (see this manual's section on QuickBooks for more information). If you'd like to report a specific product to a different asset account than the one defined in your mapping, you can enter that name here.
Quickbooks Item COGS Acct	By default, all products exported to QuickBooks are reported under the account defined in the QuickBooks mapping fields (see this manual's section on QuickBooks for more information). If you'd like to report a specific product to a different COGS (cost of goods sold) account than the one defined in your mapping, you can enter that name here.

### Custom Fields

CustomField1

CustomField2

CustomField3

CustomField4

CustomField5

Provide additional text or HTML in these fields for display in the product's details page below the price. Click Edit to modify the field names.

### Recurring Pricing

Recurring Pricing Text

A description of the product's pricing that displays to visitors (e.g. "\$9.99 for the first month, \$11.99 each additional month").

Recurring Pricing

The price charged to the customer for each payment period (e.g. \$11.99).

Recurring Start Price	The initial payment amount, if different than the Recurring Price (e.g. \$9.99).
Recurring How Often	The number of months that pass before the billing period ends and a new charge comes due (e.g. enter "6" to bill the customer every 6 months, or "12" to bill annually).
Recurring Start Duration	If using the Recurring Start Price setting, enter the duration (in months) the system will wait between billing the Recurring Start Price and the regular Recurring Price (e.g. with a Recurring Start Price of 1, a Recurring Start Duration of 6, and a Recurring Pricing of 5, the system will bill the customer \$1 for the first 6 months and then \$5 after that point).
Recurring Duration	The duration (in months) the recurring billing process will last.

### Special Pricing Levels

#### Discounted Price Level 1

#### Discounted Price Level 2

#### Discounted Price Level 3

#### Discounted Price Level 4

#### Discounted Price Level 5

#### Discounted Setup Cost Level 1

#### Discounted Setup Cost Level 2

#### Discounted Setup Cost Level 3

#### Discounted Setup Cost Level 4

#### Discounted Setup Cost Level 5

Define up to five different pricing tiers in these fields for different customer level (Wholesalers, resellers, affiliates, etc.) configured at *Customers >>Accounts* (locate the *Pricing Discount Level* field under the *Special Privileges* heading). These entries override the Product Price when qualified customers browse the store after logging in.

Similar to the *DiscountedPrice\_Level* settings, these fields allow you to configure different pricing tiers for the product's *Setup Cost*.

#### Recurring Price Level 1

#### Recurring Price Level 2

#### Recurring Price Level 3

These fields allow you to configure different pricing tiers for a recurring product's price.

Recurring Price Level 4

Recurring Price Level 5

<b>Vendor Information</b>	
Stock Status	Enter a positive or negative value (for backorders) to initialize the stock count of a particular product for system inventory tracking. Click Hist to view a record of all actions that have affected the product's stock status.
UPC Code	When using Volusion's point of sale features, you can enter numerical values here for barcode scanning. To create a barcode, click Generate Barcode next to the field title, select one of the two available barcode types, enter a numeric code, and click Generate. The barcode and its associated numerical code will then display in the popup window.
Stock Low Qty Alarm	The system automatically creates an entry for the product in the Low Inventory table (Inventory >> Products >> select Low Inventory from the View menu) when the stock value is equal to or less than the value specified in this field.
Stock Re-Order Qty	The value set in this field defines the quantity ordered during purchase order generation when processing through the Low Inventory table.
Do Not Allow Backorders	Check this option to prevent customers from placing orders when the stock status reaches zero. See this manual's "Order Processing Guide" for more information on the backorder process.
Auto Drop Ship	Activate this setting when using a third party fulfillment center for the product. When ordered, the system will generate a purchase order based on the vendor rules you've applied.
Inventory: Verify Qty On Hand	Use this field to notate the product's on-hand stock status as a personal memo (does not affect the Stock Status field). It can be useful in resolving a stock status discrepancy.
Inventory: Last Verified	Use this field to date the above entry.
Vendor Part #	The vendor's part number or product code used on a purchase order (does not relate to the Product Code field). This field will be overwritten by the Vendor PartNo from any vendor rule applied to the product.
Vendor Price	The vendor's product price, used by the Volusion system to calculate COGS and

	profit margins. This field is overwritten by the Price field in any vendor rule applied to the product.
Book ISBN	If you sell books, enter the International Standard Book Number in this field (used for reporting on purchase orders).
Add To PO Now	Automatically adds the product to the Queued for PO table (Inventory >> Products >> choose Queued for PO in the View menu) when the Stock Status value is equal to or less than the Stock Low Qty Alarm value.
Last PO Qty	The quantity ordered during the most recent purchase order.
Last PO Date	The date of the last purchase order sent to the vendor.
Share Stock Status With	Enter a product code to share its stock status with this product (often used when offering the product as a free accessory of another).
ProductID	A sequentially-assigned ID number used by the system for tracking (unrelated to the Product Code and not intended for merchant use).

To access general product settings, click *Inventory >> Products >> Settings*.

Product Settings	
EnableAccessoriesQuickAdd	Enables checkboxes on the storefront next to all accessories configured for this product, which customers can use for simultaneous addition to the shopping cart. Note that this option doesn't work on accessories with attributes.
EnableBullets_On_Features_TechSpecs	Displays each line of text in Specs as an item in a bullet list.
EnableCategoryTree_DetailsPage	Enables the "breadcrumb trail" on a product's details page: a list of all categories and subcategories of which the product is a member, listed as clickable links in navigational order.
EnableCustomerReviews	Allows customers to post reviews of each product for displays on the products' details pages.
EnableDisplayAvailability	Displays the Availability field on each product's details page.
EnableDisplayDiscountBtn	Displays a Discount button within each product's details page. When clicked, a popup window displays any quantity discounts configured for the product.
EnableDisplayDiscountedPricingLevels	Displays discounted pricing levels for each product on the details page (when configured), regardless

