### How to Login

The initial login screen is seen in Figure 1. The first thing that you need to do is log on as an administrator.

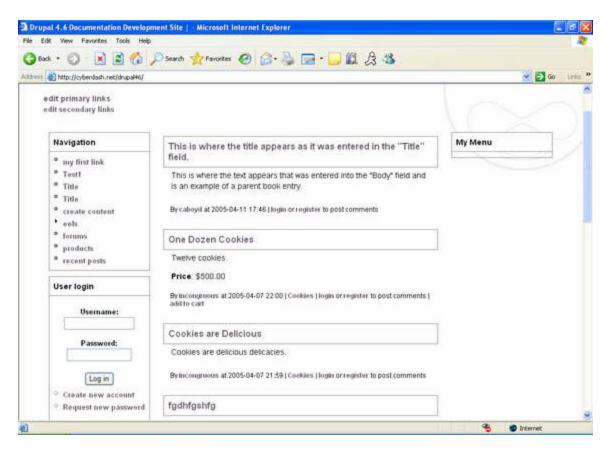


Figure 1: Initial Login Screen

## How to Create a Product

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Figure 2: Submit Product Screen Shot

- 1. In the left hand task bar, click the link that says **Create Content**
- 2. From there a sub list shows up and on the sub list you want to click **Product**
- 3. The screen shot for this is shown in Figure 2
- 4. Once on the create products page, begin filling in your information about the product you wish to create
- 5. Down the page slightly, make a title and a description for your product

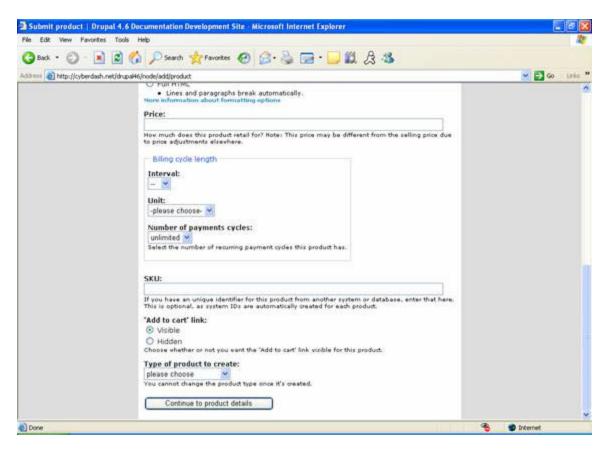


Figure 3: Submit Product Screen Shot 2

- 5. Scroll down some more and the screen seen in Figure 3 will appear
- 6. Fill in the price you wish to sell your item at without a currency symbol
- 7. Fill out the options you wish to have in the **Billing Cycle Length** list
  - 1. Interval is the number units of time between payments
  - 2. Units are given in Days, Weeks, Months, Years
  - 3. **Number of payment cycles** is how many recurring payments will be charged to the user
- 8. **SKU** is the ID number for this product. The system will assign an internal system ID number regardless if a SKU is entered. It will not automatically assign a SKU. If you don't wish to have your own SKU assigned then skip over the SKU section
- 9. Choose "Shippable Product" from the list under Type of Product to Create
- 10. Next, click on the button that says Continue to Product Details

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Figure 4: Submit Product Screen Shot 3

- 11. Again scroll down until you get to the image shown in Figure 4
- 12. Under the **Inventory Control** section choose the button that says "Enabled"
- 13. Type in the number of products you have in your initial stock in the box labeled **Number in Stock**
- 14. Under that section go to **Availability Estimate** and choose when the product will be shipped out based on what you will do
- 15. Finally click on the **Create Product** button and your product is complete

### How to Check and Edit a Product

Once a product has been created, it is possible to check its contents to verify that all the fields are appropriately labeled. If there is a mistake in one of the fields, it is possible to edit the previously created product.

