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StoreSense

E • BUSINESS THAT MAKES SENSE

Kurant StoreSense

Quick Start Version 3.0.1

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Welcome!

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

It is recommended that you follow each of the steps in the order they are presented. When additional explanation is required, click **Help** located on the top menu bar to access the StoreSense Administration online help. You can also print the user guide by downloading the PDF file from <http://www.kurant.com/support/storesense/> or your ISP's support area.

This tutorial will cover the following topics:

- ◆ Lesson One: Getting Started
- ◆ Lesson Two: Enter Your Products and Categories
- ◆ Lesson Three: Import Your Product and Category Data
- ◆ Lesson Four: Test Your Store
- ◆ Lesson Five: Managing and Processing Orders
- ◆ Lesson Six: Analyzing Your Store Statistics
- ◆ Lesson Seven: Go Live!

Throughout the tutorial, you will find notes to highlight important reminders or things to consider indicated by a  icon.

Before you begin:

-  If you will be processing credit cards on or off-line, you will need a MOTO (Mail Order/Telephone Order) merchant account.
-  If you will be processing credit cards online in the United States, you will need to make sure your bank is a CyberCash or CyberSource financial partner. Obtaining your merchant account should be done concurrently with setting up your store as this process can take anywhere from a few days to several weeks.

Lesson One: Getting Started

This lesson will guide you through the process of setting up your store operating preferences. It is recommended that you go through the entire lesson. You may return and change your settings at any time.

To begin, click **Store Manager**. The default user name and password are Admin/admin (user names and passwords *are* case-sensitive).

Step 1: Set Your General Preferences

General Preferences are usually set only once and define key information about your store, such as its name and URL. The information entered here is displayed to your shoppers wherever store name, address, e-mail address, etc. is specified in the templates.

To set your General Preferences, click **General Preferences** and enter the following information:

Store Information

Store Name

Enter the name of your store. This is usually your company name, such as Retro@ctive. Your store's name will be visible to shoppers throughout the site and will be used in messages, such as e-mail confirmations and invoices.

URL

Enter your store's web address, excluding the "http://" portion. For example:
www.yourisp.com/retro

In this example, Retro@ctive does not have its own domain name, but is utilizing the ISP's domain name. If you choose this option enter: www.yourisp.com/yourstorename (without the quotes, and no spaces in between words in your store name.)

If you have your own domain name, enter: www.yourstorename.com

- ☛ If you would like to obtain your own domain name, such as www.mystorename.com, you may do so by purchasing a domain name through any of the authorities that register domain names (such as NetworkSolutions, <http://www.networksolutions.com>).

Business Address, Phone Numbers And Contact E-Mail Address

Enter your store's contact information here. The contact information will be displayed to shoppers to call, write or e-mail to if they have questions. Your ISP may also use this information to send notification e-mails and for billing purposes.

Open for business

The default setting for this option is that your store is open. It is recommended that you close your store if you are making significant changes to your inventory or layout.

Member Only Area (Pro version only)

Do you want to enable a Member Only Area? Selecting this check box allows you to password protect your catalog, requiring shoppers to register as a member to access the Member Only catalog. Members enter the Member Only area by entering their e-mail address and password (selected during the registration process).

Require subscription product to enter (Pro version only)

If you charge a membership fee, or sell a subscription-based service/product, you may select this check box to ensure that a membership has been purchased within a specified period. You will define the price and length of the membership/subscription within the Product Manager.

Customer Number Options

In this section, you can set the length of your customer numbers as well as the starting number and any prefix.

For example if you set your starting number at 1, and choose 5 digit customer numbers with a prefix of KUR, your customer numbers will format as follows: your first customer will be Customer KUR00001 and your second customer will be KUR00002.

- Please note that while you can create and change these settings during your testing phase, it is recommend that you do not change them after you go live. A **Prefix** is not required.

Search and Cart Options

Unless you have been instructed otherwise by your web developer or designer, it is recommended that you leave these on their default settings. If you would like more information on any of these options, please refer to your StoreSense Administration guide, or click **Help** while in this section.