	of whether or not the customer is eligible for them.
EnableDisplayKits_ ProductDetailsPage	Displays a list on the product details pages of all included free accessory products.
EnableDisplayProductCode	Displays the product code of each product on its details page.
EnableDisplaySetupFee	Displays Setup Cost values on the products' details pages.
EnableDisplayStockStatus	Displays either an In Stock or Out of Stock message next to a product depending on its current stock value.
EnableEmailAFriend	Displays an Email a Friend button next to product listings on the storefront. Clicking it allows the customer to email that product's information to a specified address.
EnableHideProduct	Removes from the storefront all products with the Hide Product setting selected.
EnableLiveStockStatus	When EnableDisplayStockStatus is enabled, this option replaces the In Stock or Out of Stock messages with the exact stock value.
EnablePhotosPopup	Opens the Larger Image photo link in a popup window (instead of in the current window). This setting only affects products configured with the Larger Photo.
EnableProductAccessories	Allows you to assign products as accessories of others (enables the Accessory(s) field within each product edit page).
EnableProductFeatureList_ DualColumns	Displays product features on the storefront in two columns instead of one (default).
EnableProductQuantityBox	Displays a quantity box on product details pages, allowing customers to specify a number of units before adding the product to the shopping cart. This setting is not recommended when using quantity ordering minimums.
EnableRecentHistory	Displays a list of items each customer has recently browsed near the bottom of each product's details page.
EnableRelatedProducts	Displays a list of related products within each product's details page (randomly selected by the system from the same product category/sub-category).
EnableShowYouSaveAmount	Displays a calculation of the difference between the Product Price and the List Price on a product's details page (when using the List Price field).
EnableSimilarCategoriesList	Displays an additional breadcrumb trail of related product categories above My Recent History.
EnableTemporaryProducts	Activates the Display Begin Date and Display End Date fields for configuration of limited-time-only and seasonal products.
EnableUpdatePriceBtn	Displays an Update Price button for base products with cost-affecting attributes that allows customers to manually update product price before adding the variant to the shopping cart.

EnableWishList	Enables the wish list feature for use by registered customers, allowing them to mark products for future purchase. They can access it at any time from the My Account page by clicking View my Wish List.
KittlItems_Title	Allows you to customize the text displayed above products configured as free accessories (e.g. "These items are included with this purchase:").
ProductAccessories_Title	Allows you to define the title for the table that lists a product's accessories (e.g. "Accessories included with this product:").
ProductPage_Position_RelatedProductsAndAccessories	Enables choice of two options for product accessory display: Right of Product Description displays the accessory list in a vertical column to the right of the product's details; Below Product Description displays the accessory list in a horizontal row below the product's details.
ProductPhotos_AlternateViews_Title	Allows you to rename the Alternate Views heading within a product's storefront photo display section.
RelatedProducts_Title	Allows you to rename the Related Products section (when enabled) of the storefront.
SmartMatch_AutoCreateChildInventory	Allows the system to automatically create product codes for all attributes when inventory control is enabled at the product level.

\*Required Fields.

## Category Settings

At *Inventory >> Categories >> List All*, you'll find many settings by clicking on each ID number (see this manual's section on "Categories" for more information). The following chart details the settings in this area, arranged by heading:

<b>Basic Category Info</b>	
CategoryID *	A unique identification number automatically generated for each category within the table.
ParentID *	Choose [0] MAIN CATEGORY for a primary category, or another store category to create a subcategory of it.
Category Name *	The name of the category as it displays on the storefront.
Category Visible	Specifies which navigation menu or portion of the Volusion storefront under which the category displays. If the category is set as a subcategory using the ParentID field, this menu will be disabled.
Category Order	Used for category display order sorting (lowest numbers display first). If multiple categories have the same Category Order value, they'll be sorted alphabetically by default.
Hidden	Removes the category from the storefront.

<b>Search Engine Optimization **</b>	
Link Title Tag	A category title referenced as a meta title by search engines that displays in the category's actual URL. This field can only contain plain text (HTML and/or other programming languages are not supported).
Meta Tag Title	A category title referenced as a meta title by search engines that displays in the title bar at the top of the web browser.
Meta Tag Description	A block of text that describes the category and its products/services, not displayed to customers but indexed by search engines.
Meta Tag Keywords	Key words for the category and its contents, not displayed to customers but indexed by search engines. Enter words, separated by commas, that customers would use to locate your products in search engines.



Category Descriptions	
Category Description	Text or HTML entered here explains the category to storefront visitors. The HTML Editor button next to the field launches a popup editor that allows you to generate HTML for population into the field.
Category Description Short	A shortened version of the Category Description used for some of the condensed category/subcategory storefront views, depending on display configuration.
Category Description (Below Products)	Text or HTML entered here displays at the bottom of the category page, just below the category's product list.

Customizable SubCategory Display	
SubCategory Display Mode 1	For parent categories, this value controls subcategory display type. The default "null" value for this field is Top.
SubCategory Display Mode 2	Activates a display grid with all subcategories listed horizontally beneath the category description, with the category image as a thumbnail (Thumbnails). Category Graphics doesn't display grid lines or category titles. The default "null" value is NONE (Hide).
SubCategory Display Columns	When SubCategory Display Mode 1 is set to Top, this field allows you to define the number of columns for the subcategories list.
Category Graphic Placement	Specifies where the category image displays in relation to the subcategories list. Top displays the image above the list but below the breadcrumb trail; Absolute Top displays above the breadcrumb trail; Bottom displays the image below the list. The default "null" value is Top.

Customizable Product Display	
Product Display Mode	Defines product display on the category page: Single Rows lists product in a single row; Grid displays each product in a grid with an Add to Cart option; Checkboxes displays a checkbox next to each product, allowing customers to add specified quantities of those products directly to the shopping cart; List displays products in a list without an image or details; Lightweight Grid displays products in a more compact grid layout than the Grid setting and disables the Add to Cart option. The default "null" value is Single Rows.
Default Sort By	Defines the default product display order on the category page. Customers can change

	the order after the default display loads.
Display Columns	Determines the number of columns on the category page used for product display. The default "null" value defaults to one column.
Display Rows	Determines the number of rows on the category page used for product display.
Display Featured Products Only	Determines whether to display or hide products assigned to the Home Featured group within a category page. Y disables Next and Previous buttons and instead displays the Featured Products image above the products. The default "null" value is N.
Availability – Show it?	Defines whether to display or hide a status variable for each product based on its Availability field (if utilized).
List Price – Show it?	Defines whether to display or hide the List Price for each product on the category page.
Sale Price – Show it?	Defines whether to display or hide the Sale Price for each product on the category page.
You Save – Show it?	Defines whether to display or hide the "You save" field for each product on the category page.
Stock Status – Show it?	Defines whether to display or hide the availability status (based on Stock Status) for each product on the category page.
Description – Show it?	Defines whether to display or hide the Product Description for each product on the category page.
Description SHORT – Show it?	Defines whether to display or hide the Product Description Short for each product on the category page.

Advanced	
Alternate URL	Allows entry of a URL that overrides the category link and redirects visitors accordingly.
Alternate URL Popup	When using the above field, this setting opens the URL in a new popup window instead of in the current browser window.
Filter Category	Sets the category as a filter category and allows the system to use either the Price or Manufacturer field for all products in the category's filter dropdown options. This option requires configuration of search refinement settings, and can be very resource intensive; stores with many active filter categories may see degraded page responsiveness.

