



Making Changes to Your Store



***HOW TO
Set Up and
Modify Categories***

Revision 1.2



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MM1028-03

HOW TO

Set Up Categories

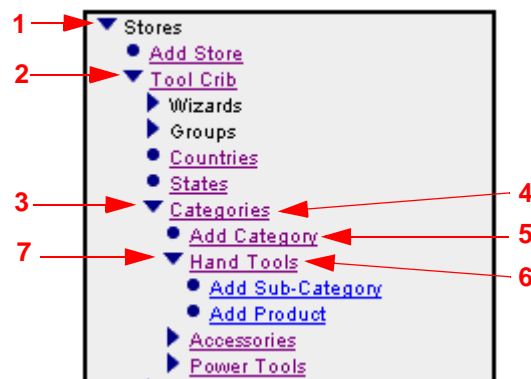
Using the Administration Interface

Introduction

To get your storefront up and moving, you will want to add products, and arrange your products by categories. You may also want to have sub-categories. It is best to have an outline of your categories and sub-categories, and how you want to arrange your products. You can place products in more than one category. Miva Merchant helps you easily set up categories and place products into categories. Miva Merchant Simple Administration guides you through creating categories and adding products to the categories, as well as other store configurations. If you are creating your first store, refer to *Start Using Miva Merchant, Wizards, & Maintain Your Store*.

To edit or add new categories:

1. Click the triangle to the left of Stores.
2. Click the triangle to the left of the store name.
3. Click the triangle next to Categories to display the current categories and the Add Category link.
4. To edit the Categories List, select the Categories link. See [“Edit Categories List” on page 2](#).
5. To add a new, top-level category, select the Add Category link. See [“Add New & Edit Category Tabs” on page 4](#).
6. To edit a specific category, select the link for the category. See [“Add New & Edit Category Tabs” on page 4](#).
7. To display links under a category, click the triangle next to the category name.
 - a. To add a sub-category, select the Add Sub-Category link.
 - b. To add products to the category, select the Add Product link. Refer to *HOW Add and Modify Products*.




Edit Categories List

The Categories link opens a form that displays a list of the categories, and allows you to perform the following tasks:

1. [“Search for a Category”](#)
2. [“Sort the Way the Categories are Displayed”](#)
3. [“Remove a Category”](#)
4. [“Add a New Category”](#)
5. [“Edit a Category”](#)
6. [“Add New & Edit Category Tabs”](#)

Search for a Category

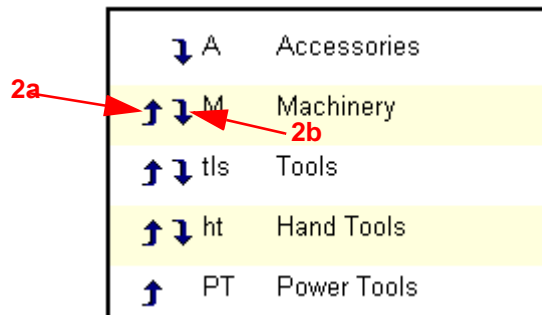
Enter a word, or part of a word, and click the Search  button. This can be either part of the Category name or the Category code. All categories containing the letters you entered are displayed.

Sort the Way the Categories are Displayed

You can display the categories by name or by code, either in ascending or descending alphabetical order.

You can sort the categories in one of the following ways:

- Name Ascending Displays the Category list A to Z by Category name.
 - Code Ascending Displays the Category list A to Z by Category code.
 - Name Descending Displays the Category list Z to A by Category name.
 - Code Descending Displays the Category list Z to A by Category code.
1. Click one of the sort links and the Category list will sort in that manner. There is a confirmation message warning you that the sort cannot be undone.
 2. You can move a Category up or down the list.
 - a. Click the up arrow to move the category up the list.
 - b. Click the down arrow to move the category down the list.



Remove a Category

1. To remove a Category, check the box in the Remove column.
2. To remove all displayed categories, click + in the Remove column.
3. Click Update.


Add a New Category

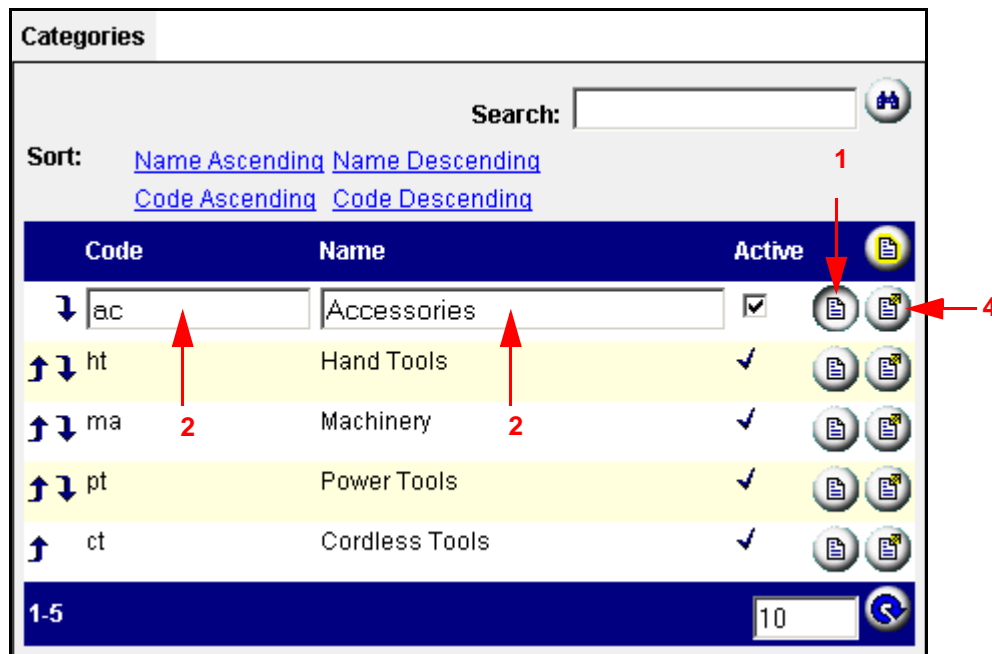
- Click the New Category  button on the Categories List form.

The Add Category form displays.






See “Add New & Edit Category Tabs” on page 4.


Edit a Category

1. Click the Edit Here  button to change the Category name or code.
2. Enter the new Code or Name.



The screenshot shows the 'Categories' administration interface. At the top, there is a search bar and a 'Sort:' section with links for 'Name Ascending', 'Name Descending', 'Code Ascending', and 'Code Descending'. Below this is a table with columns for 'Code', 'Name', and 'Active'. The table contains five rows of categories: 'ac' (Accessories), 'ht' (Hand Tools), 'ma' (Machinery), 'pt' (Power Tools), and 'ct' (Cordless Tools). Each row has a 'Remove' column with a checkbox and a '+', and an 'Edit Here' column with a document icon. Red arrows and numbers indicate specific actions: arrow 1 points to the 'New Category' button at the top right; arrow 2 points to the 'Code' and 'Name' input fields in the 'Accessories' row; arrow 3 points to the 'Update' button at the bottom right; and arrow 4 points to the 'Edit Here' button in the 'Accessories' row. A pagination bar at the bottom shows '1-5' and '10'.

Code	Name	Active	Remove	Edit Here
ac	Accessories	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
ht	Hand Tools	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
ma	Machinery	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
pt	Power Tools	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
ct	Cordless Tools	<input checked="" type="checkbox"/>	<input type="checkbox"/>	

3. Click Update.
4. To display the Edit Category form, click the Edit  button.

The Edit Category form displays, which is similar to the Add Category form with the existing data for the category filled in.

Note: The links displayed on your screen may be different from the ones shown, depending on which Layout you have selected and which modules you have installed for your store.

Add New & Edit Category Tabs

The Add Category and Edit Category forms allow you to enter information for the following areas:

- Category
- Pagination
- Headers & Footers
- Images
- Product layout
- Products

Category Tab

Category Code

The field is alphanumeric. You can enter up to 50 characters.

Category Name

The field is alphanumeric, with a length of up to 100 characters. You may enter text and HTML.

Parent Category

Enter the desired code, or click the Lookup button. In the Category Lookup page, select the category you want as the parent, if any.




Category Lookup Search

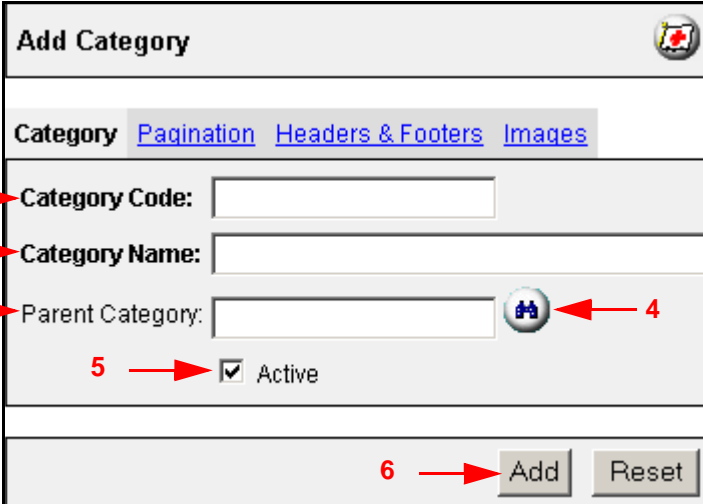
If you have many categories, you may enter a search variable in the Text Box, then click the Search button.

To see the next part of the list, click the yellow button at the bottom, right corner. Or, change the number of categories that are listed in the text box near the bottom, right corner.

Active

Ensure Active is checked. If not checked, the category will not display in your store.

1. Enter the Category code. The field is alphanumeric. You can enter up to 50 characters. Miva Merchant uses this code internally, therefore the code should be as short as possible.
2. Enter the Category Name. The field is alphanumeric, with a length of up to 100 characters. You may enter text and HTML.
3. If you want to assign this new Category to a Parent Category, you can either type the desired code, or click the Lookup  button to open up the Category Lookup window. Click the Select  button for the desired Parent Category. The category code is automatically placed in the Parent Category text box.
4. To find a Category, enter the search criteria in the text box and click the Search  button.
5. To display the category on your store, ensure that Active is checked (the default). If not checked, the category will not be seen by your customers.
6. If you do not have information to add to other tab(s), click Add (if this is a new category), or click Update (if this is an existing category). Otherwise, select the next tab.



The screenshot shows the 'Add Category' form with the following elements and callouts:


- 1**: Points to the 'Category Code' text input field.
- 2**: Points to the 'Category Name' text input field.
- 3**: Points to the 'Parent Category' text input field.
- 4**: Points to the 'Lookup' button (house icon) next to the Parent Category field.
- 5**: Points to the 'Active' checkbox, which is checked.
- 6**: Points to the 'Add' button at the bottom right of the form.

At the top of the form, there are tabs for 'Category', 'Pagination', 'Headers & Footers', and 'Images'. A 'Search' button (magnifying glass icon) is located below the Parent Category field.

Pagination Tab

If you want a certain number of products to display on this Category page of your store, set the pagination. The default is set to “Do not paginate products.”

1. To set the pagination, click the radio button next to Display
2. Enter the number of products you want to display on each page.
3. If you do not have information to add to other tab(s), click Add (if this is a new category), or click Update (if this is an existing category). Otherwise, select the next tab.

Add Category 

[Category](#) **Pagination** [Headers & Footers](#) [Images](#)

Pagination: Do not paginate products
 Display products per page

Headers & Footers Tab

Display Category Title

Displays the name of your category. Deselect it, if you want to make room for you customized Header.

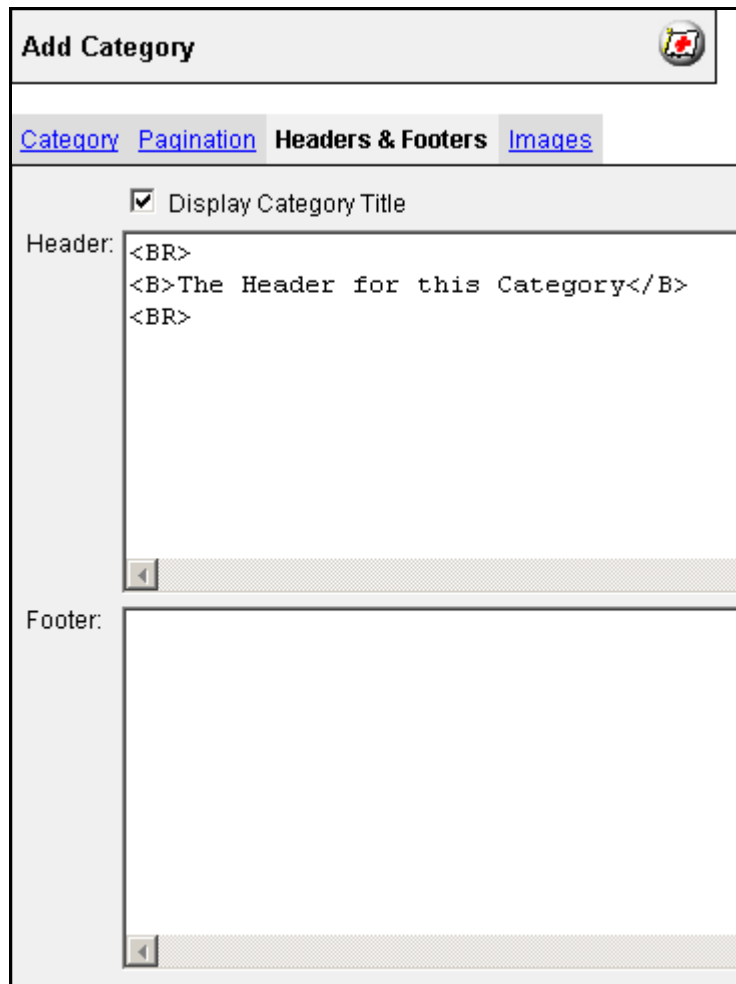
Header and Footer

Enter text and any HTML to describe this Category.

