



Setting Up and Managing Your Online Store

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Introduction to Your Online Store

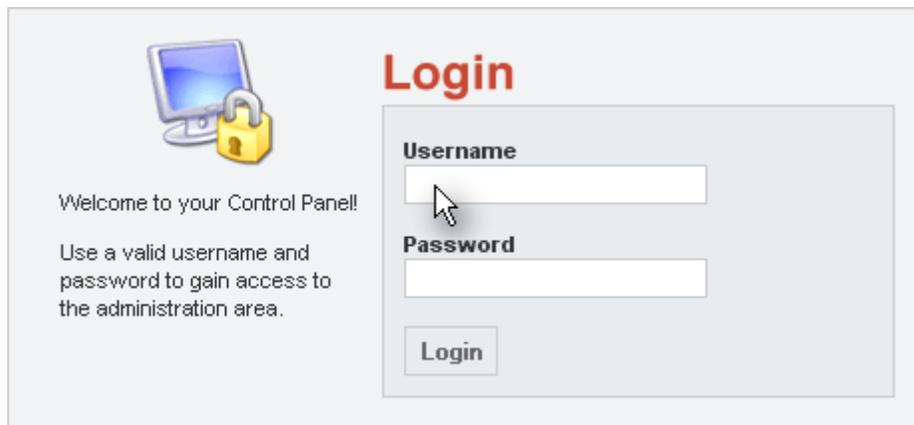
Your online store is a very powerful and full-featured part of your website that gives you the ability to sell products or services on the Web. Simply put, you have the power to manage your entire inventory, orders, customers, and much more. We urge you to read through this guide to familiarize yourself with how to manage your store through the website. It may be helpful to follow each of the steps outlined in this guide while you are reading so that you can “walk-through” each step. Please consider this an investment of your time, and once made you will be able to manage your store quickly and easily.

If you have questions or get stuck, you can always contact us for assistance. We have ongoing support and maintenance plans available to ensure that you have the help you need.

<http://www.koaconsulting.com/support-maintenance.html>

Accessing Your Online Store

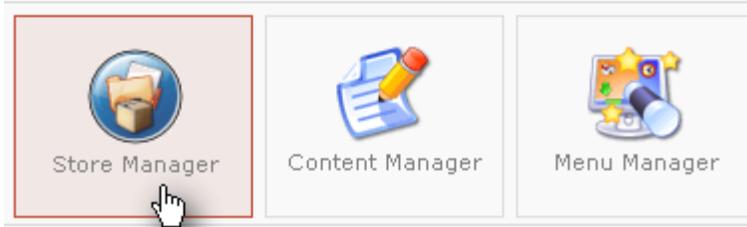
1. Your online store is accessed by logging in through the back end of your website. Begin by opening any web-browser (Internet Explorer, Firefox, etc.), and typing in “[www.<yoursitename>.com/administrator](#)”. Enter your username and password information and login.



The image shows a login interface for a control panel. On the left, there is a graphic of a computer monitor with a yellow padlock in front of it. Below the graphic, the text reads: "Welcome to your Control Panel!" and "Use a valid username and password to gain access to the administration area." On the right, the word "Login" is written in a large, bold, red font. Below this, there is a form with two input fields: "Username" and "Password". A mouse cursor is pointing at the "Username" field. Below the "Password" field is a "Login" button.

