Commerce v7 User Guide

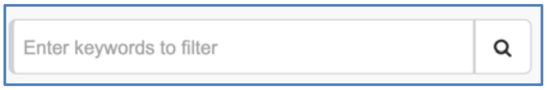
Last Modified: April 15, 2020

Table of Contents

Bridgeline Unbound Product Suite General Overview

Bridgeline Unbound is web-based, internet-connected, with no need to download software.

- All Unbound modules use the same dashboard setup for navigation and general functionality. Knowing one tool helps you to understand how to use them all. For example, all Unbound **Commerce** product pages and information are fully integrated into Unbound **Content**.
- In most of Bridgeline Unbound, you can find your way easily by using the Filter bar.



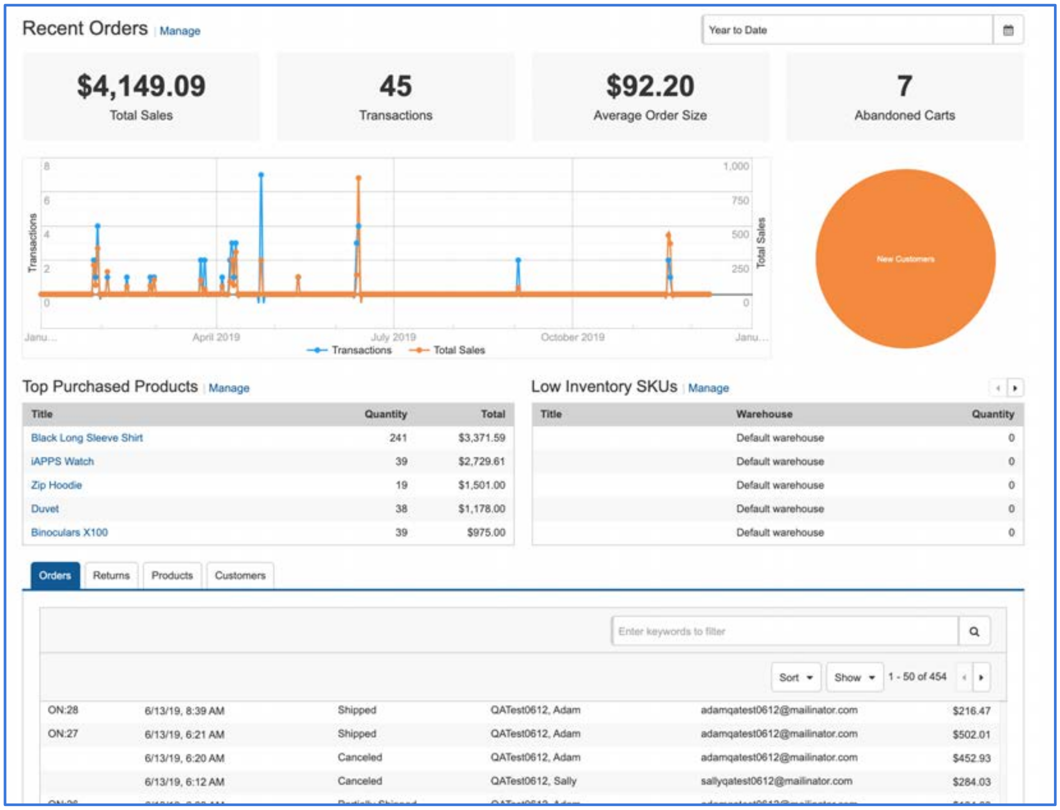
Unbound Commerce Overview

Unbound Commerce helps you build eCommerce websites and manage commerce web content. It provides many efficient functions for maintaining an online business.

Navigating the Commerce Dashboard

- On the Unbound products menu at the top of the screen, select Commerce.
- In the sub-menu under the Unbound banner, you will see you have the option of selecting the categories Store Manager, Reports, Administration, and For Developers.

- You will also see graphs and lists of recent activity.

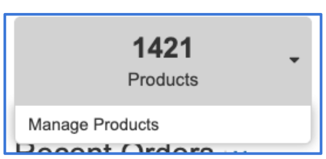


Products, Orders, Returns, Coupons & Customers

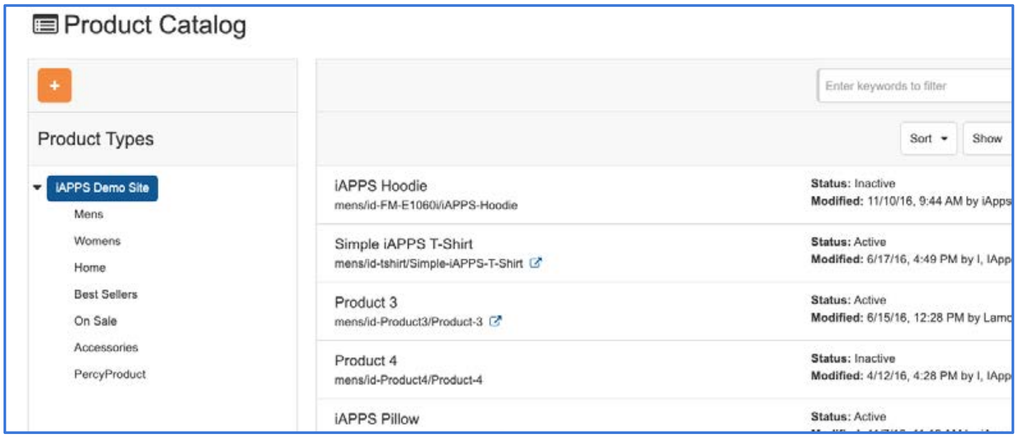
One of the first things you will probably notice when you click Commerce, along with the page of graphs and other recent statistics, is a menu of information that you can quickly access.

Click the arrow beside each feature in order to manage it.

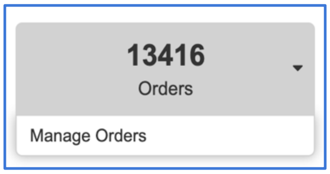
- When you click the arrow beside Products, and then **Manage Products**,



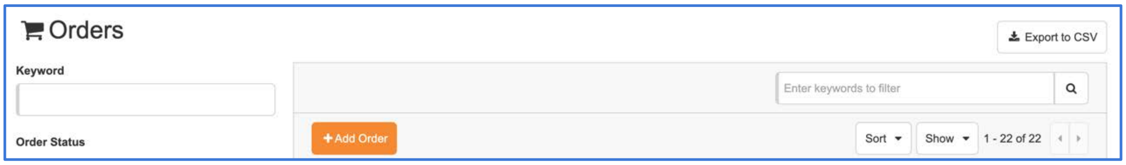
the Product Catalog page appears.



- When you click the arrow beside Orders, and then **Manage Orders**,

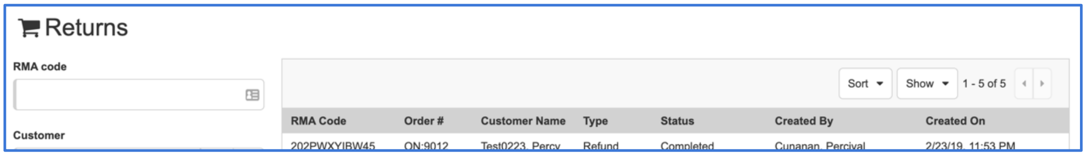


the Orders page appears.

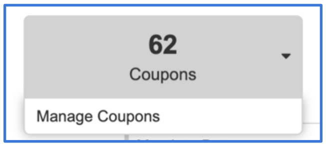


- When you click the arrow beside Returns, and then **Manage Returns**,

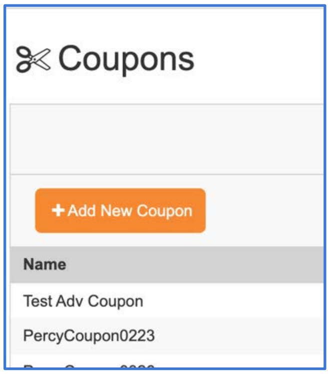
the Returns page appears.



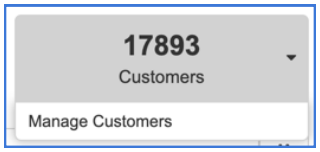
- When you click the arrow beside Coupons, and then **Manage Coupons**,



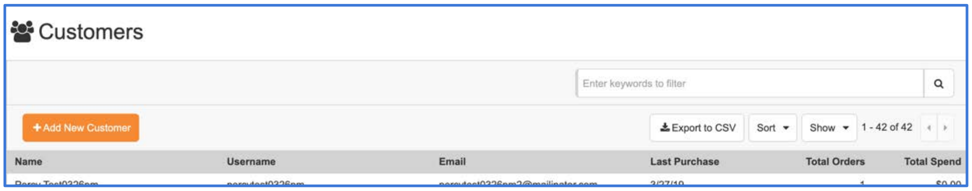
the Coupons page appears.



- When you click the arrow beside Customers, and then **Manage Customers**,

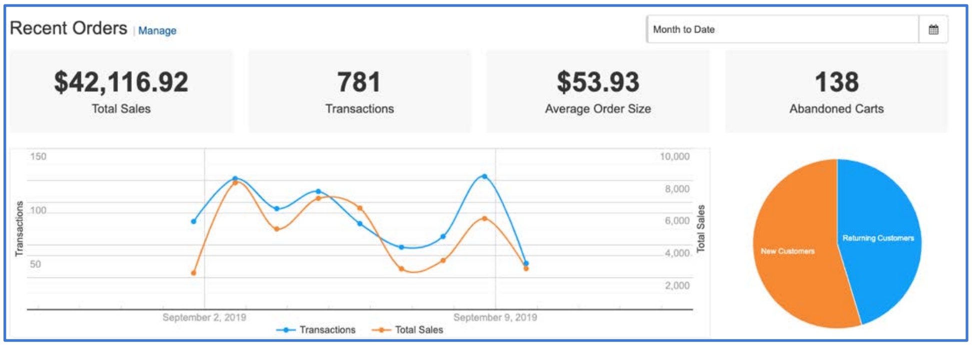


the Customers page appears.



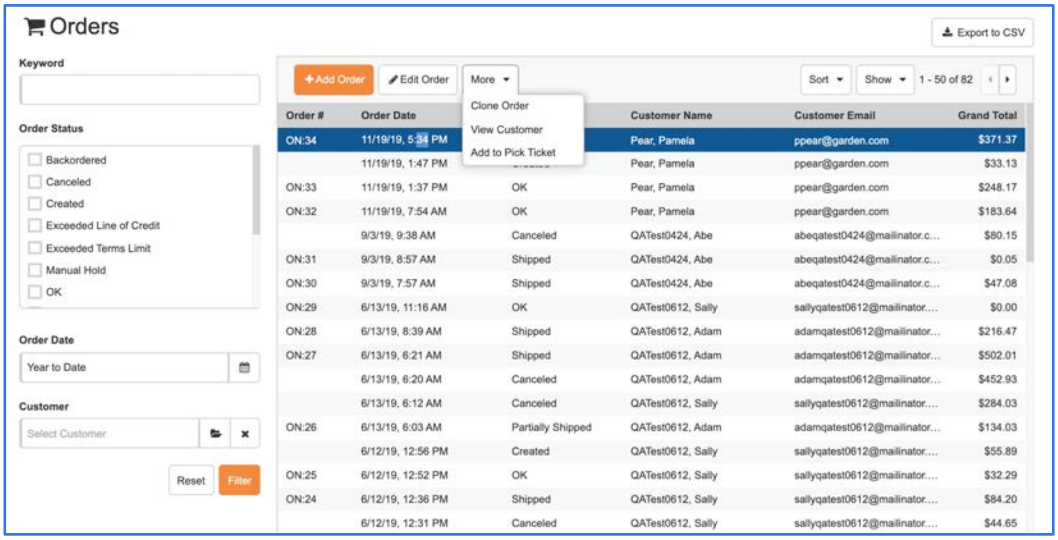
Recent Orders

This section appears in the form of information, and also as graphs, for Total Sales, Transactions, Average Order Size, and Abandoned Carts.



- For more functionality, beside Recent Orders, click **Manage**.

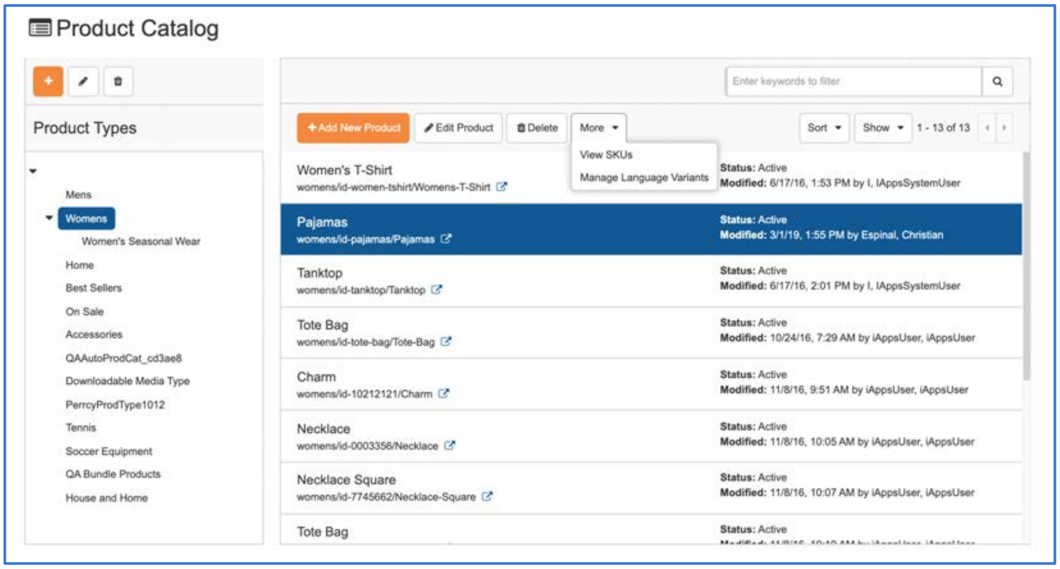
- On the Orders page, manage orders using a filter panel and search menus; or use it to add or edit orders; or to take advantage of other options using the "More" menu.



Top Purchased Products

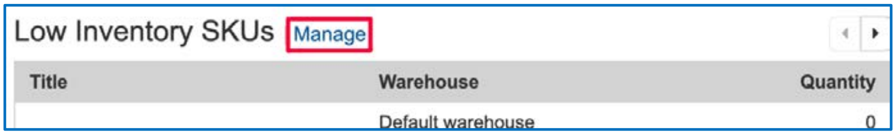
- Beside Top Purchased Products, click **Manage**.

- On the Product Catalog page, manage your Product Types and Products.

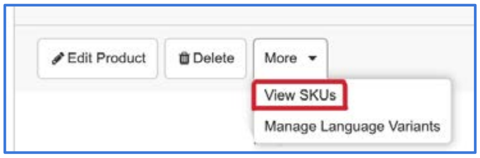


Low-Inventory SKUs

- To the right of Top Purchased Products, beside Low Inventory SKUs, click **Manage**.



- On the Product Catalog page, using the More dropdown menu, view your SKUs.

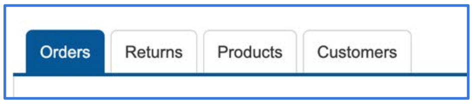


  - Using the More dropdown menu, you can also manage Language Variants.

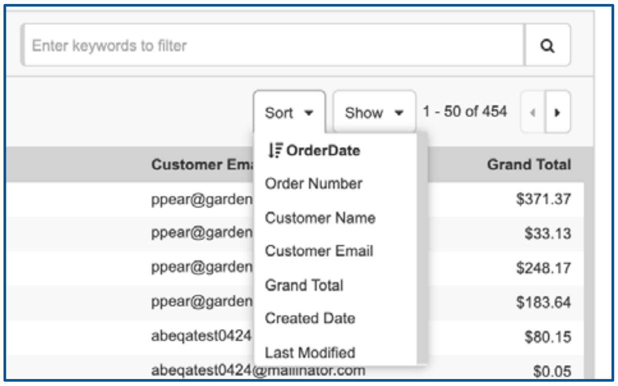
More options

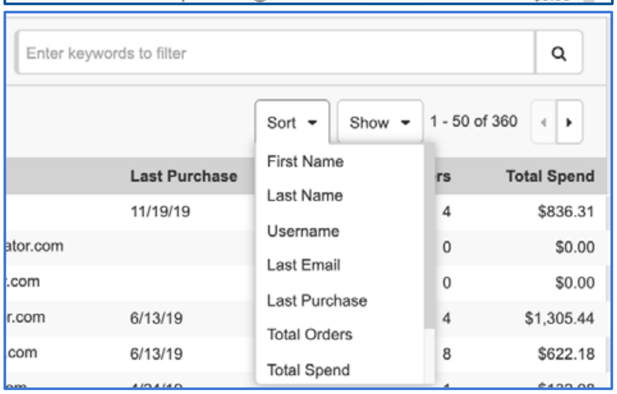
Under Top Purchased Products and Low-Inventory SKUs are tabs for

- Orders
- Returns
- Products
- Customers

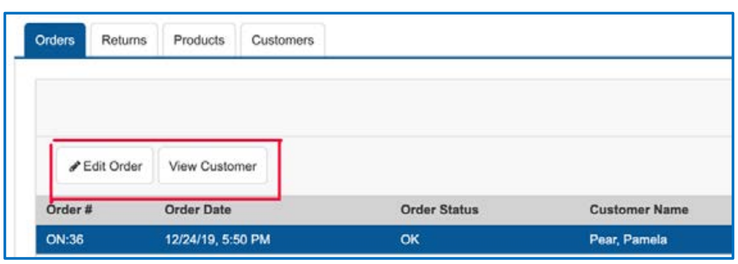


- You can filter your items within each tab.



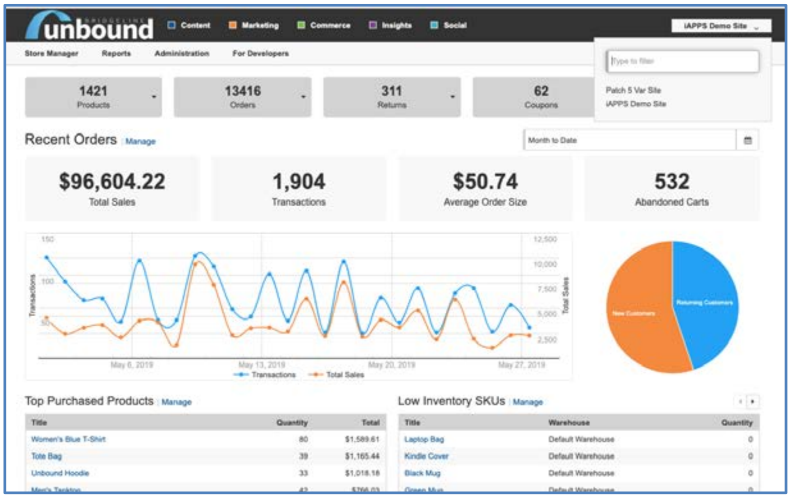


- You have further control if you click on each item in the list and use the tabs at the top of the list.



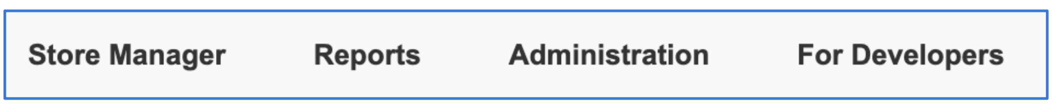
Navigating Commerce

- Click Commerce in the Bridgeline Unbound products menu.



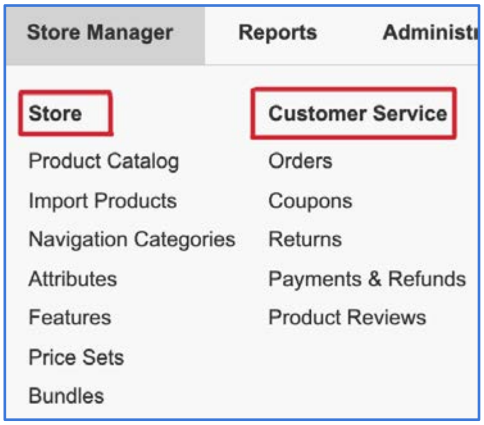
Note: Depending on your privileges, you might be able to view the pages but not edit them.

- In the sub-menu of sections below the Unbound products menu, select one of the following:
  - Store Manager
  - Reports
  - Administration
  - For Developers



Store Manager

- Under **Store Manager**, there are two sections. Choose an item from **Store** or **Customer Service**.

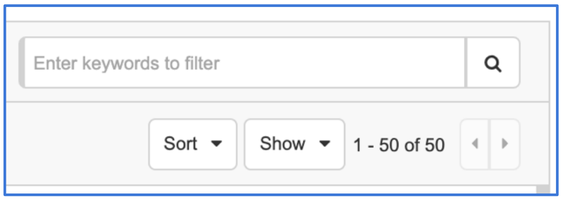


Store Manager – Store

Product Catalog

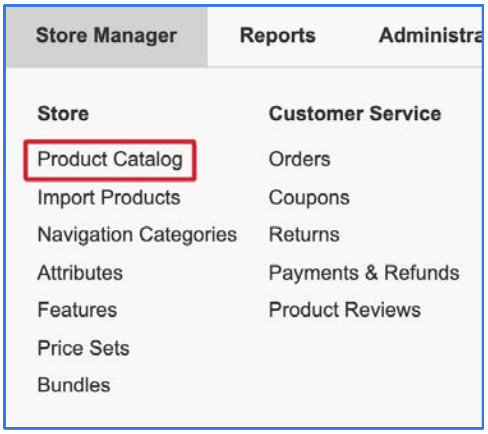
Your Product Catalog is at the heart of every other function. This is where it all starts.

- A search panel helps you to find your products by Keyword or by using the Sort and Show menus.

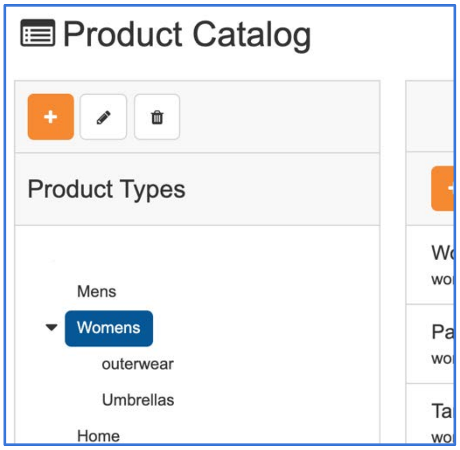


Product Types

- Under Store Manager – Store, select **Product Catalog.**

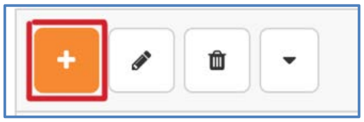


- On the Product Catalog page, in the Product Types panel, select a Product Type.