1. Enter text and any HTML to describe this Category in the Header and Footer text boxes.
2. If desired, deselect the Display Category Title checkbox to allow room to create a customized Category Title in the Header area.

The Display Category Title uses the Category Name as the Title on the select Category page in your store.

3. If you do not have information to add to other tab(s), click Add (if this is a new category), or click Update (if this is an existing category). Otherwise, select the next tab.



The screenshot shows the 'Add Category' interface with the 'Headers & Footers' tab selected. The 'Display Category Title' checkbox is checked. The 'Header' text area contains the following HTML code:

```
<BR>
<B>The Header for this Category</B>
<BR>
```

The 'Footer' text area is currently empty.

Images Tab

Tree Image

The category tree image displays in the category tree (the category menu, on the left side in your store front), and replaces the textual category name.


Title Image

The category title image displays at the top of each category page, above the products list, in your store.

You may load images for the Category menu (Tree Image) or for the title (Title Image).

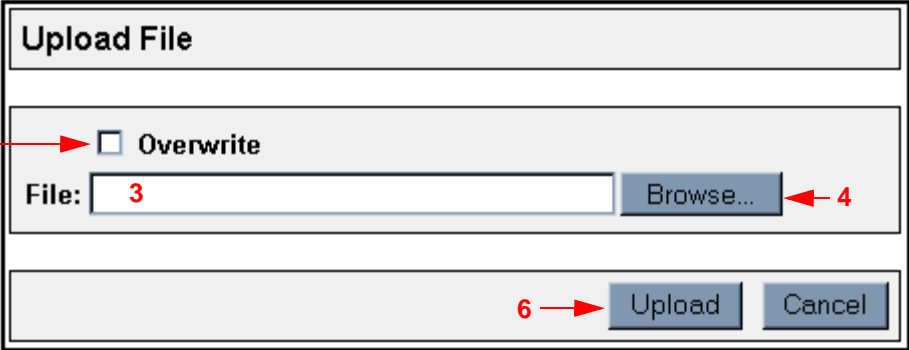
1. If the image has already been uploaded, enter the path for your graphic in the text box provided.

The Tree Image will appear in the menu area and the Title Image will appear in the main data area of your page.

2. To upload, the file, click the Upload File  button.



3. Enter the path on your local computer for the image files. These files will be uploaded to your store's website and placed in the appropriate directory.
4. If you do not know the path, click the Browse button to find the file.
5. If you have uploaded the image file before, and you are updating the file, click the Overwrite checkbox.
6. Click the Upload button.



Caution: If you use a graphic Tree Image or Title, it will replace the textual Category name.

- If you do not have information to add to other tab(s), click Add (if this is a new category), or click Update (if this is an existing category). Otherwise, select the next tab.

Product Layout Tab

Displaying when you edit the category, the Product Layout form allows you to define the way the products in the category will be displayed in your store.

Similar to the Product List and Search Layouts, you choose the format, product fields, buttons, image, and inventory message (if Tracking Inventory is activated).

- Select the Format you desire.
 - Expanded This is the way products have been displayed on the category page in past releases of Miva Merchant.
 - Line item This displays in the manner of the product listing. You can defined additional fields to be displayed than are displayed on the Product Listing screen.
- Check the Product Fields that you want to display in the store.
- Check the Buttons you want to display.
- Select the Image type you want to display with the product data on the category page, if any.
- If you are tracking inventory, select the length of the Inventory Level Message you want to display in the store, if any.
- If you selected Line Item Format, also check Product Code so there will be a link to the full description of the product. If this item is not enabled in the store, the customer will only be able to see the product data that is on the category page.

Edit Category: Accessories

[Category](#) [Pagination](#) [Headers & Footers](#) [Images](#) **Product Layout**

[Products](#)

1 → **Format:** Expanded

2 → **Product Fields:** Product Name Product Code
 Price Weight
 Description

3 → **Buttons:** Add One To Basket
 Buy One Now

4 → **Image:** Thumbnail

5 → **Inventory Level Message:** Long

6 → Product Code

- If you do not have information to add to other tab(s), click Update. Otherwise, select the next tab.


Products Tab

The products tab lists all the products. You can choose which products to view, assign and unassign products to the current category, and select the sort order of the products within the category. If you have many categories, Search helps you locate them.

1. Click the All, Unassigned, or Assigned tab to view the applicable product list.

All	Displays all products
Unassigned	Displays only those products that have not been assigned to a category.
Assigned	Displays only those products that are assigned to the current category.

Search for a Product

2. To search for a specific product, enter the name, or partial name, in the text box and click the Search  button.



The product(s) matching the search text is displayed.

Assign Product

3. Check the box next to the product(s) you want to assign to this category, or click + to check all displayed products. Click Update.


Unassign a Product

4. To a product, check the box under the Remove column. Click + to check all, and – to uncheck all displayed products.






Edit Category: Hand Tools  

[Category](#) [Pagination](#) [Headers & Footers](#) [Images](#) [Product Layout](#)

Products

All **Unassigned** **Assigned** Search: 

Sort: [Name Ascending](#) [Name Descending](#)
 [Code Ascending](#) [Code Descending](#)

Assigned	Code Name	
✓+ ✓-		
<input checked="" type="checkbox"/>	↓ P001 Finish Hammer	
<input checked="" type="checkbox"/>	↑↓ P002 Screwdriver set	
<input checked="" type="checkbox"/>	↑ P005 Wrench Set	
N/A		<input type="text" value="10"/> 

Change the Sort Order

5. To change the sort order:


You can display the products by name or by code, either in ascending or descending alphabetical order.

Name Ascending	Displays the Product list A to Z by Product name.
Code Ascending	Displays the Product list A to Z by Product code.
Name Descending	Displays the Product list Z to A by Product name.
Code Descending	Displays the Product list Z to A by Product code.

- a. Click one of the links to sort the product list.

A confirmation message warns you that the sort cannot be undone.

- b. To move a product up or down, click an arrow next to the Code.

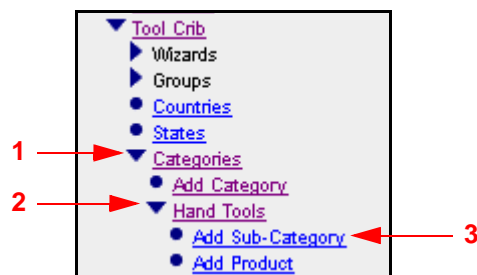
6. To open the Edit Product form, click the Edit  button.
7. Click the yellow triangle at the bottom, right corner to view the rest of the list. Or, change the number in the box and click the Refresh button.
8. Click Update.

Add a Sub-category

You may have so many products under one category that you want to further divide the products by subcategories.

1. In the Administration menu, click the triangle next to Categories.
2. Click the triangle next to the desired category.
3. Select the Add Sub-Category link.

The Add Category form is displayed with the Parent Category text box filled with the category you selected.



4. Refer to “Add New & Edit Category Tabs” on page 4.



***HOW TO
Add and
Modify Products***

Revision 1.2



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MM1030-03

HOW TO

Add and Modify Products

Introduction

The reason you set up a store is to sell products. One of the most important tasks that you have is to add and set up products in your store. You have more than one way to add products to your store:

Method	Description
Add Product Wizard (in Simple and Advanced Administration Interfaces)	An easy method for setting up products in your store. Refer to <i>HOW TO Start Using Miva Merchant, Wizards, & Maintain Your Store</i> for details.
Advanced Administration Interface	The most complete method to set up products. See the rest of this publication.
Import products data	The fastest method for adding products to your store. If you have a large number of products, consider importing the product data. Refer to <i>HOW TO Import Product Data From a Flat File</i> for more information about this method.

This *HOW TO* guide describes how to use the Administration Interface to add and edit your products. The Administration Interface allows you to perform the following tasks:

- Enter basic product information
- Define images to display your products
- Create a header and footer for each product (depending on the layout you select)
- Track product inventory
- Assign product attributes
- Assign the product to a category

Note: If you want to assign a product to a category or categories, you must create the category first. For information on categories, refer to *HOW TO Set up Categories*.

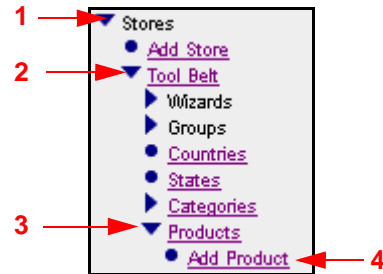
Adding a New Product

There is more than one way to add a new product, using the Advanced Administration Interface. You can add it without assigning the product to a category, and you can select the category to which you want to assign the product, then add it.

Products can be assigned to more than one category. For example, a Finish Hammer could be included in Hammers, Hand Tools, and Carpentry Tools categories.

Add Product–Unassigned to a Category

1. Click the triangle next to Stores.
2. Click the triangle next to the store name.
3. Click the triangle next to Products.
4. Select the Add Product link under Products.



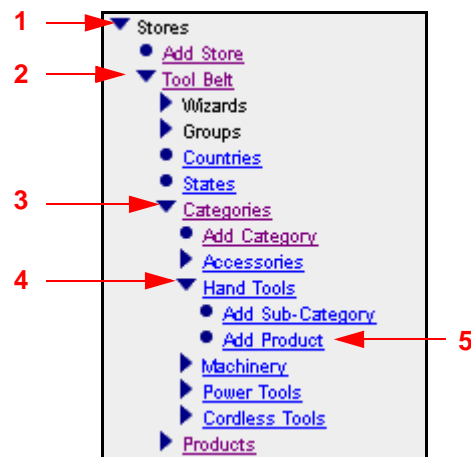
Add Product–Assigned to a Category

Use the following procedure to assign a product to a category at the same time you add it.

1. Click the triangle next to Stores.
2. Click the triangle next to the store name.
3. Click the triangle next to Categories.
4. Click the triangle next to the category name to which you want to add the product.

If you want to add the product to a subcategory, click the arrow next to the category(ies), until you see the category you want.

5. Select the Add Product link under the desired category.




Product Tabs

The Add product screen has these links, depending on the Layout you have selected for your store and if you have and 3rd party modules installed.

- Product
- Images
- Headers & Footers (MMUI layout)

If any VAT tax has been selected under store Settings, the VAT link is also displayed. Additional tabs become available when a product is added. See [“Product Editing” on page 13](#) for these tabs.




Add Product

Product
[Images](#)
[Headers & Footers](#)
[VAT](#)

Product Code:

Product Name:

Category Code: 

Price:

Cost:

Weight:

Description:

Professional Finish Hammer

The hammer head is drop forged that is h
tempered to meet ANSI, TUVE/GS, BS and i
standards.

The following attributes may be selected
For the Handle:

* heat treated tubular (\$3.00 additiona
* standard (not additional cost)

For the Finish:

* Mirror Polish (\$5.00 additional)

Taxable

Active

Note: If you have a number of products or you will be tracking inventory, consider using the Import utility. See *HOW TO Import Product Data from a Flat File*. If your have not added products before, you may want to consider using the Add Product Wizard or the Simple Administration Interface. Refer to *HOW TO Start Using Miva Merchant, Wizards, & Maintain Your Store*.


Product Tab

Enter or modify the product data for the following fields.


Product Code	Enter your product code. This is an alphanumeric field of up to 50 characters. You may enter a combination of text and HTML.
Product Name	Input your name for the product. If you choose, the name may be the same as the Product Code. This is also an alphanumeric field but you have a length of up to 100 characters. You may enter a combination of text and HTML.
Category Code	Displays only for a new product. If you added the new product assigned to a category, the category's code is automatically entered for you (although you can change it). If you added the new product unassigned to a category, this field is blank.
Price	Enter the retail price for your product. This retail price may be discounted by the assignment of Price Groups.
Cost	Enter your cost for the product. This is the cost that you will use for any markup percentage in the assigning of Price Groups.
Weight	Assign the weight of your product.
Description	This is a memo field. You may use text, HTML, or any combination of the two.
Taxable	The default value for added products is taxable. If your product should not be taxed, deselect the checkbox.
Active	The default value for added products is Active. If you want to hide a product, deselect the Active checkbox.


Images Tab

This form allows you to assign images to your products. You can have a full-sized and a thumbnail image for each product.


Add Product 

[Product](#) **Images** [Headers & Footers](#)

Thumbnail Image: 


Full-sized Image: 

1. If you know the path, enter the full path and file name to your image.

2. If you do not know the full path, click the Upload File  button to find the file. Click the Browse button to locate your image.
3. In the Upload File dialog box, click Overwrite if the file has been uploaded before, then click Upload.
4. Click the next product tab (link) you want, or click the Add button for a new product, or the Update button for an existing product.

Headers & Footers Tab

Headers & Footers allows you to add text that will display above and below your other product data in the storefront interface. HTML can be used to format the text.

Add Product 

[Product](#) [Images](#) [Headers & Footers](#) [VAT](#)

Product Display Header:	<pre>This is the Header area</pre>
-------------------------	---

Product Display Footer:	<pre>
 This is the Footer area</pre>
-------------------------	--

1. Enter text to be displayed in the header and footer of the product.
2. To remove the entries, click the Reset button.
3. Click the next product tab (link) you want, or click the Add button for a new product, or the Update button for an existing product.