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Figure 5: Product Screen Shot

- 1. In the navigation menu, click on **Products**. This scren shot is shown in Figure 5
- 2. A list of products will be displayed with its proper title, description, and pricing information
- 3. To edit a product, click on any of the product links to view its contents
- 4. To change the title, description, pricing, and any other fields, click on the Edit tab
- 5. For more explanation on changing these fields, go to the previous section of this tutorial on **How to Create a Product**

### How to Enable the Shipping Calculator

The shipping calculator gives the user full flexibility to factor in shipping costs for items purchased. Once an option is selected and saved, the program will automatically add the cost of shipping to any order placed if enabled.

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Figure 6: Shipping Options Screen Shot

- 1. To factor in shipping costs to items, click on Administer » Store » Shipping Options
- 2. As shown in Figure 6, there are three possible ways to configure the shipping calculation methods. Shipping costs can be based on the:
  - 1. Total Quantity of Items (based on the total amount of items purchased)
  - 2. Total Cost of Items (based on the total value of items purchased)
  - 3. No Shipping Costs (no shipping costs factored in)

## Total Quantity of Items

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Figure 7:Shipping Options Screen Shot 2

- 1. Scroll down to the shipping detail section shown in Figure 7
- 2. Select **Total Quantity of Items** by clicking on the circular check box. A black dot will appear to verify that you have selected it
- 3. To save this configuration, click on the **Save Configuration** button
- 4. A shipping details table will appear just below the shipping calculation methods box. Adjust the amount of items in the left column with their respective costs in the right column
- 5. Click on the Save Shipping Details button to store any adjustments

## Total Cost of Items

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Figure 8: Shipping Options Screen Shot 3

- 1. As seen in Figure 8, select **Total Cost of Items** by clicking on the circular check box. A black dot will appear to verify that you have selected it
- 2. To save this configuration, click on the **Save Configuration** button
- 3. A shipping details table will appear just below the shipping calculation methods box. Adjust the amount necessary to purchase on the left column with its respective shipping cost in the right column
- 4. Click on the Save Shipping Details button to store any adjustments

## No Shipping Costs

- 1. Select **Do not calculate shipping costs** by clicking on the circular check box. A black dot will appear to verify that you have selected it
- 2. To save this configuration, click on the **Save Configuration** button

**Note:** A message, **the configuration options have been saved** will be displayed above the shipping calculation methods (i.e. total quantity of items, total cost, or no shipping) box to confirm that changes have been stored. If any shipping details (i.e. shipping costs) are changed, a message

# **the shipping options have been saved** will display to confirm that changes have been stored.

### **Customer Emailing through Drupal**

Inside the Drupal E-commerce module a function that exists that will send out invoice, payment error and shipping information to the customer via email. These emails are preformatted with preset variables placed in to show specific customer and purchase data. These emails can be edited by the any administrator but you must be careful not to erase an important variable in the email, otherwise needed information will be left out.

#### Pre-formatted Invoice Email

The invoice email will be sent out after an order has been placed by a registered customer. The email layout is found by logging on as an administrator and then Click on **administer** » **settings** » **payment** tabs. To setup up your Invoice email information shown in Figure 9:

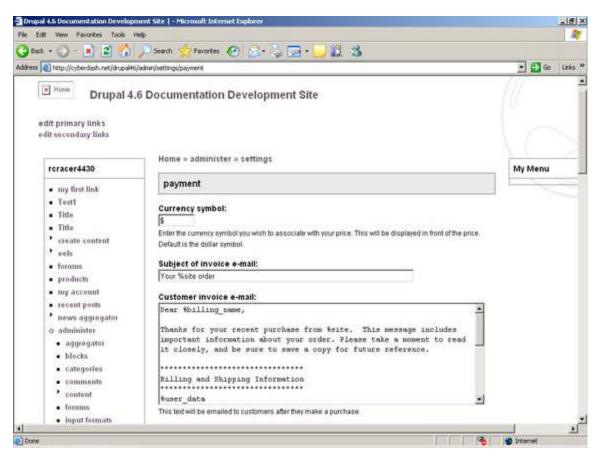


Figure 9: Payment Notification Email Screen Shot

- 1. Set currency to the standard for you company
- 2. Subject Line

- Corresponds to subject line in email
- The Default setting is "Your % site order"
  - %site is a variable that corresponds to the name of your website or company
  - This can be left this way, or changed by erasing the %site and placing in your company's name
- 3. Email Body
  - Email is in text format and should contain information about the customer, products the customer purchased and contact information to your companies Customer service personel
  - The default email looks like this:

