Web Office – E-Commerce

Introduction

The e-commerce facility in **Church**Insight allows you to sell goods and services from your web site to visitors and members of your church. This article explains how to create and configure your online shop, how to create a catalogue and how to process orders.

Before you can begin trading you will need to be able to process credit card payments. This requires that you have an **Internet Merchant Account** or that you are registered with a third party merchant/payment facility. More information on credit card payments is available in a separate document called "E-Commerce – Implementation Guide".

Enabling the Shop

If you are configuring your shop for the first time you will first need to enable it as follows:

- If you haven't logged into the web site already, do so now. Click the **Login** link at the top of the home page and enter the login name and password as supplied.
- Once you have successfully logged in click the **web office** link at the top of the home page. The Web Office will be displayed shortly afterwards.
- Click the **Settings** tab in the web office task pane to display your site settings.

> **Settings tab not available?** Contact your local web site administrator for the necessary permissions.

- Click the **Shop** icon:

- An **E-Commerce** request form will be displayed; enter your details and click **send** to submit the form to Endis. You will be contacted once your application has been received and e-commerce has been enabled.

Setting up the Shop

The shop configuration settings allow you to set payment processing options, delivery charges, catalogues and navigation quick links. To access these settings:

- In the **web office** click the **Settings** tab in the task pane.
- Click the **Shop** icon

> **Shop icon not available?** You must be a shop administrator to access the shop settings. Contact another shop administrator for the necessary permissions.

The shop settings are divided into six areas as follows:

General Settings	Contains settings for enabling or disabling the shop, the name of the shop (as it will appear on the menu bar), and the theme and layout used by the shop.

Navigation Tabs	Navigation tabs allow you to provide quicklinks to particular areas of your catalogue to assist with the browsing process. For example, you could create a "CDs" navigation tab to link to the **CDs** folder in the catalogue.
Catalogues	Indicates which catalogues you are currently featuring in your shop. At present the only catalogue available is the one containing your own products.
Delivery Charges	Allows you to create a matrix of charges for delivering goods to different regions around the world. See the section below called **Set Up a Delivery Charge Matrix** for more information.
Payment Processing	Allows you to configure your payment processor options. See the document "E-Commerce – Implementation Guide" for more information on setting up payment processing for the first time.
Shop Managers	Display who currently has permission to configure the online shop and who has permission to process orders.

When your shop is enabled for the first time the **General Settings** area will indicate that the shop is visible to shop administrators only. This allows you to create a catalogue and test payment options on your web site without making it available to the general public. Before launching the shop you will need to complete the following tasks:

- **Step 1** – configure a payment processor
- **Step 2** – set up a delivery charge matrix
- **Step 3** – create a catalogue

Step 1 – Configure a Payment Processor

Once you have registered with a recognised payment processor you will need to enter your account details as follows:

- In the **Settings** area select the **Shop** option
- Select the **Payment Processing** tab
- Select from one of the available payment processors: Authorize.net, Protx, or Paypal
- Enter the account details for this processor in the fields provided.
- Click **Save Changes** to update your settings.

For more information on selecting a payment processor see the document entitled "E-Commerce – Implementation Guide".

Step 2 – Set Up a Delivery Charge Matrix

You can charge for the delivery of goods sold from your **Church**Insight web site using a number of different criteria such as weight of goods, value of sale and world location.

- In the **Settings** area select the **Shop** option
- Select the **Delivery Charges** tab.

If you are configuring your delivery options for the first time your delivery matrix will look like this:

Region Name	Countries	Available Delivery Methods	
Unassigned countries	All countries	None: cannot sell to this region	Add

Indicating that at present you have no delivery options set. To create a new delivery region:

- Click the **Create a new delivery region** task
- Enter how you would like this delivery option to be described (for example "Rest of World" in the **name** field.
- Tick the countries you would like to be included in this region. Use the **all** button to select/deselect all the countries within a continent. Any countries which are already part of an existing delivery region will be colour coded according to the legend displayed at the bottom of the list.
- The delivery region list will be updated as illustrated below:

		Region Name	Countries	Available Delivery Methods	
		UK	United Kingdom	None: cannot sell to this region	Add
		Unassigned countries	All countries not listed elsewhere	None: cannot sell to this region	Add