Private_Section_Customers_Only	Hides the category from all customers except those on which Allow Access To Private_Sections (under Special Privileges) is enabled. These customers must be logged in.
Custom Where Clause	Allows entry of SQL queries to affect which products display on the category page. This setting is intended only for advanced users who have a working knowledge of SQL.
CUSTOM METATAGS OVERRIDE	Allows override of the category's meta information by entry of custom meta tags. This field is intended only for advanced users and SEO experts.

\*Required fields.

\*\*All fields must be filled out in order for the system's SEO functions to operate properly.

## Customer Settings

You can obtain access to numerous customer account settings by clicking the ID numbers at Customers >> Accounts. Note that these fields are identical for administrators and affiliates as well (for more information, see this manual's "Customers" section).

Basic Customer Info	
Customer ID	An automatically-generated identification number for reference within the table.
First Name	The customer's first name, as entered by the customer during registration, or by an administrator during account creation. This value can be edited by the customer from the My Account page.
Last Name	The customer's last name, as entered by the customer during registration, or by an administrator during account creation. This value can be edited by the customer from the My Account page.
Company Name	The company with which the customer is affiliated, as entered by the customer during registration, or by an administrator during account creation. This value can be edited by the customer from the My Account page.
Address Line 1	The customer's street address (e.g. 123 Main Street), as entered by the customer during registration, or by an administrator during account creation. This value can be edited by the customer from the My Account page.
Address Line 2	An optional secondary address field (e.g. Suite A), as filled out by the customer during registration, or by an administrator during account creation. This value can be edited by the customer from the My Account page.
City	The customer's city, as entered by the customer during registration, or by an administrator during account creation. This value can be edited by the customer from the My Account page.
State or Province	The customer's state/province, as entered by the customer during registration, or by an administrator during account creation. This value can be edited by the customer from the My Account page.
Postal Code	The customer's postal code, as entered by the customer during registration, or by an administrator during account creation. This

	value can be edited by the customer from the My Account page.
Country	The customer's country, as entered by the customer during registration, or by an administrator during account creation. This value can be edited by the customer from the My Account page.
Notes	Optional field for internal memos about the customer.
Access Key	Defines the customer type. Membership Pending is an automatic setting for a members-only browsing store configuration. Cancelled / No Access prevents the customer from logging in to the store and performing any related functions.
Email Address *	This is the primary identifier on each customer account, and the only required field for account creation. All automated emails sent to a customer will be sent to this address. Additionally, it serves as the username for account login.
Password	Required for account login. Note that this field is viewable to administrators, but is encrypted within the remainder of the Volusion system and cannot be exported using the Import / Export wizard functions.
Phone Number	The customer's phone number, as entered by the customer during registration, or by an administrator during account creation. This value can be edited by the customer from the My Account page.
Fax Number	The customer's fax number, as entered by the customer during registration, or by an administrator during account creation. This value can be edited by the customer from the My Account page.
Website Address	Although primarily applicable to affiliates, any customer can enter a website with which they are associated in this field during registration. This value can be edited by the customer from the My Account page.
Sales Rep	If you have a large customer service team, you can assign store administrators to specific customer accounts using this setting.

### Optional Fields

Customer Is Anonymous	If a customer places an order anonymously, the system creates an account with this field checked.
Email Subscriber	If the customer enrolls in the store's automated email program, this field will be checked. Edit it to add/remove customers

	from your mailing list.
Catalog Subscriber	If you offer a print catalog which you physically mail to customers, you can check this field to indicate the customer account is a subscriber.
Login Attempts	All failed login attempts within the last 24 hours are recorded here. If the number of failed attempts exceeds 15, the account will be locked and the customer will be instructed to contact the store administrator or support staff for assistance. You can unlock an account by clicking the link available next to this field.
Tax ID	Affiliates and tax-exempt customers can be required to enter a tax ID number, which is recorded here.
ID Customers Groups	You can use this field to assign customers to groups for organizational purposes. For example, you can group together two or more customers registered from a specific non-profit charity group.

### Special Privileges

Pays State Tax	If you charge sales tax(es), you can grant a customer tax exempt status using this field. Tax settings will not apply to any of their orders.
Pricing Discount Level	Customer accounts can be assigned to 1 of 5 different pricing discount tiers corresponding to the five discount levels under a product record's Special Pricing Levels section. Customers can view the discounted pricing for which they qualify by logging in to their accounts.
Percent Discount	Grants a customer a flat percentage discount on all purchases. This value must be less than 100.
Reward Points	Points earned from the MyRewards program display here. You can manually edit the total.
IsSuperAdmin	To grant full access to all levels of the admin area, check this field.
Allow Access To Private_Sections	Products marked as Private Section Customers Only (under the Advanced Settings heading) will appear only to customers with this access level once they have logged in to their accounts.
Removed From Rewards	Disables the customer from earning further reward program points. Points already

earned will be retained.
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### Custom Fields

Custom Field 1-5	If you've activated any customer-based custom fields (from Settings >> Custom Fields), the replies or choices entered by customers on the storefront are listed here. See this manual's section on "Custom Fields" for more information.
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### Newsletter Subscriptions & Interests

Newsletter 1-20	Each customer account can be configured for up to 20 different types of interests for newsletter subscriptions. You can define the names of these interests by clicking Edit next to the heading title, or at Marketing >> Newsletters >> click a newsletter ID number >> Send to customers w/ the following interests only >> Edit. Interests checked by recipients display here.
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\*Required fields.

## Advanced Table View Options

For advanced Volusion users, we provide special table view options throughout the admin area to help you exert further control over your data. These fields are located within the main table view pages, just above the horizontal bar that lists the number of records in the table.

[Customize](#) | [Bulk Updates](#) | [Export Results](#) | [Bookmark Results](#)

## Accessing Advanced Options

The following chart explains where advanced table view options are located under each of the admin area's tabs:

Advanced Options Locations	
Orders	Available at Overview, Recurring Billing, Returns / RMAs and Abandoned / Live Carts.
Reports	Available at Affiliate Stats and Search Terms.
Inventory	Available at Categories (>> List All), Products, Options, Vendors, Purchase Orders, Product Key Distribution and Warehouses.
Marketing	Available at Coupons / Discounts, Nav Menu Promotions, Newsletters, Gift Certificates, Affiliates and In-Stock Requests.
Customers	Available at CRM System, Accounts, Customer Reviews, Administrators and Knowledge Base.
Design	Available at Site Content (>> List All Records).
Settings	Available at Shipping (>> Edit Countries / Edit States / Edit All under Choose Carrier), Tax (>> Advanced Edit), Payment (>> Edit All), Currency (>> Advanced Edit), IP Firewall, Config Variables and Custom Fields.



Simply click one of the option headings access the related functionality.