Dear %billing\_name,

Thanks for your recent purchase from %site. This message includes important information about your order. Please take a moment to read it closely, and be sure to save a copy for future reference.

\*\*\*\*\*

Billing and Shipping Information

\*\*\*\*\*

%user\_data

Order Details

\*\*\*\*\*

%items Questions about your order? Please contact us at %email

\*\*\*\*\*

**Shipping Instructions** 

\*\*\*\*\*\*\*\*\*\*\*\*\*

We will notify you by email as soon as your order ships. Thanks for shopping at %site. We hope to hear from you again real soon! %uri

- 4. %site variable
  - Corresponds to the name of your website or company
  - This can be left this way, or changed by erasing the %site and placing in your company's name
- 5. %user\_data variable
  - Contains the customer data entered in during the purchasing process
  - You don't want to delete this variable otherwise you will not be able to display data specific to each customer so that they can double check their settings before you send out their shipment
- 6. %items variable
  - List of items the user is purchasing
  - You don't want to delete this variable because it allows the user to double check their order before it is sent out
- 7. %email variable
  - Preset email address of your customer support personal
  - This variable can be erased and replaced with the email address or contact information of your customer support person
- 8. %uri variable
  - Web address (URL) of your website
  - Again this can be erased and the URL of your website can be placed there instead

Now any part of this document can be edited to your specific style, but you will want to use the variables listed above as you go and the default email as a guide to produce your own specific purchasing email

### Pre-formatted Payment Error Email

Just below the invoice email body is the payment email settings. This email is designed to be sent to the customer when a payment error has occured. An example of a payment error email is shown in Figure 10:

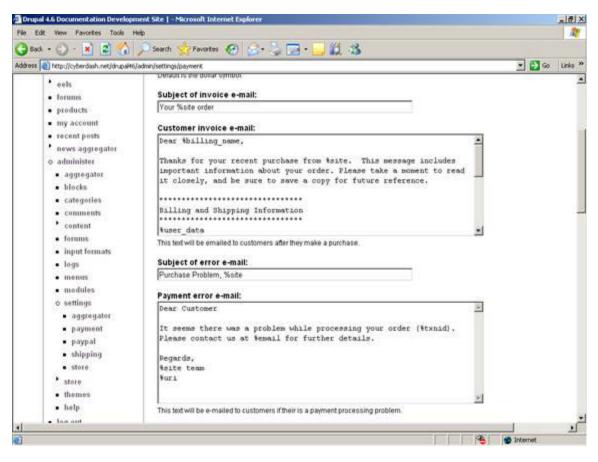


Figure 10: Payment Error Notification Email Screen Shot

- 1. Subject Line
  - Corresponds to subject line in email
  - Should be formatted in a way that will alert the customer that there is an error
  - o Default setting is: "Purchase Problem, % site"
  - o %site variable
    - Corresponds to the name of your website or company
    - This can be left this way, or changed by erasing the %site and placing in your company's name
- 2. Email Body
  - Should be short and to the point telling the customer their was an error with their purchase and that they should contact your company.
  - The default setting is:

Dear Customer,

It seems there was a problem while processing your order (%txnid). Please contact us at %email for further details.