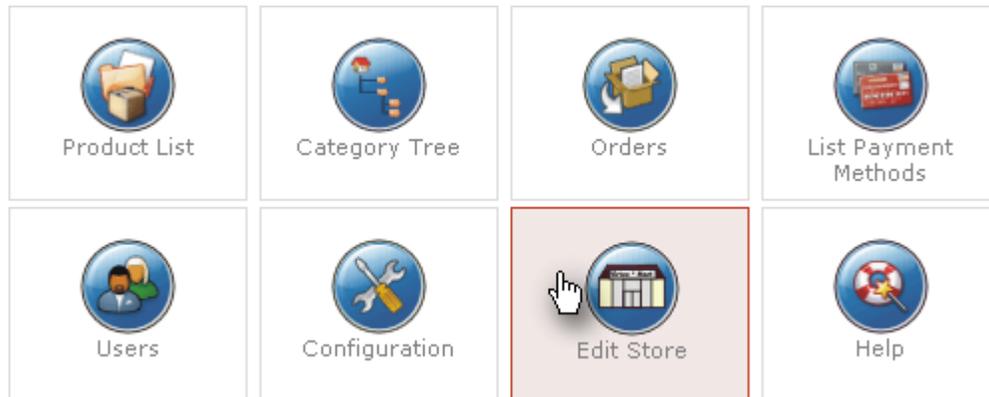
2. You are now logged in to the back end of your website. To begin setting up and managing your online store, click on “[Store Manager](#)” from the control panel.

Control Panel



Setting Up Your Store Information

1. After entering the **“store manager”**, you will be in your store’s control panel. To begin setting up your store information, click on the **“Edit Store”** button.



2. Fill in all of your store, contact and currency information in the provided fields. Further down on this page, you can add a store description, as well as your store’s “Terms of Service”. This information will be sent out as a **Receipt** or **Invoice** when an order is place.

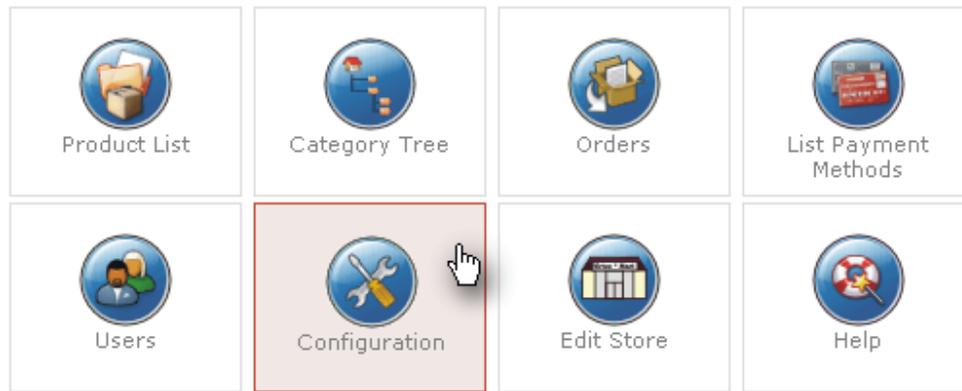
There will be some default information in all of these fields when you initially set up your store information.

3. Once you are finished filling in the information, click on the **“Save”** button on the top-right of the page to keep the information, or **“Cancel”** to discard and changes you have made. Keep in mind that you can always come back and edit/add information on this page.



Configuring Your Store

1. Back at your store's control panel, click on the **"Configuration"** button.



2. The configuration page contains many options for how your store operates:

Note: Many of the settings on the **"Configuration"** page are advanced and can cause your store to operate poorly or not at all if changed unwittingly. Therefore, this guide will only cover a few of the basic configuration settings. If you want to make major configuration settings to your store, please contact us for additional services.