## **Customize**

### **Results per Page**

All tables display a default maximum number of records per page. If multiple pages exist, you can scroll through them one at a time. To increase or decrease the number of records per page, use these fields.

### **Font Size**

This menu controls the font size of the elements displayed in the table. You can choose Large or Small. Small is generally recommended, especially for table view pages that display a large amount of data.

### **Screen Width**

This menu allows you to set the display width of the table. By default, tables display at 100% of the screen width. You can set this factor as high as 10,000%.

### **Display These Columns**

Checkboxes are provided for each table entry feature. Check or uncheck them as desired to reveal/hide them on the table view. Note that some tables can display a large number of columns. The more columns you display, the longer the page load time required. A large number of columns can noticeably affect site performance.

When finished configuring settings, click Apply Changes. To revert to default table display settings, click Reset To Default View.

## **Bulk Updates**

These options allow you to make a number of updates to the table elements at once by creating and executing SQL (Structured Query Language) code. This feature is only recommended for advanced users familiar with SQL statements, as improper use can damage store data. See this manual's "Search Terms" section for an example.

## **Export Results**

This option provides one field: Export to QueryBank as, which allows you to store often-used Bulk Update SQL queries:

- \* After executing a query using the Bulk Update tool, click Export Results.
- \* Enter a name in the text field.
- \* Leave Global checked if you'd like all administrators to be able to access the results, or uncheck it to make it available only to you.
- \* Click Export to access the Data Export Wizard table.
- \* Here, you'll see the result listed in the Saved Queries portion of the page.

For more information on use of this page, see the "Import / Export" section of this manual.

## **Bookmark Results**

Unlike the Export Results option, the Bookmark Results tool logs results as a bookmark link within the Bookmark Results tool's dialog popup. Add allows you to bookmark the current results displayed in the table. Enter a name in the text field before pressing the button. The Global option allows you to specify whether the bookmark is available to all administrator accounts, or only your own.

Click a bookmark title to reload it in the table. Also, note that you can access the query bank by clicking the hyperlink provided. Click the pencil next to the bookmark title to load the bookmark into the query bank edit page, where you can edit the actual SQL code. These options are for advanced users only.

Once the Bookmark Results option is visible within the table view page, there will be a series of links available.

For more information on the query bank functions, see the "Import / Export" section of this manual.

## **Configuration Variables**

The admin area's Settings >> Config Variables section allows you to enable and disable a large number of store features. There are three groups of configuration variables, each with its own table. You can select these tables from the View dropdown menu.

## General Variables

Update Configurations: General Variables	
Config_CRM_Plugin_URL	Enter the URL of a webpage to make its contents available in your CRM system when viewing tickets. This feature allows you to make valuable links or web tools easily accessible for use by CRM administrators. If utilized, this field must contain a full, valid URL, or errors may occur when attempting to view tickets.
Config_DateFormat	Allows you to format your store's date display.
Config_DidYouMean_Enable	New to Winter '09, this feature allows you to automatically suggest alternatives to customers using the search tool in the event of typographical errors.
Config_Donations_Suggested_Amounts	If you configure your store to accept monetary donations, this variable allows you to specify which donation amounts display on donations.asp. Text entered into this field should be formatted as follows:  Amount1:Title1 Amount2:Title2 Amount3:Title3
Config_Enable_Publish_Always_By_Default	Allows any changes made to your store's settings within the admin area's Design tab to take effect immediately on your storefront, preempting the default requirement of publishing changes first.
Config_Enable_Search_Refinement	Activates the Volusion search refinement function so that you can create filter categories, which allow customers to sort a category page's products by price or manufacturer. You can create them by setting a category's Category Visible setting to By Price or By Manufacturer.
Config_Enable24HourTime_Without_AMPM	Allows your store to report military time (e.g. 1:00 PM will be reported as 13:00). When this option is disabled, standard 12-hour time is used by default.
Config_EnableAccessoriesBelowShoppingCart	Automatically displays products configured as accessories at the bottom of the shopping cart page. This can help you entice customers to purchase additional products related to ones they've selected.
Config_EnableDiscounts_With_SpecialPricing	Grants customers assigned to special pricing levels access to purchase products with special pricing configurations. Disabling this option disables access to special pricing for all customers.
Config_EnableDisplayEstimatedShipping	Provides an estimated shipping cost on the main shopping cart page, based on products selected and the customer's postal code. For customers shopping anonymously, this option provides a text box where they can enter their zip code to receive a shipping estimate (only available for US customers).

Config_EnableDisplayOptionProducts	Modifies how product options configured to use the IsProductCode setting display on the storefront. Enabled, product options display in the shopping cart as variant products added to the cart. Disabled, options display as attributes of the main product.
Config_EnableFaxNumber	Provides customers an optional fax number field in the billing information portion of the checkout process.
Config_EnableGiftCertificates	Allows you to sell gift certificates to customers as products. Note that your store comes equipped with a default gift certificate product (product code: GFT) for you to use.
Config_EnableMaximumOrderQty	Allows you to configure the Max Qty field on each product's edit page (under Advanced Options).
Config_EnableMembersOnlyBrowsing	Requires visitors to register for a customer account before browsing or purchasing from your store. Upon visiting, customers arrive at a login/registration page. Note that this option requires enabling of Config_EnableMembersOnlyWebsite.
Config_EnableMembersOnlyWebsite	Requires visitors to register for a customer account to see pricing and add items to the shopping cart (does not restrict viewing of category and product pages for unregistered visitors). Visitors will see "Members Only" in the price field. Clicking this link redirects to the login/registration page.
Config_EnableMembersOnlyWebsite_TaxID	Displays a required Tax ID field on your store's customer registration page, often used by merchants who sell only to members, resellers, or tax exempt customers.
Config_EnableMinimumOrderQty	Allows you to configure the Min Qty field on each product's edit page (under Advanced Options).
Config_EnableOptions_DisplayPopup	Condenses the way the Volusion store displays product attributes in the checkout process by providing a link to a popup window where attributes are listed. This option is most often utilized when products have many attributes.
Config_EnableOptions_InventoryControl	Allows use of the inventory control grid and related functions. This feature automatically generates product codes for attributes.
Config_EnableOrderEditing	Allows customers to log in to the My Account area to edit their billing or shipping information, shipping methods, and product quantities (provided their order hasn't been shipped, or locked by a store administrator). Note that orders will be automatically locked if using Authorize at Sale, Capture at Shipping or Authorize + Capture at Sale settings, or if the selected payment method is PayPal or Google Checkout.
Config_EnablePriceEdit	Enables you to configure products to allow customer price editing through a text field before adding the item to the shopping cart. This option is typically used in conjunction with stores soliciting donations. Also, this option must be enabled if you sell gift certificates.
Config_EnableProtect_Images	Restricts visitors from right-clicking product images for download.