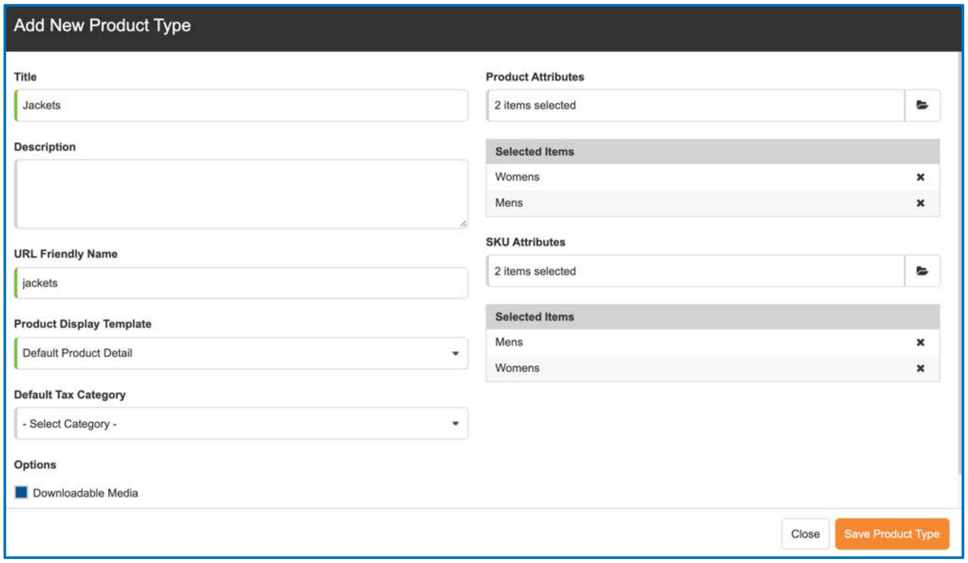


Add a Product Type

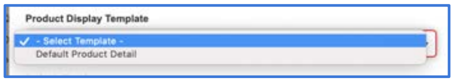
- In the Product Types panel, click the Add icon.



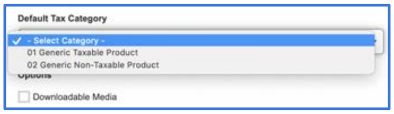
- On the Add New Product Type page, in the Title field, enter a title.
    - This automatically populates the "URL Friendly Name" field.



- Optionally, in the Description field, add a description.
- In the Product Display Template field, use the arrow to make your selection.



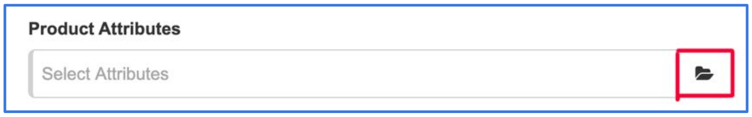
- Optionally, in the Default Tax Category field, use the arrow to make your selection.



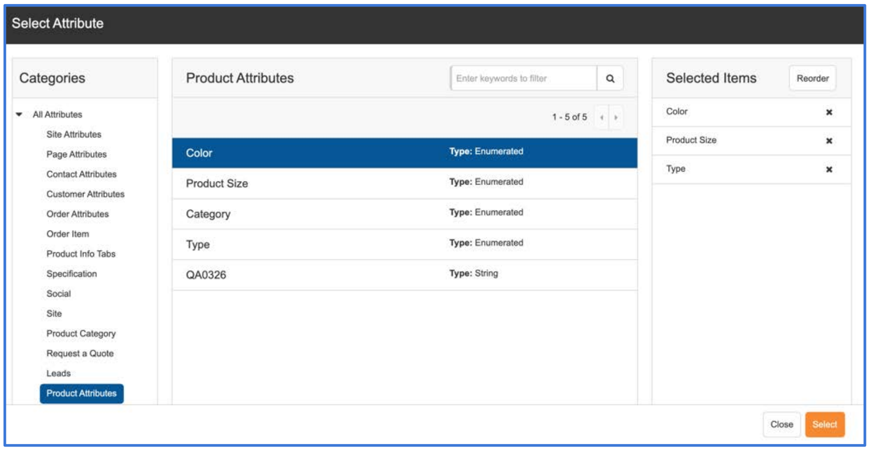
- Optionally, select the check box beside Downloadable Media.

Product Attributes

- Optionally, click the folder icon in the Product Attributes field.

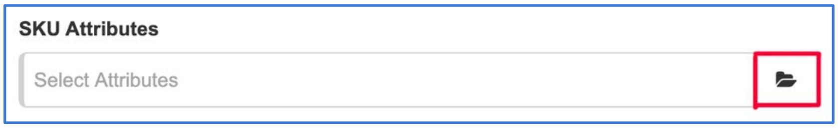


  - On the Select Attribute page, in the Categories panel, select a category.
  - In the panel on the right, in the Attributes for that category, make your selection.
  - In the Selected Items panel on the far right, click **Select**, or **Close** to return to the Add New Product Type page.

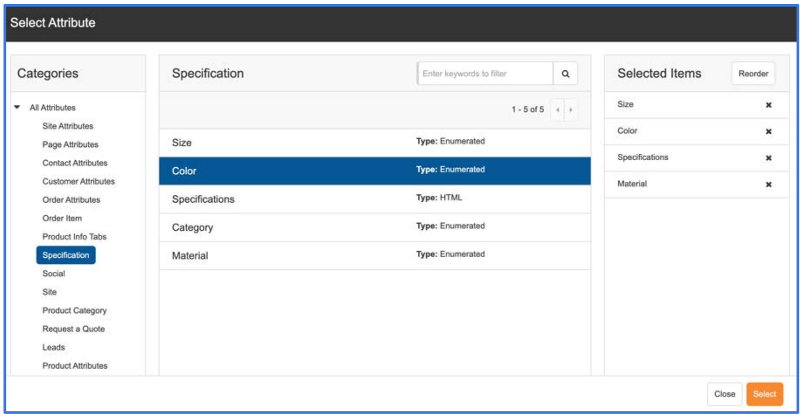


SKU Attributes

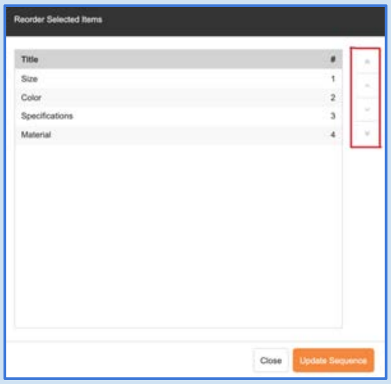
- Optionally, click the folder icon in the SKU Attributes field.



- On the Select Attribute page, in the Categories panel, select a category.
- In the panel on the right, in the Attributes for that category, make your selection.
- In the Selected Items panel on the far right, click **Select**, or **Close** to return to the Add New Product Type page.



Note: In many Selected Items panels, you can click **Reorder** to rearrange your list. In the Reorder Selected Items dialog, use the arrows to change the order of the items. Click **Update Sequence**, or **Close** to return to the previous page.



- On the Add New Product Type page, click **Save Product Type**, or **Close** to return to the Product Catalog page.

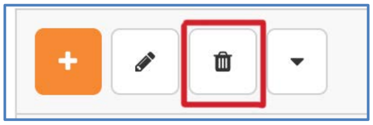
Edit a Product Type

- In the Product Types panel, select a product type. Click the **Edit** icon.

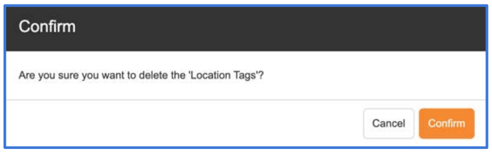
- On the Edit Product Type page, make your revision.
- Click **Save**, or **Close** to return to Product Types.

Delete a Product Type

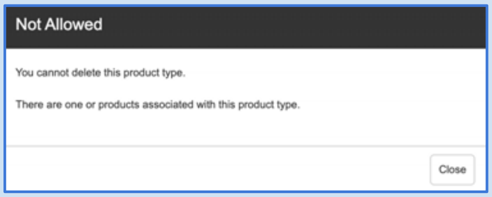
- In the Product Types panel, select a product type. Click the **Delete** icon.



- If there have been no products associated with the product type, in the Confirm dialog, click **Confirm**; or **Close** to return to Product Types.



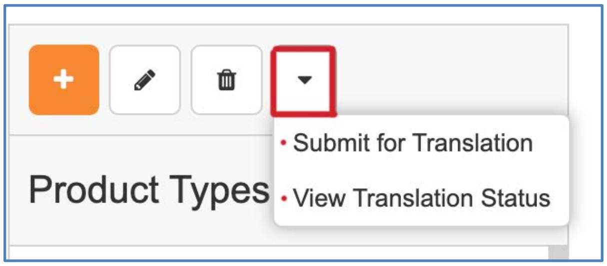
Note: If there are products associated with the product type, you will not be able to delete it.



Translate a Product Type

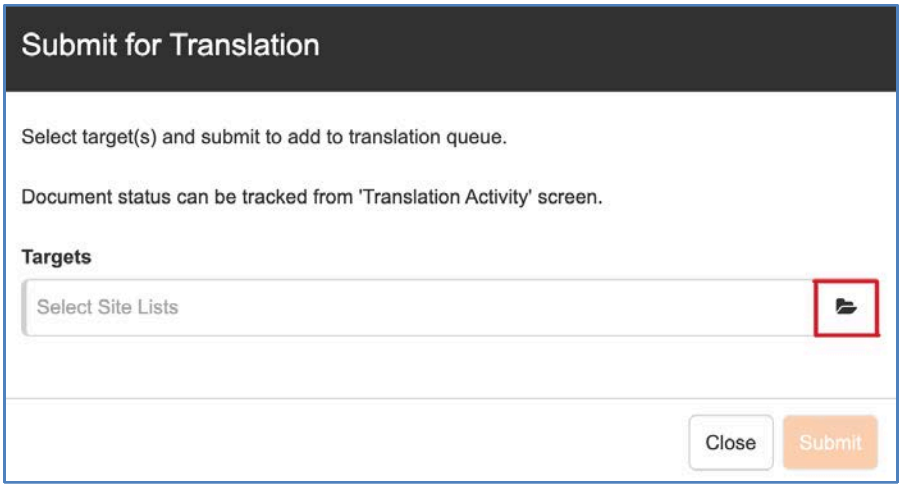
- In the Product Types panel, select a product type.

- At the top of the panel, in the row of icons, use the dropdown arrow to select **Submit for Translation** or **View Translation Status**.

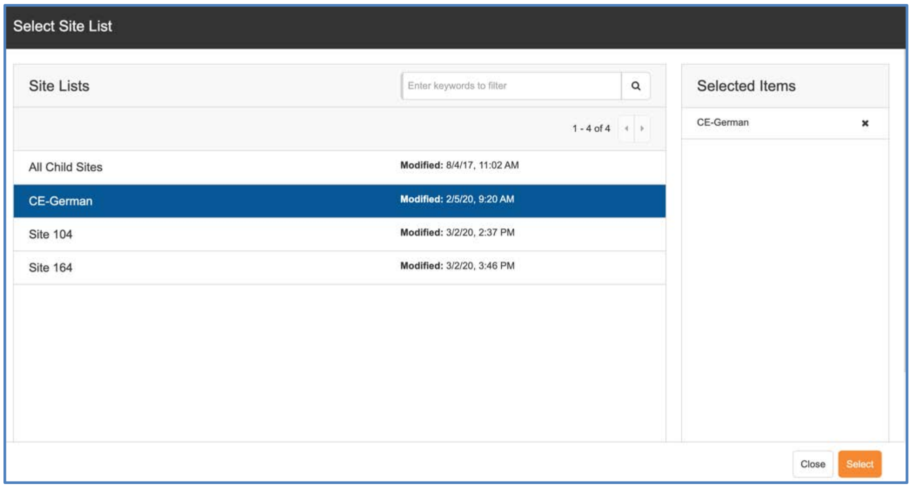


Submit for Translation

- If you choose Submit for Translation, in the Submit for Translation dialog, in the Targets field, click the folder icon.



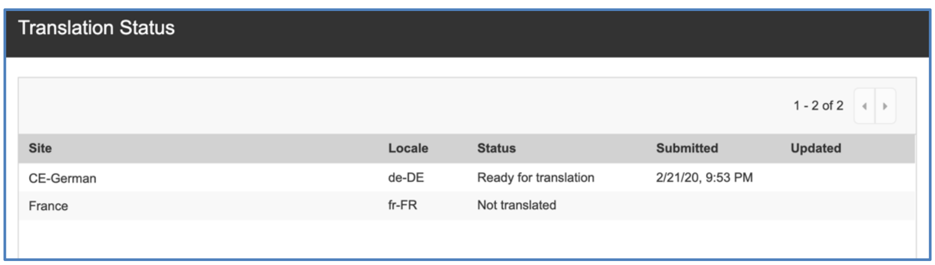
- On the Select Site List page, choose a site or sites.



- In the Selected Items panel, click **Select**.
- On the Submit for Translation dialog, click **Submit**.

View Translation Status

- If you select View Translation Status, you'll see at a glance the status of your variant sites.


Translation Status

1 - 2 of 2

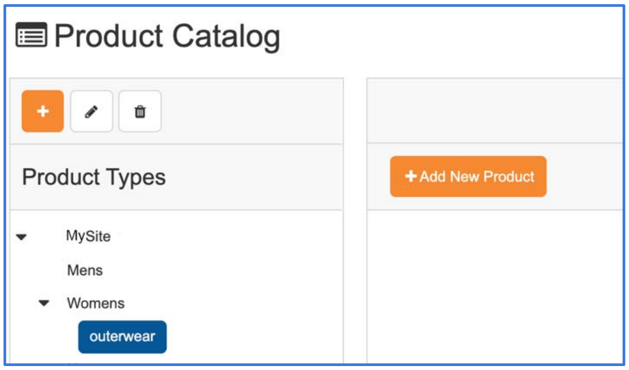
Site	Locale	Status	Submitted	Updated
CE-German	de-DE	Ready for translation	2/21/20, 9:53 PM	
France	fr-FR	Not translated		

Products

The Products panel in the Product Catalog is a kind of huge filing system of all the products in your inventory, but it's dynamic – a place where you can add new products, edit them, delete them, and more.

Add a new product

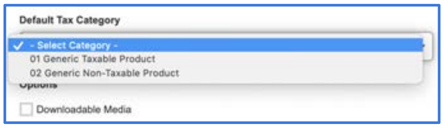
- On the Product Catalog page, in the panel on the left, select a Product **Type**.
- In the list-of-products panel on the right, click **Add New Product**.



Properties

- On the New Product page, under Properties, enter a Title and Unique Identifier (often part of an SKU).

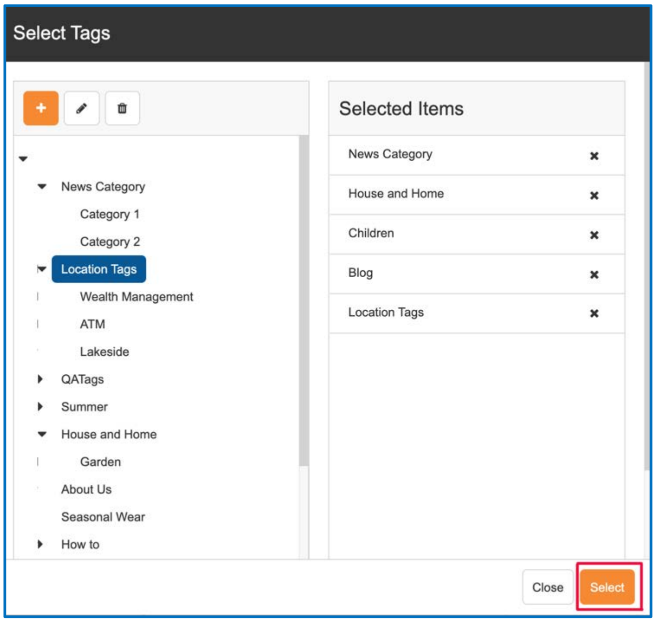
- Optionally, use the arrow in the Default Tax Category field to select a Default Tax Category.



Select Tags

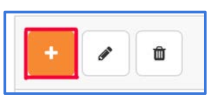
- Optionally, click the folder icon to select Tags.

- On the Select Tags page, select a Tags category. Under Selected Items, click **Select**; or **Close** to return to the New Product page.

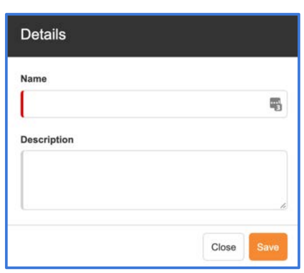


Add a Tag

- On the Select Tags page, select a tag category and click the **Add** icon.



  - In the Details dialog, add your information.

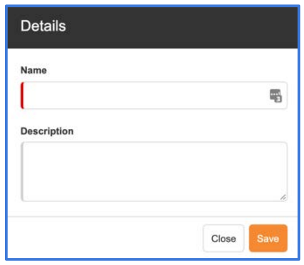


  - Click **Save**, or **Close** to return to Select Tags.

Edit a Tag

- On the Select Tags page, select a tag category and click the **Edit** icon.

  - In the Details dialog, make your revision.

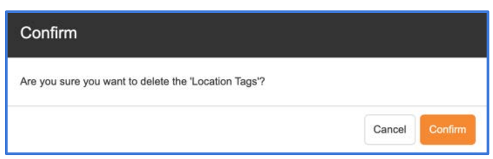


  - Click **Save**, or **Close** to return to Select Tags.

Delete a Tag

- On the Select Tags page, select a tag category and click the **Delete** icon.

  - In the Confirm dialog, click **Confirm**, or **Cancel** to return to Select Tags.



SEO fields

- Optionally, fill in the fields for SEO Friendly URL, SEO Title, SEO H1, SEO Description, SEO Keywords.

Descriptions

- Optionally, fill in a short and/or longer Description of the product.

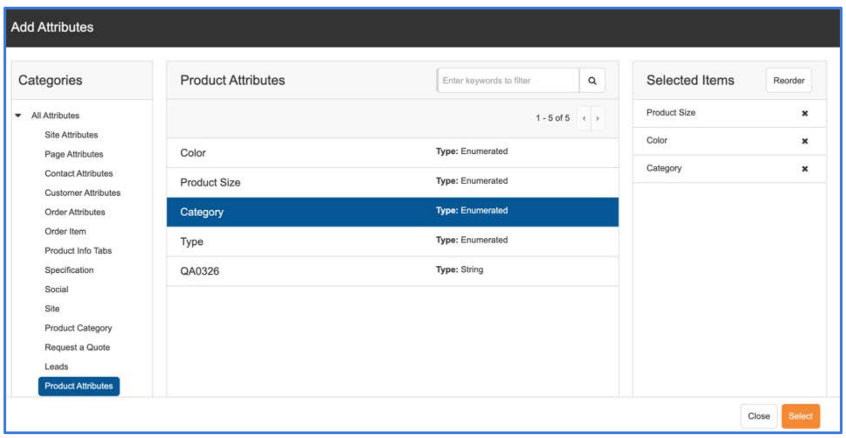
Attributes

Note: To learn more about Attributes, please see Manage Attributes.

- Optionally, assign values for the attribute.

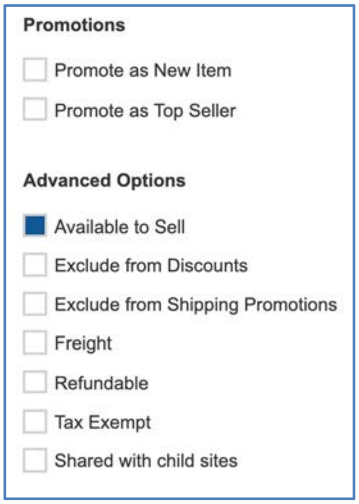
- Optionally, click **Add Attribute(s).**

- On the Add Attributes page, select a category from the Categories panel.

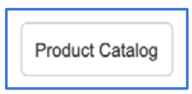


Promotions and Advanced Options

- Optionally on the New Product page, select check boxes under "Promotions" or "Advanced Options".

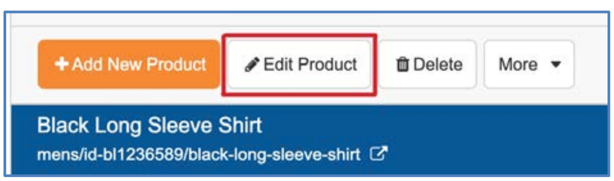


- Click **Save**.
  - To return to the Product Catalog page, click Product Catalog in the upper right.



Edit a Product

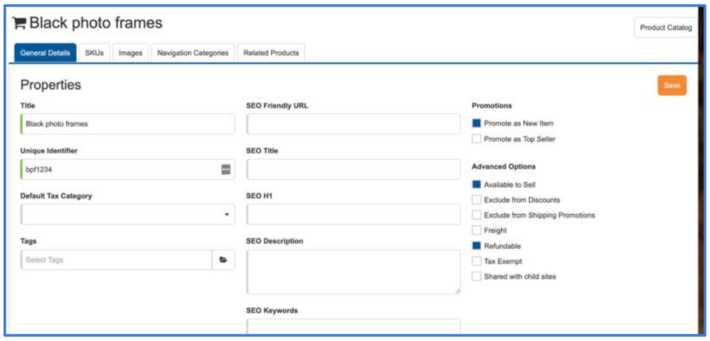
- On the Product Catalog page, in the Product Types panel, select a Product Type.
- In the panel on the right, select a product.
- Click **Edit Product**.



- On the page for your new product, there are four sections under these tabs:
  - General Details
  - SKUs
  - Images
  - Navigation Categories
  - Related Products

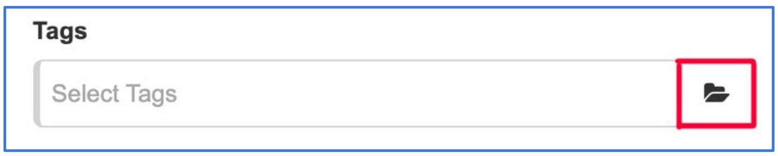
General Details

- Under the General Details tab, add a Title and a Unique Identifier (usually a SKU).

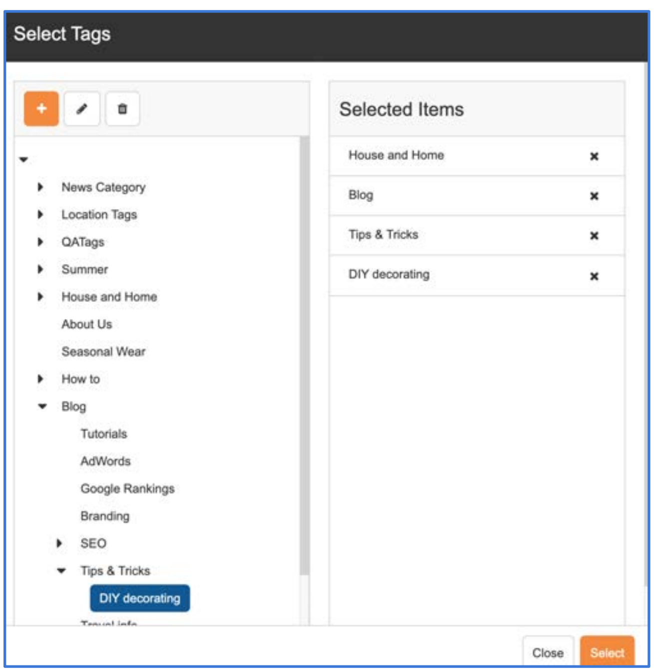


Tags

- Optionally, click the folder icon to select Tags.