VAT Tab

There are several type of VAT taxes included with Miva Merchant: German, Canadian, and Generic. (Generic can be used in the United States.) For information on configuring VAT taxes, see *HOW TO Change Your Store's Sales Tax Calculation*.

Related Products Tab

The products you assign here will be listed in your store following the product description. The list is similar to the short list of the Product List page.

Edit Product: Finish Hammer

Product Images **Related Products** Attributes Upsold Products

Inventory Headers & Footers Weight Table Shipping Charges VAT

All Unassigned Assigned Search:

Assigned

✓+ ✓-	Code Name	
<input type="checkbox"/>	P001 Finish Hammer	
<input type="checkbox"/>	P002 Screwdriver set - 4-piece	
<input checked="" type="checkbox"/>	P003 200# Sandpaper	
<input checked="" type="checkbox"/>	P004 Wrench Set	

1-4

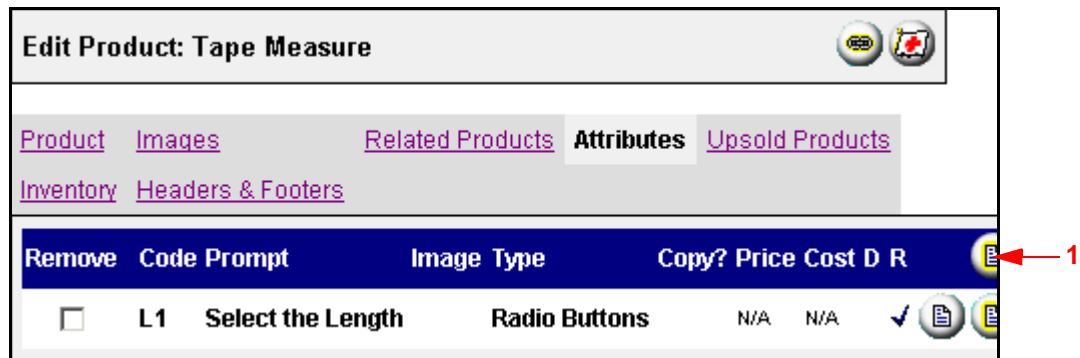
1. In the Edit Product form, click the Related Products link.
2. Check the products you want to see listed under this product's description.
3. Click Update.

Attributes Tab

A product attribute is a feature of the product. It could be an attribute that is an essential part of the product, like size or color. Or, the attribute could be an added feature, such as a monogram.

You have the option of adding attributes directly to your products, or creating Attribute Templates that you can apply to a product. Product Attributes and Attribute Templates have the same presentation in your store.

For information about Attribute Templates, refer to *HOW TO Create Attribute Templates*.



Adding Attributes

- To add an Attribute, click the New Attribute  button. Fill the text boxes with the following information:

Code	Enter an attribute code that will represent the option. For example, enter “size” to represent the size prompt. Make sure the code is unique for that product. Use any alpha or numeric characters, dashes (-) or underscores (_).
Prompt	Enter the prompt that will appear for the customer in the shopping interface. For example, enter “Choose Your Size” to represent size. You may enter text, HTML, or any other data that can be understood by a browser.
Image	If you have an image to show an example of this attribute, click the Upload button, and locate your image. This image will appear to the right of your product image, if you have one.
Type	<p>Choose a device to use in displaying the options under this prompt.</p> <p>For radio buttons and drop-down lists you will be able to create a list of options in a secondary form from which your shoppers will select their answer to the particular prompt.</p> <p>With checkboxes the prompt will ask for a single answer to a single option – checked for “yes” or unchecked for “no.”</p> <p>Text boxes prompt for a single answer (text box size is 254 characters).</p> <p>Text Areas prompt for a single long answer (the text area size is unlimited).</p> <p>Attribute templates are listed here by the Attribute Template Prompt you entered when you created the template.</p>
Copy?	You may copy an Attribute Template to any of your products, then modify the attribute and its options for that specific product.

- Price For checkbox entry and text entry prompts only. You may choose to enter a decimal number for an extra charge that will be added to the base price of the product. A negative integer will result in a subtraction from the price.
- Cost For checkbox entry and text entry prompts only. You may choose to enter a decimal number for an extra charge that will be added to the base price of the product. This is the cost that you can use for calculating discounts for the attribute to specified customers. A negative integer will result in a subtraction from the cost.
- R (Required) Click the checkbox under the R to designate the attribute prompt as a required field. The shopper will not be allowed to proceed until all required fields are answered with a selection. Left unchecked (by default), the shopper will have the option of bypassing the field to continue shopping or to go to the order form and check out. Keep in mind that because checkboxes and text boxes are “their own selection,” if an additional price has been specified, making such a field required, this will essentially be forcing the shopper to pay more for the product.






2. Click the Update button.



A new row displays:

- It's a row for an option, if you just entered an attribute type that has options (Radio Buttons or Drop-down List), or if you just entered an option. (See the Next section “Adding Options to Attributes”.
- It's a row for a new attribute, if you just entered an attribute type that does not have options (Checkbox, Text Field, or Text Area).

Adding Options to Attributes

Options are a further definition of attributes, when you have selected the Radio Buttons or Drop-down List type.

Remove	Code	Prompt	Image	Type	Copy?	Price	Cost	D	R		
<input type="checkbox"/>	L1	Select the Length		Radio Buttons	N/A	N/A			<input checked="" type="checkbox"/>		
<input type="checkbox"/>	↓ 25	25 foot			-2.00	-1.00					
<input type="checkbox"/>	↑ ↓ 50	50 foot			0.00	0.00					
<input type="checkbox"/>	↑ 100	100 foot			2.50	1.25		<input checked="" type="checkbox"/>			

1. To add a new option to an existing attribute, click the New Option  button.
2. To edit an existing option, click the Edit Here  button.

Item	Description
Option Code	Enter a unique code to represent each option.
Prompt	Enter the text to display for the option here. If you are creating radio button options you may use HTML complete with image references. However, if you are creating a list of options for a drop-down menu only minimal HTML will be allowed in the actual display of the option text.
Image	Radio button options only: Upload the image for this option, if you have one.
Price	<p>You may create an extra charge that is specific to each single option of the attribute. The price will be added to the base price of the product.</p> <p>Enter only a decimal number without entering the currency symbol. A negative integer will result in a subtraction from the price.</p>
Cost	<p>You may create an extra charge that is specific to each single option of the attribute. The cost will be added to the base cost of the product.</p> <p>Enter only a decimal number without entering the currency symbol. A negative integer will result in a subtraction from the price.</p> <p>This is the cost that you can use for calculating discounts for the option to specified customers.</p>
D (Default)	When this box under the D is checked, the option will display in the list pre-selected. For radio buttons this means that the button will appear selected, and for drop-downs it will mean that the particular option will be featured in the list – selected wherever it is in sequential order. If the shopper does not change the selection, the default selection will be used to complete the order.

1. Click Update.
Once filled and updated, the Add Option text boxes reappear for collecting information on another option.
2. When you have added all options needed for a given attribute, click the Edit button again to exit edit mode.

At any time after you have created these entries, clicking the Edit button allows you to edit information for that entry.

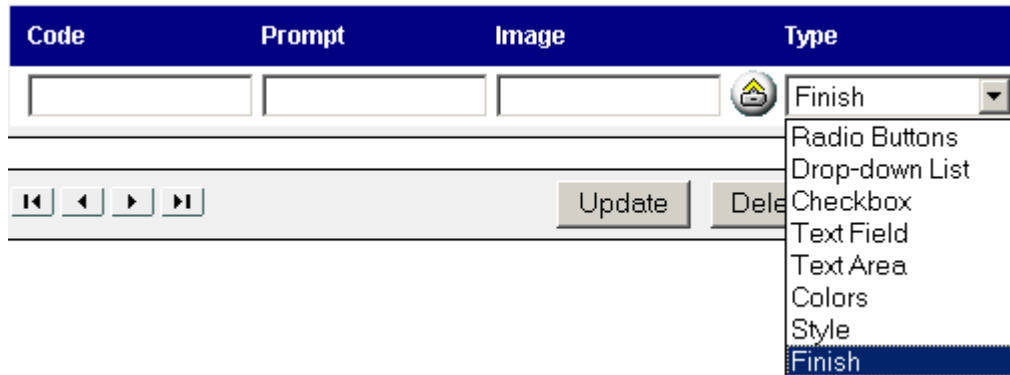
Apply an Attribute Template to a Product

When you edit an existing product and add an attribute, the Type field drop-down list contains the Attribute Template Prompt you entered when you created the Attribute Template.

1. Click the Attributes tab (link) at the top of the Edit Product form.



2. Under the "Type," column, select the Attribute Template Prompt you want to apply to this product.



3. To copy the contents of this template (so you can modify it for this particular product), check the box under Copy?.



Note: When you copy an attribute template into Product Attributes, any changes you make to the attribute template will not be reflected in Product Attributes. Likewise, any changes you make to the Product Attributes will not change the template from which you copied it.


4. Click Update.

Upsold Products Tab

This product link lists the upsold product(s) that will be offered to an e-shopper when they purchase this product. In other words, the products listed here are assigned as Required Products for an Upsold Product.




- Click the edit  button to display the Edit Upsold Product page.

Refer to *HOW TO Set Up Upsale Products*.

Edit Product: Finish Hammer



[Product](#)
[Images](#)
[Related Products](#)
[Attributes](#)
Upsold Products

[Inventory](#)
[Headers & Footers](#)
[Weight Table Shipping Charges](#)
[VAT](#)

Product Code	Threshold Percent	Pricing	Price	Percent	
P002	25.00	Percent of Total	n/a	50.00%	
P004	25.00	Percent of Total	n/a	50.00%	
1-2				10	

Inventory Tab

You can track inventory, change the stock levels, and enter specific stock messages for this specific product, or you might choose to use the defaults you set up in the Administration Store Inventory. (Refer to *HOW TO Set up Store Inventory*.) If you have quite a number of products, consider importing the data. Refer to *HOW TO Import Product Data from a Flat File*.

Edit Product: Finish Hammer

Product Images Related Products Attributes Upsold Products

Inventory Headers & Footers Weight Table Shipping Charges

Track Product

Current Stock: 50

Increase Stock By:

Decrease Stock By:

In Stock Message (Short):

In Stock Message (Long):

To enable Inventory Tracking for this product:

1. Check on Track Product.
2. Enter a whole number to Increase Stock By or Decrease Stock By.
3. To use the default Stock Messages (set in the Store's Inventory Settings), let the text boxes stay empty.
Or, enter the message(s) for this specific product.

Note: You can use the tokens in your messages. These are described at the bottom of the Product Inventory form.

4. Set whether or not to track each of the Stock Levels, or to use the Default settings for:
 - Track Low Stock Level
 - Track Out of Stock Level
 - Hide Out of Stock Products
5. Enter the Stock Levels or use the Default settings for:
 - Low Stock Level
 - Out of Stock Level
6. Click Update.

Note: Remember that the **bold items** indicate that there must be an entry or selection.

VAT Tabs

When Generic VAT, Canadian VAT, or German VAT is selected in Store Settings, a VAT tab displays in the Edit Product form, allowing you to set up the VAT for your products. For information, refer to *HOW TO Change Your Store's Sales Tax Calculation*.

Shipping Tab

Depending on the Shipping Configuration you have selected, a Shipping Tab displays in the Edit Product form, allowing you to set the specific charge for the product. Refer to *HOW TO Setup Shipping Configuration*.

Product Editing

Certain features become accessible when you edit a product that were not when adding a product. Therefore, after you have entered new products, you may need to edit features or graphic links for a particular product. See “[Product Tabs](#)” on [page 3](#).

Edit Product–Navigation

When you are editing a product, Miva Merchant provides you with the option of moving easily between the current, previous, and next products, as well as to the first and last products.

On the Edit product page, the navigation buttons are located at the bottom of the screen, as shown in the following image.