Regards,

%site team

%uri

- 3. #%txnid variable
  - Purchase ID that is assigned to every order
  - It should be left in so that the customer can use that number to reference their order when they are contacting your customer support personal.
- 4. %email variable
  - Preset email address of your customer support personal
  - This variable can be erased and replaced with the email address or contact information of your customer support person
- 5. %site variable
  - Corresponds to the name of your website or company
  - This can be left this way, or changed by erasing the %site and placing in your company's name
- 6. %url variable
  - Web address (URL) of your website
  - Again this can be erased and the URL of your website can be placed there instead

### Pre-formatted Shipping Email

The shipping email is designed to let the customer know that their order has been processed and has been shipped out of your company's location. The email section is found by first logging on as an administrator then clicking on **administer** » **settings** » **shipping** tabs. To setup the shipping email shown in Figure 11:

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<ul> <li>hlocks</li> <li>categories</li> </ul>	Questions about your order? Please contact us at Wesail.	
* comments	This text will be emailed to customers after their order has been shipped.	
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Figure 11: Shippment Notification Email Screen Shot

- 1. Subject Line
  - Corresponds to subject line in email
  - It should be formatted so that you companies name and the Purchase ID are listed
  - The Default is:

"Your % site order has shipped (#% txnid)"

- 2. %site variable
  - Corresponds to the name of your website or company
  - This can be left this way, or changed by erasing the %site and placing in your company's name
- 3. #%txnid variable

- Purchase ID that is assigned to every order
- It should be left in so that the customer can use that number to reference their order when they are contacting your customer support personal
- 4. Email Body
  - The body should be formatted so that the Purchase ID, Customer shipping information, and your customer service personnel contact information
  - Default format:

Hello % first\_name,

We have shipped the following item(s) from Order #%txnid, received %order\_date.

Items(s) Shipped:

%item

%shipping\_to

Questions about your order? Please contact us at %email.Thanks for shopping at %site. We hope to hear from you again real soon!

%uri

- 5. % first\_name variable
  - Contains the first name of the customer which was entered in during the product purchasing processes
  - Should be left on for customer comfort
- 6. #%txnid variable
  - Purchase ID that is assigned to every order
  - It should be left in so that the customer can use that number to reference their order when they are contacting your customer support personal
- 7. %order\_date variable
  - Contains the date that the order was submitted by the customer
  - Doesn't have to be left on but it allows easy tracking for the customer
- 8. %items variable
  - Contains the names of the projects that the customer ordered
  - Doesn't have to be left on but it allows easy tracking for the customer
- 9. %shipping\_to variable
  - Contains the shipping address of the customer entered in during the purchasing processes
  - Should be left on to allow the user to double check that the information is correct
- 10. %email variable
  - Preset email address of your customer support personal

- This variable can be erased and replaced with the email address or contact information of your customer support person
- 11. % site variable
  - o Corresponds to the name of your website or company
  - This can be left this way, or changed by erasing the %site and placing in your company's name
- 12. %url variable
  - Web address (URL) of your website
  - Again this can be erased and the URL of your website can be placed there instead

### Paypal

To locate the Paypal function Administer » Settings » Paypal as shown in Figure 12:

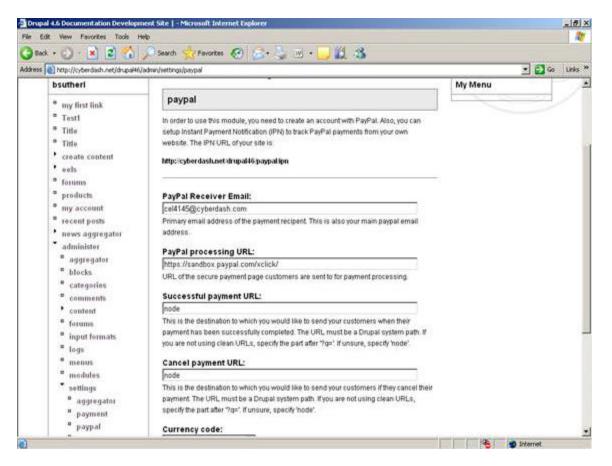


Figure 12: Paypal Information Screen Shot

1. In order to use the Paypal function, you need to create an account on the Paypal website. The way that you would complete this task is go to this link at <a href="http://www.paypal.com">www.paypal.com</a>. Make sure that you follow all instructions on the Paypal

website. After you have created your Paypal account, go back to the Drupal page to incorporate your account into your webpage. The first thing that needs to be completed on Drupal is the "instant payment notification."