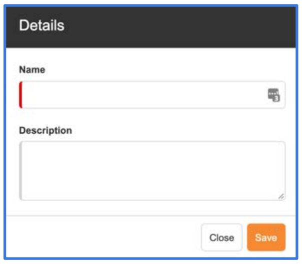
- On the Select Tags page, select a category. Under Selected Items, click **Select**, or **Close** to return to Properties.



Add a Tag

- To add a Tag, click the **Add** icon.

- In the Details dialog, add your information. Click **Save**, or **Close** to return to Select Tags.



Edit a Tag

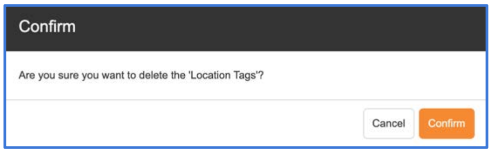
- To edit a Tag, click the **Edit** icon.

- In the Details dialog, make your revision. Click **Save**, or **Close** to return to Select Tags.

Delete a Tag

- To delete a Tag, click the **Delete** icon.

In the Confirm dialog, click **Confirm**, or **Close** to return to Select Tags.



SEO fields

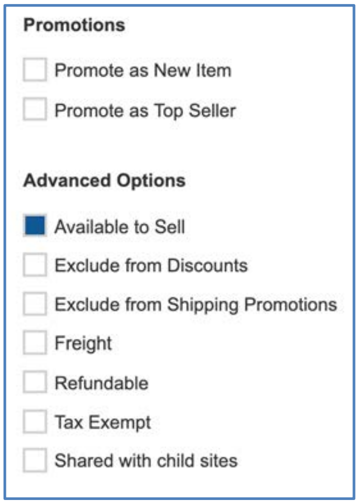
- Optionally, fill in the fields for SEO Friendly URL, SEO Title, SEO H1, SEO Description, SEO Keywords.

Descriptions

- Optionally, fill in a short and/or longer Description of the product.

Promotions and Advanced Options

- Optionally on the New Product page, select check boxes under "Promotions" or "Advanced Options".



Attributes

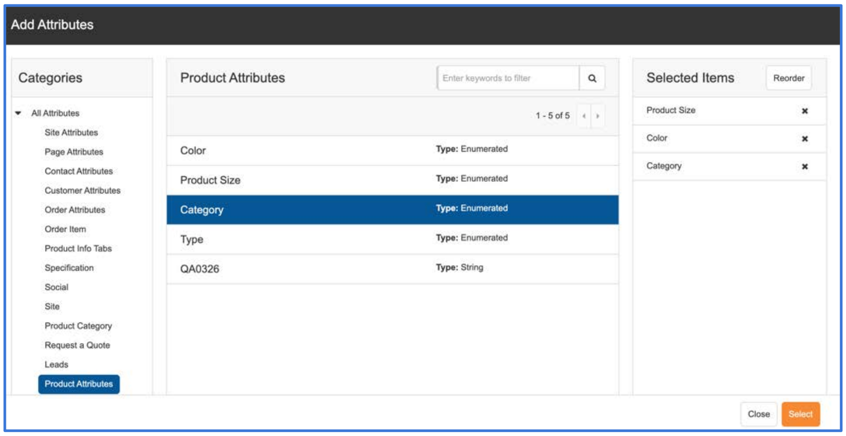
Note: To learn more about Attributes, please see [Manage Attributes](#).

Optionally, assign values for the attribute.

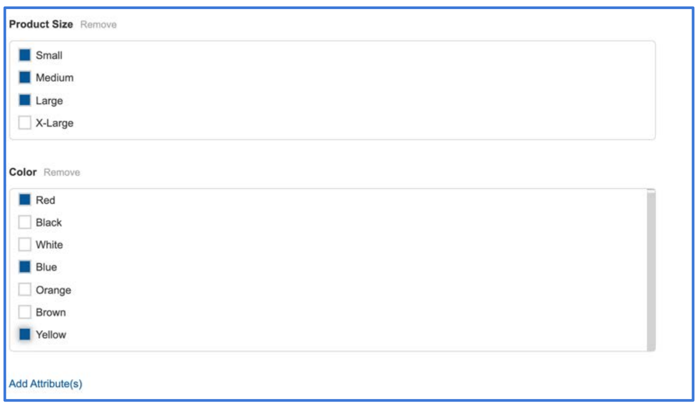
- Optionally, select an Attribute from the dropdown arrow in the Attributes field.

- Optionally, click **Add Attribute(s).**

- On the Add Attributes page, select a category from the Categories panel.



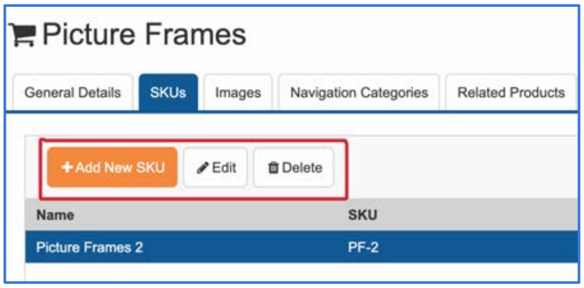
- Click **Select**, or **Close** to return to the Add Attribute(s) tab.
- On the Properties (General Details tab) assign values for the attributes.



- At the top of the page, click **Save**.

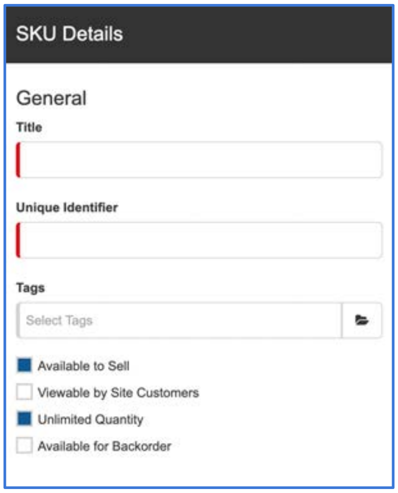
SKUs

- Under the SKUS tab, select an item from the list.
- Use the icons to Add a new SKU, Edit, or Delete.



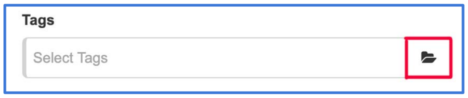
General

- If you choose to Add a New SKU, on the SKU Details page, in the General panel, Click **Add New SKU**.
- Enter a Title and Unique Identifier.

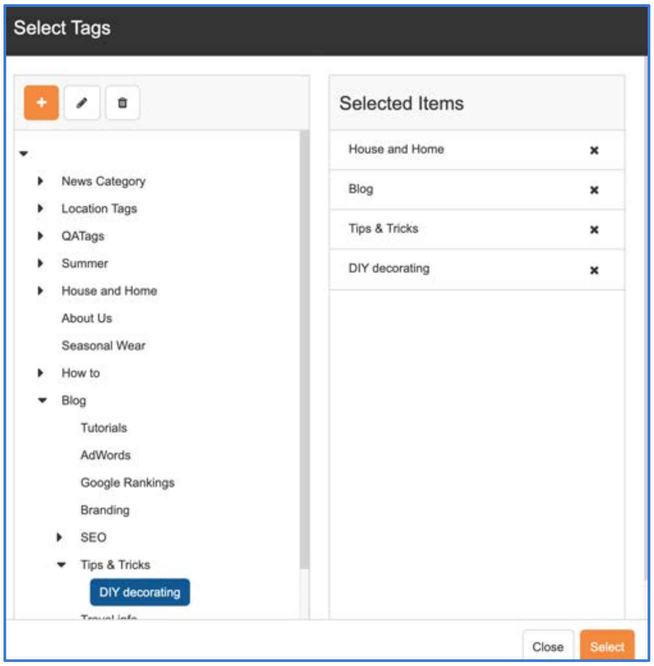


Tags

- Optionally, click the folder icon to select Tags.



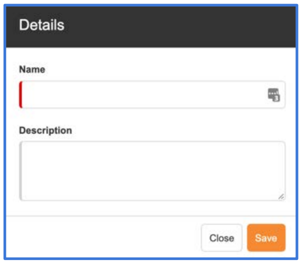
- On the Select Tags page, select a category.
- Under Selected Items, click **Select**; or **Close** to return to SKU Details.



Add a Tag

- To add a Tag, click the **Add** icon.

- In the Details dialog, add your information. Click **Save**, or **Close** to return to Select Tags.



Edit a Tag

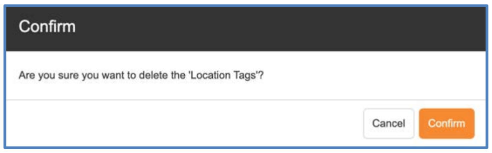
- To edit a Tag, click the **Edit** icon.

- In the Details dialog, make your revision. Click **Save**, or **Close** to return to Select Tags.

Delete a Tag

- To delete a Tag, click the **Delete** icon.

- In the Confirm dialog, click **Confirm**; or **Cancel** to return to Select Tags.

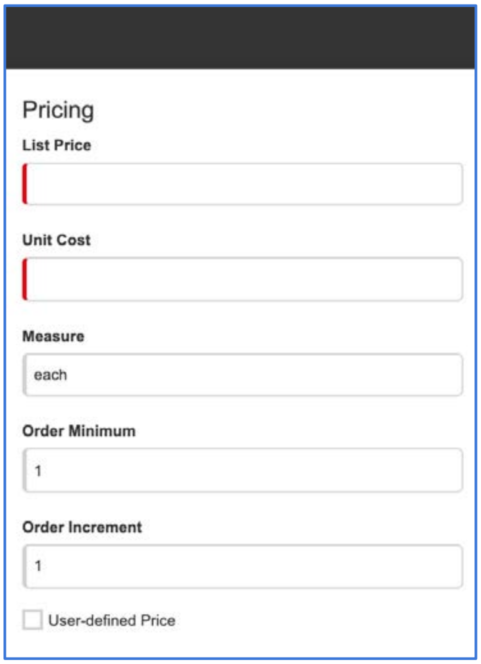


Other options

- Optionally, select the check boxes beside Available to Sell, Viewable by Site Customers, Unlimited Quantity, or Available for Backorder.

Pricing

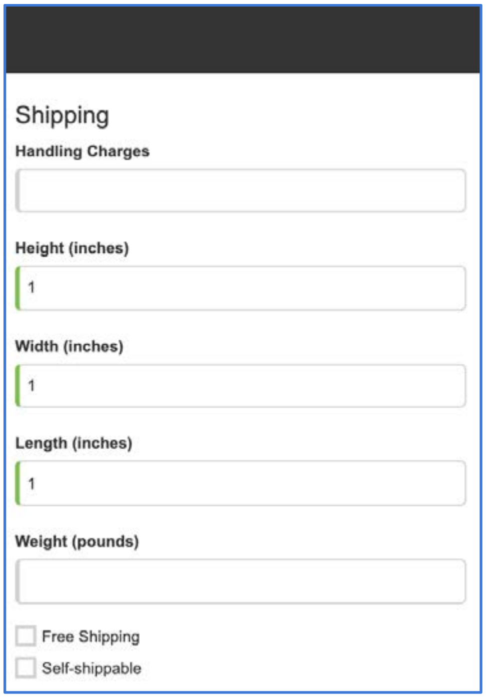
- In the Pricing section, name the List Price and Unit Cost.



- Optionally, add Measure, Order Minimum, Order Increment, and click the check box beside Order Increment.
- Optionally, select the check box beside User-defined Price.

Shipping

- Optionally, in the Shipping section, add Handling Charges, Height, Width, Length and Weight.

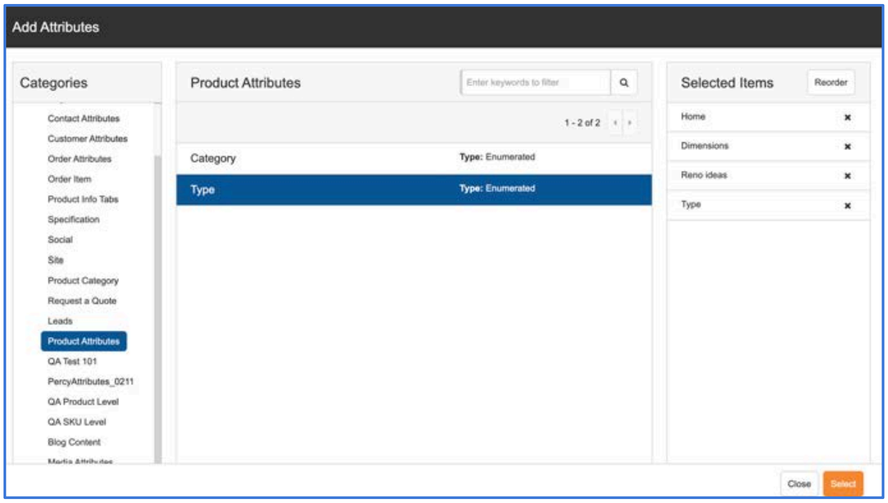


- Optionally, select the check boxes beside Free Shipping and Self-shippable.

Attributes – SKU Details

- Optionally, at the bottom of the SKU Details page, click **Add Attributes.**

- On the Add Attributes page, select a category from the Categories panel.

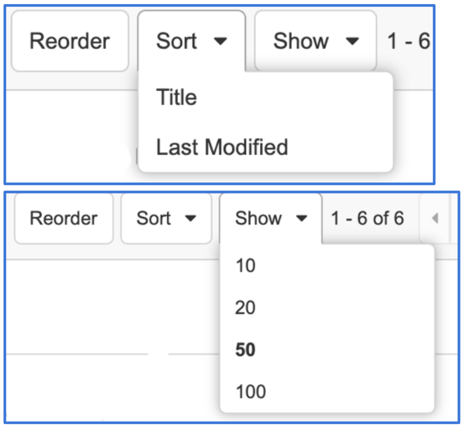


- Click **Select**, or **Close** to return to the Add Attribute(s) tab.

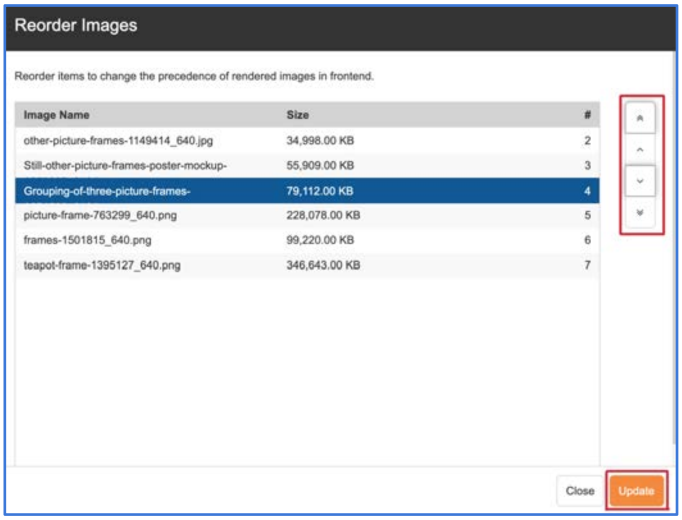
- On the main SKU Details page, select the values for the Attributes you have chosen.
  - Optionally, add more Attributes.
- Click **Save SKU**.

Images

- Under the Images tab, on the Product Images page, select an image from your list.
  - Optionally, you can Reorder or Sort your list; or determine how many items to show.



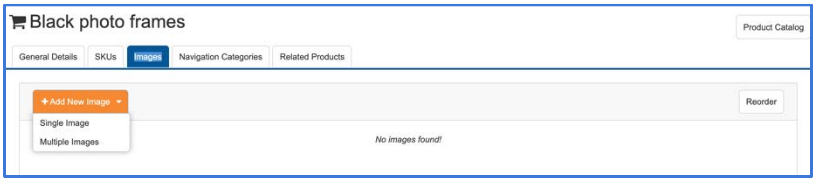
  - To reorder your list, select your images from the list and use the arrows to change their position on the page. Click **Update**.



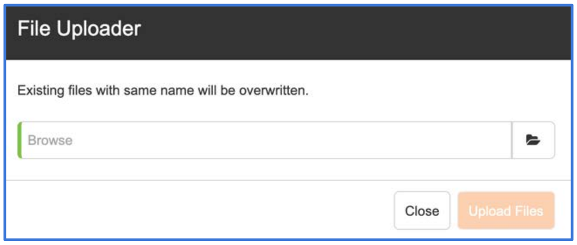
- In the Reorder Images dialog, click **Close**.

Add a new image

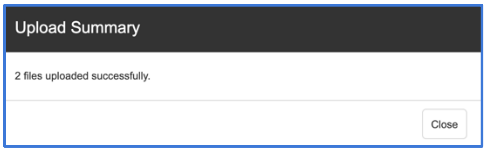
- To Add a New Image to your list, click **Add New Image**.
  - You have the option of adding a Single Image or Multiple Images.



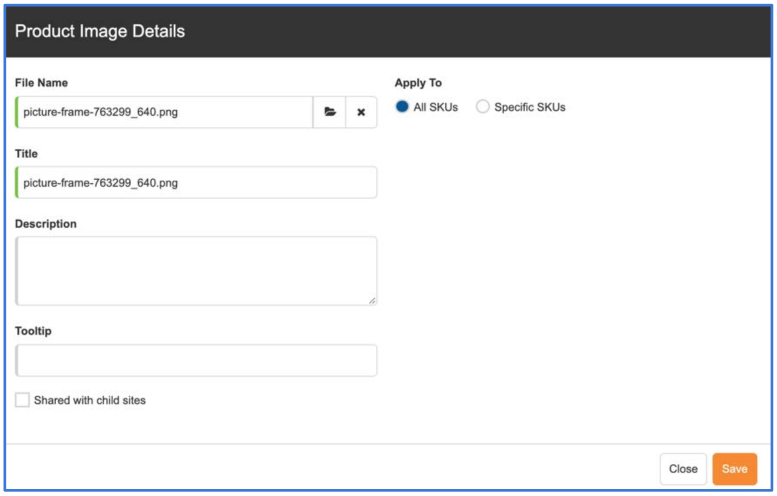
- If you choose Multiple Images, in the File Uploader dialog, click the folder icon to Browse for images in your files.



- In the Upload Summary dialog, click **Close**.



- If you choose Single Image, on the Product Image Details page, click on the folder icon to browse for an image. The name of the file is automatically populated as the Title of the photo.

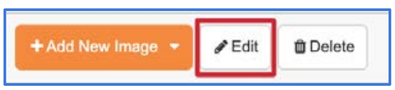


  - Optionally, give the image a description.
  - Optionally, provide a Tooltip.
  - Optionally, select the check box Shared with child sites.
  - Optionally, under "Apply To", select All SKUs or Specific SKUs.

- Click **Save**, or **Close** to return to the product page for the option of adding more images.

Edit an image

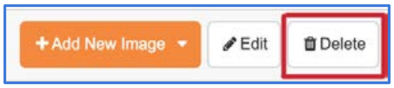
- Optionally, select an image from the list and click **Edit**.



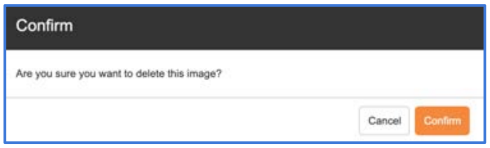
- On the Product Image Details page, make revisions or additions.
- Click **Save**, or **Close** to return to the Product page.

Delete an image

- Optionally, select an image from the list and click **Delete.**



- In the Confirm dialog, click **Confirm**, or **Cancel** to return to the Product page.

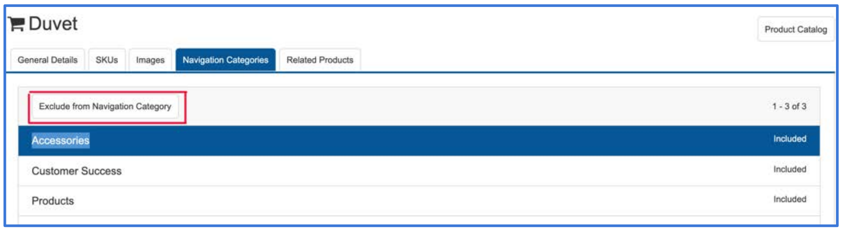


Navigation Categories

Under the Navigation Categories tab, you have the option of viewing or removing navigation categories.

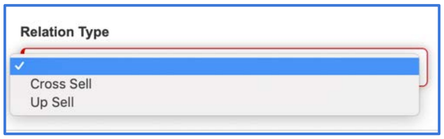
Remove a category

- Click on the Category.
- Click **Exclude from Navigation Category**

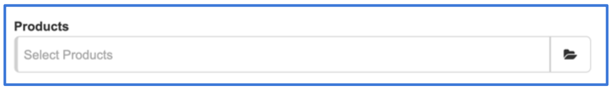


Related Products

- Under the Related Products tab, select a Relation Type.

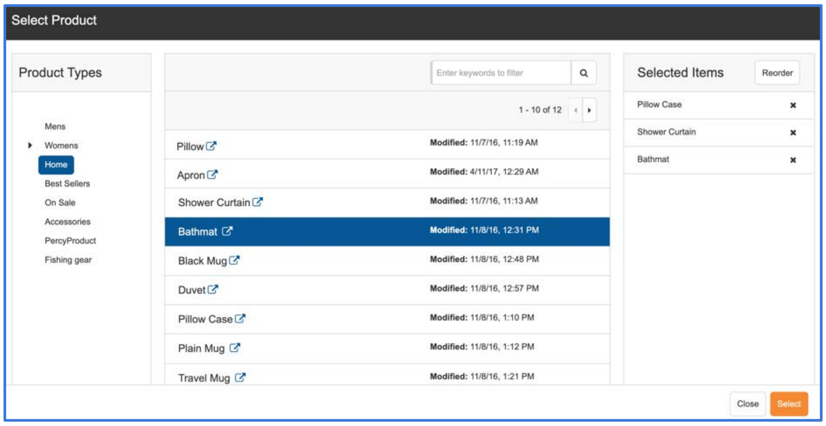


- In the Products field, click the folder icon to select Products.



- On the Select Product page, from Product Types, make a selection.

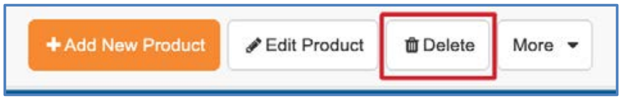
- From the panel on the right, select the related products.
- In the Selected Items panel on the far right, click **Select**; or **Close** to return to the Product page.