- Each region may have one or more "delivery methods" assigned to it. For example, in the UK region shown above you may wish to have a "1st Class Post" delivery option, a "Next Day Courier", and a "Collect at Church Meeting" option. Click on the **Add** button to create a new delivery method.
- Enter a name and description for this delivery method, then choose from one of the following charge methods:
    - **Charge by number of items** – a fixed charge depending on the number of items bought e.g. £3.95 for 1 item, £5.00 for up to 3 items etc.
    - **Charged by total order value** – a fixed charge depending on the total sale value e.g. £3.95 for orders under £25, free for orders above £25.
    - **Charged by total weight** – this option requires valid weights to be entered for each item in your catalogue e.g. £3.95 for orders up to 10kg, £5 for orders up to 20kg. This delivery charge method can be used to match those charged by courier companies.
    - **Fixed Charge** – delivery is a fixed cost regardless of weight or order value.
    - **No charge**
- The first three charge methods require you to set up pricing bands based on the number of items, order value or weight as follows:
    - Click the **Add/Edit Price** button

- Enter the highest value making up this band. For example if you were to charge £3.95 for all orders up to (and including) £25 the lowest band would look like this:

  Upper limit: £ 25 . 00
  Price: £ 3 . 95

  Click **OK** to commit your changes.

- Repeat the process for any additional bands you wish to create. **Note** any orders above the highest band will be rejected. You may therefore wish to create a "catch all" band to cater for any remaining orders which fall outside of the defined bands. In the example above, if delivery is to be free for all orders above £25 the final band setting should be:

  Upper limit: £ 9999 . 00
  Price: £ 0 . 0

  Click the **Save** button to commit your changes to this delivery method. The delivery matrix will be updated as shown below:

	Region Name	Countries	Available Delivery Methods	
	UK	United Kingdom	Standard (charged by total order value)	Add
	Unassigned countries	All countries not listed elsewhere	None: cannot sell to this region	Add

- Add further delivery methods to this region by repeating the process above.
- Add further regions as required.

Step 3 – Create a Catalogue

The **catalogue** is the area where your complete product range is stored. Each item in the shop can be one of a range of **types** (for example CD, DVD, tape etc.) and can be located in a **category** to group similar items together. To display your product catalogue:

- Click the **Shop** tab in the task pane of the web office.
- The navigation pane will be updated to show the categories in your catalogue as illustrated below:

- New Church Shop
  - CDs
    - Message CDs
    - Music CDs
  - Books
  - John Smith Ministries

Click on each category to update the work pane with information on current promotions ("hotpicks"), items in this category and any special offers you have created.

> Access to the catalogue manager is restricted if you only have **order management** permissions

Add a new category

You can add a new category to your catalogue as follows:

- Enter the **Shop** area of the **web office** using the method described above.

- Click the category which will contain your new sub-category. For example, click the **CDs** folder to add a sub-category to it.
- The work pane will be updated to show the **Summary** view for this category; click the **Advanced** tab.
- Select the **Create a new category within** *category name*
- Enter the name of the new category before clicking the **OK** button.
- The navigation pane will be updated with the new category shortly afterwards.

Add a new item

You can add a new item to the catalogue as follows:

- Enter the **Shop** area of the **web office** using the method described above.
- Click the category in the navigation pane where the new item will be located.
- The work pane will be updated with the **Summary** view for this category; click the **Items** tab.
- Select the **Add a new item to the '***category name***' category** task.
- The **Edit Item** view will be displayed; the full product description is divided into four tabs as follows:

Details	A brief overview of the product including **Title**, **Author/Artist**, **Item Type**, **Publisher**, **Product Code/ISBN**, **Priority, Thumbnail image**, **Short Description**, **Product Weight**, and **Price**. This view also indicates if this item is part of any special offers.
Full Description	The full description is the text and images used to describe the product in more detail when it has been selected from the catalogue.
Related Items	Related products are displayed underneath the main product description in a **Related Items** area. Relationships between items are *transitive*; that is, when product *A* is linked to product *B*, *A* is also linked to anything that *B* is already linked to. This enables you to create a network of linked products very quickly. The **related items preview** list shows the complete list of related items as it will appear in the shop.
Reviews/Comments	Shoppers can review a product, giving it a rating (out of five stars), or add a brief comment to the reviews. The same person may not review a product more than once, although they may add a number of comments.

- Once the item details are complete click the **Save** button to commit your changes and return to the **Item** view in your category.

Creating a Hot Pick

"Hot picks" allow you to promote important items in your catalogue for a period of time. "Hot picks" are featured in two places:

- In the shop **home** hot picks are displayed side-by-side to promote these products on entering the shop. Similarly, when a navigation tab is selected any hot picks located in that category are featured at the top.

- Any list of items in the shop (either from browsing through the categories, or by using the search facility) is ordered using the following criteria:
  - Items which are a "Hot Pick"
  - Item priority rating
  - Highest average review rating
  - Alphabetical

You can create a new hot pick as follows:

- Enter the **Shop** area of the web office using the method described above.
- Select the category in the **web office** shop manager where the item you are promoting is located.
- Click the **Hot Picks** tab to display the current hot picks in this category.
- Select the **Create a new Hot Pick from an item in this category** task. The item browser will be displayed in a new window.
- Click on the title of the item you are promoting.
- The work pane will be updated with the contents of your new hot pick. Click on either the title or the description to edit the text.
- Once the hot pick is complete set the **Publishing Status** to published, then edit the dates when the hot pick should begin and expire.
- Click the **save** button to commit your changes.