**Note:** It may take several days for your account to become active with Paypal

- 2. After you have completed your instant payment notification, you need to list the primary email address that your payments should be sent to. You should enter that email address where it says **Paypal Receiver Email**
- 3. Enter the web address where it says **Paypal processing URL** for your payment notification webpage
- 4. Enter the web address where it says **Successful payment URL** for the webpage for a successful transaction. **NOTE:** This address must be a Drupal system path. If it is not, or you are unsure, then you must enter "node"
- 5. Enter the web address where it says **Cancel payment URL** for your order cancellation webpage. **NOTE:** This address must be a Drupal system path. If it is not, or you are unsure, then you must enter "node"
- 6. Select your form of currency where it says **Currency code**. Under the drop down menu you must choose the form of currency from the list. The list includes the following: US Dollars (USD), Euros (EUR), Australian Dollars (AUD), Canadian Dollars (CAD), Pounds Sterling (GBP), and Japanese Yen (JPY)
- 7. Enable or disable the debug function of your instant payment notification. If it is enabled you will get an email telling you that it is enabled
- 8. Enter the value for your minimum purchase amount where it says **Minimum purchase amount**
- 9. Save your configuration. To do this click on the button marked **Save** configuration . To clear all of the entries that you have made, then click the button marked **Reset to defaults**

### **Product Transaction Tracking**

In order to track product shipments and transactions Drupal has a built in search engine. To reach the search feature of the site there are a few quick links that can be found on the Drupal 4.6 Documentation Development Site: http://cyberdash.net/drupal46/.

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create content     eels     forums     products     my account	The textfields in this form recognize special operators like greater than (*), less than (*), comma separated values and equals to, which is also the default option if none is specified. This allows you to easily find ranges and multiple values and works with IDs and dates.	
* recent posts	Search for:	
<ul> <li>news aggregator</li> <li>administer</li> </ul>	Searches the title and content of a product for a string of text.	
a aggregator	Transaction ID:	
<sup>8</sup> blocks		
<sup>a</sup> categories	The ID number of a transaction.	
<sup>o</sup> comments	Username or ID:	
* content		

Figure 13: Transaction Tracking Screen Shot 1

- 1. Once you are logged in, click **Administer » Store » Search** as shown in Figure 13
- 2. Click on that link and you will find a specialized search engine that will allow you to search for different fields of information about the transaction you are interested in

Once you have located the search engine there are six different fields that you can look for information on shown on Figure 13 & 14.

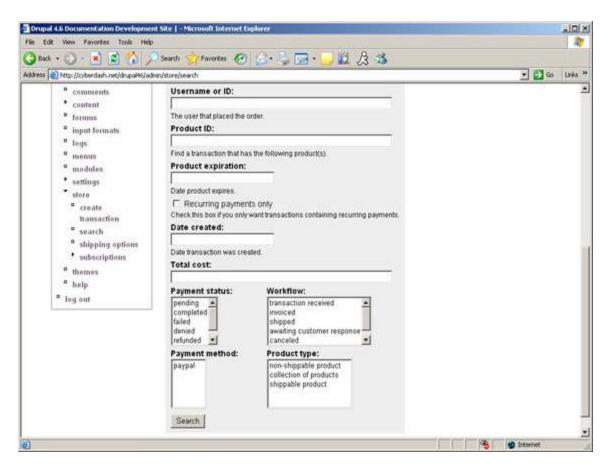


Figure 14: Transaction Tracking Screen Shot 2

- 1. Can search for general information about the title and content of a product by entering a text description
- 2. Can search for the transaction through its ID number transaction
- 3. Can search for a product under its own ID
- 4. Can search for products under a certain expiration date
- 5. Can search for a product under the date that it was created



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