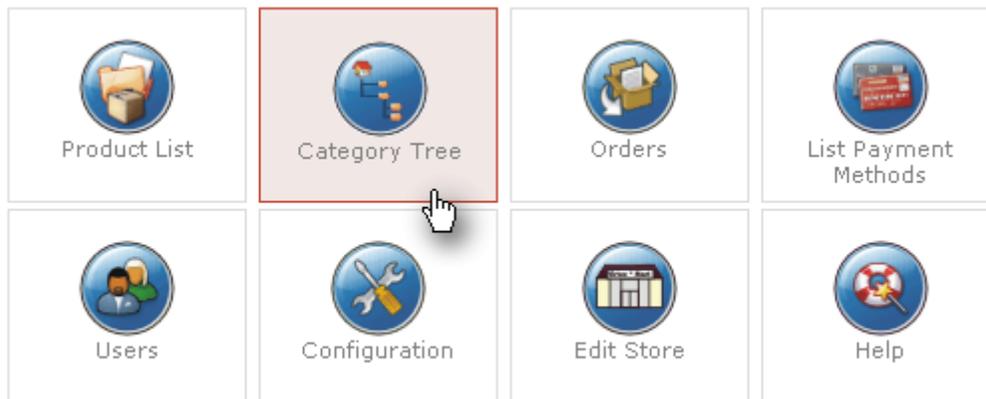
- **"Shop is Offline?"**- The first setting that you will see is "Shop is Offline". If you wish to take your store offline for a bit to make changes or add/edit/remove product offerings, you can do so here. Furthermore, you can display a message to users who visit your site while the store is offline.
- **"Use only as catalogue"** – This setting allows users to browse your products, but the products will not be available for online purchase.
- **"Tax Configuration"**- A few items down on the configuration page is the "Tax Configuration". From here you can choose whether to base taxes on the shipping or vendor address + more.
- **"Frontend Features"**- The "Frontend Features" contains many settings for how customers interact with your store. To select or deselect any features from this section of the configuration page, check or uncheck the corresponding box.

3. Again, **"Save"** or **"Cancel"** any changes that you have made to the "Configuration" page.

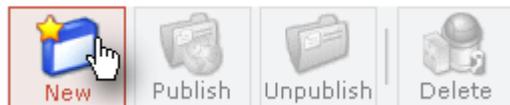


Adding a Category

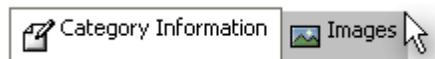
1. Before you can begin adding products to your store, we must create categories in which your products will be organized under. To begin, click on the **“Category Tree”** button from your store’s control panel.



2. To add a category, begin by clicking on the **“New”** button from the top-right menu.



3. Give your category a name (i.e. T-Shirts, Gift Baskets, Paintings, etc...) and optional description.
4. You also have the option of adding a category image. To do this, click on the **“Images”** tab on the category information page.

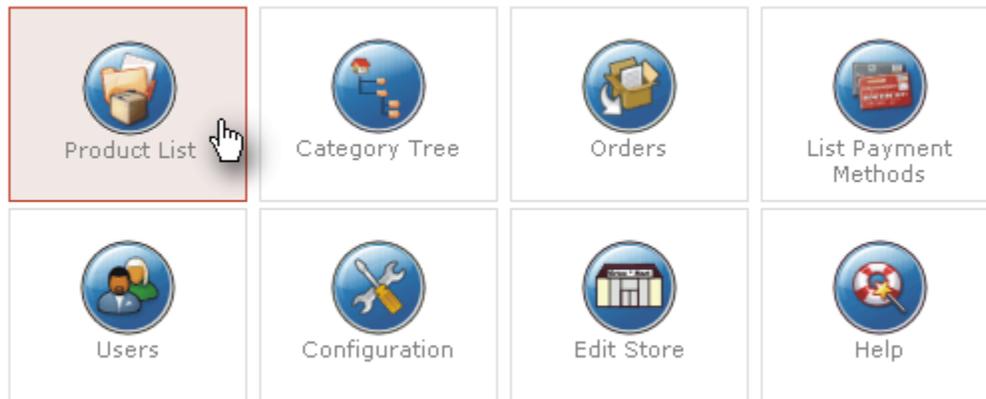


5. Click the **“Browse”** button on either the **“Full Image”** or **“Thumb Nail”** sections to browse your hard drive for an image to represent your category. You also have the option of entering the URL of an image already on the internet. If you select the “Full Image” to use, it will automatically create the “Thumb Nail” image by default.
6. Once you have completed entering your category name, description and optional image, click **“Save”** or **“Cancel”** to save or discard the new category.