Config_EnableRegisterPendingStatus	Allows customers to register under pending status. When used in conjunction with Config_EnableMembersOnlyWebsite_TaxID, customers must wait for approval from a store administrator before accessing the store. Approve pending customers by changing the Access Key on the customer account page.
Config_EnableRunningCartTotal	Displays a quantity total link near the top right corner of the storefront that dynamically updates as customers shop. Clicking the link displays the shopping cart's contents in detail.
Config_EnableSendEmailOrderShipped	Automatically sends email confirmation to your customers when their orders are marked as "shipped."
Config_EnableShoppingCartProductLink	Enables customers to click the names of products in the shopping cart to revisit the related details pages.
Config_EnableSyntaxHighlighting	Provides color coding for HTML and CSS viewed or edited at Design >> LiveEdit File Editor. Note that this option increases load times for files viewed in the editor.
Config_EnableWarehouses	Allows you to assign products to warehouses defined at Inventory >> Warehouses. The system, in turn, calculates shipping based on the warehouse location.
Config_HideGiftCertificateExpiration	Hides the expiration date of a gift certificate on the gift certificate itself.
Config_HomePage_EnableSection_FeaturedProducts	Activates the Featured Products portion of the storefront (the product display area of the initial page). It randomly displays products assigned to the Home_Featured section (Advanced Options >> Home Page Section).
Config_HomePage_EnableSection_NewProducts	Activates the New Products portion of the storefront. It randomly displays products assigned to the Home_New section (Advanced Options >> Home Page Section) in a special area on the right side of the initial storefront page.
Config_HomePage_EnableSection_SuperDeal	Activates the Today's Super Deal portion of the storefront. It randomly displays a single product assigned to the Home_SuperDeal section (Advanced Options >> Home Page Section) in a special area on the right side of the initial storefront page.
Config_HomePage_EnableSection_TopSellers	Activates the Top Sellers portion of the storefront. It randomly displays products assigned to the Home_TopSeller section (Advanced Options >> Home Page Section) in a special area on the right side of the initial storefront page.
Config_HomePage_EnableTextTitle	Allows you to use a simple text-based logo in the header of your store's template at Design >> Logos. If you intend to use a graphical image for your logo, this option must be disabled.
Config_HomePage_EnableWelcomeText	Displays a short welcome message with the customer's name in the top right corner of the storefront once the customer logs in. For this feature to work, you must also enable at least one of the following: <ul style="list-style-type: none"> <li>• Config_HomePage_EnableSection_NewProducts</li> <li>• Config_HomePage_EnableSection_SuperDeal</li> <li>• Config_HomePage_EnableSection_TopSellers</li> </ul>

Config_HomePage_NewProductsTitle	Allows you to rename the New Products homepage section.
Config_HomePage_SuperDealTitle	Allows you to rename the Today's Super Deal homepage section.
Config_HomePage_TopSellersTitle	Allows you to rename the Top Sellers homepage section.
Config_ImagesFolder	This text field contains the default directory that your store references for all store image display requirements, including buttons, tables, navigation elements, logos and more. Note that this field automatically updates any time you publish a template to your store.
Config_Live_Chat_ID	Your Live Chat ID number (Basic or Premium edition).
Config_NewGraphicDays	Defines how many days a product utilizing the DisplayBeginDate setting will be marked as "new" (using a graphic) on the storefront.
Config_POS_EnableReceipt	Automatically generates a printable sales receipt after any transaction is completed using the Orders >> Point of Sale page.
Config_RewardPoints_Days_Until_Available	Defines the number of days to elapse between earning and awarding of points when using MyRewards.
Config_RewardPoints_Earned_Per_CurrencyUnit	Defines the number of points earned per currency unit spent.
Config_RewardPoints_Expiration	The number of days for which awarded rewards points are redeemable.
Config_RewardPoints_Minimum_Points_To_Redeem	Allows you to set a minimum point total customers can redeem.
Config_RewardPoints_Program	Allows you to disable the MyRewards program, or set it to one of the configuration options (Points for Cash or Points for Product).
Config_RewardPoints_Redeemed_Per_CurrencyUnit	If using the Points for Cash configuration, this field defines the number of award points redeemed in the spending of a single award currency unit (functions as the number of points required to earn a reward currency unit).
Config_SearchRefinement_EnableOnCategoryPage	Activates the search refinement on all category pages (only active on searches by default).
Config_SearchRefinement_EnableSearchQtyOnCategoryPage	Displays the number of results returned on all category pages (only displays on search pages by default).
Config_SearchRefinement_ShowDropdowns	Displays search refinement in dropdown form instead of as links.
Config_SearchRefinement_ShowInMasterTemplate	Hides the built-in search refinement tool so that you can manually code it in your desired storefront location.
Config_SearchResults_UseTextPaging	Displays additional pages of results in a given storefront category as links (one for each page) instead of only offering Next and Previous links.

## Checkout Variables

<b>Update Configurations: Checkout Variables</b>	
Config_AlwaysDisplayDifferentShipToAddressFields	Displays separate billing address and shipping address fields on the checkout page. When disabled, a single address field displays unless the customer specifies a separate shipping address.
Config_ContinueShoppingPage	A legacy variable that is no longer functional.
Config_Credit_Card_Issue_Date_SideNotes	Allows you to display text next to the Issue Date field on the credit card entry portion of the checkout process. The Config_Enable_Credit_Card_Issue_Date variable must be active for text entered into this field to display.
Config_Credit_Card_Issue_Number_SideNotes	Allows you to display text next to the Issue Number on the credit card entry portion of the checkout process. The Config_Enable_Credit_Card_Issue_Number variable must be active for text entered into this field to display.
Config_Enable_Credit_Card_Issue_Date	Enables customers to enter the issue date for their credit card during the checkout process. Some payment gateway services may require this option.
Config_Enable_Credit_Card_Issue_Number	Enables customers to enter the issue number for their credit card account during the checkout process. Some payment gateway services may require this option.
Config_Enable_Payments_CheckingAccountType	Allows customers using the electronic check payment method to specify the account type (Checking or Savings).
Config_Enable_Payments_CheckNumber	Allows customers using the electronic check payment method to enter their 4-digit checking account number.
Config_Enable_Payments_CVV2	Requires customers to enter the CVV2 value on all credit/debit card purchases during the checkout.
Config_Enable_ShipAddresss_Validation	Verifies the city and postal code fields in a customer's shipping address before allowing order completion.
Config_EnableAllowBackOrders	Allows customers to purchase products with Stock Status of less than 1. Such products will be marked as "backordered" on the order details page.
Config_EnableAnonymousCheckout_Forced	Forces customers to check out anonymously (without registering for a customer account). The only checkout requirements are billing/shipping address(es), payment method, shipping method, and agreement to store terms. When enabled, this variable overrides the Config_EnableAnonymousCheckout_Optional variable.
Config_EnableAnonymousCheckout_Optional	Provides customers the option to check out anonymously (without registering for a customer account).
Config_EnableCoupons	Allows customers the ability to enter coupon codes during checkout (configured at Marketing >> Coupons / Discounts).
Config_EnableDifferentShipToAddress	Allows customers to specify different shipping and billing addresses during checkout.
Config_EnableDisplayCartTax	Allows you to display sales tax on products entered in