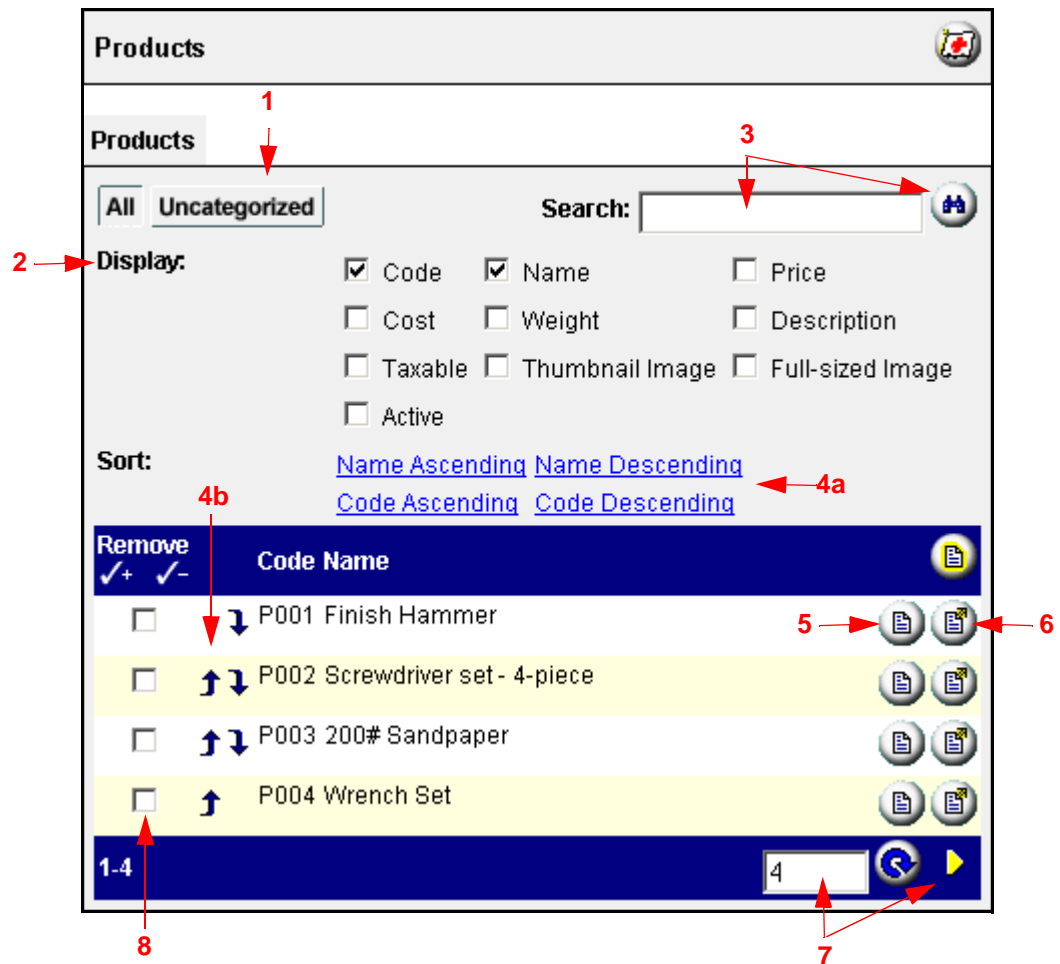
The screenshot displays the 'Edit Product: Finish Hammer' interface. At the top, there are two icons: a globe and a red cross. Below the title, a navigation bar contains several tabs: 'Product' (selected), 'Images', 'Related Products', 'Attributes', 'Upsold Products', 'Inventory', and 'Headers & Footers'. The main content area includes two input fields: 'Product Code' with the value 'P001' and 'Product Name' with the value 'Finish Hammer'. Below these fields, there are two checked checkboxes: 'Taxable' and 'Active'. At the bottom, there is a navigation bar with five buttons: a double left arrow (first product), a single left arrow (previous product), a single right arrow (next product), a double right arrow (last product), and three buttons labeled 'Update', 'Delete', and 'Reset'. A red arrow points to the first product button.

Product List

1. Click the triangle next to Stores on the Administration menu.
2. Click the triangle next to the store name.
3. Select the Products link to display the Products form.




This page shows a list of your products.



- Click All or Uncategorized tab to view the applicable product list.

All	Displays all products
Uncategorized	Displays only those products that have not been assigned to a category.
- Under display, click the corresponding checkbox next to the field you wish to view in the product row, then click the Refresh or Update button.
By default, this product list displays the Code and Name of the product.

Search for a Product


- To search for a specific product:
If you are looking for a particular product, enter the name, or partial name, in the text box and click the Search  button. The product, or list of products, that match the search text is displayed.

Change the Sort Order


This Product List sort affects the order of products in the Product List and Search list in your Store. This Sort Order does not affect the product order under a selected category. For information about sorting products within a category, refer to *HOW TO Set Up Categories*.

- To change the sort order:
You can display the products by name or by code, either in ascending or descending alphabetical order.

Name Ascending	Displays the Product list A to Z by Product name.
Code Ascending	Displays the Product list A to Z by Product code.
Name Descending	Displays the Product list Z to A by Product name.
Code Descending	Displays the Product list Z to A by Product code.

- Click one of the links to sort the product list.
A confirmation message warns you that the sort cannot be undone.
 - To move a product up or down, click an arrow next to the Code.
- To edit an entry on the product line, click the Edit Here  button. The page displays the product information within text boxes that you can edit.



6. To open the Edit Product form, click the Edit  button.
7. Click the yellow triangle at the bottom, right corner to view the rest of the list. Or, change the number in the box and click the Refresh button.

Delete a Product

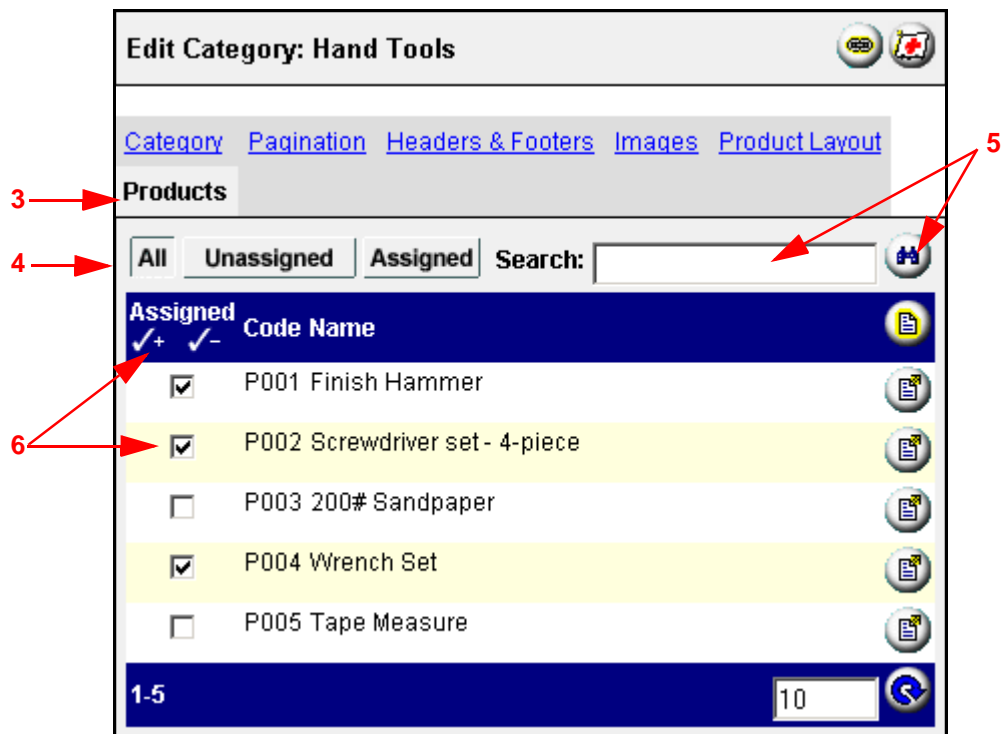
8. To remove a product, check the box under the Remove column. Click + to check all displayed products, and – to uncheck all displayed products.
9. Click Update.

Assigning Products to Categories

1. Click the triangle next to the Categories link in the Administration Interface menu to display the Categories below it.
2. Select the link for the category to which you want to assign products. (If you have nested categories, click the triangle by the category to display the subcategories.)



3. In the Edit Category page, click the Products tab.



4. Select the method for displaying the products.

All	Displays all products
Unassigned	Displays only those products that have not been assigned to this category.
Assigned	Displays only those products that are assigned to this category. The Assigned tab allows you to sort the products for this category.

5. To locate product(s), enter a product name or part of a name and click the Search button.
6. Check the box next to the product you want to assign to this category, or click + to check all displayed products.
7. Click Update.
8. If necessary, click the yellow triangle in the bottom right corner to go to the next page of products.

For additional information on categories, refer to *HOW TO Set Up Categories*.



HOW TO Create Attribute Templates

Revision 1.0



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MM1067-01

HOW TO Create Attribute Templates

Introduction

A product attribute is a feature of the product. It could be an attribute that is an essential part of the product, like size or color. Or, the attribute could be an added feature, such as a monogram.

You have the option of adding attributes directly to your products, or creating Attribute Templates that you can apply to a product. Product Attributes and Attribute Templates have the same presentation in your store. The difference is in the method you use to create the attributes (the Administration), as you can see in the following table.

Attribute Templates	Product Attributes
Administration	
<ul style="list-style-type: none">• assign to products during product import (template must exist prior to product import)• one template can be applied to many products• can be copied into product attributes and modified for that specific product• can add additional price for an option	<ul style="list-style-type: none">• can not be imported• identify unique or rare product attributes for one product only• can not be copied to another product• can add additional price for an option
Store Presentation	
<ul style="list-style-type: none">• images can be used for attributes and options• choice of multiple options, Yes/No, and fill-in• default and required options	<ul style="list-style-type: none">• images can be used for attributes and options• choice of multiple options, Yes/No, and fill-in• default and required options

Attribute Templates

Use the following procedure to create an attribute template.

1. Click the triangle next to Stores.
2. Click the triangle next to the store name.
3. Click the triangle next to Attribute Templates.
4. Select the Add Attribute Template link.



Add Attribute Template

Add Attribute Template 🔍

Template

Attribute Template Code: ← 1

Attribute Template Prompt: ← 2

← 3

1. Enter the code for the Attribute Template Code, which can be up to 40 characters.
2. Enter the prompt in the Attribute Template Prompt text box. This text will appear in your Product Attributes Type drop-down list.




Note: The **Attribute Template Prompt** is the prompt you choose in the Product Attributes form when you want to apply a template to a product.

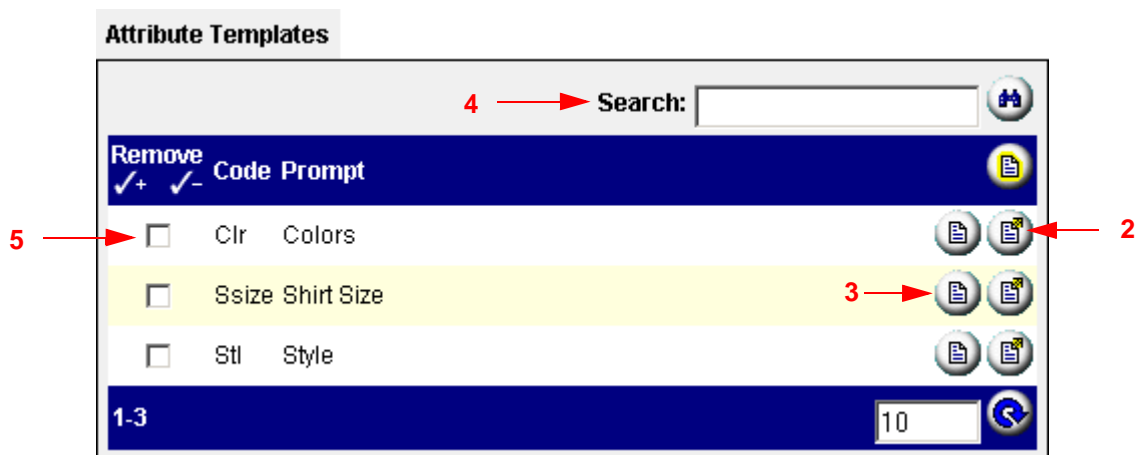
3. Click Add.
4. To add Attributes, click the Attributes and Options link. See [“Attributes and Options” on page 4.](#)

Edit Attribute Templates

1. In the Administration Interface menu, select the Attribute Templates link.





2. To edit a template, click the Edit  button.
The Edit Attribute Template form will display. Click the Attributes and Options link. See [“Attributes and Options” on page 4](#).
3. To edit viewable text, click the Edit Here  button to change an entry in that line.
4. To search for an attribute template, enter the prompt text, or part of the prompt text, then click the Search  button.
5. To remove an attribute template, under the Remove column, check the box next to the template you want to remove, then click Update. Click + to check all displayed boxes, and – to uncheck all displayed boxes.







Attributes and Options

Enter Attributes

1. To create a new entry, click the New Attribute  button on the right side of the screen.
2. To edit an existing entry, click the Edit Here  button.
The data you can edit displays within text boxes.

Edit Attribute Template: F01							
Template Attributes and Options							
Remove	Code	Prompt	Image	Type	Price	Cost	D R
<input type="checkbox"/>	Fin	Select the Finish	Radio Buttons	N/A	N/A	✓	 
<input type="checkbox"/>	↓ 01	Mirror Polish		4.00	2.50		
<input type="checkbox"/>	↑↓ 02	High Polish		2.50	1.50		

3. Enter the Code for an attribute.
Enter a code that will represent the option. Make sure the code is unique for that attribute. Use any alpha or numeric characters, dashes (-) or underscores (_).
4. Enter the Prompt. This text will display to your e-shoppers in your store, and inform them of the options they need to make.
You might enter "Choose Your Size" to represent size. You may enter text, HTML, or any other data that can be understood by a browser.
5. If you have an image of this attribute, enter the full path, or click the Upload File  button to find the file, click Overwrite if the file has been uploaded before, then click Upload.
In your shopping interface (your store), this image will appear to the right of your product image, if you have one.

Edit Attribute Template: Ssize					
Template Attributes and Options					
Code	Prompt	Image	Type		
<input type="text"/>	<input type="text"/>	<input type="text"/>		Radio Buttons	

6. Select the type.
 - For radio buttons and drop-down lists you will create a list of options from which your shoppers will make selections.
 - Checkboxes prompt for a single answer to a single option – checked for “yes” or unchecked for “no.”
 - Text fields prompt for a single answer (text field size is 254 characters).
 - Text Areas prompt for a single long answer (the text area size is unlimited).

Note: Your customers could enter a name or initials in the Text field, for a monogram, for example. The Text Area could be used for detailed instructions from special customers.