Creating a Special Offer

Special offers allow you to create price promotions for a limited period of time on a single item or a combination of items. You can create a new special offer as follows:

- Enter the **Shop** area of the web office using the method described above.
- Select the category in the **web office** shop manager where *one* of the items you are promoting is located.
- Click the **Offers** tab to display any current special offers relating to products in this category.
- Select the **Create a new offer** task. The **Create Offer** wizard will be displayed shortly afterwards.
- A range of offer "types" will be displayed. Select the offer type closest to the one you wish to create. The basic information required for this offer will displayed beneath along with tips on how you could implement an offer of this type.
- Enter the basic information required before clicking the **proceed** button.
- Full details of the offer you are creating will be displayed in the **Edit Offer** screen. Enter the details required as follows:

Details	Enter the title, description, and dates when the offer will be available. Select also whether the offer can be used in conjunction with other offers and whether it can be claimed more than once in a single order.
Criteria	These parameters will be set automatically by the basic information provided in the previous screen. If necessary add further purchases required in order to obtain the special offer.

Reward These parameters will be set automatically by the basic information provided in the previous screen. Edit the discount given along with the number of items which will qualify if necessary. The check box at the bottom allows you to indicate whether the items specified in the **criteria** section also receive this reward (in many cases this option will be set automatically and should only be changed with care).

- Once the details of the special offer are complete click the **Save** button to commit your changes. The **offers** view will be updated with the new special offer shortly afterwards.

Processing Orders

Once your shop is live to the public you will need to begin processing orders, shipping goods and processing payments. When a new order has been placed the **Orders** section of the **Web Office Shop** will be updated as illustrated below:

Orders

- New (1)

To process a new order:

- Click on the **New** category; a list of new orders will be displayed in the work pane:
- Click on the order number or the button for the order you wish to process. The details of the order will be displayed in the work pane.
- If you are unable to fulfil this order immediately you may wish to set the **status** option to "Awaiting Stock" or something similar. You can, if you wish, enter your own text in this field to give more details to the customer.

  If you are able to fulfil this order immediately you should take the following actions:

- **Step 1 – confirm payment** – click the **Confirm Now** button, then click the **OK** button to proceed. Once the process is complete the Status will change to **Paid**.

  No money is taken from the customer credit card until the **Confirm Now** button is pressed.

- **Step 2 – update order details** – in the **lines** area of the order enter the quantity of each item which has been shipped. In most cases this will be the same number of items as the number ordered.
- **Step 3 – change the order status –** update the order **status** to indicate to the customer the progress of their order. If required you can enter your own text in this field to give more details to the customer. This status information is available to the customer in the **My Orders** section of the web site.
- Click **Save** to commit your changes. If all lines on the order have been shipped the order will move to the **Fully Shipped** category. At a later date you may wish to move this order to the archive by checking the **Archive** option in the order details.

Security

Two types of security permission are available for restricting access to the E-Commerce areas of the **web office**:

- **Order Manager** – This permission enables the user to process orders in the **Shop** area of the web office. They may also see the items in the catalogue (including hot picks and special offers) but they may not make any changes.

- **Full Manager** – This permission gives full access to editing the product catalogue as well as access to the global shop settings found in the **Settings** area. This permission should be granted with **extreme** care as it will enable the user to change the payment processing account details.

Shop manager permissions can be changed in the **Shop** section of the **Settings** area. In addition to these permissions you can also give editing permissions for a particular section of the catalogue to a user as follows:

- Enter the **Shop** area of the web office using the method described above.
- Select the category in the **web office** shop manager where you would like to add a new catalogue editor.
- Click the **Permissions** tab to display a list of current editors. Any user who has **Full Manager** permissions will automatically have all permissions on this area of the catalogue.
- Click the **Add a person** button. The user **Record Browser** will be displayed in a new window.
- Select the person you wish to add; the list of people will be updated in the work pane.
- Click on the permissions you wish to add as follows:
  - **Reviews –** allows the user to access item reviews and comments and edit them if necessary.
  - **Features** – allows the user to create and edit "hot picks" as well as set item promotion priorities.
  - **Exclusion** – allows the user to change the visibility of items in the catalogue.
  - **Pricing** – allows the user to change prices and create special offers.
  - **Product Editor** – allows the user to change product descriptions.
  - **Advanced** – allows the user to change the catalogue structure for groups below the current one.
- Click the **Save Changes** button to update the list.