When you have completed setting your General Preferences, click **Submit**. You are now ready to move on to the next step.

Step 2: Set Your Billing Preferences

Before getting started, CyberCash and CyberSource merchants will need the following information when setting StoreSense Billing Preferences:

- Is your credit card processor host based or terminal based? Obtain this information from your bank.
- Are you an Immediate Fulfillment merchant? If so, you fulfill orders the same day or within 24 hours. This fulfillment model allows you to authorize and capture credit card funds at the same time.
- Are you a Future Fulfillment merchant? If so, you fulfill all or some orders after 24 hours of placement. In this model, you obtain the authorization when the order is placed and capture the funds when the order is shipped.

To set your Billing Information, click **Billing Information** and enter the following information:

Storewide Preferences

Security

Selecting this option will enable SSL (Secure Socket Layer) during the checkout process and reassures shoppers that their sensitive information is secure. If you have your own domain name, you will need to use your own SSL certificate. Please contact your ISP about obtaining an SSL. If your store will be living at your ISP's domain name, contact your ISP to see if it's possible to use their SSL.

Order Limit

Do you want to establish a storewide order limit? If so, enter the maximum dollar amount for an individual transaction that your store will accept. This setting is not required, but can provide an added level of security.

Credit Cards

Will you be accepting credit cards? If so, select the check boxes next to the cards that you accept.

Require Customers to Provide Credit Card Information

Do you want to require customers to provide their credit card information when checking out? Select this check box to indicate whether customer is required to submit credit card information with their order, rather than sending it separately. If this box is checked, the customer will not be allowed to complete the order process without entering their credit card information.

Retain Customer Credit Card Information

Do you want to retain customer credit card information for easier checkout? Select this check box to save customer credit card information. With this option enabled, returning customers will not have to re-enter their credit card each time they purchase from your store. If you are not using CyberCash and you accept credit cards, you must enable this option.

Show Credit Card Information In Administration Area

Do you want to show credit card information within the administration area? Select this check box to do so. If you will be processing credit card numbers off-line, you will need to select this check box so that the information is available for entry into your terminal.

Processor

Will you be processing credit cards online? If so, select the processor you will be using from the drop-down list, and click **Configure**.

Enabling this option will allow you to obtain credit card authorizations real-time via CyberCash or CyberSource. Because StoreSense is so closely integrated with these processors, many other aspects of the credit card process are also automated.

If you will be processing credit cards online using CyberCash or CyberSource, your financial institution will send your merchant account information directly to that processor. While you are in the process of obtaining your merchant account, you should go to the CyberCash/CyberSource web site to sign up as a new merchant. During the registration process, you will be prompted for information related to your store software and host. See *CyberCash Registration*, page 6.

Be sure to turn CyberCash on only after you have received authorization from CyberCash to send test transactions.

- ☞ When configuring your credit card processor, it is recommend that you copy the CyberCash ID, Merchant Key and Hash Secret from the CyberCash web site and paste that information into these fields.

Processor Configuration

Processor Type

Indicate whether your processor is host based or terminal based. This information should be obtained from your bank when you set up your merchant account, or from the CyberCash web site and manual.

Fulfillment Model

If you are an “immediate fulfillment” merchant, you ship all orders within 24 hours of receiving them. If not, you are considered a “future fulfillment” merchant. These indicators tell StoreSense and CyberCash when to capture and settle credit card transactions.

- ☞ StoreSense is closely integrated with CyberCash to automate many of the functions associated with accepting credit cards over the Internet. Use the chart below to set your preferences within StoreSense and CyberCash.

Processor Type	Fulfillment Model	CyberCash Preferences	Functionality Enabled
Host Based	Immediate	Auto Mark: OFF/No Auto Settle: OFF/No	In this model, all transaction funds are authorized, captured and settled to your account at the time of purchase.
Host Based	Future	Auto Mark: OFF/No Auto Settle: ON/Yes	In this model, all completed/shipped orders are automatically settled to your account daily.
Terminal Based	Immediate	Auto Mark: ON/Yes Auto Settle: ON/Yes	In this model, all authorized transactions are automatically settled to your account daily.
Terminal Based	Future	Auto Mark: OFF/No Auto Settle: ON/Yes	In this model, all completed/shipped orders are automatically settled to your account daily.