7. **Checkbox, Text Field, Text Area types only:** Enter the Price, if any. You may choose to enter a decimal number for an extra charge that will be added to the base price of a product.
If you are using the Radio Button or Drop-down List type, you may later choose to add charges for specific options.
8. **Checkbox, Text Field, Text Area types only:** Enter the Cost, if any. Enter your cost, which may be the wholesale cost. This charge will be added to the base cost of the product.
If you are using the Radio Button or Drop-down List type, you may later choose to add charges for specific options. (
9. If this attribute is required, click the checkbox in the (R) column. In the shopping interface, your shopper must make a selection to proceed.

The screenshot shows a software interface titled 'Attributes and Options'. It features a table with the following columns: 'Code', 'Prompt', 'Price', 'Cost', and 'D R'. The 'Code' column contains the text 'size'. The 'Prompt' column contains 'Please Choose Y'. The 'Price' and 'Cost' columns contain the value '0.00'. The 'D R' column contains a checked checkbox. Red arrows labeled 7, 8, and 9 point to the Price, Cost, and D R columns respectively. There are also icons for adding and deleting rows in the Price, Cost, and D R columns.


10. Click Update.
 - A new row of empty text boxes displays after the row you just entered.
 - It's a row for an option, if you just entered an attribute type that has options (Radio Buttons or Drop-down List) or if you just entered an option. See the next section, [“Add Options to Attributes”](#).
 - It's a row for a new attribute, if you just entered an attribute type that does not have options (Checkbox, Text Field, or Text Area).
11. See the next section, [“Add Options to Attributes”](#).

Add Options to Attributes

If you selected the drop-down list or radio button attribute type, follow the steps below to add the options. You may choose to add charges for specific options.

1. Enter the code for the first option of this attribute.
2. Enter the prompt that describes this option to your e-shopper.
3. **Radio Button type:** If you have an image for this option, enter the full path. Or, click the Upload File  button to find the file, check Overwrite if the file has been uploaded before, then click Upload.





Template **Attributes and Options**

Code	Prompt	Image	Type
size	Please Choose Your Size Here		Drop-down List
↓ P	Petite		
↑ S	Small		
M	Medium		

Red arrows indicate: 1. Code input, 2. Prompt input, 3. Image input.

4. Enter the Price for this option, if any.
You may choose to have a different price for each single option, which will be added to the base price of the product. Enter the decimal number without the currency symbol.
5. Enter the Cost for this option, if any.
You may choose to have a different cost for each single option, which will be added to the base cost of the product. Enter your cost, which could be the wholesale price of this option.
6. If you want this option as the default, check the box in the (D) column.
When default options are displayed in your store, the default you choose here will be preselected for your shopper. Of course, your shopper can change the selection.

Templates **Attributes and Options**

Code	Prompt	Price	Cost	D	R
size	Please Choose Your Shirt Size	N/A	N/A	✓	
↓ P	Petite	0.00	0.00		
↑ S	Small	0.00	0.00		
M	Medium	0.00	0.00	<input checked="" type="checkbox"/>	

Red arrows indicate: 4. Price input, 5. Cost input, 6. Default checkbox.

7. Click Update. A new row of empty text boxes displays for your next option. Repeat these steps for each option.

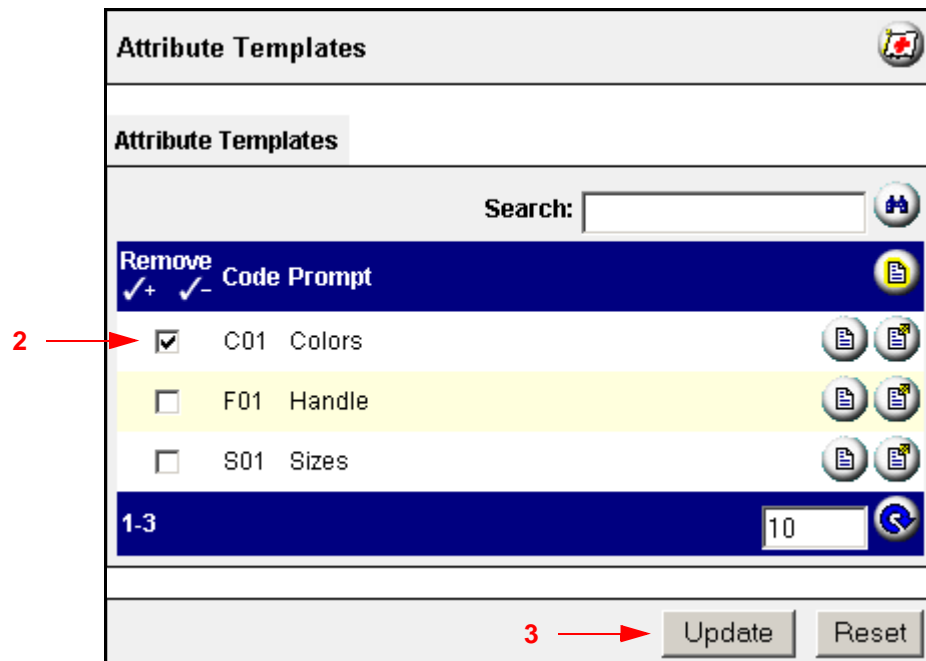
Delete an Attribute Template

When an Attribute Template is assigned to one or more products, it cannot be deleted. In that case, go to the Attribute tab in the Edit Product form, and remove the applied Attribute Template.

1. In the Administration Interface menu, select the Attribute Templates link.



2. In the Attribute Template batch list, check the box next to the template you want to remove.
3. Click Update.



Apply an Attribute Template to a Product

When you edit an existing product and add an attribute, the Type field drop-down list contains the Attribute Template Prompt you entered when you created the Attribute Template.

1. Click the Attributes tab (link) at the top of the Edit Product form.

Remove	Code	Prompt	Image	Type	Copy?	Price	Cost	D	R
<input type="checkbox"/>	fin	Finish		Finish		N/A	N/A		

2. Under the "Type," column, select the Attribute Template Prompt you want to apply to this product.

Prompt	Image	Type
		Finish

3. To copy the contents of this template (so you can modify it for this particular product), check the box under Copy?.

Copy?	Price	Cost	D	R
<input checked="" type="checkbox"/>	0.00	0.00	<input type="checkbox"/>	

Note: When you copy an attribute template into Product Attributes, any changes you make to the attribute template will not be reflected in Product Attributes. Likewise, any changes you make to the Product Attributes will not change the template from which you copied it.

For more information about editing a product, refer to *HOW TO Set Up and Modify Products*.



HOW TO Set Up Inventory

Revision 1.1



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MM1105-02

HOW TO

Set Up Store Inventory

Introduction

The reason you set up a store is to sell products. One of the most important tasks that you have is to add, present, and administer your products in your store. When you use Inventory tracking, depending on how you set it up, Miva Merchant will track your product stock levels, identify back-ordered and out-of-stock items to your customers. You can even hide the products that are currently out of stock.

Miva Merchant Inventory, lets you do the following:

1. Activate Inventory and enter default stock levels and messages.
2. Enter product specific stock levels and messages
 - enter data directly in the Edit Product Inventory form
 - import the inventory data

Before you initiate inventory tracking, you should put your store in Maintenance Mode. Otherwise, it will be quite probable that your inventory tracking levels will not start with the proper quantities.

To view the Inventory form:

In the Administration menu, on the left, perform the following:

1. Click the triangle next to Stores.
2. Click the triangle next to the Store's name.
3. Select the Inventory link.



Caution: Before changing inventory settings (and other store settings and configurations), put your store in Maintenance Mode. Refer to *HOW TO Edit Store Settings, Maintenance Mode & Order Minimums*.

Inventory Descriptions

When you turn on Track Inventory, Miva Merchant can keep track of your products' stock levels. In the Inventory form, you set which stock levels to track, the stock levels, and stock messages.

Stock Levels

You can set the default stock levels on the Inventory form, which you can apply to all, most or some products. Then, when you track inventory for a product, you can set specific stock levels or use the default stock levels that you set in this Inventory form.

Level	Description
Low Stock	The number of products left in your inventory that cause the Low Stock Messages to display.
Out of Stock	The number of products left in your inventory that cause the Out of Stock messages to display. When your products are not in stock, you may not want them to display. If so, check "Hide Out of Stock Products."

Stock Messages

Inventory also contains generic or default messages. As with the stock levels, you can choose to use the generic messages for all your products, or enter specific messages for a product.

Message	Description
In Stock (Short and Long)	Displays message while the inventory is above the Low Stock level set for the product.
Low Stock (Short and Long)	Displays while the inventory is at or below the Low Stock Level, and above the Out of Stock Level, set for the product.
Out of Stock (Short and Long)	Displays while the inventory is at or below the Out of Stock Level. It can display when an e-shopper attempts to buy a more than the quantity in stock.
Limited Stock Message	Displays when an e-shopper buys more than the <i>quantity available</i> (Current Stock minus Out-of-Stock levels), allowing the e-shopper to know the quantity available, and re-enter a quantity.

The default for these messages contain tokens, which are variables for the product name, code, and stock levels. These tokens are identified at the bottom of the Inventory page in the Administrative Interface.

You can keep the supplied stock level messages, or change them to ones that may be more useful for your store. For example, the default Low Stock Message indicates that the product is back-ordered, and there may be a delay in shipping. If you want, you could change this to say "Buy 'em fast we've only got %inv-available% left!" which would display as "Buy 'em fast we've only got 3 left!"

3. If you want to track products' sold out levels:
 - Check Track Out of Stock Level.
 - If desired, check Hide Out of Stock Products.
 - Enter the Out of Stock Level quantity.
 - Keep the provided Out of Stock Messages, or modify them for your specific requirements.
4. Modify the other messages as you desire.
 - In Stock Messages
 - Limited Stock Messages

Note: Remember that the **bold items** indicate that there must be an entry or selection.

The long messages appear in the Expanded format of the Product List Layout, Search Layout, and Product Layout. The messages also appear in Product Descriptions and the Basket.

Email Notification Tab

You might choose to send an email to your product's supplier, copying in either your store managers, yourself, or both, when a product's inventory level is low or out.

To set up Email Notification:

1. Check when to send Inventory Email: when stock is low, out, or both.
2. Enter data for the required fields (bold items must contain an entry):

Note: To send to or copy in multiple recipients, separate the Email addresses with a comma and a space. For example:
supplier@address.com, admin@store.com, manager@store.com

If you are sending an Email to a supplier, your Email message might read:

%product_name% stock level is currently %inv_level%. Please fill our standard order. Thank you.

If the inventory level were low and the product is posters, this message would read:

Posters stock level is currently low. Please fill our standard order. Thank you.

3. Optionally, enter Email address(es) in CC for courtesy copies.
4. Click Update.

Edit Product Inventory Tab

When you turn on Track Inventory in Inventory Settings, each product will have a new link called Inventory, which is available when you edit a product. If you are tracking the inventory for only a few products, you could enter the product inventory data directly into the Inventory form of Edit Product. If you have quite a few products to track, it might be easier and quicker to import the product data, including the inventory data.

For each product, you can choose to use the settings that you set in the Store's Inventory form (which this publication describes), or select specific settings for some of your products. In Product Inventory, you can:

- Leave the Stock Messages text boxes empty or enter specific text for the product.
- Set whether or not to track each of the stock levels, or to use the Default settings.
- Set the product stock levels or use the Default settings.

Note: The product level is adjusted when a shopper places an item(s) in the basket, and adjusted again, if applicable, when the basket expires.

For specific information on how to modify inventory for a product, refer to *HOW TO Add and Modify Products*.

Import Inventory Data

You can import product data (the product's name, code, cost, description, image URLs, and more) and the product's inventory data. The inventory data includes all the stock levels and messages:

- Adjust Stock By
- Track Product Inventory
- In Stock, Low Stock, Out of Stock, and Limited Stock messages
- Track Low Stock and Out of Stock Levels
- Hide Out of Stock Products

For specific information on how to import product data, refer to *HOW TO Import Product Data Using a Text File*.



HOW TO Set Up Upsale Products

Revision 1.2



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MM1051-03

HOW TO

Set Up Upsale Products

Introduction

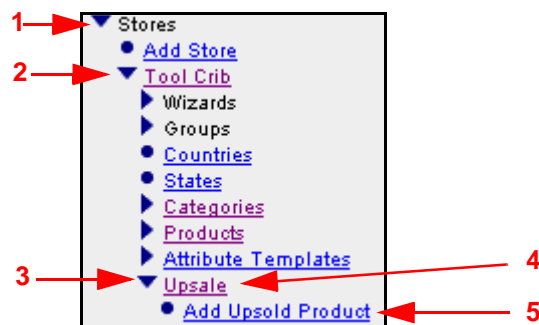
When a customer buys a certain dollar amount of products from your store you may want to reward that customer. To do this you can offer the customer an upsale item, from a list of your products at a reduced price. There is a set of criteria that you can set for an upsale event.

Miva Merchant selects a single item from the upsale list based on this special set of criteria ensuring that the item in question is in the proper price range relative to the running total in the shoppers basket. In addition, it will also check that the shopper has not already purchased the item at the regular price.

You can edit Upsale setting and existing Upsale products, and add new Upsale products.

Use the following procedure to edit a product or add it to the upsale list.

1. Click the triangle next to Stores.
2. Click the triangle next to the store name.
3. Click the triangle next to Upsale to .
4. To edit Upsale settings and the Upsold Products list, select the Upsale link. See [“Upsale Link” on page 2](#).
5. To add an upsold product, select the Add Upsold Product link. See [“Add and Edit Upsold Products” on page 3](#).



Upsale Link

When you select the Upsale link (in the Administration menu) a form is displayed that allows you to edit Settings and Upsold Products.

Upsale Settings Tab

The Upsale Settings:

1. Enter the number of Upsale products that you want to display to your customers on the Upsale screen.
2. Enter the number of upsale products from which your customers can select on the Upsale screen.