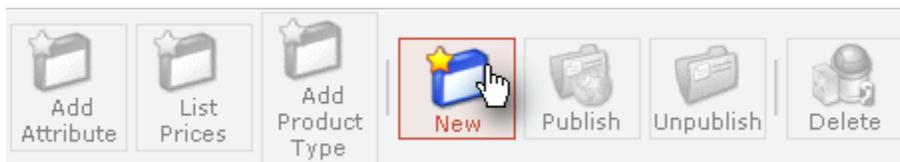


Adding a Product

1. To start the process of adding a product to your store, we begin by clicking on the **“Product List”** button from your store’s control panel.



2. Once in the product list page, click on **“New”** to start adding your new product.



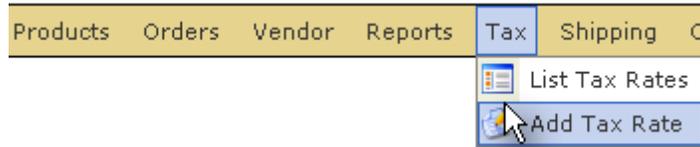
3. Fill in the product information and description fields, and select the category for which you want the product to be displayed in. A product may be assigned to multiple categories by holding down **“Ctrl”** and clicking on multiple categories.

When adding or editing a product’s price, be sure you enter the price into the **“Product Price (Net)”** field and not the **“Product Price (Gross)”** field. The gross field is the product price multiplied by your Tax Rate for the item (aka: VAT ID).

Product Price (Net):	<input type="text" value="25.00"/>	<input type="text" value="US Dollar"/>	
Product Price (Gross):	<input type="text" value="27.0625"/>	\$25.00 x 8.25 % (Tax Rate)	
Tax Rate:	<input type="text" value="2 (8.25%)"/>		

Note: T or
lettering structure for assigning SKU’s.

Note: The **“VAT ID”** is the tax that will be charged to customers who purchase the product you are adding. To add different tax rates, go to the **“Tax”** drop down menu on the top toolbar and click on **“Add Tax Rate”** from the drop down menu. Fill in the information and specify the tax rate in decimal form. This new rate will now be available from the **“VAT ID”** list when adding new products.



- Next, move your way through the tabs above the product information and fill in the fields if you wish for them to be displayed with your product in the store. You can also upload the product image through the **“Product Images”** tab.



- Click **“Save”** or **“Cancel”** to save or discard adding the new product. Your new product will now be displayed in the **“Product List”** and in your online store.



Note: Using the **“Publish”** field in your **“Product List”**, you can remove items from your store without deleting them entirely. This also comes in handy for offering specials. For example, if you wanted to have a product on special for the weekend, you could clone the product so that there are two of them in your product list. Then, simply change the price of one for the weekend special. Once the weekend is over unpublish it and publish the normal priced product. You can always repeat this process to make the product on special again at a later time.

Customer Reviews	Publish	Clone Product	Remove
-	✓		
-	✓		
-	✓		
-	✓		
-			

Cloning a Product

If your store has many similar products or types of products, you can expedite the process of adding a new product by using the **“Clone Product”** feature of your store. Your store must already contain a product for this option to be available. This comes in handy if all you need to do is add a different picture or short description for a group of similar products (i.e. T-Shirts).

1. Start by getting to the product list just like in the first step **“Adding a Product”**.
2. Next, find what product you want to clone from your **“Product List”**, and click on the **“Clone Product”** icon on the far right.



3. You are now presented with the exact product setup for the product that you wish to clone. Now, all you need to do is modify the information to match that of the new product you are adding. Everything is still completely modifiable. The only thing that you **MUST change** is the **“SKU”**. All products need a unique **“SKU”**.
4. **“Save”** or **“Cancel”** the cloning of the new product.