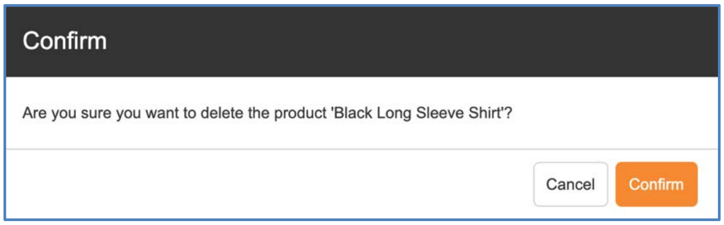
- On the product page, click **Save**.

Delete a Product

- On the Product Catalog page, in the Product Types panel, select a Product Type.
- In the panel on the right, select a product.
- Click **Delete**.

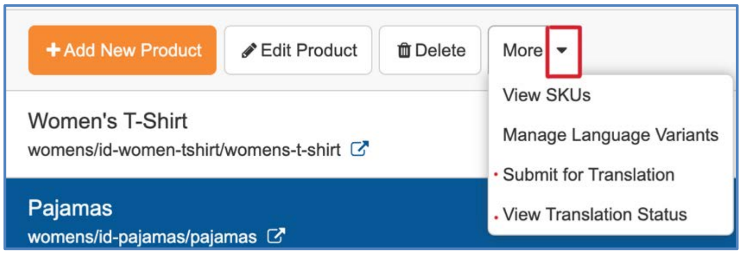


- In the Confirm dialog, click **Confirm**.



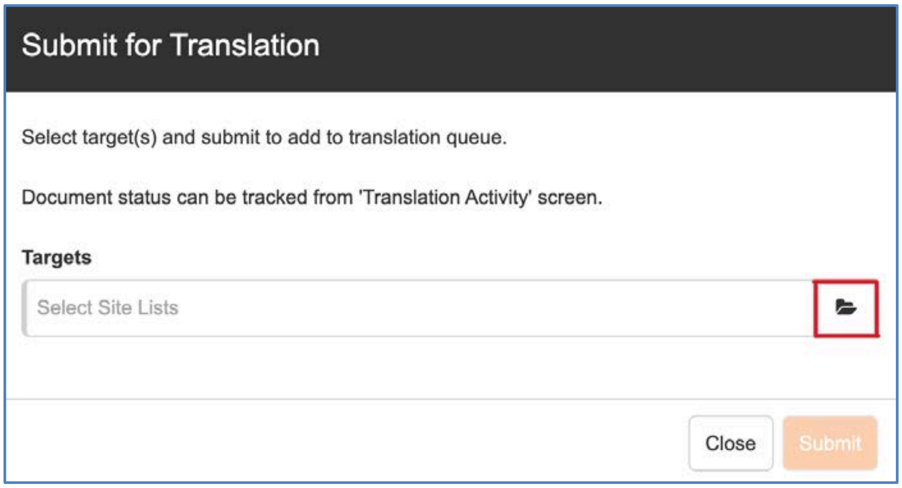
Translate a Product

- In the Product panel, select a product.
- At the top of the Product panel, In the row of icons, use the “More” dropdown arrow to select **Submit for Translation** or **View Translation Status**.

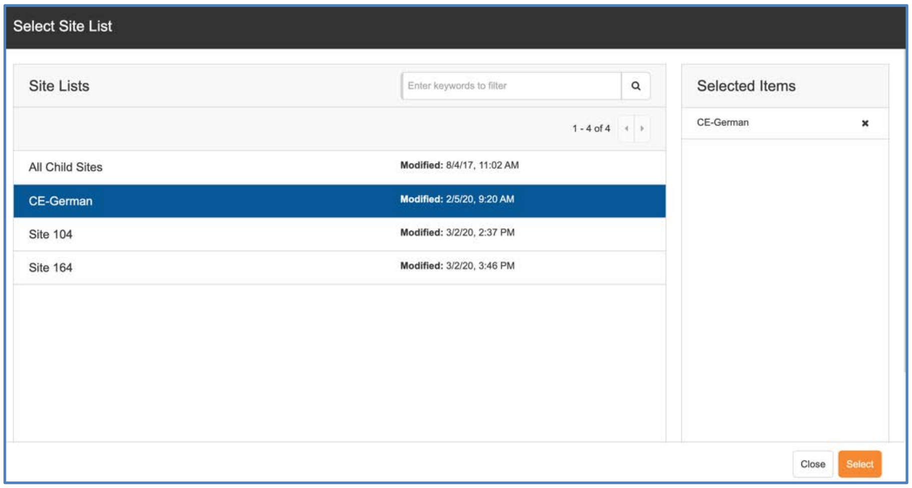


Submit for Translation

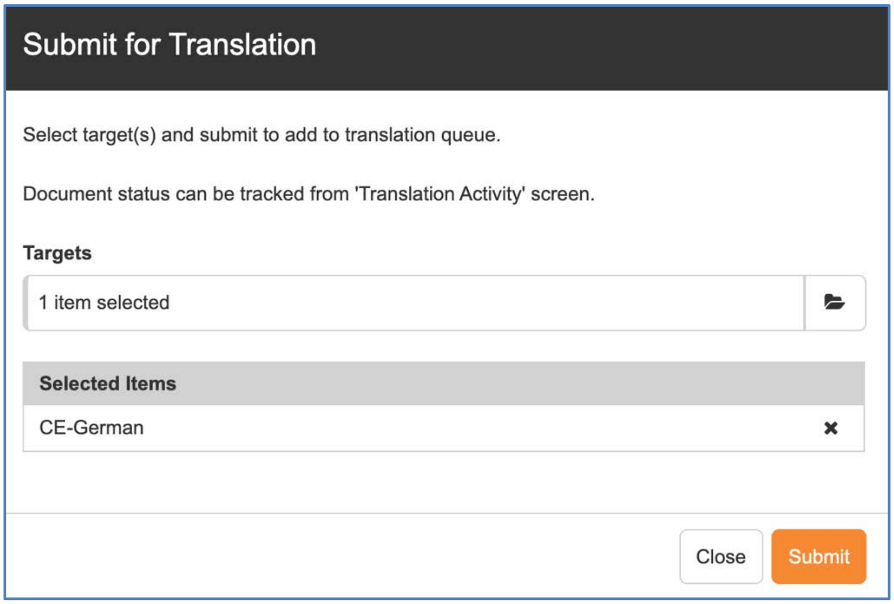
- If you choose Submit for Translation, in the Submit for Translation dialog, in the Targets field, click the folder icon.



- On the Select Site List page, choose a site or sites.

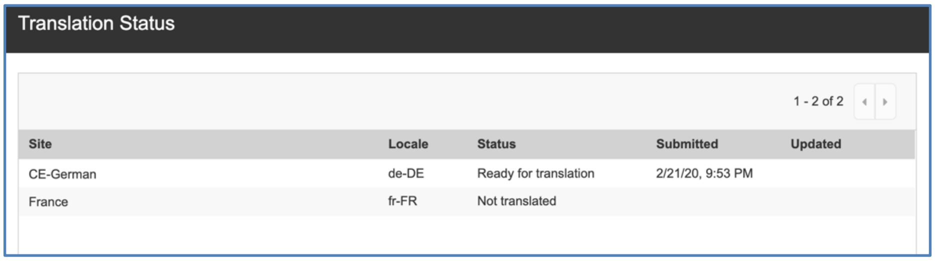


- In the Selected Items panel, click **Select**.
- On the Submit for Translation dialog, click **Submit**.



View Translation Status

- If you select View Translation Status, you'll see at a glance the status of your variant sites.

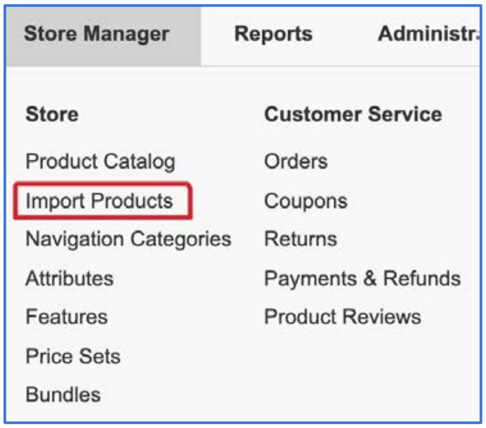


Store Manager – Store *(continued)*

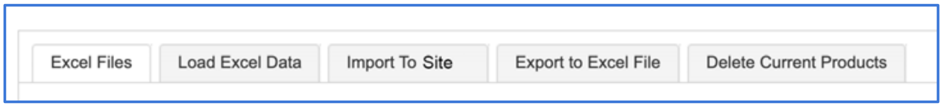
Import Products

Organize your products with their elements and data in your own database.

- Under Store Manager – Store, select Import Products.

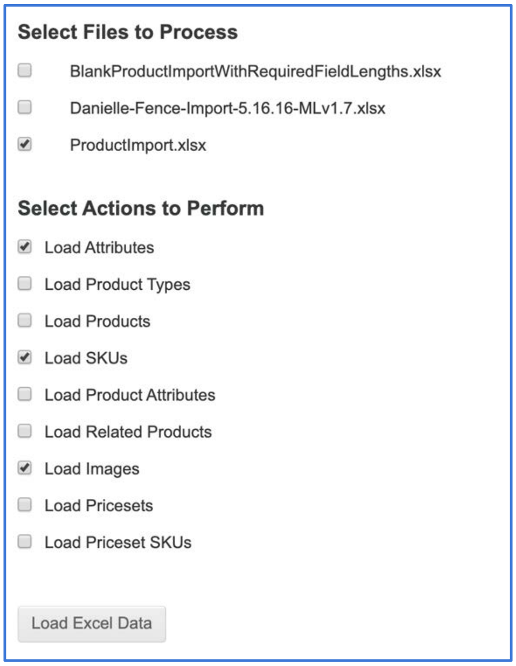


- At the top of the Import Products section, click a tab to import particular data in regard to your products.



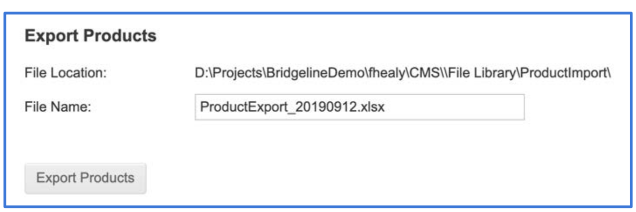
- Under the **Excel Files** tab, on the Current Files page, delete or download files from a list, or click **Choose File** to upload a file.

- Under the **Load Excel Data** tab, on the “Select Files and Actions” page, select the relevant check boxes, and click **Load Excel Data**.

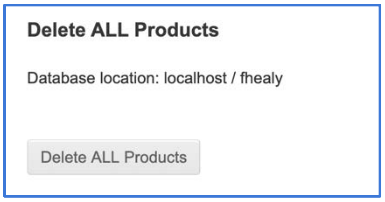


- Under the **Import to [Site]** tab, in the Select Actions to Perform list, select the relevant checkboxes. Click **Import to** [Site].

- Under the **Export to Excel File**, on the Export Products page, you can export your products in an Excel file to your computer. Click **Export Products**.



- Under the **Delete Current Products** tab, on the Delete ALL Products page, click Delete ALL Products.

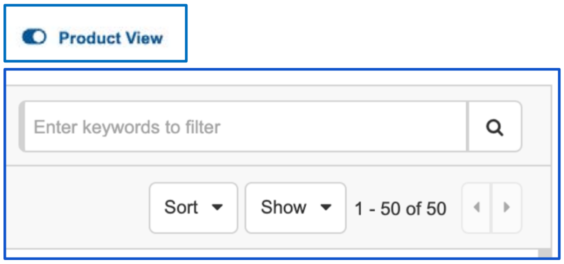


- You will be prompted to confirm.

Navigation Categories

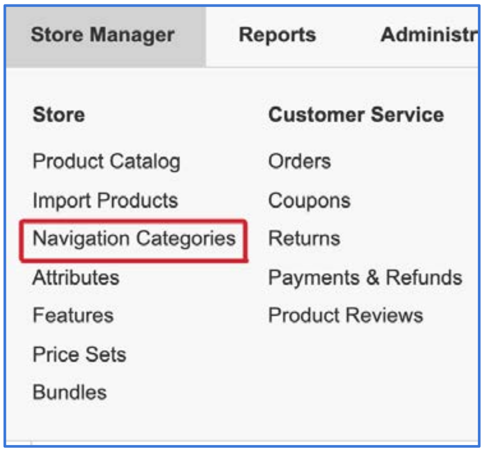
Determine the primary navigation of your site by adding menus that relate to your site.

- If Product View is enabled, a search panel allows you to filter pages under a selected menu node or product.

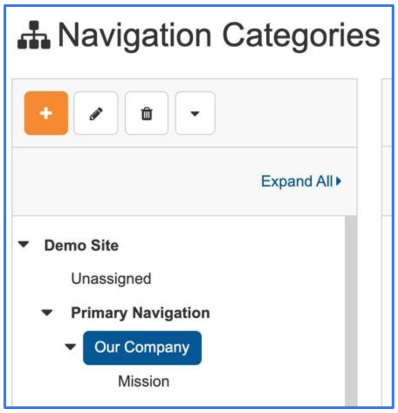


Manage Navigation Categories

- Under Store Manager – Store, click **Navigation Categories**.

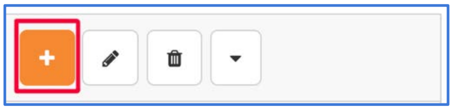


- On the left side of the page, in the Navigation Categories panel, create your site's sections.

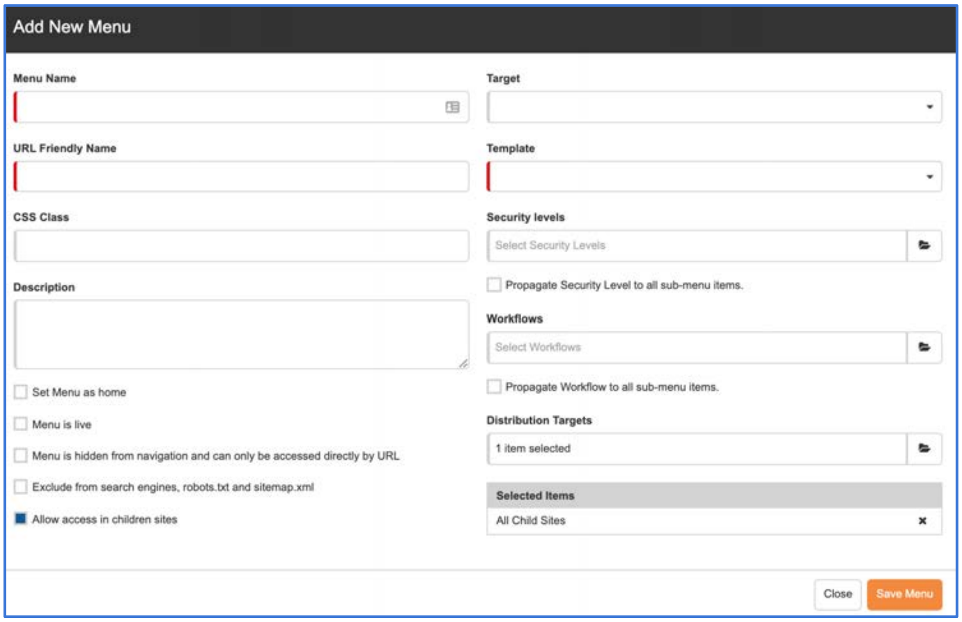


Add a Navigation Category

- To add a section or menu item, click the Add icon.



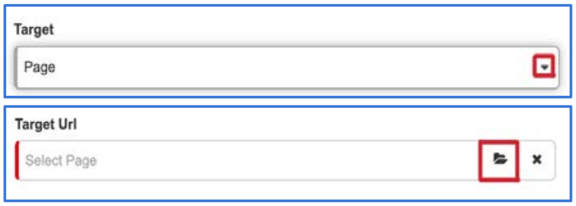
- On the Add New Menu page, enter a Menu Name. The Menu Name automatically populates URL Friendly Name.



- Optionally, fill in the CSS Class field.
- Optionally, fill in the Description field.
- Optionally, select check boxes for
    - Set Menu as home
    - Menu is live
    - Menu is hidden from navigation and can only be accessed directly by URL
    - Exclude from search engines, robots.txt and sitemap.xml
    - Allow access in children sites
    - Propagate Workflow to all sub-menu items

Target

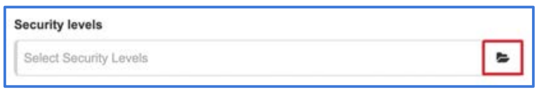
- Optionally, in the Target field, using the dropdown arrow, select a Target.
    - If you choose Page, File, Other Menu Item, External URL, Internal URL, or Mail to in the Target URL field, click the folder icon to select a page.



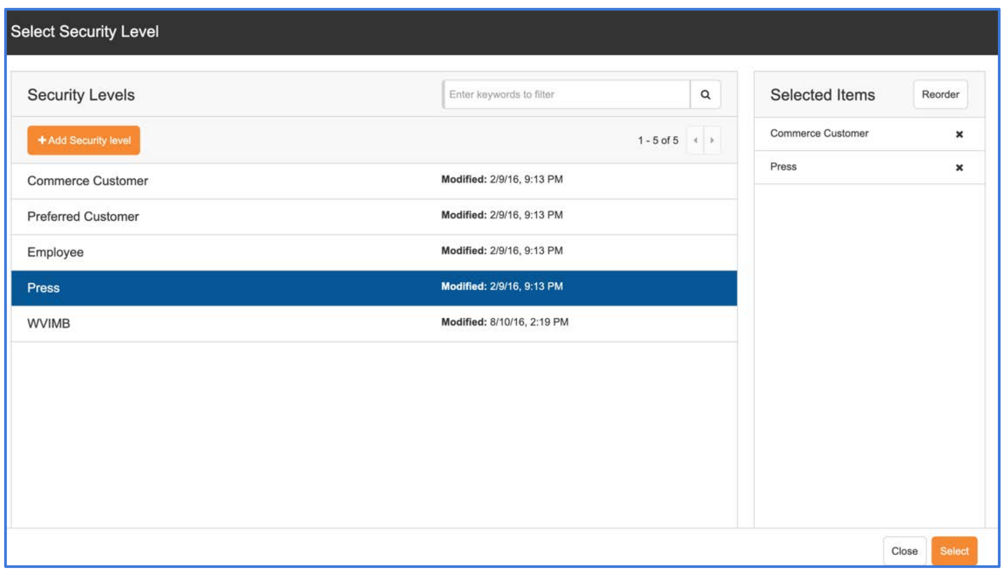
    - If you choose Product List in the Target field, in the Template field, use the arrow to select a Template from the list.

Security Levels

- Optionally, in the Security Levels field, click the folder icon.

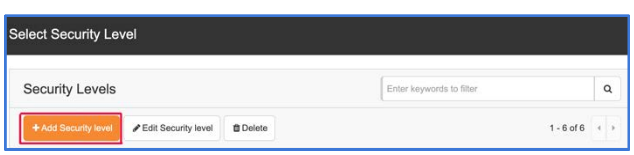


- On the Security Levels page, under Security Levels, select a Security Level from the list.

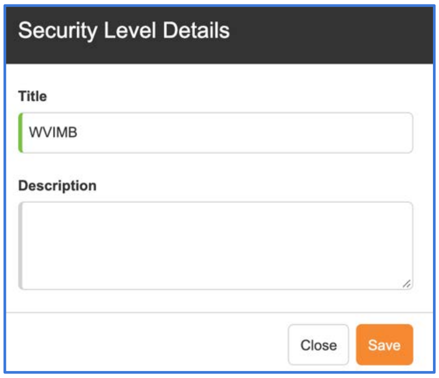


Add, Edit, Delete Security Levels

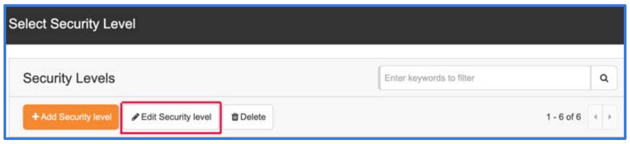
- Optionally, on the Select Security Level page, under Security Levels, click **Add Security Level**.



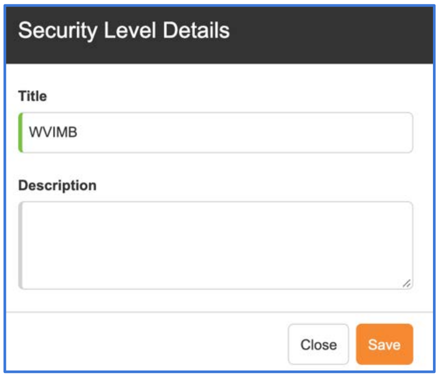
- In the Security Level Details dialog, create a Title for the Security Level. Optionally, create a Description.



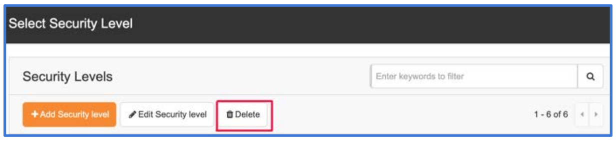
- Click **Save**; or **Close** to return to Security Levels.
- Optionally, on the Select Security Level page, under Security Levels, select a Security Level and click **Edit Security Level**.



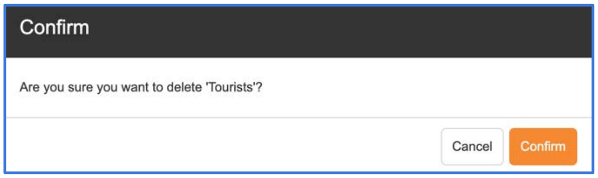
- In the Security Level Details dialog, make your addition or revision. Click **Save**; or **Close** to return to Security Levels.



- Optionally, on the Select Security Level page, under Security Levels, click **Delete** to remove a Security Level.



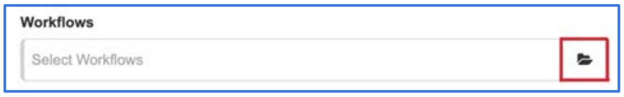
- In the Confirm dialog, click **Confirm**; or **Cancel** to return to Security Levels.



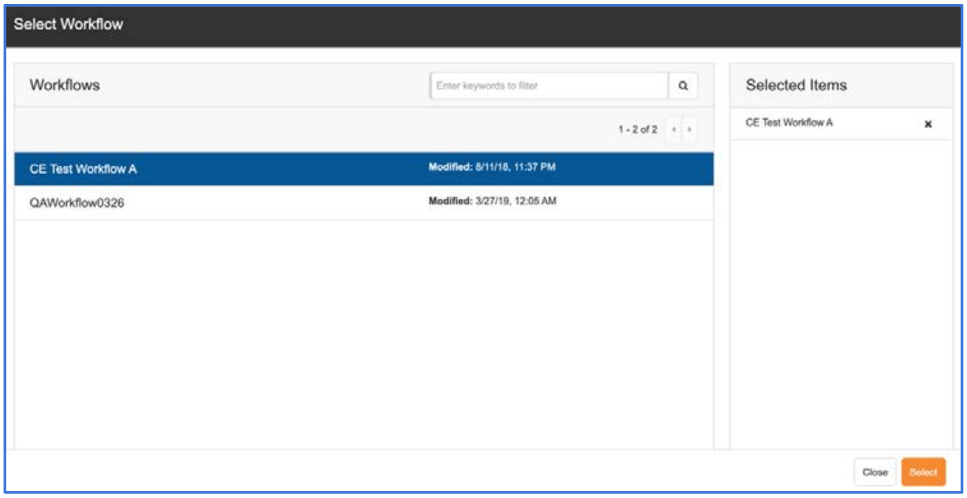
- When you have chosen your Security Levels, in the Selected Items panel, click **Select**, or **Close** to return to Add New Menu.