The screenshot shows the 'Upsale' settings interface. At the top, there is a header 'Upsale' with a home icon. Below it are two tabs: 'Upsold Products' (highlighted) and 'Settings'. The 'Settings' tab contains two input fields: 'Upsold Products to Show' with the value '3' and 'Max Number of Upsold Products to Select' with the value '1'. Red arrows labeled '1' and '2' point to these input fields respectively.

Upsold Products Tab

The Upsold Products tab lists your upsale products.

1. To find specific products, enter a selection criteria into the Search box, click the Search Button, and click the Search button.
2. To add a new upsale to your store, click the New Upsold Product button. Refer to “Add and Edit Upsold Products” on page 3 for detailed instructions.
3. To change the upsale criteria for a product, click the Edit button. Refer to “Add and Edit Upsold Products” on page 3 for detailed instructions.
4. To edit the fields that are displayed on the form, click the Edit Here button.

The screenshot shows the 'Upsold Products' tab interface. At the top, there is a header 'Upsale' with a home icon. Below it are two tabs: 'Upsold Products' (highlighted) and 'Settings'. A search box is located below the tabs. Below the search box is a table with the following columns: 'Remove', 'Product', 'Threshold', 'Pricing', and 'Price Percent'. The table contains two rows of product data. Red arrows labeled '1' through '5' point to various elements: '1' points to the search box, '2' points to the 'Remove' button, '3' points to the 'Product' button, '4' points to the 'Threshold' button, and '5' points to the 'Product' checkbox.

Remove	Product	Threshold	Pricing	Price Percent
<input type="checkbox"/>	P002	75.00	Percent of Total	n/a 50.00%
<input type="checkbox"/>	P004	75.00	Percent of Total	n/a 50.00%

At the bottom of the table, there is a pagination bar showing '1-2' and a page number '10'.

When you Click the Edit Here button the form displays the product fields as text boxes. Enter new information into any of the fields and click Update.

Product Code	Threshold Percent	Pricing	Price	Percent
P002	75.00	Percent	0.00	50.00 %
P004	75.00	Percent of Total	n/a	50.00%

1-2 10

- To remove a product from as an Upsale, under the Remove column check the box next to the item and click Update.

Add and Edit Upsold Products

When you select the Add Upsold Product link in the Administration menu, the Add Upsold Product form displays.

Upsold Product Tab

This tab is identical whether you are adding a new or editing an existing Upsold Product.

- If you are adding an upsold product, enter the product code, or click the Lookup button to select a product from the store's product list.

After you select a product from the Lookup screen, the form reappears with the product code entered.

Note: When you edit an upsold product, the product code field cannot be changed.

Add Upsold Product

Upsold Product

Product Code:

Threshold Percentage of Order Total: %

Pricing:

Absolute Price:

Percent of Original Price: %

- Enter the percent of the shopper's running total, that this product is priced, to be eligible as an upsale product. For example, you set the upsale price of the item that you are adding to be \$25 and you set the threshold percentage to be 50%. The shopper will then need to have a running total of at least \$50 in their basket for the item to be eligible as an upsale offer. In this example, to

determine the relationship between the price of the upsold item and the customer's running total, you would ask, "\$25 is 50% of what dollar amount." The answer is \$50.

Set the Pricing Options of the Upsale product.

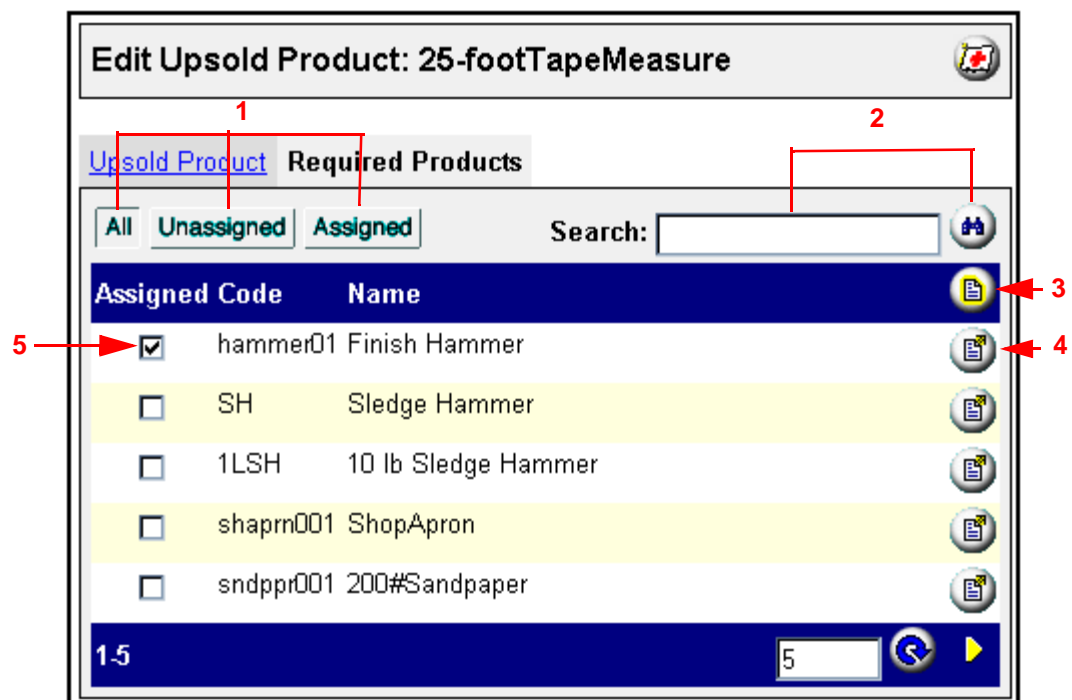
3. To set a fixed price for your upsale product, click Absolute Price and enter the exact upsale price for the item.
4. To set a percentage price for your upsale product, click Percent of Original and enter a decimal number for a percentage of the item's base price.
5. Click Add . You will see a message at the bottom of the form telling you that your item has been added and the Edit Upsold Product form appears.

Required Products Tab

This tab displays when you edit an existing Upsale Product.

One of the selection criteria for choosing an upsale item is that it must be related to one, several, or all of the items already in the shoppers basket at checkout.

After you add a new Upsold product, the Edit Upsold Product form is displayed with the tab, Required Products.



1. Select a method to view the list.

- All This displays a list of all products on your product list.
- Unassigned This displays a list of those products on your product list that you have not assigned as a required product for your upsale item.
- Assigned This displays a list of those products on your product list that you have assigned as a required product for your upsale item.

2. To locate product(s), enter a selection criteria into the Search box and click the Search Button.
3. To add a new product to your store, click the New Product button . Refer to *HOW TO Add and Modify Products* for a detailed description of this process.
4. To edit a product, click the Edit Product button. Refer to *HOW TO Add and Modify Products* for a detailed description of this process.
5. To identify the required product(s) that your shoppers must purchase to be eligible for this upsale, check the Assigned box next to the required product(s) and click Update.
6. To remove a product from your required list, uncheck the Assigned box next to the item and click Update.

Caution: Do not click Delete to remove an item from the required item list. Clicking the Delete button will remove the upsale product from the Upsale list.

7. Click Update.



***HOW TO
Set Up & Administer
Price Groups***

Revision 1.2



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MM1046-03

HOW TO

Set Up & Administer Price Groups

Introduction

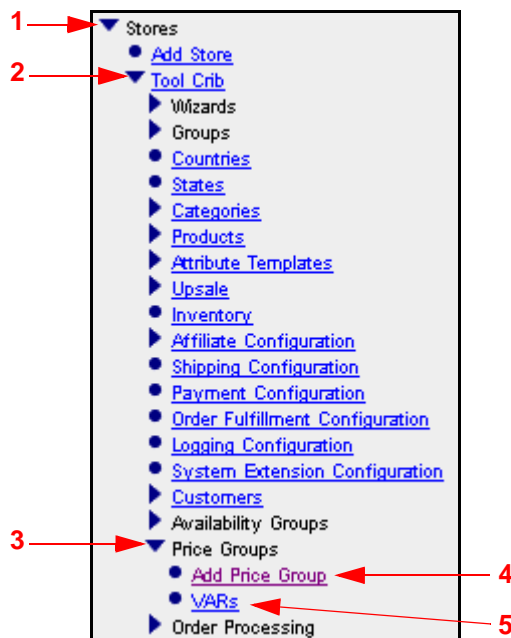
Price Groups allow you to define Customers who will receive special prices on specified products. First you create the Price Group, then you add the products and the customers to the Price Group.

Customers who are assigned to the Price Group will see the assigned products at the price you assign to them in the Price Group.

Add or Edit a Price Group

Price Groups are created using the Administration Interface.

1. Click the triangle next to Stores to view the stores in your Miva Domain.
2. Click the triangle next to store's name to view the functional areas of the store.
3. Click the triangle next to Price Groups to view the items below it.
4. To create a new price group, select the Add Price Group link.
5. To edit a Price Group, select its name. (As an example, VARs is used here.)



Price Group is the only tab that is present on the initial Add Price Group form.

6. If you are editing, and the Price Group tab is not selected, select Price Group.
7. Enter (or change) the name of this Price Group.
8. Select one of the following methods of pricing for the Price Group:
 - a. Retail
 - Sells at the price you entered for the product's Price field.
 - b. Cost
 - Sells at the cost you entered for the product's Cost field.
 - c. Discount From Retail:%
 - Sells at the percent of discount from Retail.
 - Enter the percent discount in the text box provided.
 - d. Markup From Cost:%
 - Sells at a markup percentage from cost to the price group.
 - Enter the percent markup in the appropriate text box.



9. Click Add (or Update, if editing).
- When the Price Group is created, new tabs display.

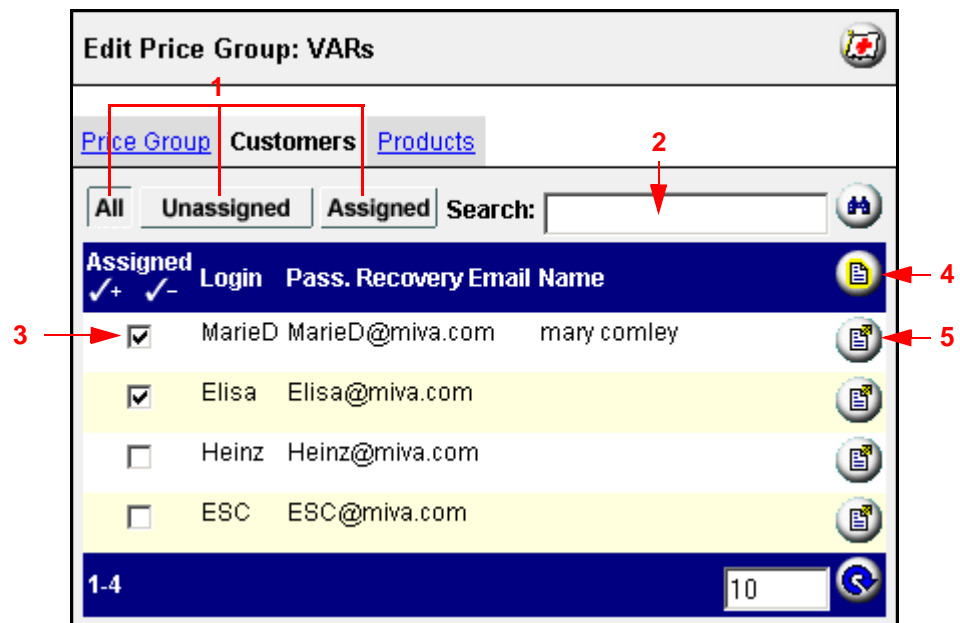
Once the Price Group has been established, you must add customers and products to it. This is done using the Edit Price Group form.

Assigning Customers to a Price Group

Select the tab you want to update to display a list. The example below shows the Customer tab, which also represents the functionality for the Products tab.

You can perform the following tasks in this screen:

1. Display your store's customers.
 - All Displays all customers.
 - Unassigned Displays customers not assigned to this Price Group.
 - Assigned Displays customers assigned to this Price Group.
2. Search for a customer.
 - a. Enter the name, or a partial name into the text box.
 - b. Click the Search  button.
 - c. Those customers that meet the search criteria are displayed.
3. To Assign a customer to the Price Group, check the box by the name of the customer you want to add. Click + to check all items, and – to uncheck all items in the list. Click Update.
4. To add a new customer, click the New Customer button. See [“Add Customer” on page 4](#).
5. To edit customer information, click the Edit  button.



6. Click Update when complete.

Add Customer

When you click the New Customer  button, the following form displays.

1. Enter the information for the new customer.
2. Click Update.

For detailed information about adding new customers, refer to *HOW TO Set Up Customers*.

Add Customer

Identification [Shipping/Billing Information](#)

Login:	<input type="text"/>
Email Lost Passwords To:	<input type="text"/>
Password:	<input type="password"/>
Confirm Password:	<input type="password"/>

Assigning Products to a Price Group

Select the Products tab to display a list of your store's products. You may choose to associate any of these products with the price group.

See the detailed descriptions for displaying, searching, and selecting items under [“Assigning Customers to a Price Group” on page 3](#). The same methods are used.

Edit Price Group: VARs

Price Group
Customers
Products

All
Unassigned
Assigned
Search:

Assigned	Code Name	
<input checked="" type="checkbox"/>	P001 Finish Hammer	
<input checked="" type="checkbox"/>	P002 Screwdriver set - 4-piece	
<input type="checkbox"/>	P003 200# Sandpaper	
<input checked="" type="checkbox"/>	P004 Wrench Set	
<input type="checkbox"/>	P005 Tape Measure	

1-5

1. Select the Products tab.
2. Click the checkbox by the name of the product(s) you want to add to this Availability Group.
3. Click Update.