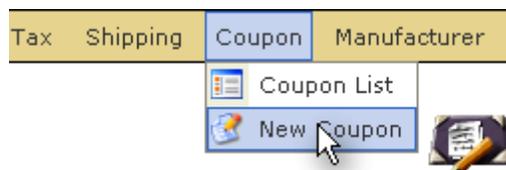


Adding Coupon Codes to Your Store

Offering coupons to your online store can be beneficial for many reasons. For example, say you are attending a convention or event and want to encourage attendance from the community. You could offer a coupon at the event with a code that customers can then use on your online store to receive a discount.

Once a customer obtains a coupon code, they can then enter it in during the checkout process of your store to receive the specified discount you created.

1. Begin by logging in to the **back end** of your website, and navigate to the **“Store Manager”**.
2. Once in the store control panel, hover on **“Coupon”** from the top store menu bar and select **“New Coupon”**.



3. Enter a UNIQUE coupon code and select whether you want the coupon to be a set dollar amount (Total) or percentage off.
4. Next, decide whether you want the coupon to last indefinitely (**Permanent Coupon**), or as a one time use (**Gift Coupon**). Finally enter the value of the coupon.

A screenshot of a coupon creation form. It contains the following fields and options: 'Coupon Code:' with an empty text input box and an information icon; 'Percent or Total:' with two radio buttons, 'Percent' (selected) and 'Total'; 'Coupon Type:' with a dropdown menu showing 'Gift Coupon' and an information icon; and 'Value:' with a dropdown menu showing 'Gift Coupon' and 'Permanent Coupon', with a mouse cursor hovering over 'Permanent Coupon'.

Click **“Save”** to make the coupon active.

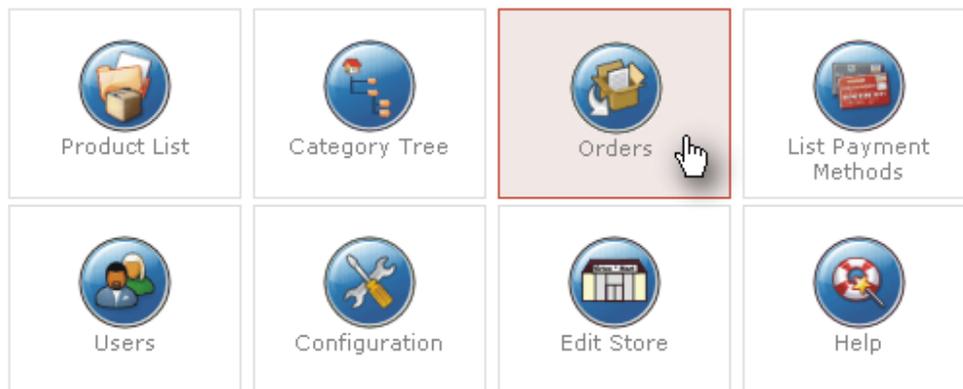
Managing Orders

Once you have received an order from a customer, it will be viewable in the **“Orders”** area of your store. From here, you can manage and inspect all the details of each order.

1. Once an order is placed, you will receive **up to three** different emails:
 - **Purchase Order:** Notification that an order has been placed.
 - **PayPal Confirmation:** Notification that you have received payment for the purchase order.
 - **User Account Details:** Notification that a user created an account for your store. You won't necessarily receive one of these emails for every order since it may be a repeat customer who had previously created an account.

Note: Before shipping an order to a customer, confirm that you have received the payment by logging into your PayPal account (www.paypal.com) and double-checking that the funds are in your account. Doing this in conjunction with receiving the PayPal confirmation email will ensure that you don't ship an order that hasn't been paid for.

2. To view and manage your orders, click on the **“Orders”** button on your store's control panel. This will then bring up the **“Order List”**.



