



Mercantec PowerCommerce™ PowerSoftCart Getting Started Guide

To Get Up and Running Quickly

This is a simple guide for anyone who has never used PowerSoftCart before.

Its purpose is to show you how to quickly get your shopping cart and store front up and running – in the shortest possible time.

1. Set-Up Your Website

You need to set up the front page of your website before you can build your shopping cart. If you haven't already done this, look at the "PowerWebBuilder Getting Started Guide" and follow the directions to get your website set up.

2. Log In

Log in to your PowerCommerce DashBoard. If you have set up the front page of your website, you already know how to do this. If not see the "PowerWebBuilder Getting Started Guide" and follow the directions to get your website set up.

3. Go to the Dashboard

Once you login you will be taken to your DashBoard.

Click on "PowerSoftCart" and you will be taken to PowerSoftCart.

4. Do Your Initial Setup

The first time you go to PowerSoftCart, you will be taken to a nine step QuickStart Wizard.

We are going to take some short cuts and show you how to quickly load a product into your shopping cart. In the process you will set up your shopping cart and learn how it works.

Select your first item and make sure you have the following information before you start:

- (a) Item name (1 to 5 words works best)

- (b) Item description (no more than 1 to 3 short sentences work best)
- (c) Item price
- (d) local sales tax rate

Step 1 - Welcome

Use the default setting “Generate a storefront with the same look and feel as the web site created using PowerWebBuilder.”

Just click “Next” to move to Step

Step 2 – Customer Registration

Skip customer registration at this time.

New customers will be able to register when they place orders. You can add your existing customers to your registration database at a later time.

Just click “Next” to move to Step 3.

Step 3 – Item Category Editor

The shopping cart permits you to create categories of products and to place a product in one or more of these categories. These categories help your customers locate the specific products they are interested in.

If you have more than 10 to 15 products, you may want to use categories. If you have only 10 to 15 products you probably don't want to use them.

First thing, in either event you will need to delete the sample categories (“Category 1” and “Category 2”) and the sub-categories underneath them as well. Please do that now.

Tip: Before you can delete a category or subcategory, you must remove all items in that category and you must also delete all sub categories beneath it.

- (a) Remove “Sub-Category 2B” - Click on “Sub-Category 2B” then click on “Delete”.
- (b) Now remove “Sub-Category 2A” - Click on “Sub-Category 2A” then click on “Delete”.
- (c) Now you can remove “Category 2” the same way.

Repeat (a) through (c) above with Category 1.

If you have only 10 to 15 products and are not going to use categories (and you have deleted Category 1 and Category 2) you can now move on to step 4.

If you are going to use categories, write down on a piece of paper the categories you want to use (its' best to keep category descriptions to no more than 1 to 4 words long).

Use product categories that will make it easiest for your customers to find your products (think ahead and build a category structure that will work with future as well as current products.

If you find yourself wondering whether you are creating to complex of a category structure... you are! If in doubt, keep it simple. It's easy to add categories later.

Now use the “Add” button to add the categories (and sub-categories) that you want.

Keep in mind, that you can assign a product to more than one category. If you don't assign it to a specific category it will be assigned to the "Items" category.

To go on to Step 4, click "Next".

Step 4 – Item Editor

Now we are going to add your first item.

Click "Add an Item". You will be taken to a screen to enter the following information:

- (a) "SKU": Enter an inventory or sku number for the item in this field.
- (b) "Name": Enter the name of the item enter it in this field (1 to 5 words works best).
- (c) "Description": Enter the description of the item in this field (no more than 1 to 3 short sentences works best).
- (d) "Base Price": Enter the price of the item in this field.

Once you enter this information, click "Next".

You will be brought to a screen that permits you to upload images of your item.

The "Item Page Image" image will be displayed on the same page as your product.

The "Item List Image" image should is a smaller image that is displayed whenever the shopping cart presents a list of products to your customer.

For now there is not need to upload any images. If you have a large and a small "thumbnail" image of the initial product you are adding, you can upload it now.

Otherwise click "Next".

You will see that the "Items" category is checked to show that your new item has automatically been placed in the "Items" category.

You can leave it that way, or you can place the product in one or more other categories. All you need do is click on the boxes associated with the categories to which you want the product associated.

Once you are done, click "Next".

You are now at a screen that will permit you to enter a second item repeating the same process that you just completed.

Instead of entering a second item, click "Next" to go to Step 5.

Step 5 - Shipping

You can set your shipping fees by price, weight or quantity. What you set here will apply to all your products (you can later create exceptions for specific products if you want).

If you don't select any one of the shipping options, the shopping cart will default to the "price" model (which is the most common).

For now leave the "price" selection for shipping fees as your default (you can change it later)

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You can select any combination of shipping methods: Standard, Second Day and Overnight. For now let's just use "Standard" and "Second Day". That will require you to delete "Overnight".