The customers who are assigned to this Price Group will now see the assigned products for the price that you assign to it in the Price Group.



***HOW TO
Set Up
Availability Groups***

Revision 1.2



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MM1025-03

HOW TO

Set Up Availability Groups

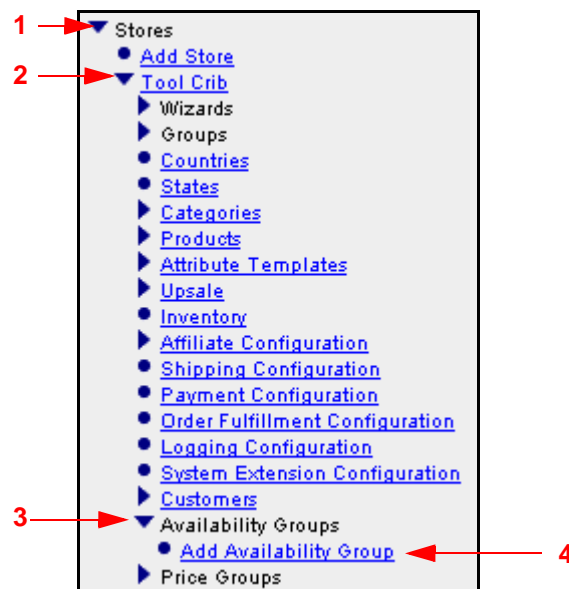
Introduction

Miva Merchant can create specific groups that contain customers, categories and products. Therefore you can create a group called Wholesale and place all of your wholesale customers in it. You can then put categories and products in this group. By doing this you have created a special grouping of customers, categories and products that can be treated in a special manner.

Add Availability Group

Availability Groups are created using the Administration Interface.

1. Click the triangle next to Stores to view all store names in your Miva Domain.
2. Click the triangle next to the store's name to view the functional areas of the store.
3. Click the triangle next to the Availability Groups to view the Add Availability Group link.
4. Select the Add Availability Group link.



5. Enter the name of the Availability Group and click Add button.

Add Availability Group

Availability Group

Availability Group Name: ← 5

Edit Availability Group

When the Availability Group is created, new tabs display. When you select one of these tabs, a form displays a list of customers, categories, or products.

Edit Availability Group: Wholesale

Availability Group [Customers](#) [Categories](#) [Products](#)

Availability Group Name:

The example below shows the Customers tab, which represents the basic functionality of these screens.

Edit Availability Group: Wholesale

[Availability Group](#) **Customers** [Categories](#) [Products](#)

All Unassigned Assigned Search:

	Login	Pass. Recovery	Email	Name	
Assigned	✓+	✓-			
<input type="checkbox"/>	mary	elise@miva.com		mary comley	
<input type="checkbox"/>	Name1	name1@miva.com			
<input type="checkbox"/>	Name2	Name2@miva.com			
<input type="checkbox"/>	Name3	Name3@miva.com			

1-4

You can perform the following tasks with these forms:

1. Display your store's customers.
 - All Displays all customers.
 - Unassigned Displays customers not assigned to this Availability Group.
 - Assigned Displays customers assigned to this Availability Group.
2. Search for a customer.
3. Click the New Customer button to create a new customer record.
4. Check the box in the Assigned column to assign a customer to this Availability Group. Click + to check all and – to uncheck all displayed items.
5. Update customer information by clicking the Edit button for the customer's name.
6. See additional customers by changing the number in the box. If there are more customers than are displayed on this page, an arrow is displayed in the right, bottom corner. Click the arrow to display the next page of customers names.

Customers Tab

When you select the Customers tab, the list of all registered customers for your store displays. Use the following procedure to assign customers to an Availability Group.

1. Select the Customers tab.
2. Click the checkbox by the name of each customer you want to add to or remove from this Availability Group.
3. Click Update.

Categories Tab

To assign categories to an availability group, select the Categories link. This provides you the list of the categories that you may choose to associate with the availability group. Use the following procedure to assign categories to an Availability Group.

1. Select the Category link.
2. Click the checkbox by the name of each category you want to add to or remove from this Availability Group.
3. Click Update.

Products Tab

To assign products to the availability group, select the Products link. This provides you the list of the products that you may choose to associate with the availability group. Use the following procedure to assign products to an Availability Group.

1. Select the Product link.
2. Click the checkbox by the name of each product you want to add to or remove from this Availability Group.
3. Click Update.



HOW TO Edit States & Countries List

Revision 1.2



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MM1049-03

HOW TO

Edit States and Countries Lists

Introduction

The Edit State List is a very important part of the Ship To, Bill To, and Tax portions of your store. From this list, you may add or remove a state from the store's list.

Use the following procedure to edit the States listing.

1. In the Administration menu, click on the triangle ▶ next to Stores. This expands ▼ the Stores menu.
2. Click the triangle ▶ next to the store's name to expand the menu.
3. Click the Countries link to change this list.
4. Select the States link to change this list.



Countries

The Edit Country List form is displayed.

Assigned	Code	Country
<input checked="" type="checkbox"/>	AF	Afghanistan
<input checked="" type="checkbox"/>	AL	Albania
<input checked="" type="checkbox"/>	DZ	Algeria
<input checked="" type="checkbox"/>	AS	American Samoa
<input checked="" type="checkbox"/>	AD	Andorra
<input checked="" type="checkbox"/>	AO	Angola
<input checked="" type="checkbox"/>	AI	Anguilla
<input checked="" type="checkbox"/>	AQ	Antarctica
<input checked="" type="checkbox"/>	AG	Antigua
<input checked="" type="checkbox"/>	AR	Argentina

By default, all countries are checked.

- If you do not want to do business in a certain country, uncheck the box next to that country, then click Update.
 - Click **+** to check all displayed items, and **-** to uncheck all displayed items in the list.
- To find a country, enter the name, or part of the name, then click the Search button.
- Select one of the tabs to display the countries.


All	Displays all countries
Unassigned	Displays only those countries that have not been assigned to this store.
Assigned	Displays only those countries that are assigned to this store.
- To view more of the list, change the number in the box at the bottom and click Update or Refresh. Or click the yellow triangle in the bottom, right corner.

State List

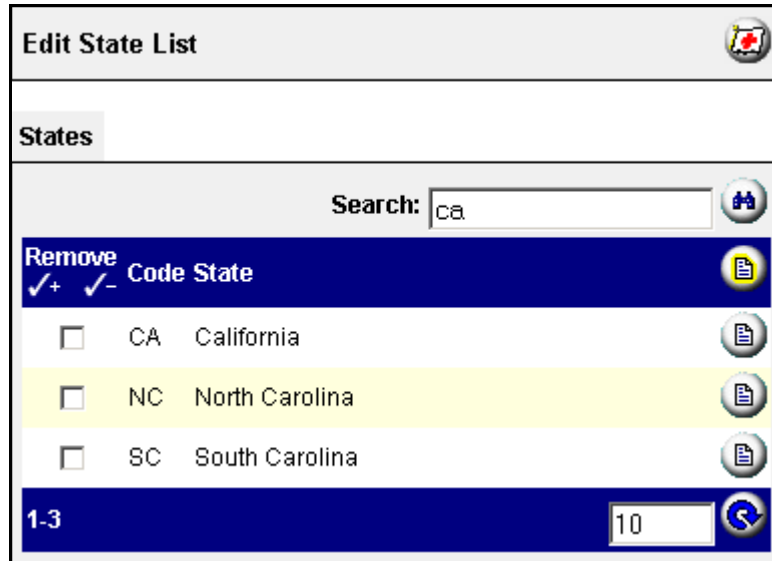
The Edit State List form is displayed.


Remove		Code State	
✓+	✓-		
<input type="checkbox"/>		Outside US	
<input type="checkbox"/>		AK Alaska	
<input type="checkbox"/>		AL Alabama	
<input type="checkbox"/>		AR Arkansas	
<input type="checkbox"/>		AZ Arizona	
<input type="checkbox"/>		CA California	
<input type="checkbox"/>		CO Colorado	
<input type="checkbox"/>		CT Connecticut	
<input type="checkbox"/>		DC District of Columbia	
<input type="checkbox"/>		DE Delaware	

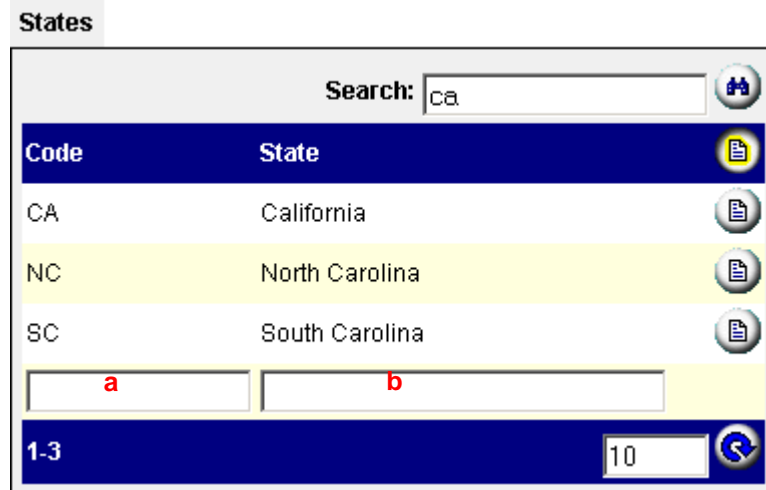
Editing the State List

1. Search for a state.
 - a. Enter the name, or a partial name into the text box, then click the Search  button.
 - b. Those states that meet the search criteria are displayed.

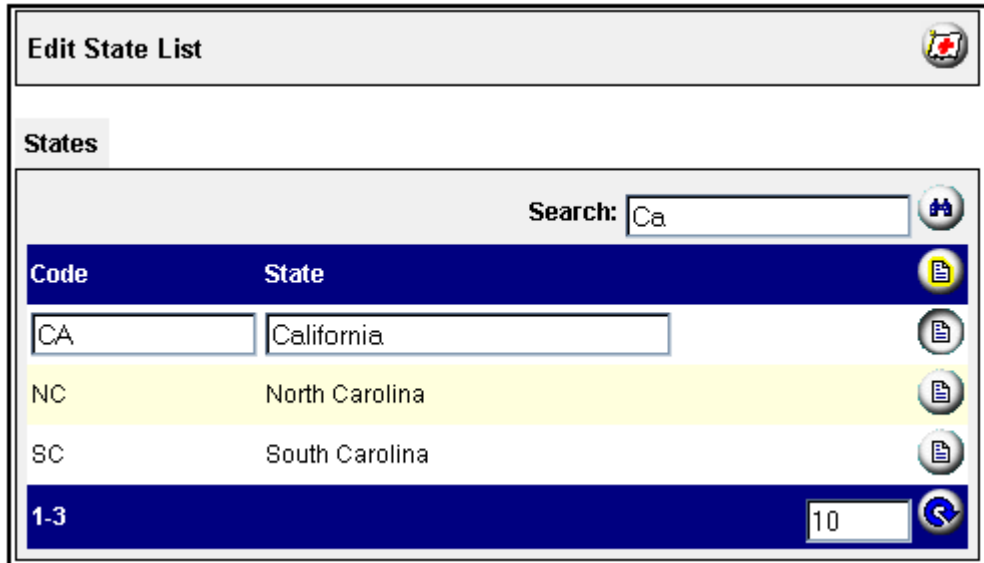
In the example below, the search criteria is "Ca." Only those states with "Ca" in the name are displayed.



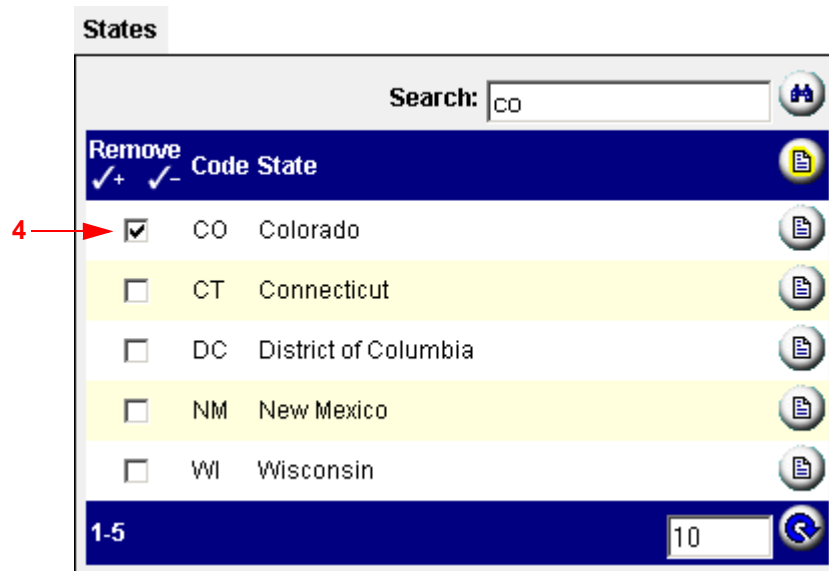
2. Click the New State  button to add another state.
 - a. Enter the state code.
 - b. Enter the name of the state.



3. Click the Edit button to edit the state code or name.



4. To remove a state, uncheck the box next to the state and click Update.



Outside the US

It should be noted that the "Outside US" listing contains a null code. This is the default value used in the Bill To area of the customer's order form. If Outside US is removed from the list, then a state code will be entered to the Bill To area.