AVS Codes (Address Verification System)

When left blank, all AVS codes returned via CyberCash will be accepted and will not affect the authorization process. This option is not available with all processors.

- ☞ Check with your bank before enabling AVS Codes. AVS codes are returned with each authorization and do not affect the authorization process.

Invoice Note

Enter the note you want to appear to those customers who choose to send their credit card separately. This will only appear if you have not checked the option to require customer to provide credit card information during checkout.

Checks and Money Orders, Purchase Orders, Department Orders

Indicate the remainder of your billing preferences and adjust the invoice notes as desired. For additional information on any of these options, refer to StoreSense Store Administration Help.

When you have completed setting your Billing Preferences, click **Submit**. You are now ready to move on to Step 3.

CyberCash Registration

During the CyberCash registration process at the CyberCash Web Site (amps.cybercash.com), you will be prompted for information related to your store software and host. Use the information provided below for these areas.

Granting Development Partner Access

Kurant is a CyberCash technical partner (TP) and therefore is not listed as a Merchant Development Partner (MDP). Please enter the following into the text boxes:

ISP Name: Your ISP's name here

Store Front Software: StoreSense

Cash Register Version: 3.2

Software Download and Integration

You do not need to download any software; the merchant connection kit is already integrated into StoreSense. You may want to download some of the documentation listed, such as the Planning and Admin Guides for reference. Click **Continue** after downloading any documentation.

Registration Completed

Your initial set-up is now complete. Your bank will provide directly to CyberCash the information necessary to complete the Merchant Configuration. The chart above outlines how to set your merchant preferences within CyberCash. For the remainder of the CyberCash process and to "Go Live" with CyberCash, refer to the CyberCash web site and documentation.

Step 3: Set Your Mail Preferences

To set your Mail Preferences, click **Mail Preferences** and enter the following information:

Staff E-mail

This is the e-mail address that will receive the StoreSense notifications listed below. It does not need to be the same e-mail address that was used in setting up your General Preferences.

Mail Server

The SMTP server you use to send Internet mail.

Server Port

The mail port for the server you use to send e-mail.

When you have completed setting your Mail Preferences, click **Submit**. You are now ready to move on to the next step.

Step 4: Set up Your Shipping Tables

StoreSense sets up a default shipping zone based on Total Order Amount and a ship to basis of State/Country.

If you wish change these settings, or add additional zones, please refer to the StoreSense Store Administration guide.

You are now ready to move on to the next step.

Step 5: Set up Your Sales Tax Table

StoreSense gives you the option of collecting sales tax by county or state, depending on your state laws.

To set up your Sales Tax tables, click **Sales Tax** and enter the following information:

Do you collect sales tax by state?

If the answer is yes, enter the standard postal abbreviation of the state where you are required to collect sales tax and the tax rate in decimal form. Click **Submit**. Repeat this process for each additional state where you are required to collect sales tax.

Do you collect sales tax by county?

If the answer is yes, enter the county name and standard postal abbreviation of the state where you are required to collect sales tax and the tax rate in decimal form. Click **Submit**. Repeat this process for each additional county/state where you are required to collect sales tax.

When you have completed setting up your Sales Tax table, click **Submit**. You are now ready to move on to the next step.

Step 6: Set up Your Inventory Preferences

These functions are only available to StoreSense Pro customers. If you did not purchase the Pro version, continue to the next step.

To set up your Inventory Preferences, click **Inventory Preferences** and enter the following information:

Enable Inventory

Will you be using the StoreSense inventory functions? If the answer is yes, select the **Enable Inventory** check box. This will cause items to be removed from inventory when purchased.

Serialized Inventory

Is any of your inventory serialized? If the answer is yes, select the **Enable Serialized Inventory** check box in addition to the **Enable Inventory** check box. This will add the ability to associate serial numbers with each product. When a product is purchased, a serial number is taken from a pool of available serial numbers on a first in/first out basis.