3. The **“Order List”** displays the order number, customer name, order date, order status and the subtotal.

#	<input type="checkbox"/> Order Number	Name	Print view	Order Date	Last Modified	Status	Update	SubTotal	Remove
1	<input type="checkbox"/> 00000009			01-May-08 17:48	01-May-08 17:48	Pending	<input type="checkbox"/> Notify Customer? <input type="button" value="Update Status"/>	\$19.95	

4. You can view the entire order details by clicking on the “Order Number” for the order in the list. This will display everything about that order including who made the purchase, how they made payment, the item(s) ordered and the status of the transaction. The page gives you the ability to enter in notes (such as order updates or shipment tracking information) which can be sent directly to the purchaser. The page also provides a “Print View” option in case you need to save this for your records.
5. You can manage the order status on the order list page (or in more detail on the order details page) and designate a specific status for each individual order by selecting a status from the drop down menu. For example you may wish to change the status to confirmed once you make sure the funds were sent to your account, and then change the status to shipped once you sent the item(s) out.

Order Date	Last Modified	Status	Update	SubTotal	Remove
01-May-08 17:48	01-May-08 17:48	<div style="border: 1px solid black; padding: 2px;"> Pending ▼ Pending Confirmed Cancelled Refunded Shipped </div>	<input type="checkbox"/> Notify Customer? <input type="button" value="Update Status"/>	\$19.95	

User List

1. Your online store also holds all of the users that have created an account with your store in order to make a purchase. To access your “User List”, click on the “Users” button from your store’s control panel.



2. You will now be viewing the “User List” for your store. The list contains the username, full name, and the group for all the users of your online store. When a user registers an account for your store, they will automatically show up under this user list. You also

have the option of selecting certain users and removing them from your user list VIA the **“Remove”** icon on the far right of the list. This user list also contains all of the administrators for your site as well.

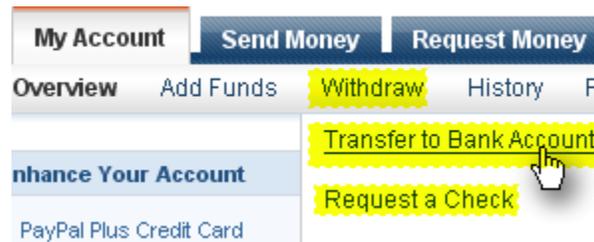
#	<input type="checkbox"/> Username	Full Name	Group	Shopper Group	Remove
1	<input type="checkbox"/> admin		shopper / (Super Administrator)	-default-	
2	<input type="checkbox"/> client		/ (Administrator)		
3	<input type="checkbox"/> koa		/ (Super Administrator)		
4	<input type="checkbox"/> koatech		/ (Super Administrator)		
5	<input type="checkbox"/> [redacted]		/ (Administrator)		

Withdrawing Payments from PayPal

The PayPal website is very powerful and easy to use as well. We suggest familiarizing yourself with it and going through their help documentation if you get stuck or have questions to ensure you are using their services effectively. Every client sells different products and services and may use different features and settings, so we suggest you take some time to view the various options and configure them appropriately.

When you receive payment from a sale in your online store, it will be instantly viewable in your PayPal account. In order to transfer the money from your PayPal account into your bank account, you need to make a withdrawal from PayPal.

1. Begin by going to www.paypal.com and logging in.
2. Once logged in, you will be at your account overview page which shows your current PayPal balance and a summary of recent transactions. To withdraw funds from your PayPal account, go to the “Withdraw” link from the top menu and select the withdrawal method you prefer.



3. If withdrawing to a bank account, specify the amount you wish to withdraw from your PayPal account, and double-check to confirm that the destination bank account information is correct. This withdrawal method is free to use.

From this balance:

Amount:

To:

[Add bank account](#)

Remaining Monthly Limit: \$500.00 USD
PayPal members are limited to withdrawing \$500.00 USD per month. [Lift this limit](#)

Note: If your bank information is incorrect, your withdrawal will be returned and a fee will be charged. See the [fees table](#). Additional bank fees may apply. Please contact your bank directly regarding additional fees.

4. You also have the option of withdrawing funds by requesting a check from PayPal. Again, specify the amount, and confirm that the destination address for the check is correct. A **fee of \$1.50** is added if requesting a check from PayPal.