Workflows

- Optionally, in the Workflows field, click the folder icon.



- On the Select Workflow page, select a Workflow from your list.



- In the Selected Items panel, click **Select**, or **Close** to return to Add New Menu.

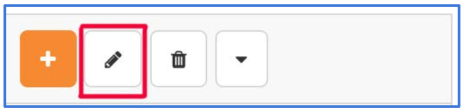
Workflow options

- Optionally, select the check box to Propagate Security Level to all sub-menu items.
- Optionally, select the check box to Propagate Workflow to all sub-menu items.
- In the Distribution Targets field, click the folder icon.

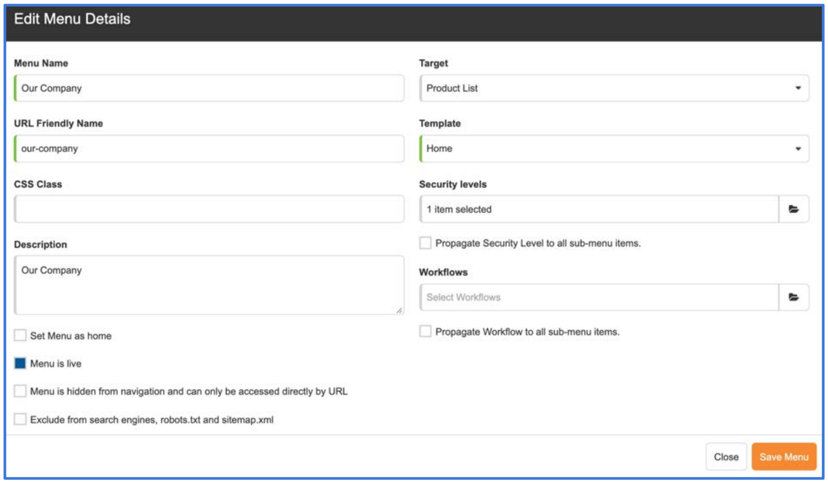
- On the Select Site List, select a site or sites.
- In the Selected Items panel, click **Select,** or **Close** to return to the Add New Menu page.

Edit a Navigation category

- On the Navigation Categories page, in the categories panel, select a category.
- Click the Edit icon.



- On the Edit Menu Details page, make revisions or additions.
- Click **Save Menu**, or **Close** to return to Navigation Categories.

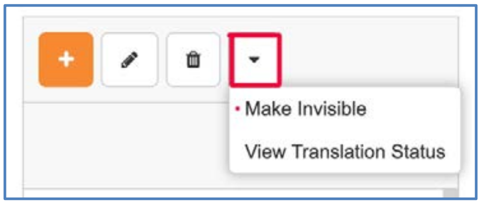


Delete a Navigation Category

- Optionally, to delete a menu item, click the **delete** icon.

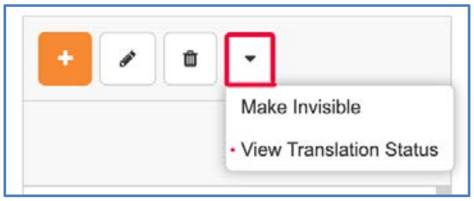
Determine visibility

- Optionally, to make the status of a menu visible or invisible, click the dropdown arrow to select **Make Invisible**/Make Visible.



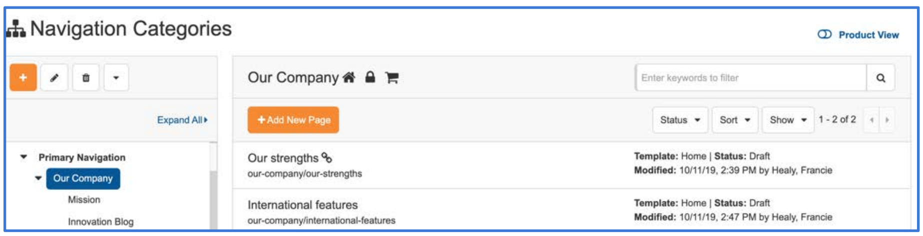
View Translation Status

- Use the small arrow to select **View Translation Status**.

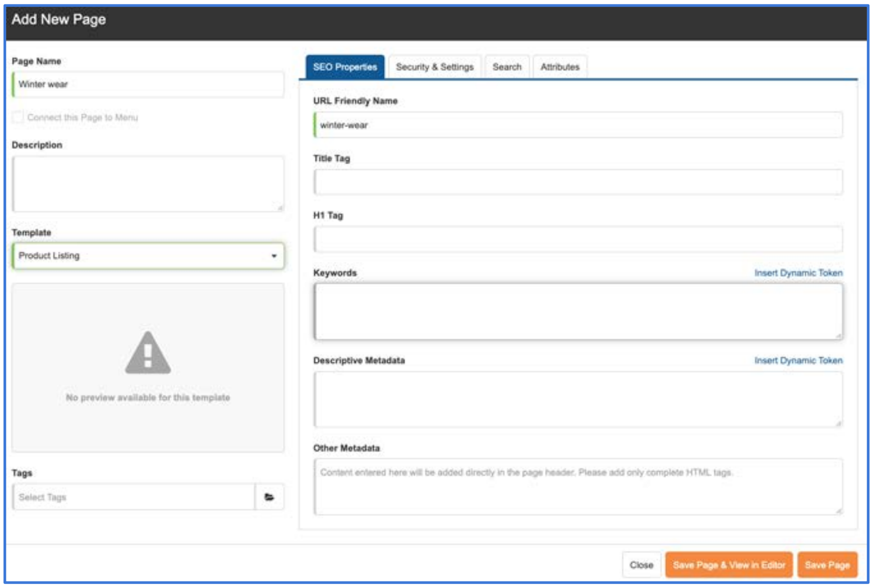


Add a page to a Navigation Category

- On the Navigation Categories page, from the panel on the left, select a category.
- In the panel on the right, click **Add New Page**.

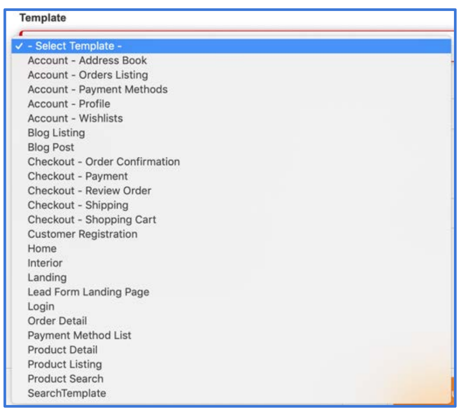


- On the New Page, enter a Page Name.



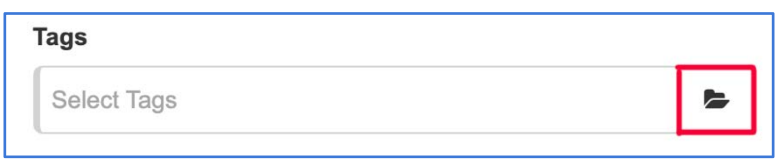
- Optionally, add a Description.

- In the Template field, in the dropdown menu, select a Template.

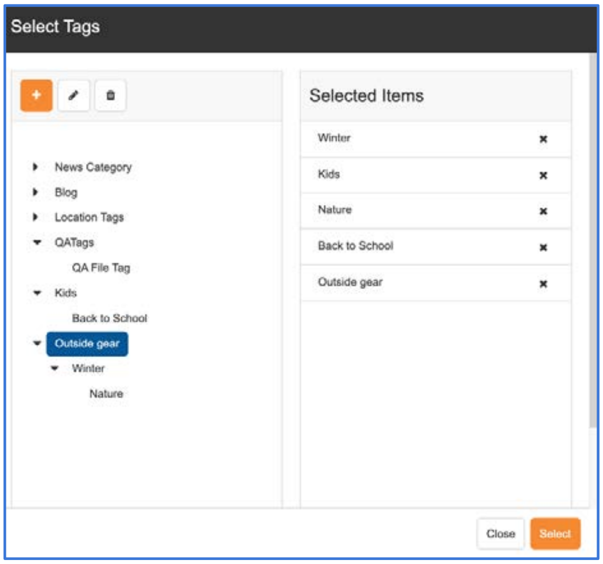


Tags

Optionally, in the Tags field, click the folder icon.



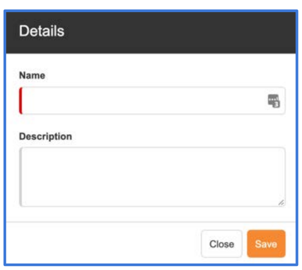
- On the Select Tags page, select a category. Under Selected Items, click **Select**; or **Close** to return to Add New Page.



Add a Tag

- To add a Tag to a category, click the **Add** icon.

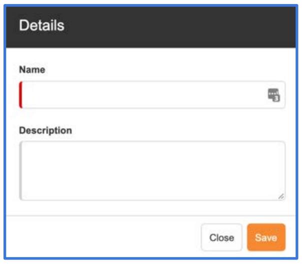
- In the Details dialog, add your information. Click **Save**, or **Close** to return to Select Tags.



Edit a Tag

- To edit a Tag in a category, click the **Edit** icon.

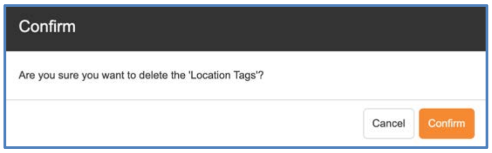
- In the Details dialog, make your revision. Click **Save**, or **Close** to return to Select Tags.



Delete a Tag

- To delete a Tag, click the **Delete** icon.

- In the Confirm dialog, click **Confirm**; or **Cancel** to return to Select Tags.

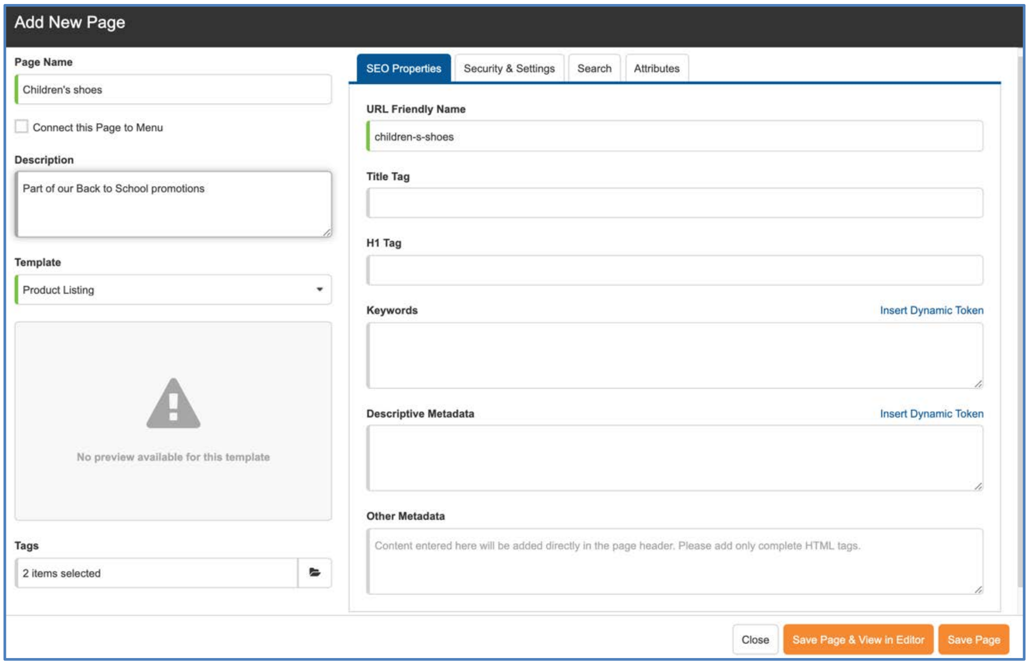


Page Sections

- There are four sections to Add New Page under the tabs SEO Properties; Security & Settings; Search; and Attributes.

SEO Properties

- Under the SEO Properties tag, the Page Name you have chosen automatically populates the URL Friendly Name field. There are more options, however.

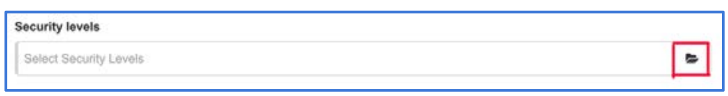


- Optionally, fill in the tag fields.
- Optionally, enter Keywords.
- Optionally, enter descriptive Metadata and Other Metadata.
- Click **Save Page & View in Editor**, or **Save Page**.
- Alternately, click **Close** to return to Navigation Categories.

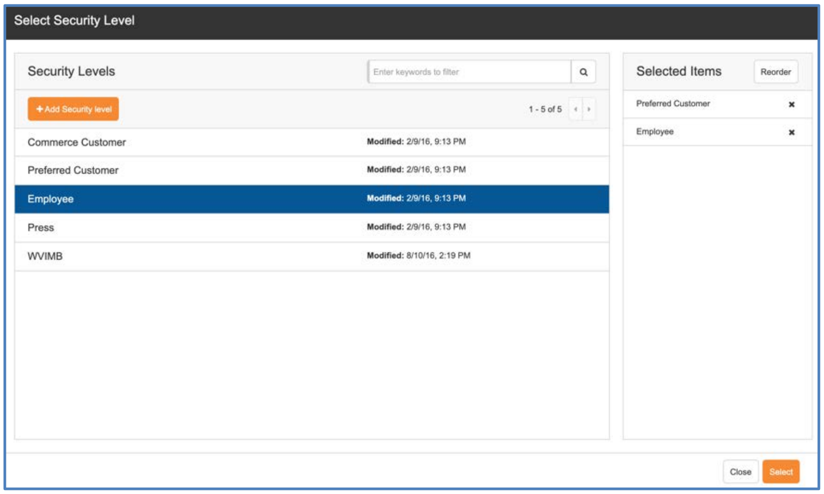
Security & Settings

Security Levels

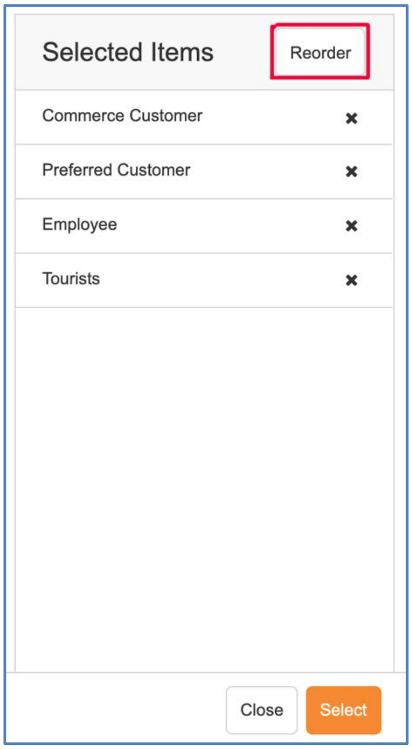
- In the Security Levels field, click the folder icon.



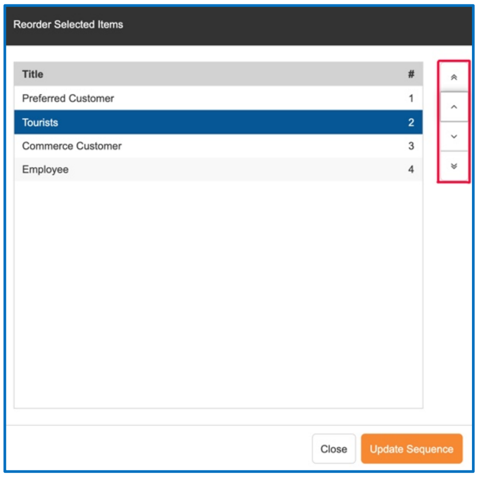
- On the Security Levels page, select a Security Level or levels.



- In the Selected Items panel, click **Select**, or **Close** to return to Add New Page.
  - To re-arrange the order of Selected Security Levels in the Selected Items panel, click **Reorder**.



  - In the Reorder Selected Items dialog, use the arrows to change the order of the items.

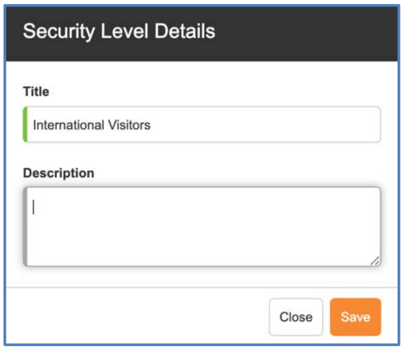


- Click **Update Sequence**, or **Close** to return to the previous page.

Add a Security Level

- To add a new Security Level, on the Select Security Level page, click **Add Security Level**.

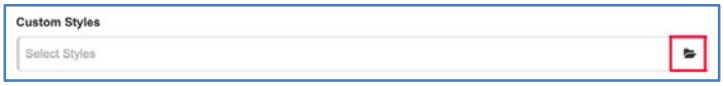
- In the Security Level Details dialog, give the new Security Level a Title, and, optionally, a Description.



- Click **Save**.

Custom Styles

- In the Custom Styles field, click the folder icon.



- On the Select Style page, in the Styles panel, select a Style category.
- In the panel to the right, select a Style.
- In the Selected Items panel on the far right, click **Select**, or **Close** to return to Add New Page.

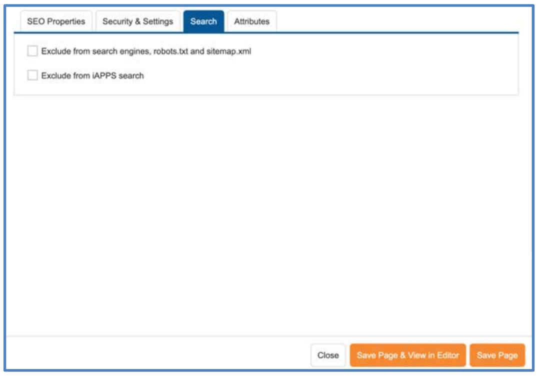
Custom Scripts

- In the Custom Scripts field, click the folder icon.

- On the Select Script page, in the Scripts panel, select a Script category.
- In the panel to the right, select a Script.
- In the Selected Items panel on the far right, click **Select**, or **Close** to return to Add New Page.

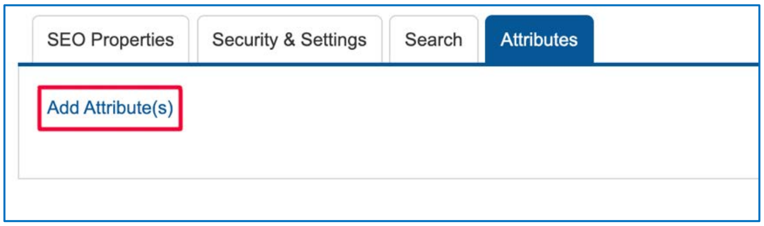
Search

- Under the Search tab, select a check box beside "Exclude from search engines, robots.txt and sitemap.xml" or "Exclude from [Site] search".

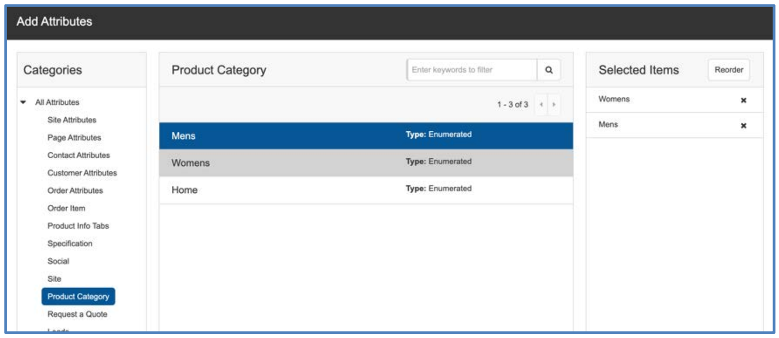


Attributes

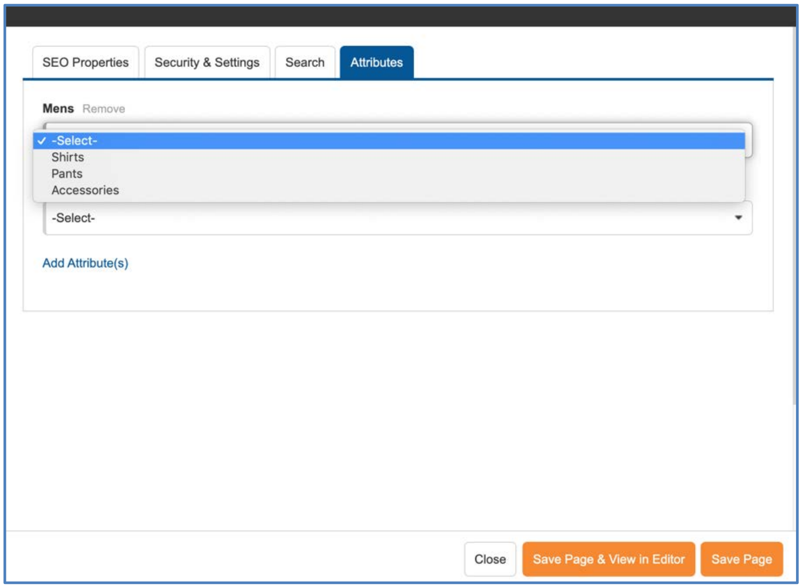
- Under the Attributes tab, click **Add Attribute(s)**.



- On the Add Attributes page, select a category from the Categories panel.



- In the Selected Items panel, click **Select**, or **Close** to return to the Add Attribute(s) tab.
  - On the new page, in the Attributes fields you have chosen, click the arrow for a dropdown menu of attributes.



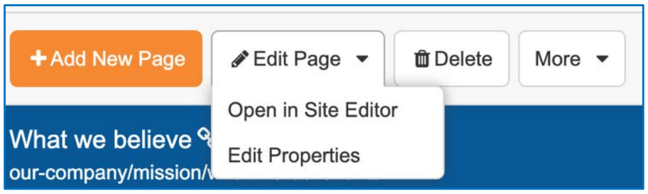
  - Optionally, click **Add Attributes** again to select from Categories and repeat the process.
  - Click **Save Page & View in Editor**, **Save Page**, or **Close** to return to Navigation Categories.