Hide products from catalog when quantity is zero.

Do you want to hide products from shoppers when there is no product in stock? If so, select this option.

Hide products from shoppers when threshold is reached

Do you want to hide products from shoppers when a pre-defined threshold is reached? StoreSense gives you the option of hiding your products from shoppers when the inventory reaches a predefined threshold, or zero. Select your desired option, or leave blank if you don't want your catalog views affected by your available inventory. The threshold is set when you define a product using the Product Manager.

Show backorder status on invoice

Do you want to include a backorder notice on your customer's invoice if any of the products ordered will be backordered? If the answer is yes, select this check box and a Backorder status will appear under the affected line item on the customer's invoice.

Do not allow backorders

Do you want to allow backorders? Some merchants cannot allow backorders because they carry limited edition items and cannot always acquire stock to fulfill a backorder. If you do not allow backorders, select this check box.

When you have completed setting-up Inventory Preferences, click **Submit**. You are now ready to move on to the next step.

Step 7: Set up Your User Permissions

StoreSense gives you the ability to define access privileges to each of the Store Managers, providing enhanced security to sensitive information and allowing you to more easily distribute functional responsibility throughout your organization. It is highly recommended that you create your own administrative user name and password and then delete the default during this session.

- ☞ User Names and Passwords are case sensitive
- ☞ Passwords must be between 4 and 10 characters in length.

To add a new user:

- 1** Click **Users**.
- 2** Enter the name of the user (up to 10 characters) and a password.
- 3** Enter the password a second time to confirm it.
- 4** Select the areas to which this user will have access by select the check boxes.
- 5** Click **Submit** to add the user to the list
- 6** Repeat until all users are added to the system.

Congratulations! You have just completed this lesson and have defined your store preferences. You can make changes to this area at any time by accessing the Store Manager and clicking the preference you wish to update.

Lesson Two: Enter Your Products and Categories

This is one of two lessons that will guide you through the process of entering your products and categories into StoreSense, or “stocking your virtual shelves.” You have two methods to choose from when entering products into StoreSense

- ◆ Enter products manually through the Product Manager (covered in this lesson)
- ◆ Importing your product information through the Product Import interface (covered in *Lesson Three: Import Your Product and Category Data*, page 13).

It is recommended that you go through the entire lesson. You may return and update product information at any time.

To begin, click **Category Manager**. Enter the following user name and password: Admin/admin (user names and passwords *are* case-sensitive), or enter the new name/password you set up in *Lesson One: Getting Started*.

Step 1: Set up your categories

To set up your categories, select **Add Category**, and enter the following information

Category Name

Enter your category name here. You do not have to worry about the order of entry; StoreSense will automatically alphabetize all category entries.

Show exclusively in members only catalog (Pro version only)

Did you enable the Member Only Area in *Lesson One: Getting Started*? If so, you may indicate if this category will be shown in the member’s only area *only*.

After entering your information, click **Submit**.

- For more advanced users, you may want to further customize your store’s look and feel by creating your own category headers and footers, or associate a photo with a category. See the StoreSense Administration Guide and the StoreSense Template Reference for additional help on this topic.

Set up your sub-categories

If your store organization includes sub-categories, follow these instructions. Otherwise, you may go directly to *Step 2: Using Product Custom Fields*.

After setting up your categories, you will be brought to a **Category Information** page, which allows you to update information on your newly entered category or add sub-categories.

To set up your sub-categories, click **Sub-Categories** and enter the following information:

Sub-Category Name

Enter your Sub-Category name and click **Submit**. You do not have to worry about the order of entry; StoreSense will automatically alphabetize all category entries. Continue this process until you have entered in all subcategories associated with this category.

- Repeat this step until all your Categories and Sub-Categories have been entered.
- If at any time you wish to view your current category layout, click **Category Manager** and select **Map Categories**. This will list all categories and their associated sub-categories.