Note: If you do not wish to do business outside of the US, you can rename the Outside US listing to Choose One. The customer will then choose one of the states that you have listed for your store.



***HOW TO
Set Up and
Administer Customers***

Revision 1.3



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HOW TO

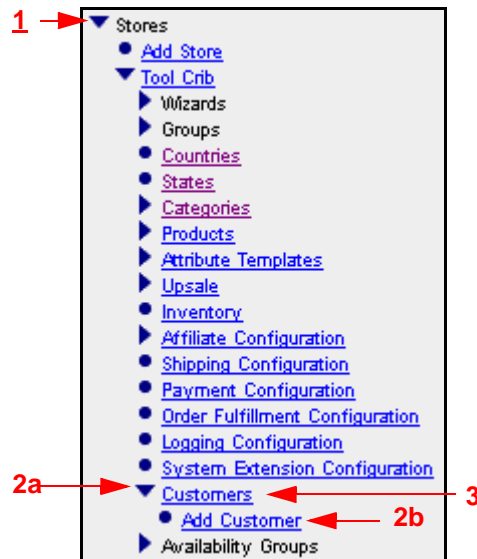
Set Up and Administer Customers

Introduction

Miva Merchant allows you to build a customer list. With this list, you can maintain customer shipping and billing data. You can also use this list to assign customers to Availability Groups and Price Groups. For more information about Availability and Price Groups refer to: *HOW TO Set Up Availability Groups* and *HOW TO Set Price Groups*.

Use the following procedure to add and edit customer information.






1. Click the triangle next to the store name to open the menu.
2. To add a customer:
 - a. Click the triangle next to Customers.
 - b. Select the Add Customer link. See ["Add New Customers"](#) on page 6.
3. To edit the Customer List or a Customer form, select the Customer link.

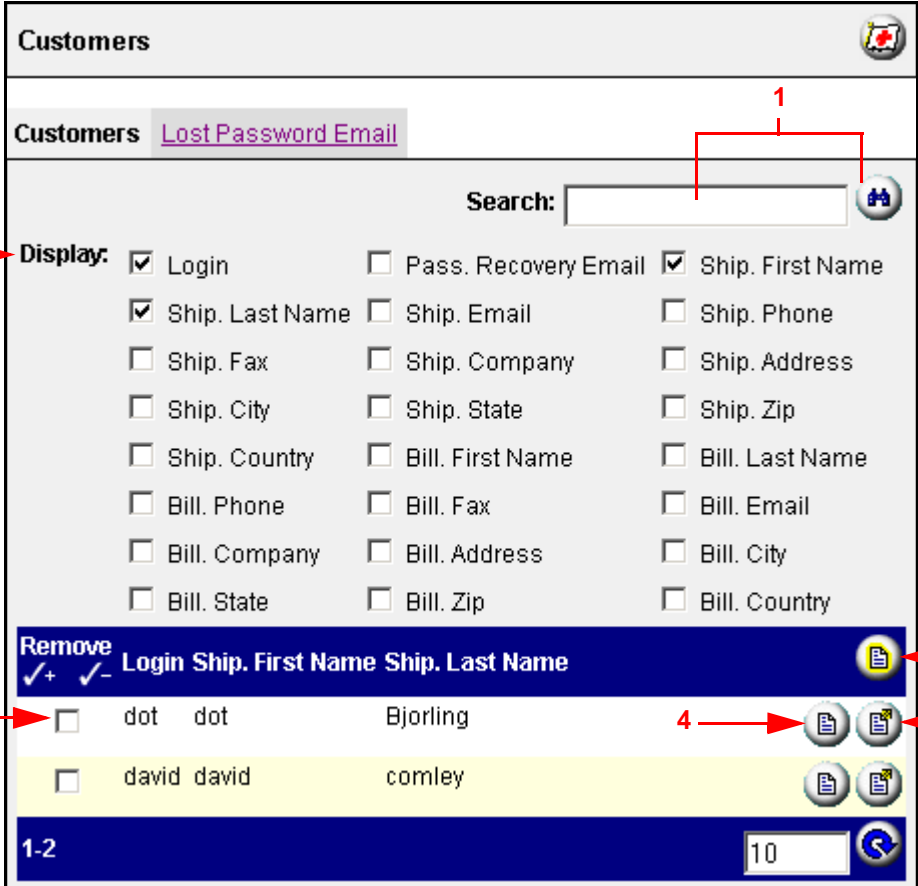


Customers List

The Customers list form is displayed. The forms has the tabs: Customers and Lost Password Email.

Customers Tab

1. Search for a customer.
 - a. Enter the search criteria into the text box, then click the Search  button.
 - b. Those customers that meet the search criteria are displayed.
2. This form displays a set of options for each customer. Check the boxes for the options you wish to have displayed on your customer list and click Update. The checked items are then displayed as text in the customer list. In the above screen, Login, Pass., Recovery Email, Recovery Email.
 - a. Enter the search criteria into the text box, then click the Search  button.
 - b. Those customers that meet the search criteria are displayed.
3. Click the New Customer  button to add a new customer. Refer to “Add New Customers” on page 6 for additional information about this procedure.
4. Click the Edit Here  button to change data in that row.
5. Click the Edit  button to edit all information for an existing customer. See “Edit Customer” on page 3.
6. To remove a customer, check the box in the Remove column. Click + to check all displayed customers, and – to uncheck all displayed customers.



The screenshot shows the 'Customers' tab interface. At the top, there are tabs for 'Customers' and 'Lost Password Email'. Below the tabs is a search bar with a 'Search:' label and a search icon (1). Underneath the search bar is a 'Display:' section with a grid of checkboxes for various fields (2). The fields include Login, Pass. Recovery Email, Ship. First Name, Ship. Last Name, Ship. Email, Ship. Phone, Ship. Fax, Ship. Company, Ship. Address, Ship. City, Ship. State, Ship. Zip, Ship. Country, Bill. First Name, Bill. Last Name, Bill. Phone, Bill. Fax, Bill. Email, Bill. Company, Bill. Address, Bill. City, Bill. State, and Bill. Zip. Below the 'Display:' section is a table with a 'Remove' column and a 'Login' column. The table has two rows: one with 'dot dot' and 'Bjorling', and another with 'david david' and 'comley'. The 'Remove' column has checkboxes (6). The 'Login' column has a '+' sign and a '-' sign. To the right of the table are several icons: a 'New Customer' icon (3), an 'Edit Here' icon (4), and an 'Edit' icon (5). At the bottom of the interface, there is a pagination bar showing '1-2' and a page size selector set to '10'.

Lost Password Email Tab


This is the form to set up your message to any customer that requests that his or her forgotten password be sent via email.

1. Enter or change any of the following information.
 - From Enter the email address that the customer can reply to if they have additional inquiries.
 - CC Enter any email address that you wish to receive a copy of the email with the password.
 - Subject Enter the subject to alert the customer so that they will realize that this is the response to their request.
 - Header Text Enter any header text that you want to appear at the beginning of your email.
2. Click Update.

Edit Customer

The following form is displayed. The form has the tabs: Identification and Shipping/Billing Information.

Identification Tab

Edit Customer: george 

Identification
Shipping/Billing Information

Login:	<input type="text" value="george"/>
Email Lost Passwords To:	<input type="text" value="george@miva.com"/>
Password:	<input type="password"/>
Confirm Password:	<input type="password"/>

- a. Change any of the following Identification information:
 - Login The name the customer will use as a login name.
 - Email Lost Passwords To The email address you will use to send the password if the customer notifies you that it is lost.
 - Password The password.
 - Confirm Password Confirm the password.
- b. Select the Shipping/Billing Information tab to change other customer data.

Shipping/Billing Tab

1. Change any of the Ship To information.
2. If the Billing address is different, change the "Bill To:" information.
3. Click Update.

Edit Customer: george

Identification
Shipping/Billing Information

Ship To:	Bill To:
First Name: <input type="text" value="george"/>	First Name: <input type="text"/>
Last Name: <input type="text" value="bancroft"/>	Last Name: <input type="text"/>
Email Address: <input type="text" value="george@miva.com"/>	Email Address: <input type="text"/>
Phone Number: <input type="text" value="858-490-2570"/>	Phone Number: <input type="text"/>
Fax Number: <input type="text"/>	Fax Number: <input type="text"/>
Company: <input type="text" value="Miva Corporation"/>	Company: <input type="text"/>
Address: <input type="text" value="2629 Ariane Drive"/>	Address: <input type="text"/>
City: <input type="text" value="San Diego"/>	City: <input type="text"/>
State/Province: <input type="text" value="California"/>	State/Province: <input type="text" value="Outside US"/>
Other State/Province: <input type="text"/>	Other State/Province: <input type="text"/>
Zip/Postal Code: <input type="text" value="92117"/>	Zip/Postal Code: <input type="text"/>
Country: <input type="text" value="United States"/>	Country: <input type="text" value="<Select One>"/>

Mailing Lists (new in 4.13)

The mailing lists to which this customer has subscribed are shown on this tab. You can manually unassign a customer from lists here. And, although you can also assign a customer to lists, you might want to let them sign up or subscribe for themselves. (You should check the ramifications of sending unsolicited email in your area.)

Edit Customer: jamesb

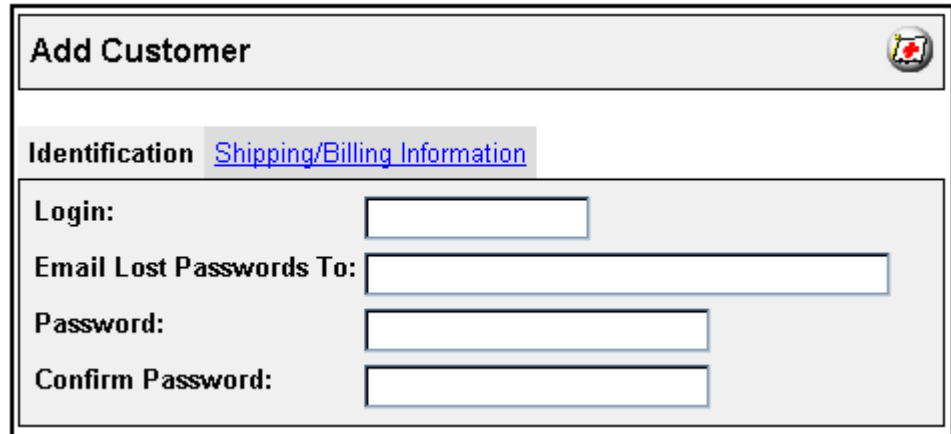
[Identification](#) [Shipping/Billing Information](#) **Mailing Lists**

Assigned	Available Code	Prompt
✓+ ✓-		
<input checked="" type="checkbox"/>	✓	News1 <i>Subscribe to Monthly Newsletter (includes upcoming sales specials, new product information, articles on related interests and hobbies, and more!)</i>
<input checked="" type="checkbox"/>	✓	Sale1 <i>Get Featured Products & Sales Info Sign up to be informed about our special sales</i>
<input type="checkbox"/>	✓	testcode <i>You can use HTML code in the prompt. But, the HTML will not be validated. Invalid HTML code may cause your store to display improperly.</i>

Add New Customers

The Add Customer form has the tabs: Identification and Shipping/Billing Information.

Identification Information




The screenshot shows a web form titled "Add Customer" with a small icon in the top right corner. Below the title bar, there are two tabs: "Identification" (which is selected and highlighted) and "Shipping/Billing Information". The "Identification" tab contains four input fields: "Login:" with a text box, "Email Lost Passwords To:" with a text box, "Password:" with a text box, and "Confirm Password:" with a text box.

1. Enter the following Identification information:
 - Login Enter the name the customer will use as a login name.
 - Email Lost Passwords To Enter the email address you will use to send the password if the customer notifies you that it is lost.
 - Password Enter the password.
 - Confirm Password Confirm the password.
2. Select the Shipping/Billing Information tab.

Shipping/Billing Information

3. Add the Ship To information.
4. If the Billing address is different, enter the Bill To information.

Edit Customer: george 

[Identification](#) **Shipping/Billing Information**

Ship To:		Bill To:	
First Name:	<input type="text" value="george"/>	First Name:	<input type="text"/>
Last Name:	<input type="text" value="bancroft"/>	Last Name:	<input type="text"/>
Email Address:	<input type="text" value="george@miva.com"/>	Email Address:	<input type="text"/>
Phone Number:	<input type="text" value="858-490-2570"/>	Phone Number:	<input type="text"/>
Fax Number:	<input type="text"/>	Fax Number:	<input type="text"/>
Company:	<input type="text" value="Miva Corporation"/>	Company:	<input type="text"/>
Address:	<input type="text" value="2629 Ariane Drive"/>	Address:	<input type="text"/>
City:	<input type="text" value="San Diego"/>	City:	<input type="text"/>
State/Province:	<input type="text" value="California"/>	State/Province:	<input type="text" value="Outside US"/>
Other State/Province:	<input type="text"/>	Other State/Province:	<input type="text"/>
Zip/Postal Code:	<input type="text" value="92117"/>	Zip/Postal Code:	<input type="text"/>
Country:	<input type="text" value="United States"/>	Country:	<input type="text" value="<Select One>"/>

Mailing Lists (new in 4.13)

The mailing lists assignments reflect the way the prompts are checked in the Mailing List Settings. If you checked **Subscribe Customer by Default**, then all the mailing lists here will be checked.

5. Be sure to uncheck each list to which you do not want to automatically subscribe this new customer.
6. Click Add.