Page options

Edit a page

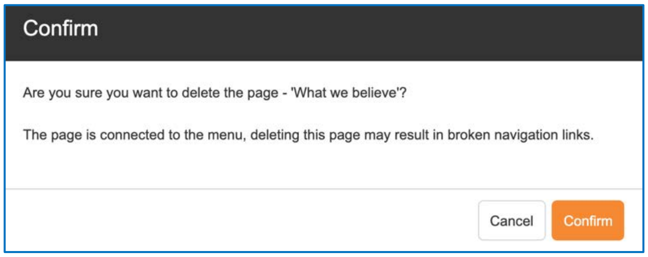
- To edit a page, select a Navigation Category.
- Select the page.

- Click **Edit Page**. Use the dropdown arrow to choose to open the page in the Site Editor, or to Edit Properties.



Delete a page

- To delete a page, select a Navigation Category.
- Select the page.
- Click **Delete**.
- If there are pages connected to the menu, you will receive a warning. If you decide to go ahead, click Confirm.

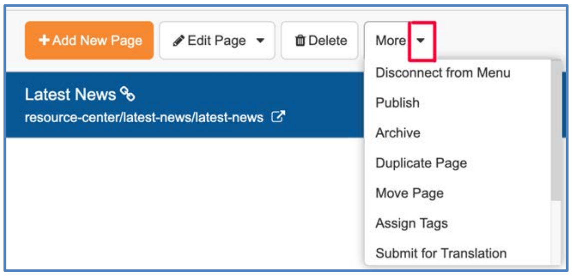


The More menu

Use the "More" dropdown arrow to:

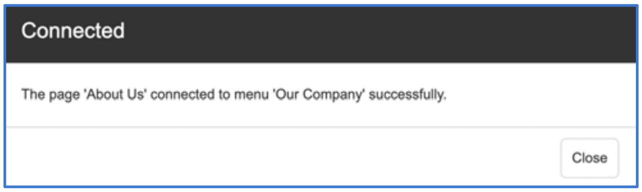
- Connect to/Disconnect from Menu
- Publish
- Archive
- Duplicate Page
- Move Page
- Assign Tags
- View Translation Status
- Manage Tracking Codes

- Manage Language variants



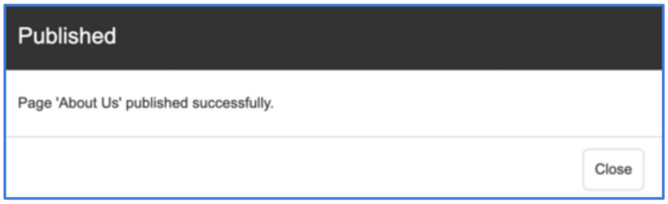
Connect to Menu

- To connect or disconnect a page from a menu, select **Connect to Menu/Disconnect from Menu**. A dialog confirms this.



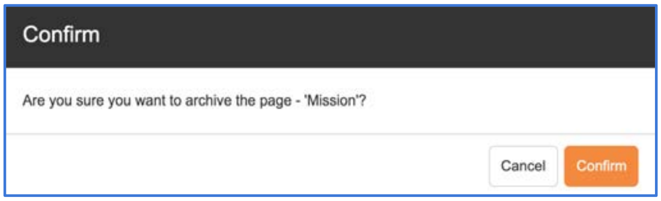
Publish

- To Publish your page, select **Publish**. A dialog confirms this.



Archive

- To archive a page, select **Archive**. A dialog confirms this.

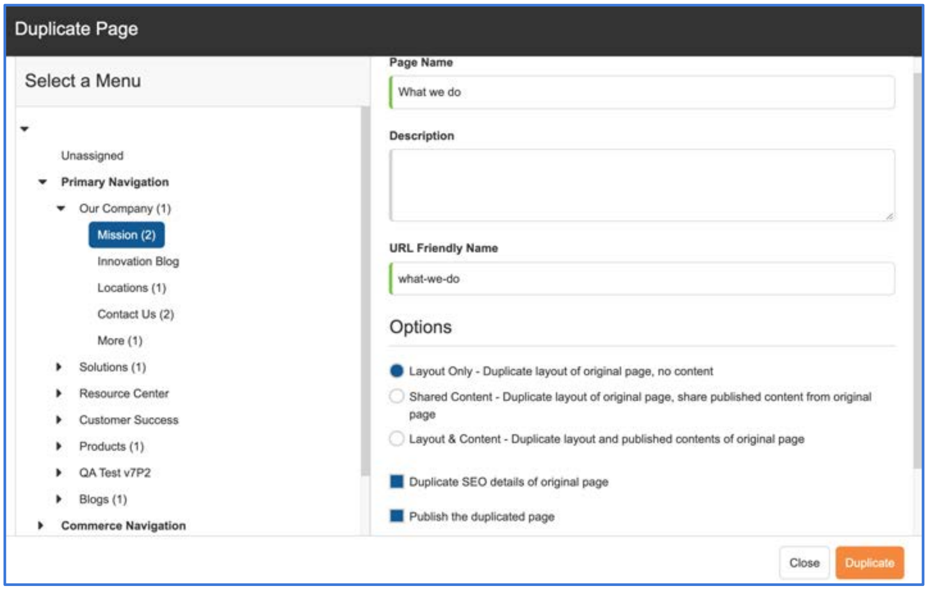


Duplicate Page

- To duplicate the page, select **Duplicate Page**.
- On Duplicate Page, in the Page Name field, enter a name.
- Optionally, select:

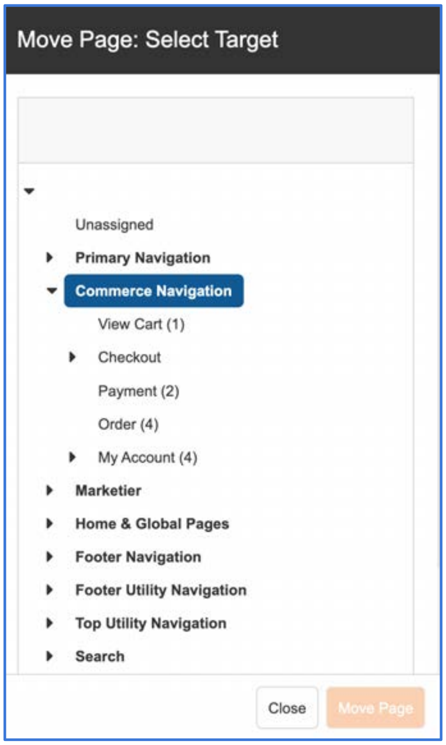
- Layout Only – Duplicate layout of original page, no content
- Shared Content – Duplicate layout of original page, share published content from original page
- Layout & Content – Duplicate layout and published contents of original page
- Duplicate SEO details of original page
- Publish the duplicated page

- Click **Duplicate**.

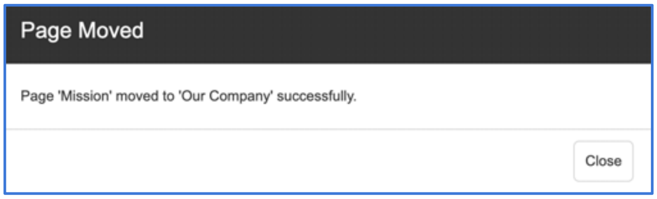


Move Page

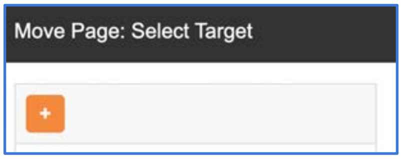
- To move a page, select **Move Page**.



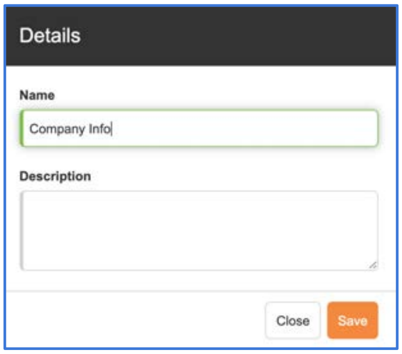
- In the Move Page: Select Target dialog, select a category.
- Click **Move Page**.
- A dialog confirms this.



  - Alternately, click the **Add** icon to add a targeted category.

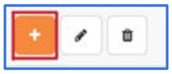


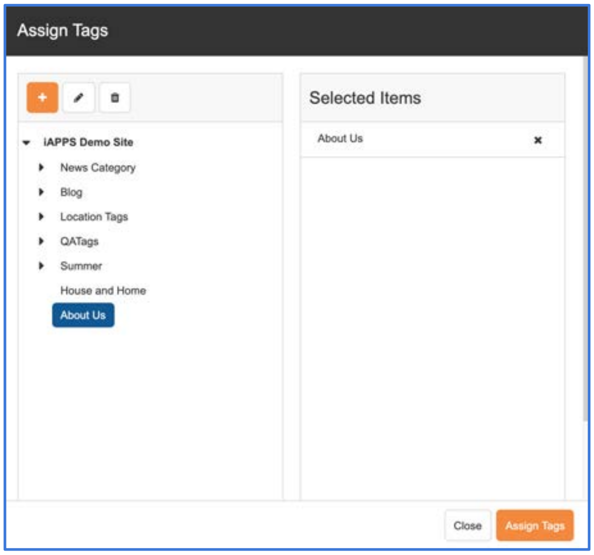
  - In the Details dialog, enter the new information. Click **Save**.



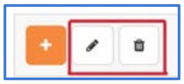
Assign Tags

- To assign tags to the page, select **Assign Tags**.
- On the Assign Tags page, click the Add icon to add a tag, or select one from the list.





- In the Selected Items panel, click **Assign Tags**.
- Optionally, use the edit or delete icons to edit or delete tags in the list.



Translation options

To access Translation options, select **Submit for Translation** or **View Translation Status**.

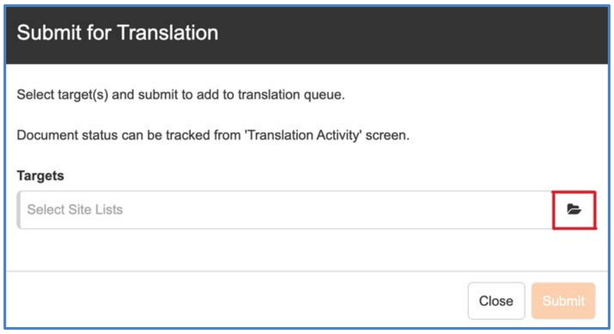
Note: A page must be published in the parent site before it can be transmitted for translation. A page with a status of Draft, Archived or In Workflow can't be submitted.

If a page submitted for translation doesn't exist in the variant site, a new page will be created in the same Menu as in the master/parent site.

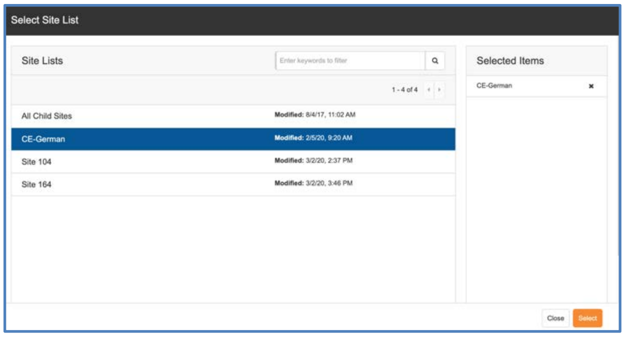
If the page ***does*** exist in the variant site, the page, along with its properties and content, will be updated accordingly.

Submit for Translation

- If you choose Submit for Translation, in the Submit for Translation dialog, in the Targets field, click the folder icon.



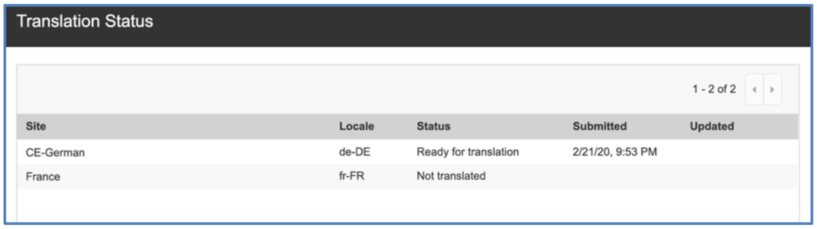
- On the Select Site List page, choose a site or sites.



- In the Selected Items panel, click **Select**.
- On the Submit for Translation dialog, click **Submit**.

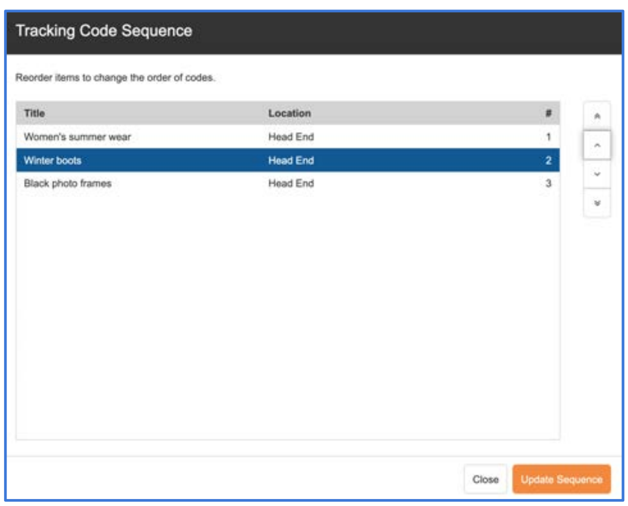
View Translation Status

- When you select View Translation Status, you'll see at a glance the status of your variant sites.



Manage Tracking Codes

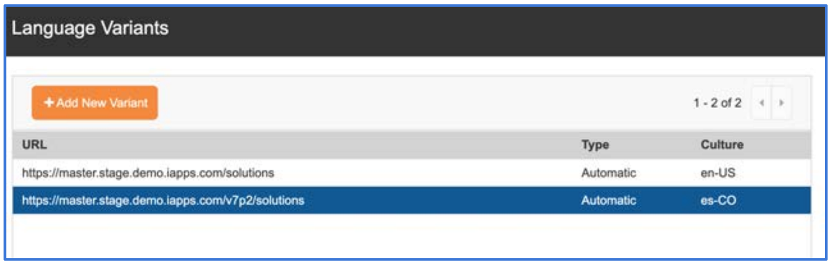
- To view or update the sequence of tracking codes, in the More dropdown menu, select **Manage Tracking Codes**.
- On the Tracking Codes page, click Add New Code.
- In the Tracking Code dialog, enter a Title, Code, and Location.
- Click Save.
- Alternately, select a code from the list.
- Click **Update Sequence**.
- Optionally, reorder codes. In the Tracking Code Sequence dialog, select a code. Use the arrows at the right to move it up or down in the list.
- Click Update Sequence, or Close.



- On the Tracking Codes page, click Save.
- Optionally, to make revisions to a code, click Edit Code.
- Optionally, to remove a code, click Delete.

Manage Language Variants

- To view or update Language Variants, in the More dropdown menu, select **Language Variants**.
- Optionally, on the Language Variants page, click Add New Variant.



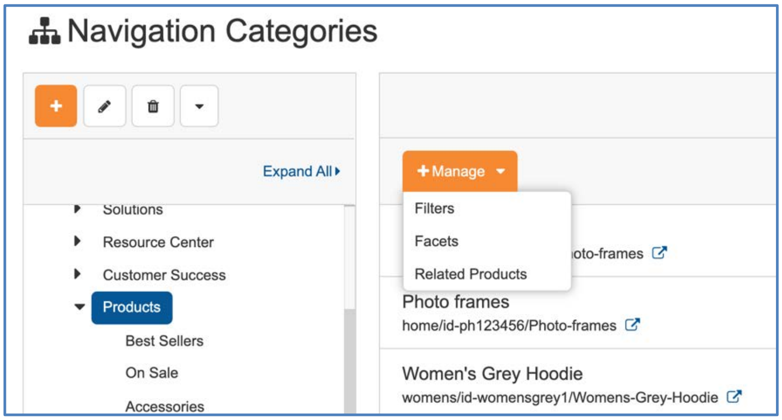
- In the Language Variant dialog, enter Variant Type, URL, and Culture.

- Click **Save**.
- On the Language Variants page, click **Close**.

Filters, Facets and Related Products

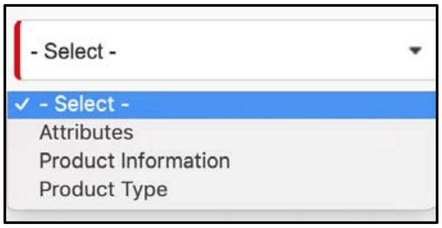
Note: In order to Manage Filters, Facets and Related Products, make sure Product View, on the upper right hand side of the Navigation Categories page, is enabled.

- On the Navigation Categories page, in the panel on the left, select a main category.
- In the panel on the right, click **Manage** and the arrow for options.



Filters

- From the Manage dropdown menu, select **Filters**.
- On the Navigation Category Filter page, using the "Select" dropdown menu, choose Attributes, Product Information or Product Type.

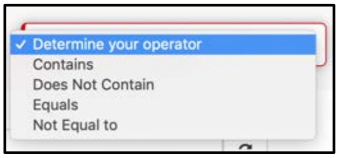


- To add more filters, click the plus sign.

- Click **Or** or **And** for each.

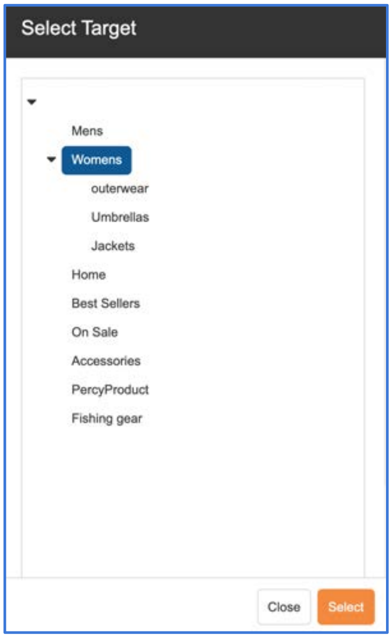
- In the Determine your operator field, select Equals or Not Equal to.

- Alternately, where relevant, in the Determine your operator field, select: Contains; Does not Contain; Equals; Does Not Equal.

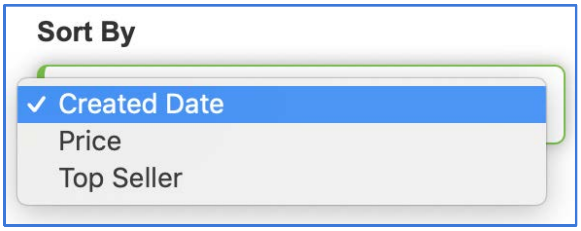


- In the Select Producttype field, click the folder icon.

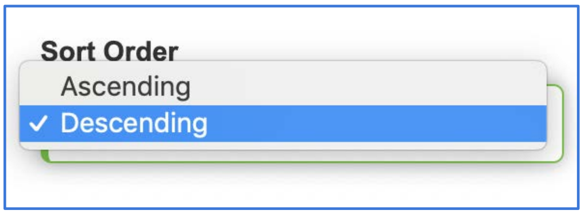
- In the Select Target dialog, choose a target. Click **Select**.



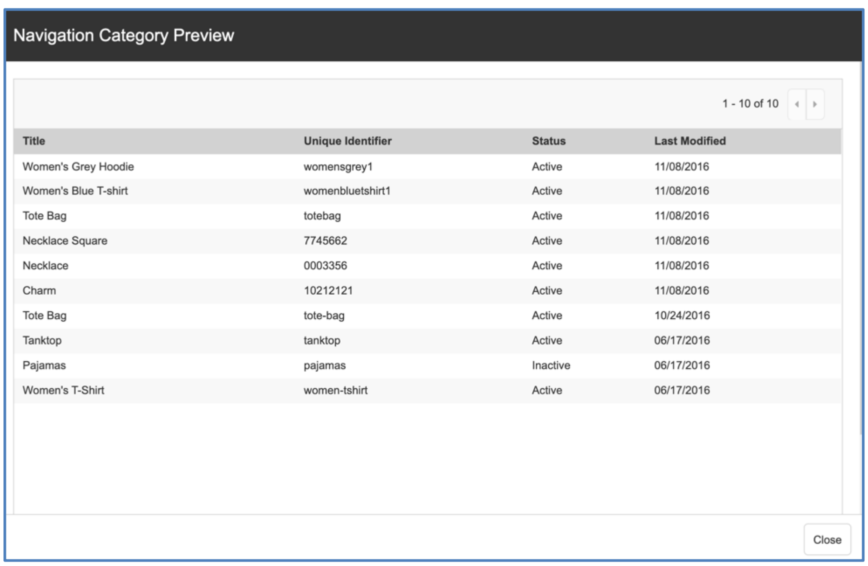
- Optionally, Sort filters by Created Date, Price, or Top Seller.



- Optionally, Sort the order of filters by Ascending or Descending.



- Click **Save.**
- Optionally, click **Preview Products** to see a full list.


Navigation Category Preview

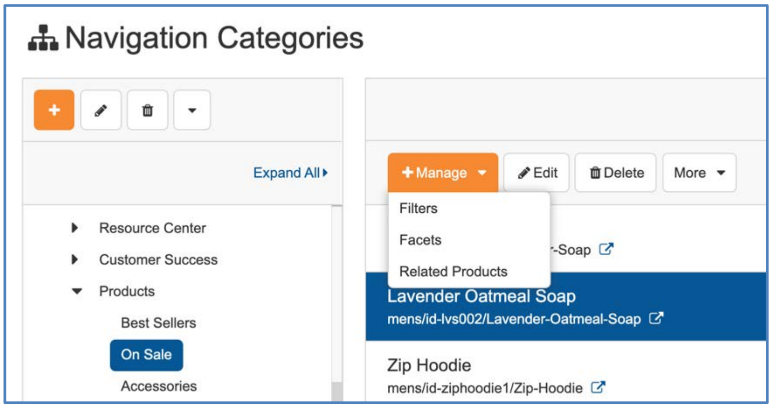
1 - 10 of 10

Title	Unique Identifier	Status	Last Modified
Women's Grey Hoodie	womensgrey1	Active	11/08/2016
Women's Blue T-shirt	womenbluetshirt1	Active	11/08/2016
Tote Bag	totebag	Active	11/08/2016
Necklace Square	7745662	Active	11/08/2016
Necklace	0003356	Active	11/08/2016
Charm	10212121	Active	11/08/2016
Tote Bag	tote-bag	Active	10/24/2016
Tanktop	tanktop	Active	06/17/2016
Pajamas	pajamas	Inactive	06/17/2016
Women's T-Shirt	women-tshirt	Active	06/17/2016

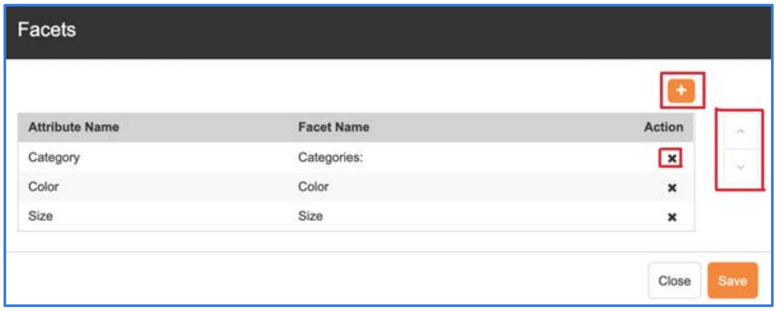
Close

Facets

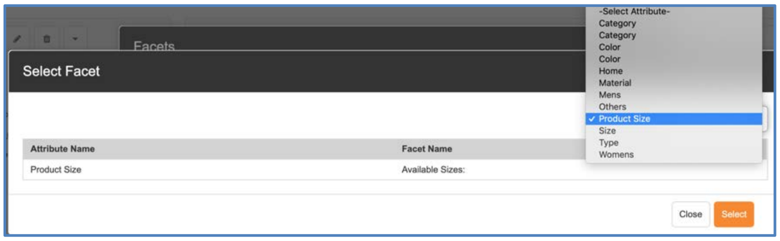
- From the Manage dropdown menu, select **Facets**.