Step 2: Using Product Custom Fields

(Pro version only)

If you wish to display custom information with your products, you may enter the titles in the Custom Field area of the Product Manager. Some examples of where this might be useful:

- ◆ A merchant that sells gardening supplies can indicate season, light, soil, etc.
- ◆ A merchant that sells CD's can use the fields to indicate New or Used and the condition.

To use the fields:

- 1 Click **Product Manager** and select **Custom Fields**.
- 2 Enter your field names as you want them to appear to shoppers. It is not necessary to use all six of the fields.
- 3 Click **Submit** when you are done.

Step 3: Adding Your Products

After you have completed entering all of your categories and sub-categories, you are ready to enter your products. This step will guide you through the process of manually adding your products through the Product Manager, associating them with categories and sub-categories.

- For the purposes of this lesson, you may only want to add 10-15 of your products for testing purposes. If you choose to do this, be sure your initial items fall into at least two different categories to benefit fully from the lesson.
- Each piece of information on the **Product Add** form is considered a field in the product database.
- **Product Name** and **Price** are the only required fields. If you chose to calculate shipping charges by weight, then weight is also a required field.
- If you have purchased the Supplier Module, make sure you enter your supplier information prior to adding or importing your products.

To begin adding products, click **Product Manager** and select **Add Product**. Enter the following information:

Basic Information

The only required field in this section is Product Name.

You may also enter an OEM (manufacturer), SKU/Item Number, keywords, Brief and Long Descriptions, weight, thumbnail and photo file name.

The remaining options in this section are considered advanced functions; please refer to the StoreSense Administration Guide by clicking the **Help** button located in your top menu bar.

- StoreSense will automatically assign a number to each product. You may want to use this number instead of SKU numbers.
- It is not necessary to include Product Name, OEM, Category/Sub-Category or SKU in the Keyword field.

Pricing Information

Enter the price at which you wish to sell the product.

In this section, you may also set quantity discounts and place the product on sale.

Inventory Information

Will you be using the inventory functions (Pro version only)? If so, enter the quantity of your product that is currently in stock.

- If your inventory is serialized and you will be importing your serial numbers, leave the quantity information blank, as the inventory will be updated automatically when the serial numbers are imported.

To calculate the Profit Margin and Cost of Inventory available within the StoreSense Report Manager, you will need to enter your cost for the product in the Cost field.

Options

Do you carry multiple colors and/or sizes of the same product? StoreSense refers to these as Options (tracked as a single product) or Attributes (tracked as distinct products, Pro version only).

To enter colors and sizes as Options, enter each of the options in the provided fields.

To enter these product variations as Attributes (Pro version only):

- 1 Complete and submit the entire **Add Product** form. The **Product Information** page appears.
- 2 Click **Attributes** (at the bottom of the page) to complete your attribute entry.

Custom Information

Did you create Custom Field Titles in *Step 2: Using Product Custom Fields*? If so, enter the appropriate information for the fields you created.

Click **Submit** to add your product or click **Clear** if you want to clear the form and start over. You are now ready to associate your product with the categories/sub-categories you created earlier.

After submitting your product, you will be brought to a **Product Information** page. From this page, you can associate the product with its categories/sub-categories.

To associate categories to this product:

- 1 Click **Categories** (at the bottom of the page).
 - 2 Select the category/sub-category you wish to associate with your product and click **Add**.
 - 3 Repeat this process until you have completed your product and category associations.
- ➡ If you are organizing your catalog by category, you must associate every product with a category, or it will not display in the catalog.

You have just completed adding your first product. To continue adding products, click **Product Manager** and select **Add Product**, repeating the steps above.

Congratulations! You have just completed this lesson and have learned how to manually enter your products into StoreSense. You can make changes to this area at any time by accessing the **Product Manager**, clicking **List Product** and selecting the product you wish to update.

Lesson Three: Import Your Product and Category Data

This is one of two lessons that will guide you through the process of entering your products and categories into StoreSense, or “stocking your virtual shelves.” You have two methods to choose from when entering products into StoreSense

- ◆ Enter products manually through the Product Manager (covered *Lesson Two: Enter Your Products and Categories*, page 9)
- ◆ Importing your product information through the Product Import interface (covered in this lesson).