	the shopping cart.
Config_EnableGiftWrap	Allows customers to choose options for gift wrapping and gift messaging on the shopping cart page for properly-configured products (fill in Gift Wrap Cost on the product edit page, under the Advanced Options heading).
Config_EnableOrder_Comments	Allows customers to enter comments on orders during checkout. This text displays on order details pages.
Config_MaximumTotalOrderCost	Defines a total maximum currency unit amount a customer can spend on a single order. This can be useful if your payment processing service has set a risk-based transaction limit for your merchant account.
Config_MinimumTotalOrderCost	Defines a total minimum currency unit amount a customer can spend on a single order.
Config_PaymentGateway_CreditCards_CurrencyCode	The currency code used to send credit/debit card information to your gateway. This is the standard three-letter, all-caps code used to officially signify a region's currency.

## Email Variables

Update Configurations: Email	
Config_EmailAddress_AffiliateNotification	Allows you to specify an email address to which the system sends notifications whenever an affiliate registers with the store. To create and manage email accounts, log in at <a href="http://my.volusion.com">http://my.volusion.com</a> and click Email under the My Store heading in the left-hand menu.
Config_EmailAddress_Billing	Allows you to specify an email address to which the system sends notifications when recurring billing customers' payments decline.
Config_EmailAddress_From	The default "from" email address used in all automated correspondence generated by the system.
Config_EmailAddress_OrderNotification1	Allows you to specify an email address to which the system sends notifications when customers place orders.
Config_EmailAddress_OrderNotification2	Allows you to specify a secondary email address to which the system sends notifications when customers place orders.
Config_VSMTPKey	The unique VSMTP security key for your store (not editable). This key is required if using Volusion's VSMTP class to create custom ASP scripts that send email through the store's built-in SMTP functions. Recommended only for advanced user. See our online knowledge base for more information: VSMTP.

## QuickBooks Mapping Table Settings



As mentioned in the “QuickBooks Integration” section of this manual, both the IIF export and Web Connector integrations require settings configuration for effective communication with Intuit’s QuickBooks software. The following tables explain each value contained in the mapping tables for both integrations.

To locate the IIF mapping table, click *Inventory >> Import / Export >> Click here to configure QuickBooks mapping*.

<b>IIF Mapping</b>	
Config_QuickBooks_Include_Shipped_Orders_Only	Allows you to restrict the export to only orders marked as “shipped.”
Config_QuickBooks_Include_with_Orders_Customer_Info	Allows you to include customer information on all exported orders. This option is enabled by default.
Config_QuickBooks_Include_with_Orders_Product_Info	Allows you to include product information on all exported orders. This option is enabled by default.
Config_QuickBooks_Map_ITEM_ACCNT	The name of the income account associated with store products.
Config_QuickBooks_Map_ITEM_ASSETACCNT	The name of the asset account that holds the products’ asset value. This variable must be configured, but doesn’t report stock status. It will always report as zero.
Config_QuickBooks_Map_ITEM_COGSACCNT	The name of the expense account associated with your products’ “Cost of Goods Sold” account.
Config_QuickBooks_Map_SPL_ACCNT	The name of the bank account receiving funds from the store’s orders.
Config_QuickBooks_Map_SPL_NAME	The name of the expense account for the store’s shipping product displayed on orders.
Config_QuickBooks_Map_SPL_Shipping_ACCNT	The name of the inventory account for the store’s shipping product. This is the account charged for shipping costs.
Config_QuickBooks_Map_SPL_Shipping_INVITEM	The name of the inventory item related to the store’s shipping charges.
Config_QuickBooks_Map_SPL_Tax_ACCT	The name of the income account associated with the store’s sales tax.
Config_QuickBooks_Map_SPL_Tax_INVITEM	The item name for the store’s tax account.
Config_QuickBooks_Map_SPL_Tax_NAME	The name of the expense account associated with the state/city/provincial paid by the store.
Config_QuickBooks_Map_TRNSTYPE	This field should always be set to CASH SALE.
Config_QuickBooks_Order_Date_Beg_Blank_For_All	Orders generated before the date defined in this field (in mm/dd/yyyy format) won’t be included in the export.
Config_QuickBooks_Order_Date_End_Blank_For_All	Orders generated after the date defined in this field (in mm/dd/yyyy format) won’t be included in the export.

To locate the Web Connector mapping table, click *Inventory >> Import / Export >> Volusion API >> Here* (next to “Manage QuickBooks Web Connector”) >> *Click Here* (next to “To make changes to Config Variables such as Account names”).

<b>Web Connector Mapping</b>	
Config_Quickbooks_Map_ITEM_ACCNT	The name of the income account associated with store products.
Config_Quickbooks_Map_ITEM_ASSETACCNT	The name of the asset account that holds the products' asset value. This variable must be configured, but doesn't report stock status. It will always report as zero.
Config_Quickbooks_Map_ITEM_COGSACCNT	The name of the expense account associated with your products' "Cost of Goods Sold" account.
Config_Quickbooks_Map_SPL_ACCNT	The name of the bank account receiving funds from the store's orders. If sending orders as sales receipts, this field must be a Bank account type. If sending orders as invoices, this field must be a Receivable account type.
Config_Quickbooks_Map_SPL_NAME	The name of the expense account for the store's shipping product displayed on orders.
Config_Quickbooks_Map_SPL_Shipping_ACCNT	The name of the inventory account for the store's shipping product. This is the account charged for shipping costs.
Config_Quickbooks_Map_SPL_Tax_ACCNT	The name of the income account associated with the store's sales tax.
Config_Quickbooks_Map_SPL_Tax_INVITEM	The item name for the store's tax account.
Config_Quickbooks_Map_SPL_Tax_NAME	The name of the income account associated with the store's sales tax.
Config_Quickbooks_Map_Order_Date_Beg_Blank_For_All	Orders generated before the date defined in this field (in mm/dd/yyyy format) won't be included in the export.
Config_Quickbooks_QBWC_Discount_Account	The name of the expense account associated with the store's discount items account.
Config_Quickbooks_QBWC_Discount_Item_Name	The name of the item type associated with the discount item account.
Config_Quickbooks_QBWC_Gift_Cert_Account	The name of the expense account associated with the store's gift certificate items.
Config_Quickbooks_QBWC_Gift_Cert_Item_Name	The name of the item type associated with the gift certificate item account.
Config_Quickbooks_QBWC_Only_Send_Customers_With_Orders	Allows you to export customer information only for customers who've placed orders.
Config_Quickbooks_QBWC_Only_Send_Products_Which_Were_Ordered	Allows you to export product information only for products that were ordered.
Config_Quickbooks_QBWC_Y_Invoice_N_	Reports all exported orders as invoices instead of sales receipts (all IIF export orders are sales receipts).