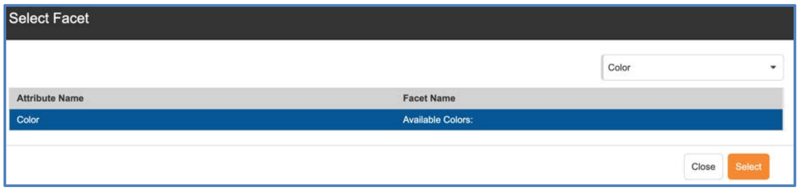
- In the Facets dialog, use the arrows at the right to reorder items, or click the x to remove an item.



- To add a Facet, click the **Add** icon.
- In the Select Attribute field, select an Attribute from the dropdown list.

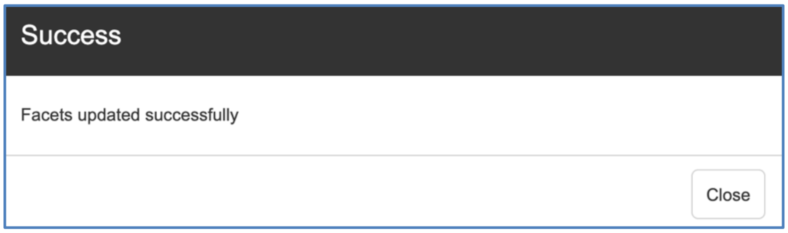


- Select the Attribute. In the Select Facet dialog, select the Attribute. Click **Select**.



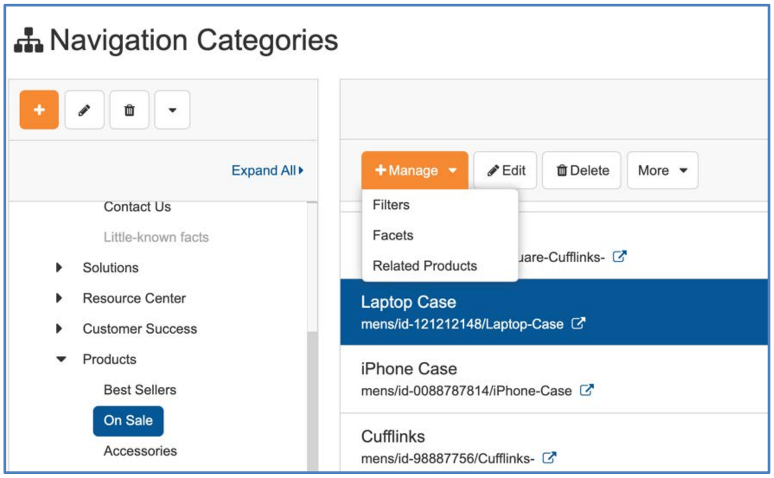
- Keep adding Attributes as required. Click **Save**.

- When you click **Save**, a Success dialog appears.

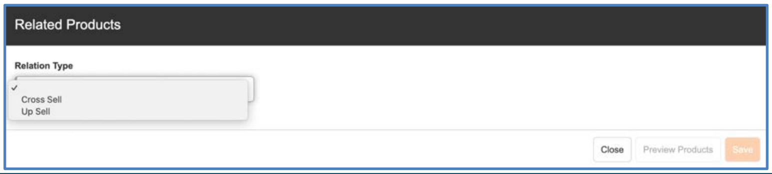


Related Products

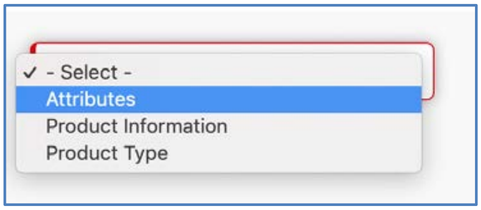
- From the Manage dropdown list, select Related Products.



- In the Relation Type field, click the arrow to choose Cross Sell or Up Sell.

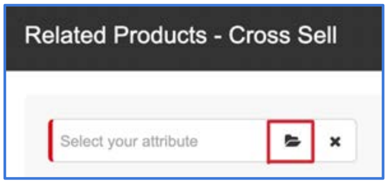


- On the Related Products page (Cross Sell or Up Sell), in the field at the top, use the dropdown arrow to choose Attributes, Product Information, or Product Type.

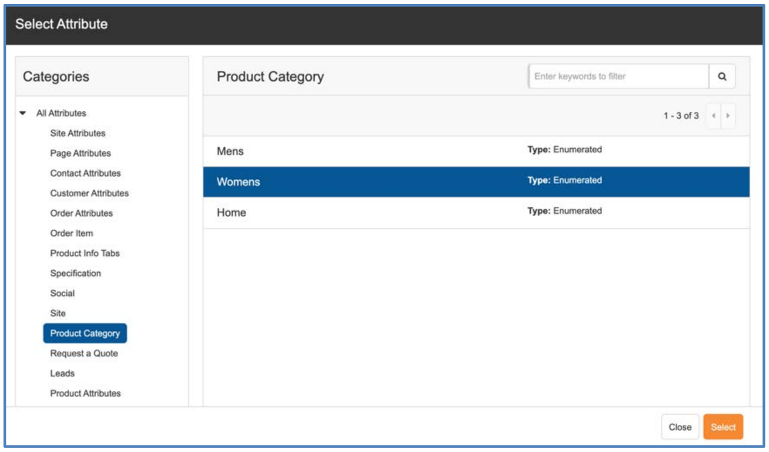


Attributes

- If you choose Attributes, click the folder icon to select an attribute.



- On the Select Attribute page, in the Categories panel, select a Category.
- In the Product Category panel, select a product category.

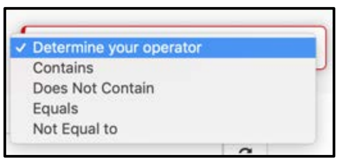


- Click **Select**.
- To add more Attributes, click the plus sign.

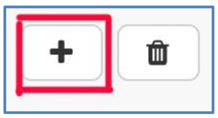
- Click **Or** or **And** for each.

- In the Determine your operator field, select Equals or Not Equal to.

- Alternately, where relevant, in the Determine your operator field, select: Contains; Does not Contain; Equals; Does Not Equal.

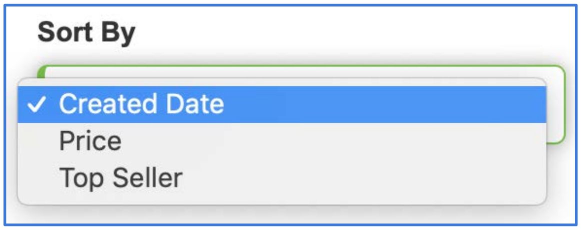


- To add more Attributes, click the Add icon.

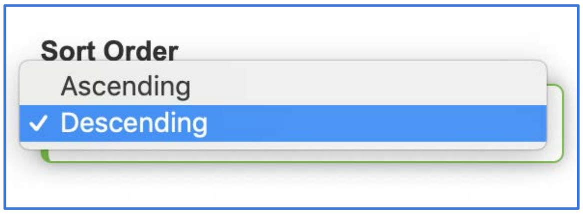


- Alternately, click the Delete icon to remove an Attribute.

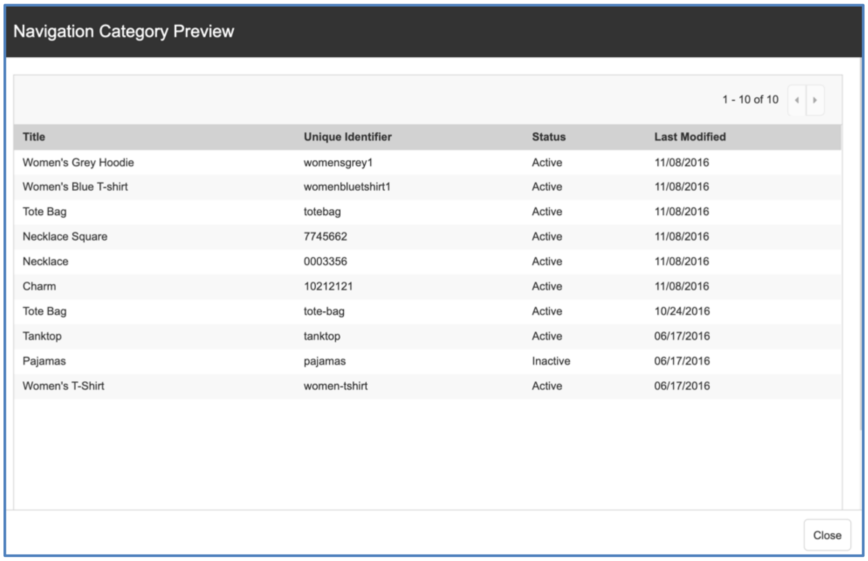
- Optionally, Sort filters by Created Date, Price, or Top Seller.



- Optionally, Sort the order of filters by Ascending or Descending.



- Click **Save.**
    - Optionally, click **Preview Products** to see a full list.



Navigation Category Preview

1 - 10 of 10

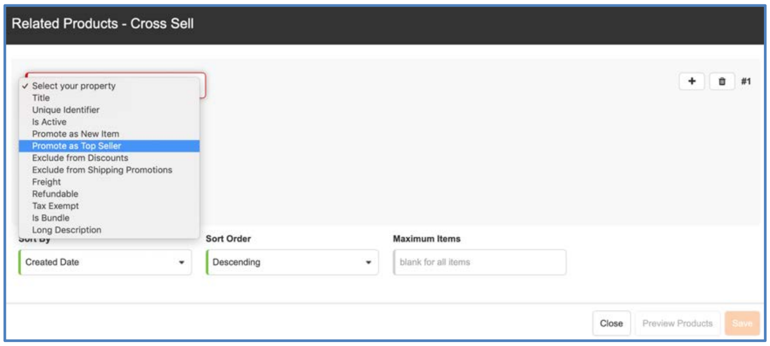
Title	Unique Identifier	Status	Last Modified
Women's Grey Hoodie	womensgrey1	Active	11/08/2016
Women's Blue T-shirt	womenbluetshirt1	Active	11/08/2016
Tote Bag	totebag	Active	11/08/2016
Necklace Square	7745662	Active	11/08/2016
Necklace	0003356	Active	11/08/2016
Charm	10212121	Active	11/08/2016
Tote Bag	tote-bag	Active	10/24/2016
Tanktop	tanktop	Active	06/17/2016
Pajamas	pajamas	Inactive	06/17/2016
Women's T-Shirt	women-tshirt	Active	06/17/2016

Close

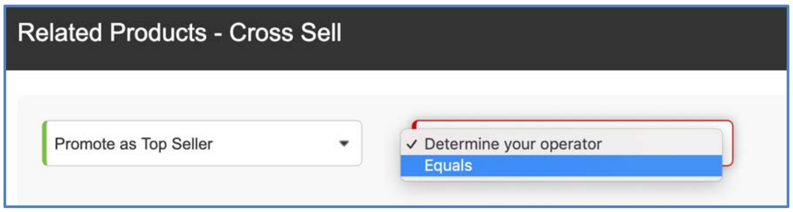
    - Optionally, click **Close** to return to Navigation Categories, or **Preview Products** to see all the items in this category.

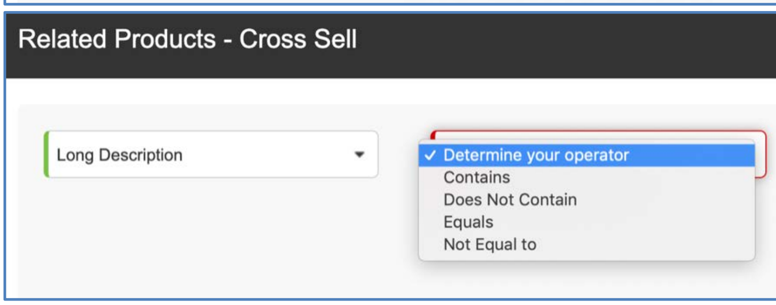
Product Information

- If you choose Product Information, in the Select your property field, use the arrow to select a property from the dropdown menu.

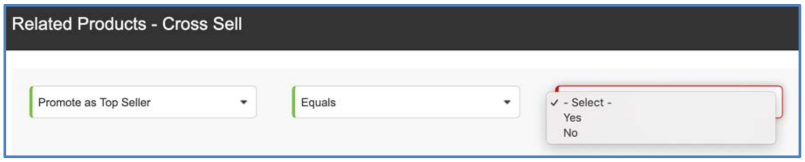


- On the Related Products page, in the Determine your operator field, use the dropdown arrow to make a selection in relation to the property you have chosen.

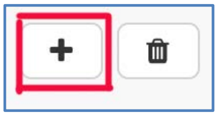




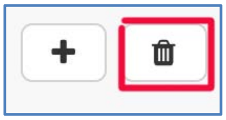
- In the next field, select or add as appropriate.



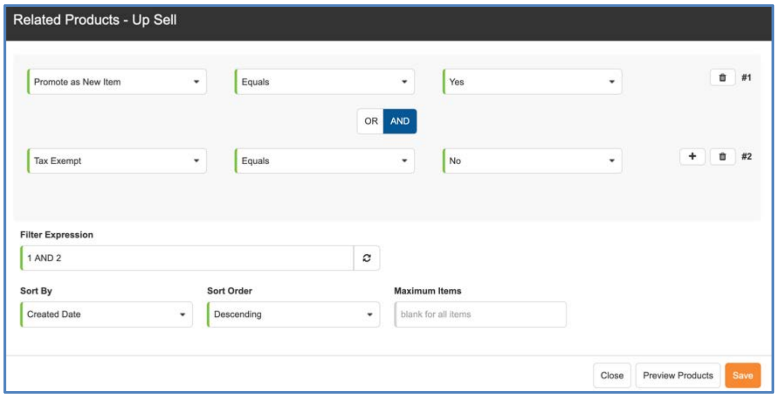
- To add more properties in Product Information, click the Add icon.



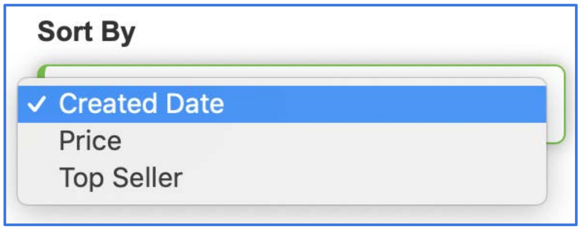
- Alternately, to remove a Property, click the Delete icon.



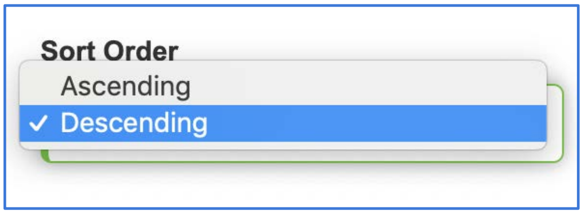
- With each property, select **Or** or **And**.



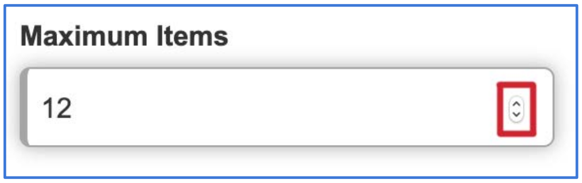
- Optionally, Sort filters by Created Date, Price, or Top Seller.



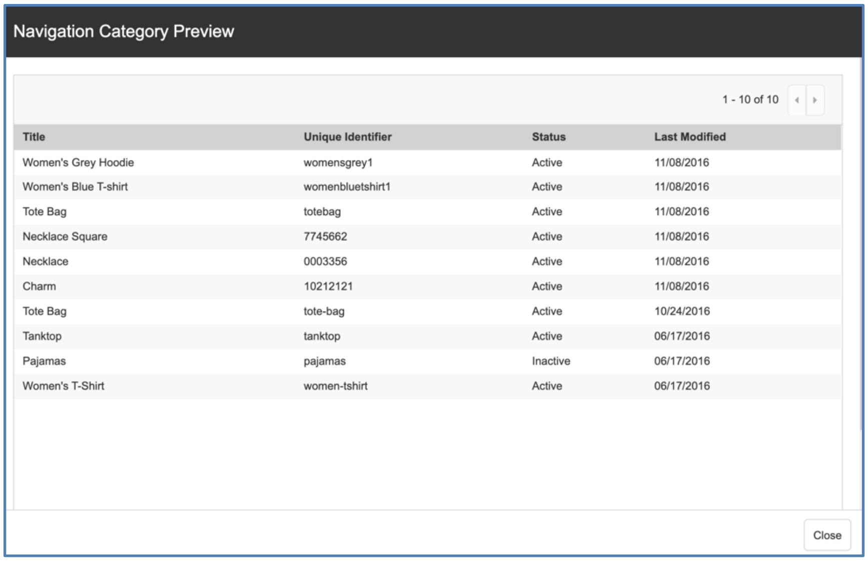
- Optionally, Sort the order of filters by Ascending or Descending.



- Optionally, in the Maximum Items field, use the arrows to determine the number of items.



- Click **Save.**
    - Optionally, click **Preview Products** to see a full list.


Navigation Category Preview

1 - 10 of 10

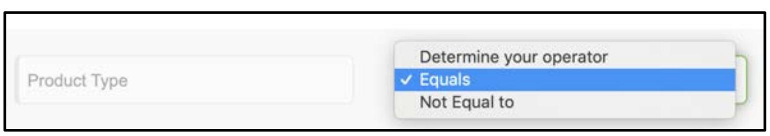
Title	Unique Identifier	Status	Last Modified
Women's Grey Hoodie	womensgrey1	Active	11/08/2016
Women's Blue T-shirt	womenbluetshirt1	Active	11/08/2016
Tote Bag	totebag	Active	11/08/2016
Necklace Square	7745662	Active	11/08/2016
Necklace	0003356	Active	11/08/2016
Charm	10212121	Active	11/08/2016
Tote Bag	tote-bag	Active	10/24/2016
Tanktop	tanktop	Active	06/17/2016
Pajamas	pajamas	Inactive	06/17/2016
Women's T-Shirt	women-tshirt	Active	06/17/2016

Close

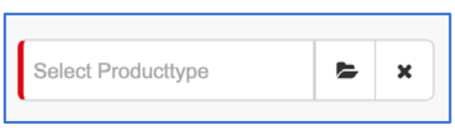
    - Optionally, click **Close** to return to Navigation Categories, or **Preview Products** to see all the items in this category.

Product Type

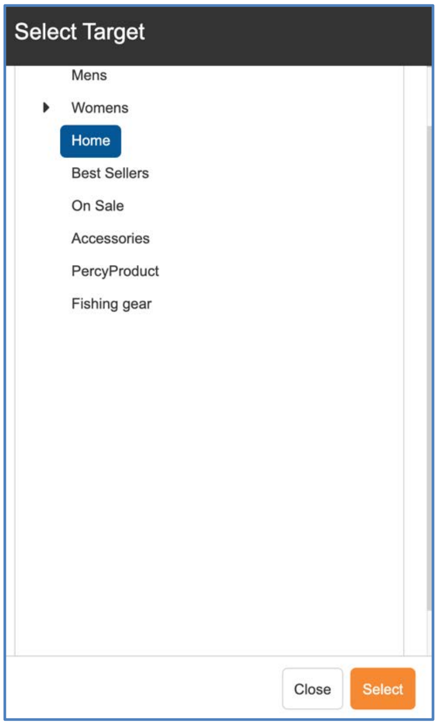
- If you choose Product Type, in the Determine your operator field, use the arrow to make your selection.



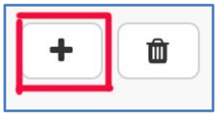
- In the Select Producttype field, click the folder icon.



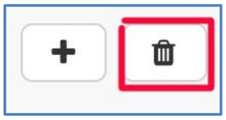
- In the Select Target dialog, choose a product type. Click **Select**.



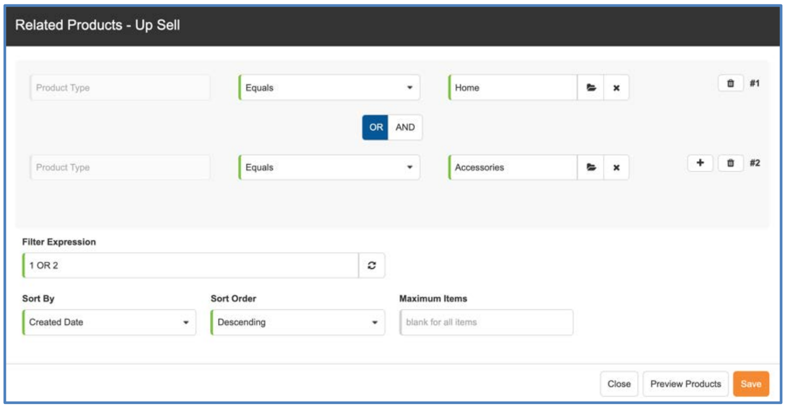
- On the Related Products page, click **Save**.
- Alternately, to add more Product Types, click the Add icon.



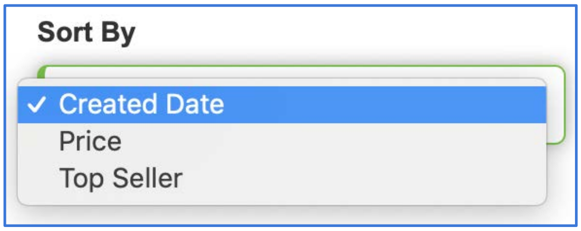
- Alternately, click the Delete icon to remove a Product Type.



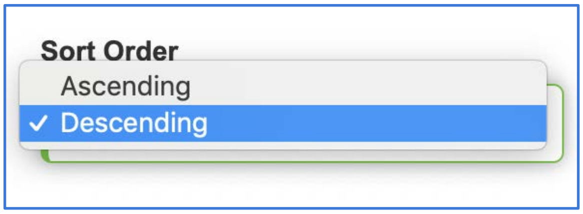
- With each Product Type, select **Or** or **And**.