It is recommended that you go through the entire lesson. You may return and update product information at any time.

To begin, click Support, located on the top menu bar, and select **Import/Export**. Enter the following user name and password: Admin/admin (user names and passwords *are* case-sensitive), or enter the new name/password you set up in *Lesson One: Getting Started*.

Step 1: Set up your categories

If you didn't already do this in *Lesson Two: Enter Your Products and Categories*, page 9, you'll need to do this now.

Step 2: Using Product Custom Fields

If you didn't already do this in *Lesson Two: Enter Your Products and Categories*, page 9, you'll need to do this now.

Step 3: Export a Sample File Layout

The first step in this process is to export the Product Table. To do so:

- 1 Click **Export**.
- 2 Select *Product* from the drop-down list
- 3 Select your platform from the drop-down list
- 4 Click **Export**. The **Select Category** page appears.
- 5 Select *All* from the drop-down list and click **Export**. An **Export Results** page will appear.
- 6 Click the “here” link. An **Export Status** window will appear detailing the results of the export.
- 7 When the export is complete, click the “here” link. The **Export Log** appears.
- 8 Click the “here” link to download the file you've exported. A browser prompt window will appear.
- 9 Choose **Save File** from the Browser prompt.

- 10 Enter a file name and browse to a location to save the file. You may leave the file name unchanged from its default, product.csv file name. Please make a note of where you save the file so that you may easily access it for the remainder of this lesson.
- 11 After choosing your file name and saving location, click **Save**.

Step 4: Open Your File in Excel

We have chosen Excel for the purposes of this lesson. To open the file:

- 1 Open Excel.
- 2 From the **File** menu, select **Open**
- 3 Select *All* from the **File Type** drop-down list.
- 4 Select and open your file.

Step 5: Enter Your Product Information

Enter your product information, referring to *Lesson Two: Enter Your Products and Categories*, page 9, for information on the available fields.

Some rules regarding entering your information:

- ◆ It is very important that you do not alter any of the Column header information.
- ◆ Do not delete any column.
- ◆ Never enter any information into the Product ID Column for new products. StoreSense uses this column to create system defined Product Numbers. For existing products, this column is an identifier to indicate which product you are updating when importing your product database.
- ◆ If you have multiple sizes and/or colors of the same product, you may import them as separate products, or import the main product only and use the Product Manager to add the associated Attributes (colors/sizes).
- ◆ If you purchased the Supplier Module, make sure to enter your supplier information prior to importing your product file.
- ◆ Leave blank any fields you will not be using.

Are you associating a product with more than one category? If so:

- 1 Copy the product information from one line to the next
 - 2 Change the Category/Sub-category name for each new association. Do *not* change the Product ID. StoreSense will automatically create your categories in the Category Manager during the import process.
- Note: when using the Import feature, you can only associate a product with more than one category when *updating* the product database, not when importing a *new* product database. This is because you have a Product ID entered in order for the import to recognize the additional category.

When you have completed entering your product information, you are ready to import your file. Save your working file as a .csv file and return to StoreSense.

Step 6: Import Your Product File

To import your edited product file:

- 1 Return to the Import/Export area of Support
- 2 Click **Import**.
- 3 Select *Products* from the **Import to Table** drop-down list.
- 4 Click **Browse...** to locate your saved product file. Double click the file so that it appears in the **File Location** field
- 5 To replace the existing product inventory quantity information with the information that is in the .csv file, select **Replace inventory quantity with import value**. To *add* the information in the file to the existing information, select **Add import value to existing inventory**.
- 6 Click **Import**.
- 7 After clicking **Import**, you will be presented with a message informing you that your file has been submitted for processing. You may check the status of the import by clicking the “here” link. The import status will open in a new window and will automatically refresh itself every 30 seconds.
- 8 When your import has completed, the status will change to **Import Complete** and provide information on the number of records processed and successfully imported. The status window will also report whether there was any import errors and prompt to click for further information on any errors.

