

Version 3.20 Index

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CONTENT MANAGER

The Content Manager is the area designated for the management of contents, such as create categories, add new products, preview pages before publishing, etc.

This is the default area you arrive at upon entering a section.

All contents are managed through the use of categories and sub-categories.

Each category can contain multiple items and each item can be associated with multiple attachments such as files (MP3s, PDFs, Word, Real Media, etc.)

Content is managed through a complex hierarchy of sub-categories within categories that forms a tree-like structure.

The top of the tree is referred to as the “top level” and categories that exist on the same plane are referred as being on the “same level”.

The position within the tree is indicated by Present Dir which is displayed on every page.

Add Category

Basic

Add Category allows users to create a new category.

The name of the category will vary from site to site, and after version 3.00, it is possible to have more than one category type.

The most important field to complete when creating a new category is the “Directory Name”.

Please note that the “**Directory Name**” must contain only characters of the alphabet and/or numbers. The use of spaces and punctuations is not allowed.

After version 3.00, you may also enter Meta information about the category, which is used to tell search engines what information is contained in the category.

“**Meta Title**”– Is the Title of the category and is given the most importance by most search engines. As a rule of thumb, the “Meta Title” should be between 3 – 8 words. The use of punctuation is allowed.

“**Meta Keywords**”– should contain all the keywords that help to describe what the category encompasses. As a rule of thumb, all the keywords/keyphrases should be separated by a comma, and no keyword should be repeated more than 3 times- otherwise it may be marked as being spam by search engines. Creative use of capitalisation and singular/plural of words should be used.

“**Meta Description**”– should contain a brief description of the category. As a rule of thumb, a

sentence or a paragraph should suffice.

For categories that permit the upload of image(s), please ensure that the images are:-

- Jpeg format
- 72 pixels / inch
- RGB Format (not CMYK or Grayscale)

Edit Category

Basic

Edit Category allows users to edit the details of an existing category.

Please leave the field “**New Directory Name**” blank, if you do not wish to change the “**Directory Name**”.

Please note that the “**New Directory Name**” must contain only characters of the alphabet and/or numbers. The use of the spaces and punctuations is not allowed.

Remove Category

Basic

Remove Category allows users to remove an existing category.

***Particular caution should be taken, because all sub-categories, items and attachments within any sub-categories will also be deleted once removed, it cannot be undone.

Upload CSV

Intermediate

Upload CSV allows users to upload products in batch to a particular category.

First download the database structure by clicking on the item template, to the right of “**Download CSV FORMATTED Template**”. It is advisable to save the file locally first before editing.

The downloaded template can be opened with programs such as MS Excel and subsequently data can be entered onto the template. Once all the necessary data entry have been complete. The file can be uploaded onto AuthorSmith.

Please note that the first row in the original template must not be deleted.

To upload the newly created file, click on “Browse” next to the correct item type.

Add Item

Basic

Add Item allows users to create a new item within a category.

Please note that, items can only be added within a category.

The name of the item will vary from site to site, and after version 3.00, it is possible to have

more than one item type.

Upon completion, press “Submit”.

After version 3.00, you may also enter Meta information about the category, which is used to tell search engines what information is contained in the category.

“Meta_Title”– Is the Title of the category and is given the most importance by most search engines. As a rule of thumb, the “Meta_Title” should be between 3 – 8 words. The use of punctuation is allowed.

“Meta_Keywords”– should contain all the keywords that help to describe what the category encompasses. As a rule of thumb, all the keywords/keyphrases should be separated by a comma, and no keyword should be repeated more than 3 times- otherwise it may be marked as being spam by search engines. Creative use of capitalisation and singular/plural of words should be used.

“Meta_Description”– should contain a description of the category. As a rule of thumb, a sentence or a paragraph should suffice.

For categories that permit the upload of image(s), please ensure that the images are:-

- Jpeg format
- 72 pixels / inch
- RGB Format (not CMYK or Grayscale)

Edit Item

Basic

Edit Item allows users to edit the details of an existing item.

Please note that it is not necessary to re-upload any associated images, unless the existing one(s) need to be changed.

Move Item

Basic

Move Item allows users to move the selected item into another existing category.

Choose the category where the item should be moved to.

Remove Item

Remove Item allows users to remove an existing item.

Particular caution should be taken, because all associated attachments will also be deleted and once removed. This function cannot be undone.

Preview Item

Basic

Preview Item allows users to preview how an item will be appear before being published.

There may be more than one page generated per item and the exact type-setting of the page will be governed by the template of the category in which the item belongs.

The default preview name for displaying the item “page1”.

For more about how to create and manage templates, please visit the Template Editor section.

Add Attachment

Add Attachment allows users to attach an associated file to an existing item.

It is possible to add multiple attachments per item.

When uploading the associated attachment, please note that any file format is acceptable such as PDF, MP3, MPEG or DOC. Please ensure that the file size of the attachment is under the specified “Maximum Upload Size”. The default is 8 MegaBytes.

Edit Attachment

Edit Attachment allows users to edit the details of an attachment.