So set your shipping method on "overnight", now click "Delete" and you will be prompted with a second delete button to make confirm that is what you want. Click the second "Delete" button as well.

You will now see that you have only two shipping methods "Standard" and "Second Day".

Now set your shipping method to "Standard" then click "Edit". A new menu will drop down at the bottom of the page.

It will show the shipping "Method" as being "Standard".

You need to fill in a "Base Charge" which is the minimum shipping fee for "Standard" shipping. For now let's leave the "Base Charge" at \$0.00.

You will then see two ranges of shipping charge based on price (notice that there is a button to add more ranges and a button to delete all ranges at once).

- (a) Set the first range at 0.00 to "\$99.99" and a charge of "\$5.00" with a message of "Shipping and handling for orders under \$100.00". (Notice that you can use percentages as well as dollars.)
- (b) Set the second range at higher than "\$99.99" and a charge of "\$0.00" with a message of "Free shipping and handling for orders over \$100.00".

Then click "Save".

Now go and change the "Shipping Method" to "Second Day" then click "Edit".

Do the same as before except set the "Base Charge" at "\$5.00", and

- (a) Set the first range at 0.00 to "\$99.99" and a charge of "\$10.00" with a message of "Second day shipping and handling rates for orders under \$100.00". (Notice that you can use percentages as well as dollars.)
- (b) Set the second range at higher than "\$99.99" and a charge of "\$5.00" with a message of "Discounted second day shipping and handling charges for orders over \$100.00".

Then click "Save". You have now set your shipping and handling settings for all products. You can go back and modify them later. And you can also, modify them on a product-by-product basis later. We will show you how later in this document.

Now click "Next" to move to Step 6.

Step 6 – Sales Tax

Click "Add".

Then select your state and click "Save".

Now Click "Edit".

Enter your local sales tax under "Rate" for "General Merchandise". If you have no local sales tax, leave the setting at 0.000

Click "Save", then click "Next" to move to Step 7

Step 7 – Payment Options

Check the payment options that you accept. For your own testing purposes, select at least one credit card option (you can later turn it off later if you decide not to use it).

Then click “Next” to move to Step 8.

Step 8 - Security

In order to protect customer credit card information we have a second level of security. This is an electronic key that we generate and then download to your computer to ensure that only people with this key can access this confidential information.

Enter your password and a password hint. (Don't forget to save your password) We will refer to this password later as the “Credit Card Password”.

Then click “Next”.

Then wiggle your mouse to generate a unique security key.

Now click “Download Key”. Download your electronic key to a directory on your personal computer. Select or create a directory that you will remember. It's also a good idea to save this electronic key to a floppy disk or CD.

To test the electronic key that you just downloaded, enter your new password and use the browse button to select your electronic key. Then click “Begin Key Test”.

If you don't pass the test, use the “Previous” button to go back and start again.

Once you are finished, click “Next” to go to Step 9.

Step 9 - Congratulations

Click “Preview” and your browser will open up a new window with your site on it.

You will notice that there are now several new menu selections that have automatically been added, including: Store, Search, My Account, and View Cart.

In this new window, click on “Store” You will see your item listed in the category or categories to which you assigned it.

Congratulation, you have successfully completed the PowerSoftCart QuickStart Wizard and have developed a basic e-commerce storefront.

5. Do a Test Purchase

While you are in your “Preview” window, click on “Store” and then order the item you just entered.

Use the following test Card information to do a test transaction:

Card Type:	Visa
Card Number:	4111111111111111
CVV2:	any 3 digit number

Expiration Date: a month/year that is equal to or later than today's date
You will find that the email address you submit as a customer will receive a notice of the order you place.

Also you as the merchant will receive a notice of the order at the email address you have loaded into your merchant profile.

If you want to change the email address at which you receive notices of sale, or you want to change your merchant profile information, you can do so later.

Now go back to your PowerSoftCart window and click "Proceed to Dashboard".

6. Go to the PowerSoftCart Manager Screen

Click on "PowerSoftCart".

Since you've completed the QuickStart Wizard, you will now be taken to PowerSoftCart Manager screen, which has numerous new options that you can use to enhance and manage your storefront.

This is where you will spend most of your time operating the shopping cart. The most important part of this screen is the menu along the left hand side called the "PowerSoftCart Main Menu".

7. Manage Your Orders

Now that you are at the PowerSoftCart Manager screen, let's view the order you just placed.

Go to the "Checkout Counter" from the left menu, and click on "Orders". You will be taken to the "Order Manager" screen.

The "Order Manager" allows you to view and process orders that have been placed in your storefront, including the one you just placed.

You can search for one or more orders by Order Number (including ranges of order numbers), Customer Last Name, Order Total, Order Status and Order Date (including ranges of order dates).

Enter your last name and click on "Search" to look up the order you just placed.