Import Your Product Serial Numbers

(Pro version only)

To import your product serial numbers, follow the steps above, with the following exceptions:

- ◆ Select Product Serial from the drop-down of files available for export.
- ◆ Include only the Product ID, Serial 1 and Serial 2 columns when importing (this will require you to delete the product name from the exported file, prior to importing).
- ◆ Make sure your product quantity is set at zero for these products prior to importing for the first time. StoreSense will automatically update your inventory based on the number of serial numbers imported.

Congratulations! You have just completed this lesson and have learned how to use the Import function to enter your products into StoreSense. You can make changes to this area at any time by accessing the Product Manager, clicking **List Product** and selecting the product you wish to update, or by repeating the lesson.

Lesson Four: Test Your Store

Before continuing the lessons, we recommend that you shop in your store and create test customers and transactions that you will access in the remainder of the Tutorial. To access your newly created store, click **Store** located in the top menu bar.

When you have completed your test transactions, you can access your Administrative area by entering `www.yourisp.com/mystorename/storesense/admin/`. If you have your own domain name, the URL should be `www.mystorename/storesense/admin/`.

You will be prompted for a user name and password – please refer to the welcome e-mail you received from your ISP.

If you are also testing CyberCash, valid test numbers are:

Visa: 4111111111111111

MasterCard: 5555555555554444

Lesson Five: Managing and Processing Orders

In this lesson, you will learn how to manage and process orders using the Order and Shipping Managers. It is recommended that you go through the entire lesson. You may return and repeat the lesson at any time before you go live.

To begin, click **Order Manager**. Enter the following user name and password: Admin/admin (user names and passwords *are* case-sensitive), or enter the new name/password you set up in *Lesson One: Getting Started*.

Step 1: Process and Authorize an Order

All orders are considered pending until they are authorized.

To process an order that has backordered items: (Pro version only)

- ◆ Select the **Pending With Backordered Items** report

A backorder will clear itself when adequate inventory is available in the Product Manager. Refer to the StoreSense Administration User Guide for additional information on managing backorders. After inventory becomes available, its status changes to Ready for Shipping. If it requires Check/PO or Credit Card approval, its status changes to the appropriate pending state.

To authorize an order requiring Check or PO Approval:

- ◆ Select the **Check or PO Approval Required** report

To authorize the order, select the check box next and click **Authorize**. After an order is authorized, its status changes to Ready for Shipping.

To authorize an order requiring Credit Card Authorization:

- ◆ Select the **Credit Card Authorization Required** report

To authorize the order, select the check box next to the appropriate order when you receive your credit card authorization and click **Authorize**. After an order is authorized, its status changes to Ready for Shipping.

If you are processing credit cards on-line via CyberCash or CyberSource and are requiring the Customer to provide their credit card information when they check out (this was decided during *Lesson One: Getting Started, Set Your Billing Preferences*, page 3), your authorizations will be handled automatically.

Step 2: Adjust an Invoice

There may be occurrences where you need to adjust the quantity ordered on an invoice, prior to shipping the order. Some reasons for this are because the customer calls and says they meant to order one instead of two of something, or an item may be on indefinite backorder.

To adjust an invoice:

- 1 Click **Orders Ready for Shipping**.
- 2 Click the number of the invoice you wish to adjust.
- 3 Select **Adjust Invoice**.
- You may also view the invoice by entering the Invoice Number (or tracking number) in the **View Order by Tracking or Invoice Number** field.
- 4 Enter the revised quantity in the text box. StoreSense will automatically recalculate any tax or shipping.
- 5 Click **Submit** when done.

Step 3: Cancel an Order

You may cancel an order at any time prior to shipping.

To cancel an order, follow the instructions in *Step 1: Process and Authorize an Order*, page 17. Instead of clicking **Authorize**, click **Cancel**.

Step 4: Ship an Order

When an order is authorized, its status changes to Ready for Shipping.

To ship an order:

- 1 Click **Orders Ready for Shipping**. This automatically takes you to the Shipping Manager. Orders ready for shipping are listed in the order they were received. Orders where customers specified priority shipping have the shipping method color coded to represent the chosen ship method, blue/second day and red/overnight.
 - 2 Select those orders that are ready to ship.
 - 3 Click **Ship** to ship your orders.
- Clicking **PL** will present a Packing List in a new window that you can print and send with your orders.