## SalesReceipt

The Config\_Quickbooks\_Map\_SPL\_ACCNT variable must be set to a Receivable account type.

## Volusion API Export Tables

The following tables explain all values generated by various types of Volusion API exports.

### Stone Edge

The API provides special exports for integration with Stone Edge Order Manager (SEOM) that contain data on your store's customers, orders, or products databases (see this manual's "Stone Edge" section for further information).

#### Stone Edge Download Customers

This export contains the following fields from the Volusion customers table, as well as some fields required for use within SEOM:

Response	
ResponseCode	A response code specific to SEOM.
Response Description	A success or failure header for use by SEOM.

Customer	
WebID	The CustomerID in the Volusion customers database table.
UserName	The customer's login username for the Volusion store (equivalent to the email address).
Password	The export passes no information to this field in the SEOM template. Passwords are encrypted.
AffiliateID	The CustomerID in the Volusion orders database table. If the customer's Access Key is set to Partner / Affiliate, this is the affiliate ID number.

#### ShipAddr

FirstName	The FirstName in the Volusion customers database table.
LastName	The LastName in the Volusion customers database table.
Email	The EmailAddress in the Volusion customers database table.
Company	The CompanyName in the Volusion customers database table.
Phone	The PhoneNumber in the Volusion customers database table.
Addr1	The BillingAddress1 in the Volusion customers database table.
Addr2	The BillingAddress2 in the Volusion customers database table.
City	The City in the Volusion customers database table.
State	The State in the Volusion customers database table.
Zip	The PostalCode in the Volusion customers database table.
Cou	The Country in the Volusion customers database table.

BillAddr	
FirstName	
LastName	
Email	As the Volusion customer database table, only stores one customer address (as opposed to distinguishing between billing and shipping addresses), these fields are identical to their counterparts under the ShipAdr header.
Company	
Phone	
Addr1	
Addr2	

City	
State	
Zip	
Cou	

## Stone Edge Download Orders

This export contains the following fields from the Volusion orders table, as well as some fields required for use within SEOM:

Response	
ResponseCode	A response code specific to SEOM.
Response Description	A success or failure header for use by SEOM.

Order	
OrderNumber	The OrderID in the Volusion orders database table.
OrderDate	The OrderDate in the Volusion orders database table.
Password	The export passes no information to this field in the SEOM template. Passwords are encrypted.
AffiliateID	The CustomerID in the Volusion orders database table. If the customer's Access Key is set to Partner / Affiliate, this is the affiliate ID number.

## Billing

FullName	A combination of the BillingFirstName and BillingLastName in the Volusion orders database table.
Email	The EmailAddress in the Volusion customers database table.
Company	The BillingCompanyName in the Volusion orders database table.
Phone	The BillingPhoneNumber in the Volusion orders database table.

## Address

Street1	The BillingAddress1 in the Volusion orders database table.
Street2	The BillingAddress2 in the Volusion orders database table.
City	The BillingCity in the Volusion orders database table.
State	The BillingState in the Volusion orders database table.
Code	The BillingPostalCode in the Volusion orders database table.
Country	The BillingCountry in the Volusion orders database table.

## Shipping

FullName	A combination of the ShipFirstName and ShipLastName in the Volusion orders database table.
Company	The ShipCompanyName in the Volusion orders database table.
Phone	The ShipPhoneNumber in the Volusion orders database table.

## Address

Street1	The ShipAddress1 in the Volusion orders database table.
Street2	The ShipAddress2 in the Volusion orders database table.
City	The ShipCity in the Volusion orders database table.
State	The ShipState in the Volusion orders database table.
Code	The ShipPostalCode in the Volusion orders database table.
Country	The ShipCountry in the Volusion orders database table.

<b>Product**</b>	
LineID	The OrderDetailsID in the Volusion order details database table.
ProdType	If the ProductWeight in the Volusion order details database table is zero, this value is reported as Download. Otherwise, the value is reported as Tangible.
Name	The ProductName in the Volusion order details database table.
SKU	The ProductCode in the Volusion order details database table.
Taxable	The TaxableProduct in the Volusion order details database table.
Quantity	The Quantity in the Volusion order details database table.
ItemPrice	The ProductPrice in the Volusion order details database table.
Total	The TotalShippingCost in the Volusion orders database table.
Weight	The ProductWeight in the Volusion order details database table.
CustomerText	The ProductNote in the Volusion order details database table.

### **Payment CreditCard\*\***



Issuer	The PaymentMethodID in the Volusion orders database table.
AVS	The AVS in the Volusion orders database table.
TransID	The CreditCardTransactionID in the Volusion orders database table.

Totals	
ProductTotal	The TotalPrice in the Volusion order details database table.
SubTotal	The TotalPrice in the Volusion order details database table.
GrandTotal	The PaymentAmount in the Volusion order details database table.

Discount**	
Type	The DiscountType in the Volusion order details database table.
Amount	The TotalValue in the Volusion order details database table.
ApplyDiscount	A static value, always reported as Pre.
Description	The Name in the Volusion discounts database table.

Tax	
TaxShipping	A static value, always reported as Yes.
TaxAmount	The total sum of the values in the SalesTax1, SalesTax2 and SalesTax3 fields in the Volusion orders database table.
TaxRate	The SalesTaxRate in the Volusion orders database table.
TaxExempt	Either "Y" or "N," based on the value set in the PaysStateTax field in the Volusion customers database table.

TaxID	The TaxID in the Volusion customers database table.
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ShippingTotal	
Total	The TotalShippingCost in the Volusion orders database table.
Description	The ShippingMethodID in the Volusion orders database table.

Other	
Comments	The Order_Comments in the Volusion orders database table.
IPHostname	The Customer_IPAddress in the Volusion orders database table.
TotalOrderWeight	The ProductWeight in the Volusion order details database table.
WebCustomerID	The CustomerID in the Volusion orders database table.

## Stone Edge Download Prods

This export contains the following fields from the Volusion products table, as well as some fields required for use within SEOM:

Response	
ResponseCode	A response code specific to SEOM.
Response Description	A success or failure header for use by SEOM.