Please note that it is not necessary to re-upload the actual attachment, if only the associated information needs to be changed.

Remove Attachment

Basic

Remove Attachment allows users to remove an attachment.

Please note with care that once an attachment is removed, it cannot be undone.

Publish

Basic

Once all the content mangement and updates have been complete, Publish will implement those change to be reflected on the site.

Please note that the process may take minutes to complete, so please wait until the page has completely stopped and click “Done” to close the window.

Please note that when users press “Publish”, only the current category and the categories below the current category will be published, but not the categories above or on the “same level”. Hence, to re-publish the entire site, it is necessary to press “Publish” at the “top level”. Refer to above for definition.

ACCOUNTS

The Accounts area will contain information about your subscription and also printable versions of the

monthly invoices and receipts.

Setting

Intermediate

The Setting area allows users to manage profile information, contact details, configuration for delivery, delivery parameters, change company logo, etc. To make changes to the Settings, click on the link “edit SETTING”. **Returning Limit**

After an order has been shipped out, there is a period within which the shopper can return the order if the products are defective or if he/she decided that for whatever reason that the order is not suitable. The “Returning Limit” defines the total numbers of days between the time the order has been shipped and the time when the order is allowed to be returned. **Store Pickup Method**

This is the delivery method that is designed for sales made through a retail store or online with the customer picking up the order at the retail store. For CartSmith this is the shipping method that will not subject the shopper a shipping & handling fee. **Repending Method**

In the event that an order should be replaced, this field defines the default shipping method that will be used for sending out of the replacement items. **Accept Expiry Refresh**

After an order has been received and replaced, this field defines whether the “Returning Limit” of the replaced order is refreshed or not. (e.g. if a shopper purchases an order, he/she is given 45 days within which to return the products for whatever reason, after 7 days, the shopper decides to return the products for replacement, once the products are replacement products are sent out, the “Accept Expiry Refresh” defines whether the shopper is given another 45 days within which to re-return the purchased item(s) or not)Decline Expiry RefreshThe Setting area allows users to manage profile information, contact details, configuration for delivery, delivery parameters, change company logo, etc. To make changes to the Settings, click on the link “edit SETTING”. **Returning Limit**

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45 days within which to return the products for whatever reason, after 7 days, the shopper decides to return the products for replacement, once the products are replacement products are sent out, the “Accept Expiry Refresh” defines whether the shopper is given another 45 days within which to re-return the purchased item(s) or not)**Decline Expiry Refresh**

After an order has been received and declined for refund and replacement, this field defines whether the “Returning Limit” of the declined order is refreshed or not. (e.g. if a shopper purchases an order, he/she is given 45 days within which to return the products for whatever reason, after 7 days the shopper decides to return the products for replacement, but the merchant decides that the grounds for replacement is inadequate and returns the original item(s), once the returned products are sent out, the “Declin Expiry Refresh” defines whether the shopper is given another 45 days within which to re-return the purchased item(s) or not)**Default No of Rules**

When defining the shipping rates for the various shipping methods and their routes, the Default No of Rules defines the default number of rules that will appear on the page. **Max Rules**

When defining the shipping rates for the various shipping methods and their routes, the Max Rules defines the maximum number of rules that will can be added for a particular rule.

After an order has been received and declined for refund and replacement, this field defines whether the “Returning Limit” of the declined order is refreshed or not. (e.g. if a shopper purchases an order, he/she is given 45 days within which to return the products for whatever reason, after 7 days the shopper decides to return the products for replacement, but the merchant decides that the grounds for replacement is inadequate and returns the original item(s), once the returned products are sent out, the “Declin Expiry Refresh” defines whether the shopper is given another 45 days within which to re-return the purchased item(s) or not)**Default No of Rules**

When defining the shipping rates for the various shipping methods and their routes, the Default No of Rules defines the default number of rules that will appear on the page. **Max Rules**

When defining the shipping rates for the various shipping methods and their routes, the Max Rules defines the maximum number of rules that will can be added for a particular rule.

Shipping Method

Basic

Different shipping methods may be created for the delivery of goods to shoppers. When adding a shipping method, the merchant should define the shipping method and include the delivery times for the shipping method. (e.g. Shipping Method : Standard Registered Mail / Delivery Times : 5 – 7 working days)

Currency

Intermediate

CartSmith is offers a multi-currency shopping environment. The default currency should be the first currency added and whose value should be 1.00, the default currency can be any currency whatsoever. To add a currency, click on "ADD currency". **Code**

Defines the three-letter code of the currency (e.g. US Dollars is USD, Hong Kong dollars is HKD and British Pounds is GBP)**Symbol left**

For some currencies the currency symbol precedes the monetary amount and is placed to the left (e.g. US dollars the left symbol is \$ or US\$, Hong Kong dollars is \$ or HK\$, etc.) If the currency symbol should come after the monetary amount, this field should be left blank.

Symbol Right

For some currencies the currency symbol follows the monetary amount and is placed to the right (e.g. French Francs the right symbol is F or FF, Deutsch Mark is DM or DEM, etc.) If the currency symbol should come before the monetary amount, this field should be left blank.