Step 5: View a Completed Order

To view a list of orders that have been completed (shipped):

- 1 Select **Completed Orders**.
- 2 Select a search type of **Order Date** or **Ship Date**.
- 3 Select either **Pre-defined Date Ranges** or a **Custom Date Range**. If you select **Pre-defined Date Range**, select a range from the drop-down list. If you select **Custom Date Range**, enter the date range you wish to view.
- 4 Click **Go**. A list of completed orders fitting your criteria appears.
- 5 To view an order, click the invoice date.

Step 6: Issue a Credit

To issue a credit, you must first view the completed order that you will be issuing the credit against. To view the completed order:

- 1 Follow the instructions in *Step 5: View a Completed Order* (page 18) and select the appropriate invoice from the list.
- 2 Click the date to open the invoice.
- 3 Click **Issue Credit** at the bottom of the page. A page appears that shows the invoice date, invoice number and the account the credit will be applied to (Visa, MasterCard, etc.). Beneath this information is a display of the invoice with a check box next to each line item.
- 4 Enter the following information.

Do you wish to issue a credit for all items on the invoice?

If the answer is no and you are not crediting all invoice items, uncheck the items that will not be included in the credit. All checked items will be credited.

Credit Shipping Charges

Do you wish to credit shipping charges? Select the check box to credit shipping charges. You may also choose to credit partial shipping charges by entering a revised dollar amount.

Do you want the credited items to be returned to inventory?

Select the check box to return credited items to inventory.

Issue Store Credit

If you want to credit to be applied to the account in which the order was made (Visa, MasterCard, etc.), you may skip this area. If you would like to issue a Store Credit, select the **Issue Store Credit** check box (Pro version only).

Credit Note

You may enter any text you would like to appear as a note on the credit.

- 5 Click **Submit** when done.

Congratulations! You have just completed this lesson and have learned how to manage and process orders through the Order Manager. You can make repeat this lesson at any time with test orders prior to going live by accessing the Order Manager.

Lesson Six: Analyzing Your Store Statistics

In this lesson, you will learn how to access and analyze your store statistics through the Report and Customer Managers (Customer Manager functions available in Pro version only). You may return and repeat the lesson at any time.

To begin, click **Report Manager**. Enter the following user name and password: Admin/admin (user names and passwords *are* case-sensitive), or enter the new name/password you set up in *Lesson One: Getting Started*.

Step 1: Review Report Manager Reports

To review a report:

- 1 Click a report type.
- 2 Select a report from the drop-down box for review.
- 3 Choose a date range and click **Go**.
- 4 Repeat this process for each of the reports to learn the wealth of information available to you within the Report Manager.

For specific details on each report, refer to the StoreSense Administration User Guide by clicking Help in the top menu bar.

Step 2: Review Customer Order History

(Pro version only)

You can review customer order history information within the Customer Manager. To do so:

- 1 Click **Customer Manager**.
 - 2 Select **List Customers**.
 - 3 Select a customer from the list and click the date shown in the Order History Column. This will bring you to a page listing all orders made by that customer.
 - 4 Click **Product History** to further break this list down by product.
 - 5 To access this customer's profile information, click their name.
- The Customer Manager contains additional functionality not included in this tutorial. For more information on the Customer Manager, please refer to the StoreSense Administration User Guide.

You have just completed this lesson and have learned how to access and review reports available in both the Customer and Report Managers. You can make repeat this lesson at any time with test information prior to going live by accessing either the Customer or Report Managers. After you go live, you will be able to view these reports with your “live” data.

Lesson Seven: Go Live!

Prior to going live, you will want to delete your test customers and orders. To do so:

- 1 Click **Store Manager**
- 2 Select **Maintenance**.
- 3 Select the following check boxes: Purge all Unconfirmed Orders, All Orders/Credits/Carts and All Customers.

Congratulations! You have completed the StoreSense Quick Start Program. We hope you found it helpful.