On the right side of order information displayed on your screen you will see a "Select Action" menu with the following options:

1. "View Order" – This will display all the details of the order.
2. "Reinstate" – This will reinstate an order that you have previously rejected.
3. "Reject Order" – This will reject an order.
4. "Shipped" – This will mark the order as shipped (and at the same time will send an email notification to the shopper that the order has been shipped)
5. "Payment Rcvd" – This will mark the order as having been paid (and will add the order to the sales report database)
6. "Completed" – This will mark the order as completed (and will add the order to the sales report database if it has not already been added by the "Payment Rcvd" function.
7. "Reset Order Status" – If for any reason you need to reset any of the above statuses for an order this will permit to do so.

You may also download a text file of the orders from any search by clicking on the “Download Orders” button.

Note on Credit Card Security: The only way for you to view a customer’s credit card number you have to use the electronic key that you have previously created and downloaded.

To view the test credit card number that you used to enter your test order, select the “View Order” option. A new window will pop up with all the information about that order except for the credit card information.

To get the credit card information, enter the special “Credit Card Password” you created earlier. Then use the browse button to select the electronic key that you previously downloaded onto your computer.

After you have done the above, click on the “Decrypt” button and the computer will display all the information for that order, including the credit card information.

8. Look at Your Reports

Let’s go take a look at your shopping cart’s order reports.

Your reports will show only those reports that you have marked as “Payment Rcvd” or as “Completed”.

So go back to the “Checkout Counter” from the left menu, and click on “Orders”. You will be taken to the “Order Manager” screen.

Enter your last name and click on “Search” to look up the order you just placed.

Go to the “Select Action” menu and select “Payment Rcvd” to mark this order as paid and add this order to your report database.

Now go to the “Checkout Counter” from the left menu, and click on “Reports”. You will be taken to the “Sales Reports” screen.

There are two parts to this screen.

The top part is titled “Select Report to Run (completed orders only)”. Here is where you determine the nature of the report. You can run a report by size of sale, by category of item, by customer name, by state and by city.

The bottom part is titled “Select Date Range”. Here is where you determine the period of time to be covered by a report.

Once you have the top and the bottom filled out, click “Run Report”.

9. Add More Products

Now you are ready to add more items.

To add items one at a time, Click on “Item Editor” under the “Catalog” sub-menu on the left.

- (a) Now, where the screen reads “Add Item”, enter the SKU number for your second item, enter the name of the item, then click “Add Item”.
- (b) Now add the description and price for that item. Then click “Save”. Then click “Return to Item Manager”.

Now add two or three additional items by repeating steps (a) and (b) above.

The “Item Editor” will display your entered items at the bottom of the “Item Editor” page.

Select one of these and click on “Edit”.

You will now be able to do a variety of things with each product.

- (a) Click on “Generate Buy Now Button” and you can create a buy now button that will work on other web sites.
- (b) Click on “Categories” and you can assign that product to one or more categories.
- (c) Click on “Attributes” and you can add color, size and similar (you will want to first set the types of attributes you want to use by first going to the left menu and clicking on “Attributes” under the “Catalog” sub-menu).
- (d) Click on “Pricing” to change an items price (set the “discount” to active and you can give a product a discount that will continue for a set period of time).
- (e) Click on “Images” to upload images of an item.
- (f) Click on “Tax Rates” and you can assign special taxes rates to specific products (you will want to first set the types of taxes you want to use by first going to the left menu and clicking on “Sales Tax” under the “Checkout Counter” sub-menu).
- (g) Click on “Shipping” and you can add additional handling and shipping fees for a specific item that will be added to the default shipping and handling charge.

Tip: Avoid uploading images larger than 50 to 70K. If you upload larger images, it will cause your web pages to load too slowly for many users.

Tip: The top portion of the “Item Editor” has a search function. You can search your entire shopping cart (or even just a single category) for a specific item or even a listing of all items in a category.

Tip: You can upload large numbers of products by clicking on “Item Data Import” under the “Catalog” sub-menu. But learn how to add items one at a time before you try this.

Tip: In order to completely remove an item from your shopping cart you must click on “Item Editor” under the “Catalog” sub-menu, then click on the “Edit” for that item, then (a) click on “Advanced” and then uncheck the item as active and then click on “Save” and then “Return”, then (b) click on “Categories” and uncheck the item from all categories and then click on “Save” and then “Return”.

10. Checkout Counter

There are a number of global setting that affect all items and transactions.

Go to the “Checkout Counter” sub-menu. Here you will be able to change your shipping, sales tax and payment settings and options. You can also look up orders and run reports here as well.

Once you have your storefront set up, this will be the area in which you will spend most of your time managing your online store.

11. Other Options

Now go to the left menu and from the top down click on each link. See what each one does. Experiment around and see what you can do.

If you want to change your merchant profile and the email to which merchant notifications of orders are sent, go to the “Security/Settings” from the left menu, and click on “Site Info”.

You should also take a look at the “Email Template Editor”.

12. Publish Your Changes

You need to remember that none of your changes will be placed on your web site until you click on the “Publish” button in the upper right hand corner of the screen.

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