## Product

Code	The ProductCode in the Volusion products database table.
WebID	The ProductID in the Volusion products database table.
Name	The ProductName in the Volusion products database table.
Thumb	The URL for the product image thumbnail.
Image	The URL for the main product image.
Discontinued	A value not reported by Volusion. It will always read No.
QOH	The StockStatus in the Volusion products database table.
Price	The ProductPrice in the Volusion Products - Products_Extended database table.
Cost	The VR_Price in the Volusion vendor rules table.
Weight	The ProductWeight in the Volusion Products - Products_Extended database table.
Description	The ProductDescription in the Volusion Products - Products_Descriptions database table.

## Pitney Bowes

An industry leader in shipping logistics since 1920, Pitney Bowes offers a variety of products and services that can help businesses manage their shipping and order fulfillment needs. The Volusion API offers an export for use with Pitney Bowes.

Pitney Bowes Integration Export Values	
OrderNumber	The OrderID in the Volusion orders database table.
CosingeeID	The CustomerID in the Volusion orders database table.

Customer Name	The ShipFirstName and ShipLastName fields in the Volusion orders database table.
Att	This field is required by Pitney Bowes, but no data is provided by the Volusion export. The default value is "null."
Address1	The ShipAddress1 in the Volusion orders database table.
Address2	The ShipAddress2 in the Volusion orders database table.
City	The ShipCity in the Volusion orders database table.
State	The ShipState in the Volusion orders database table.
ZipCode	The ShipPostalCode in the Volusion orders database table.
PhoneNumber	The ShipPhoneNumber in the Volusion orders database table.
CountryCode	The ShipCountry in the Volusion orders database table.
CarrierID	The ShippingMethodID in the Volusion orders database table.

## Files & Directories Guide

When you access your store's FTP account or visit Design >> LiveEdit File Editor in your admin area, you'll notice that Volusion uses a specific file structure layout. This portion of the appendix provides information about that layout, as well as the data contained in each file and directory.

### The /V Directory

By default, both the FTP directory and LiveEdit File Editor begin in the /V folder. This is the initial store directory to which administrators have access. Note that access to the main root directory is restricted in accordance with Payment Card Industry security guidelines.

Within the /V directory, you can upload custom files of your choice, as well as modify nearly all files listed in the subdirectories it contains. Here, you'll find the following directories, subdirectories and files:

<b>/V</b>	
Basic	Contains all basic, essential HTML, CSS, JavaScript and image files used by the store. The content within this directory is categorized in several subdirectories, listed in the tables below.
Logs	Contains a text file that records specific store activity, such as a list of "500" errors.
VSPFiles	Contains files used to generate automated emails and newsletter templates, as well as a collection of images used to display specific buttons and navigation elements on the storefront.

<b>/V/Basic</b>	
Assets	Contains files used to build the visual portion of your storefront, such as CSS and image files.
Cart_basic.html	The default HTML template for the customer checkout portion of your store.
Home_basic.html	The default HTML template for the basic layout of your store's homepage (the portion that contains the Featured Products section).

Master.html	The default HTML template of the store's overall framework.
Myaccount_basic.html	The default HTML template of the customer account management console.
Productdetails_basic.html	The default HTML template for the individual product pages within your store.
Productlist_basic.html	The default HTML template for pages that list multiple products, such the category and search results pages.

#### **/V/ Basic/Assets**

CSS	Contains all CSS files associated with the main HTML template files in the /V/Basic directory. Note that there are subdirectories within this directory that contain CSS files pertaining to specific languages that you can use (e.g. /En for English, /Fr for French).
JS	Contains all stand-alone JavaScript files for pop-out navigation menu functions.
Images	Contains images for portions of your storefront interface. This directory is divided into subdirectories that represent a particular language configuration option (e.g. /En for English, /Fr for French). These subdirectories are further divided into subdirectories corresponding to the HTML templates in the /V/Basic directory.
ReadOnly	Contains read-only files that generate portions of your online store, such as header and footer templates.
Name.txt	Contains basic information about your store, such as your monthly hosting plan.

#### **/V/Basic/Assets/CSS/En**

Cart_basic.css	The CSS files contained within this directory provide the basic style definitions associated with the corresponding HTML templates in the V/Basic/ directory. Note that these files pertain to the language-specific style definitions as indicated by the subdirectory in which they appear (e.g. /En for English, /Fr for French).
Checkout_basic.css	
Home_basic.css	
Master.css	

Myaccount\_basic.css

Productdetail\_basic.css

Productlist\_basic.css

### **/V/Basic/Assets/Images/En**

Cart\_basic

Checkout\_basic

Home\_basic

Master

Myaccount\_basic

Productdetail\_basic

Productlist\_basic

These directories contain all images used to construct the navigational elements within the corresponding HTML templates. Note that these images files pertain to the store language option indicated by the subdirectory in which they appear.

### **/V/Basic/Assets/Js**

Menu\_popout\_styles.js

Provides the JavaScript that generates the store's pop-out navigation menu functions.

### **/V/Basic/Assets/ReadOnly**

Footer.html

A read-only HTML template used for the storefront footer.

Header.html

A read-only HTML template used for the storefront header.

Hashes.txt

Contains MD5 hashes used for securing portions of your store.

Install.txt	Contains an output from installation scripts originally used during store account setup.
Menu_popout_data.js	A read-only file that contains JavaScript definitions associated with your store's pop-out JavaScript navigation menu.
Readme.txt	Contains some basic information regarding this portion of your store.

## **/V/VSPfiles**

Assets	Contains additional files and subdirectories associated with the display of storefront visual elements.
Downloadables	Contains all downloadable product files associated with entries configured at Inventory >> Products.
Email_templates	Contains all ASP files used to generate emails sent by the system (e.g. shipping confirmation and purchase order emails).
Jmenu	Contains a large number of subdirectories and files associated with the JavaScript functions. We do not recommend modifying the JavaScript code available in this directory.
Newsletters	Contains subdirectories and files used for your email newsletters. Most files in this directory are stored in the /Templates/Global/ subdirectory.
Photos	Contains several subdirectories that contain photos related to your store's categories, products and more.

## **/V/VSPfiles/Photos**

Categories	Contains all category photos uploaded through the admin area.
Manufacturers	Contains all product manufacturer photos uploaded through the admin area.
Options	Contains all product attribute photos uploaded through the admin area.
Uploads	Contains all additional photos uploaded through the admin area.



## **Note on Additional Template Directories**

Each template you've downloaded at Design >>Template (displays under the My Templates tab), generates a subdirectory within the /V/ directory. Each of these subdirectories contains files and subdirectories similar in naming convention to the content of the /V/Basic/ directory. These files however, pertain to the layout and form of the template after which they are named.