Decimal Right

Defines the symbol used for the decimal place. In most countries, it is denoted by a full stop but there are certain european countries where the decimal place is denoted by a comma. (e.g. for French Francs the Decimal Right will be a "," whereas for Hong Kong dollars the Decimal Right will ".")**Thousand Point**

Defines the symbol used for the thousand separator. In most countries, it is denoted by a comma but there are certain european countries where a full-stop is used instead and in Sweden a space is used.**Value**

Defines the exchange rates of the currency against the first currency added which is defined as 1. (e.g. If the first currency added is Hong Kong dollar, it's value will be 1 and subsequently if US dollar is added next the value will be 0.1282)

Warehouse

Basic

The Warehouse section offers the merchant the ability to add the warehouse locations where the stock is stored. To add a warehouse click on the "ADD warehouse" link.

SUPPORT

The Support area allows you to send an email to the Hodfords Support Department, should you require any technical assistance or troubleshooting.

BILLING

The Billing area allows you to send an email to the Hodfords Billing Department.

USERS

The Users area allows you to manage users and manage access rights for each user. This role is generally carried out by the Administrator.

Add User

Advanced

To give a new user access to the GUI can be done through this function. "**cmuser**" refers to the login name

"**cmgroup**" refers to the group to which users belongs

"**password**" is the password which the cmuser should enter to login

"**cm_permission**" can be set either to "No Access" or "Have Access" and refers to whether the cmuser has the privilege to manage users

"**cm_accounts**" can be set either to "No Access" or "Have Access" and refers to whether the cmuser has the privilege to access the accounts information. For each section of the site, there will be a choice of "No Access" or a pre-defined access level represented by a number. Each number refers to an access-level which may have a different set off privileges within the section. The privileges of each access-level can be defined in "Security Editor" within the section. "0" represents the highest level access to that section.

Edit User

Advanced

To change the access rights of an existing user can be done through Edit User. Edit User follows all the same protocol as Add User.

Remove User

Advanced

To completely remove a user from having access to the GUI.

LOGOUT

Logout allows users to logout from the GUI after use. After each session, it is advisable to logout to avoid any unauthorised access.

TEMPLATE EDITOR

The Template Editor empowers users to manage the templates that govern the display of contents, preview category level pages and edit preferences.

Add Template

Advanced

“Add Template” allows users to create templates within a particular category.

This function should only be used by advanced users who have programming knowledge.

The underlying programming language governing Templates is PHP. For more information about PHP, please visit website (<http://www.php.net/>).

For the pre-defined variables and functions on how to create templates, please refer to the Developers’ Guide.

“**Filename**” refers to the template’s filename, can be arbitrary, but generally should suffixed with .phtml or .php.

“**Output_filename**” refers the name of the file that would be generated, an example would be : index.html, index.xml or index.wml.

“**Template_dir_name**” refers the directory name that would be created within the category to store the output file.

“**Type**” refers to the type of template being created. DIR – refers to templates for category information, PRODUCTS – refers to templates for the display of items, ATTACHMENT – refers to templates for the display of attachments.

“**Multiple**” refers to whether or not multiple pages need to be generated for the template. This option is only applicable to templates for PRODUCTS. When set to “y”- it means that multiple pages would be generated for the display of all the items within the category and when set to “n” – it means that only one page would be generated for the display of all the items within the category.

“**Item_quantity**” is only valid if the “Multiple” option is set to “y” and refers to how many items would be displayed within each page.

“**Main_html**” will contain the source codes for template.

Edit Template

Advanced

Edit Template allows users to make changes to existing templates.

All the rules described in “Add Template” apply.

Remove Template

Advanced

Remove Template allows users to delete a template within a particular category.

Please note that once removed, it cannot be undone.

Preview Category

Basic

Preview Category allows users to preview how an item will appear before being published.

There may be more than one page generated per item and the exact type-setting of the page will be governed by the template of the category in which the item belongs.

The default preview name for displaying the item “**page1**”.

Global Update Templates

Advanced

Global Update Templates allows users to synchronise all templates to the uploaded template.

This function should not be used under normal circumstances.

Edit Configuration

Advanced

Edit Configuration allows users to change the configuration and certain preferences of the GUI.

The underlying programming language governing Templates is PHP. For more information about PHP, please visit website (<http://www.php.net/>).

The user using this function should be an advanced user.

SECURITY EDITOR

The Security Editor allows the authorised users to define which functions are permitted for each access-level.

Add Security Level

Intermediate

Add Security Level allows authorised users to create a new access-level that defines a set of privileges.

The “top level” is defined as “**level : 0**” and “**level : 1**” refers to all the categories below the “top level”.

Users can define which functions are allowed or not at which level, by selecting “YES” or “NO” next to the particular function.

Edit Security Level

Intermediate

Add Security Level allows authorised users to edit the privileges of an existing security level.

All the same rules described in “Add Security Level” apply.

Remove Security Level

Remove Security Level allows the a particular Security Level to be removed.

Once a Security Level has been removed, it cannot be undone.

- End -