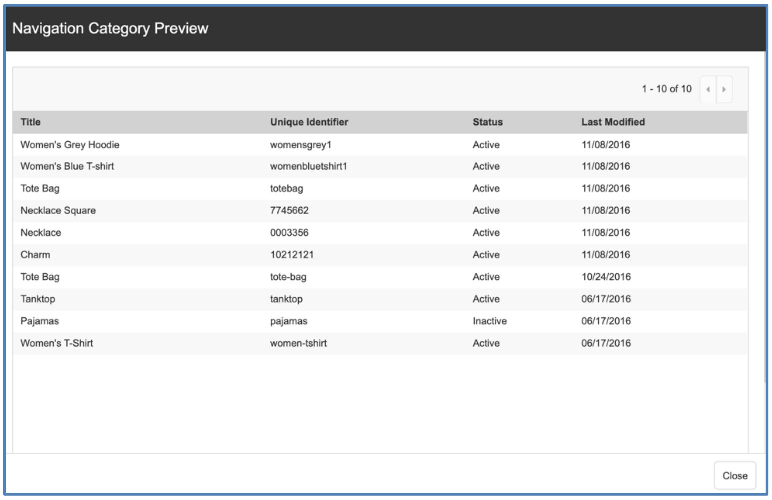
- Optionally, Sort filters by Created Date, Price, or Top Seller.



- Optionally, Sort the order of filters by Ascending or Descending.



- Click **Save.**
  - Optionally, click **Preview Products** to see a full list.

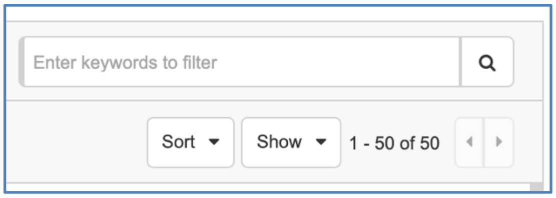


Title	Unique Identifier	Status	Last Modified
Women's Grey Hoodie	womensgrey1	Active	11/08/2016
Women's Blue T-shirt	womenbluetshirt1	Active	11/08/2016
Tote Bag	totebag	Active	11/08/2016
Necklace Square	7745662	Active	11/08/2016
Necklace	0003356	Active	11/08/2016
Charm	10212121	Active	11/08/2016
Tote Bag	tote-bag	Active	10/24/2016
Tanktop	tanktop	Active	06/17/2016
Pajamas	pajamas	Inactive	06/17/2016
Women's T-Shirt	women-tshirt	Active	06/17/2016

- Optionally, click **Close** to return to Navigation Categories, or **Preview Products** to see all the items in this category.

Attributes

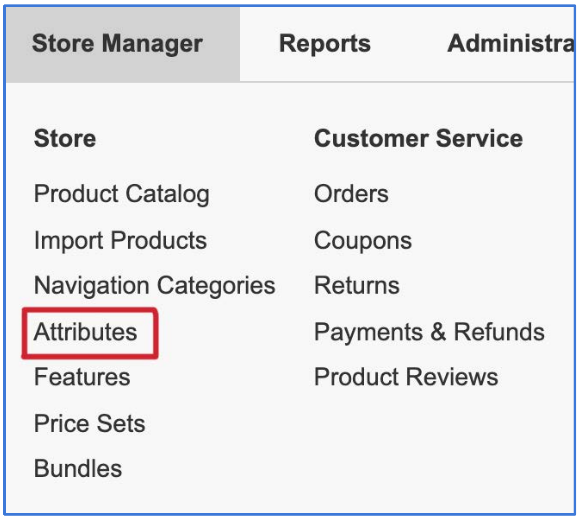
- Manage all the Attributes you want on your site.
  A search panel helps you to find your Attributes by Keyword or by using the Sort or Show menus.



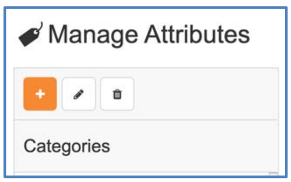
- You can manage them according to Categories – for example: Site, Page, Customer, Product and Order Attributes and so on. You can also create Attributes by size, color, social media and others.

Manage Attributes

- Under Store Manager – Store, select **Attributes**.

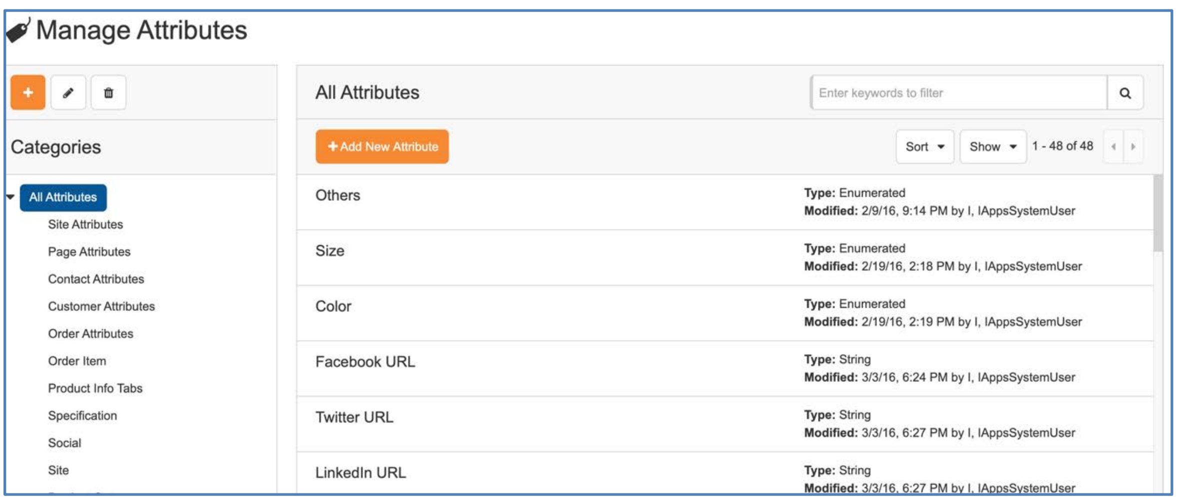


- In the Categories panel, select a category.
- Optionally, use the add, edit and delete icons to add, edit or delete a category.

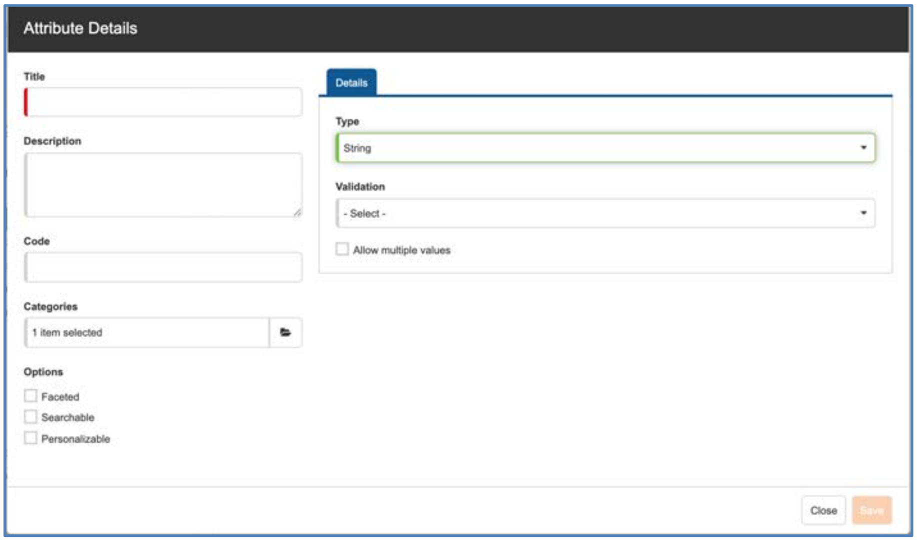


Add a New Attribute

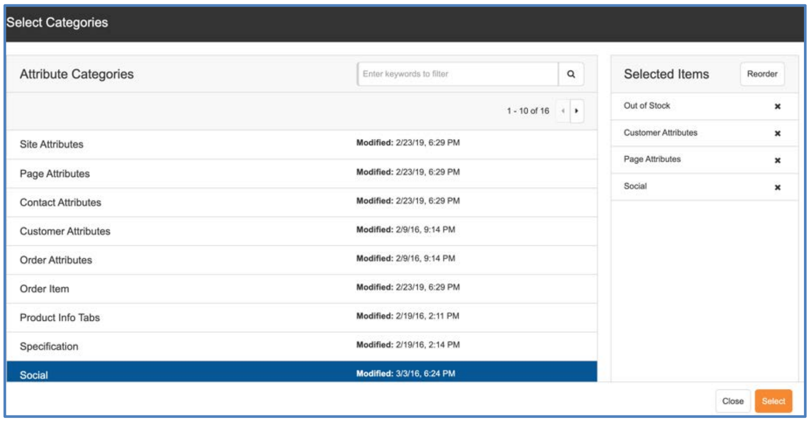
- On the panel to the right, click **Add New Attribute**.



- On the Attribute Details page, enter a Title.



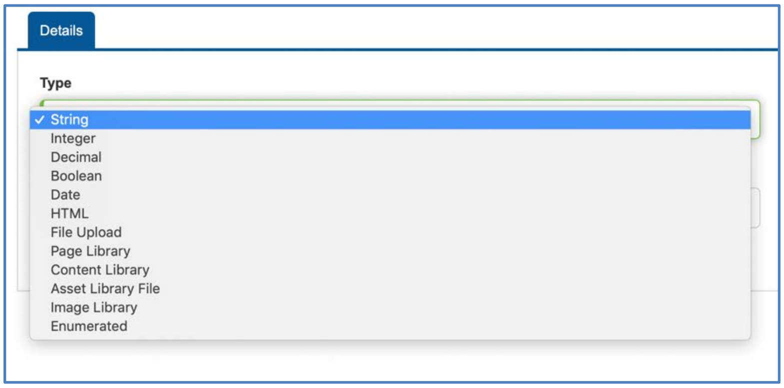
- Optionally, provide a description and code.
- Optionally, in the Categories field, click the folder icon.
  - On the Select Categories page, under Attribute Categories, make your selection.



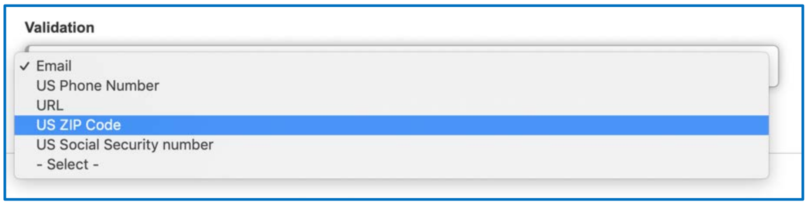
  - In the panel on the right, under Selected Items, click **Select**, or **Close** to return to the Manage Attributes page.

Attribute Options

- Optionally, select the check boxes beside Faceted, Searchable, Personalizable.
- Under the Details tab on the Attribute Details page, in the Type field, use the dropdown arrow to make your selection.



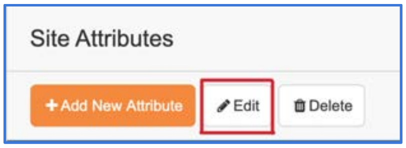
- In the Validation field, use the dropdown arrow to make your selection.



- Optionally, select the check box beside Allow multiple values.
- Optionally, on the Attributes Details page, under the Facets tab, enter the information.
- Click **Save,** or **Close** to return to the Manage Attributes page.
- Optionally, on the Attributes Details page, under the Facets tab, enter the information.

Edit an Attribute

- On the Manage Attributes page, in the panel on the left, select a category.
- In the panel on the right, click **Edit**.

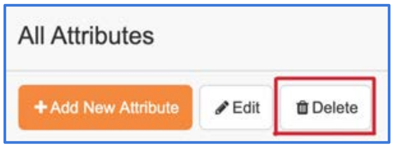


- On the Attribute Details page, make any revisions.
- Click **Save**.

Delete an Attribute

- On the Manage Attributes page, in the panel on the left, select a category.

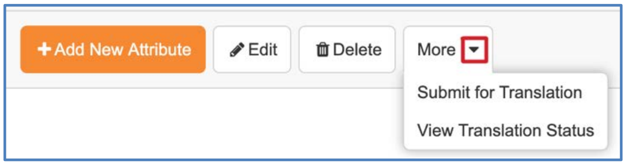
- In the panel on the right, click **Delete**.



- In the Confirm dialog, click **Confirm**.

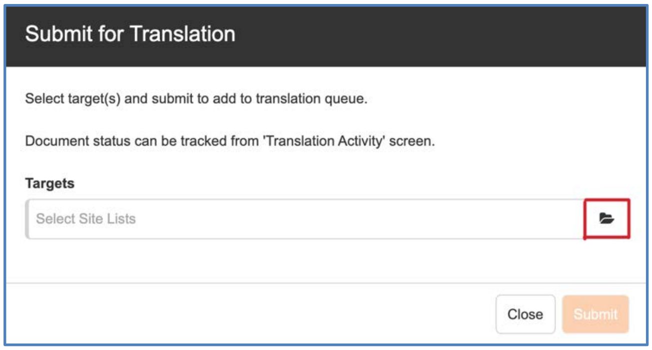
More Attribute options

- On the Manage Attributes page, in the panel on the left, select a category.
- In the panel on the right, click the More dropdown menu to select **Submit for Translation** or **View Translation Status**.

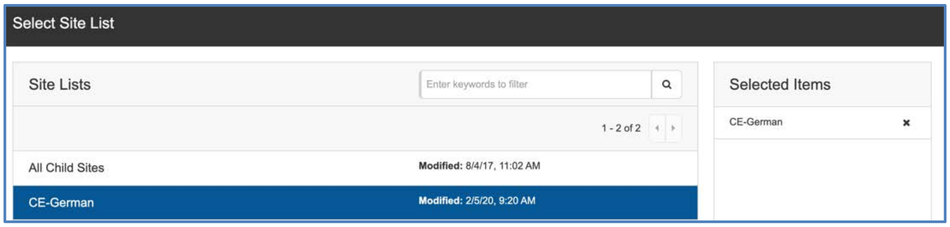


Submit for Translation

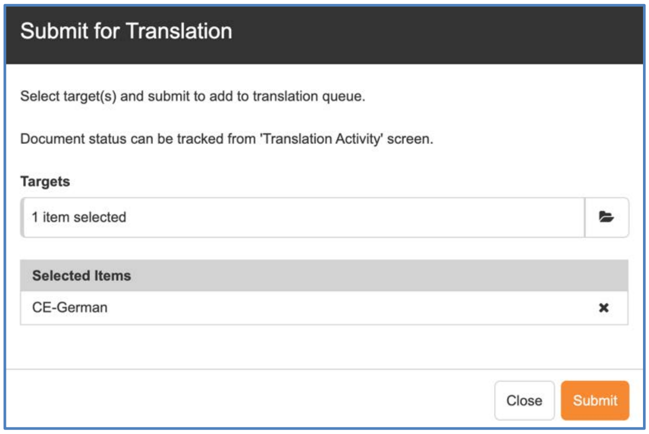
- In the Submit for Translation dialog, in the Targets field, click the folder icon.



- On the Select Site List page, select a site.
- In the Selected items panel on the right, click **Select**.

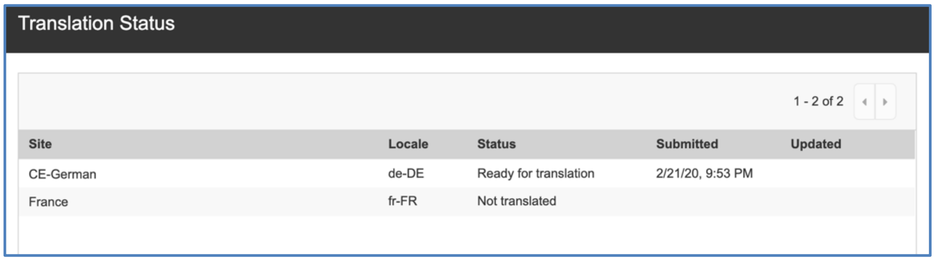


- In the Submit for Translation dialog, click **Submit**.



View Translation Status

- To see the status of your translation(s), using the More dropdown menu, select View Translation Status.



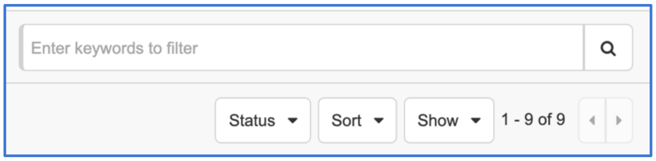
Features

Features are a way to sell more products by highlighting categories of products. A set of Features highlighted on the main store page might include, for example:

- Manager's Special
- Top Sellers
- Bargain Basement
- Hot New Products

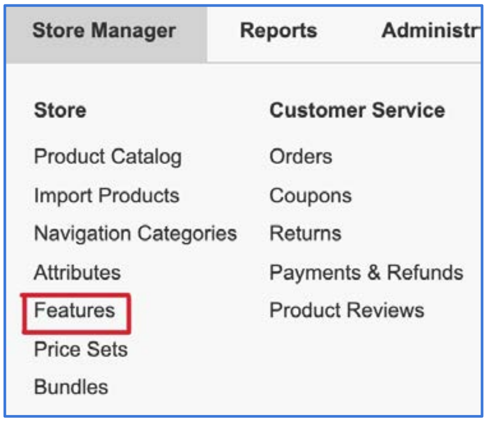
Manage features using items in your Product Catalog.

- A search panel helps you to find your orders by Keyword or by using the Status, Sort and Show menus.

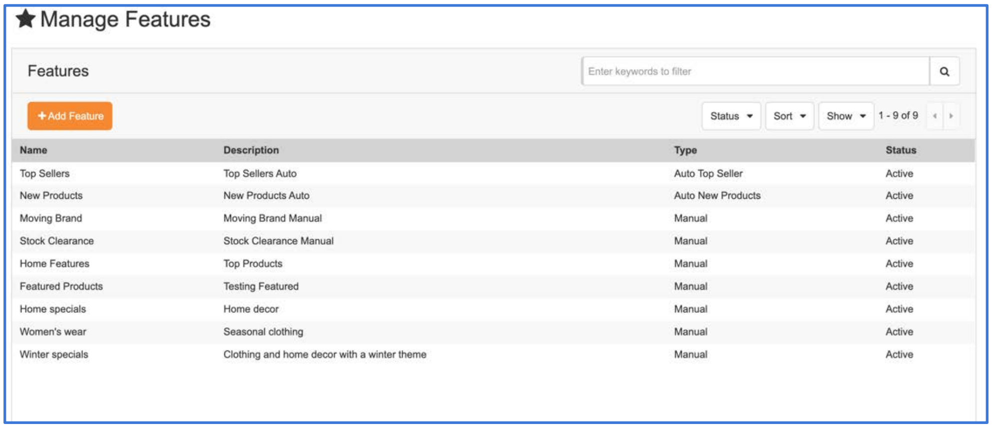


Create a new Feature

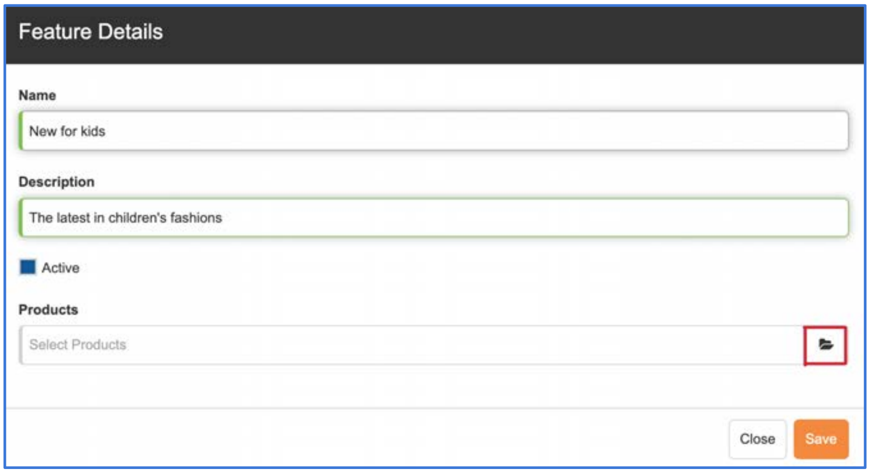
- Under Store Manager – Store, select Features.



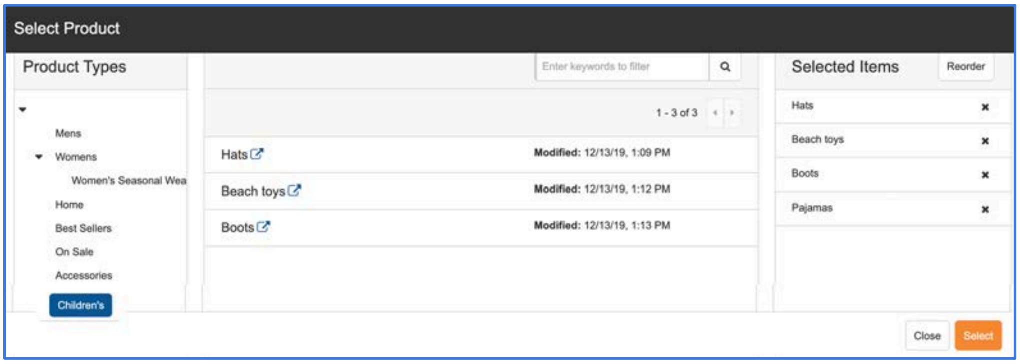
- On the Manage Features page, click **Add Feature**.



  - Alternately, to edit a Feature, click **Edit Feature**.
- On the Feature Details page, enter a Name and Description.



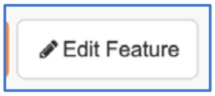
- Under Products, in the Select Products field, click the folder icon.
- On the Select Product page, from the Product Types panel, select a category.
- In the product list, select an item or items.
- In the Selected Items panel, click Select.



- On the Feature Details page, click **Save**, or **Close** to return to the Manage Features page.

Edit a Feature

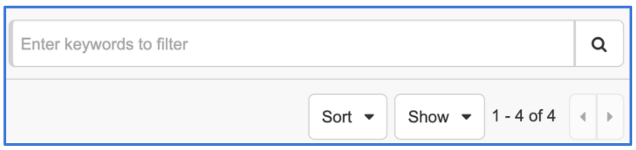
- On the Manage Features page, select a Feature from the list.
- Click **Edit Feature**.



- On the Feature Details page, make any revisions. Click **Save**, or **Close** to return to the Manage Features page.

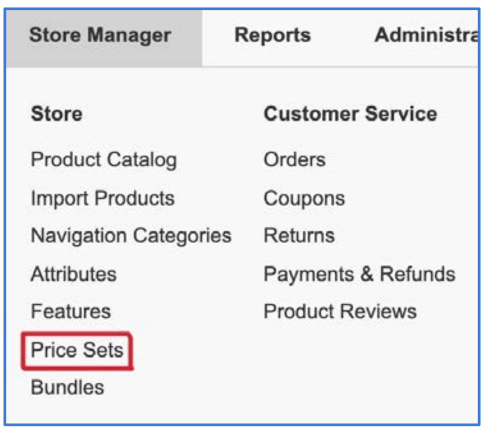
Price Sets

- You can establish promotional price sets that are applicable to groups or customer categories for a specified time.
- A search panel helps you to find your orders by Keyword or by using the Sort and Show menus.

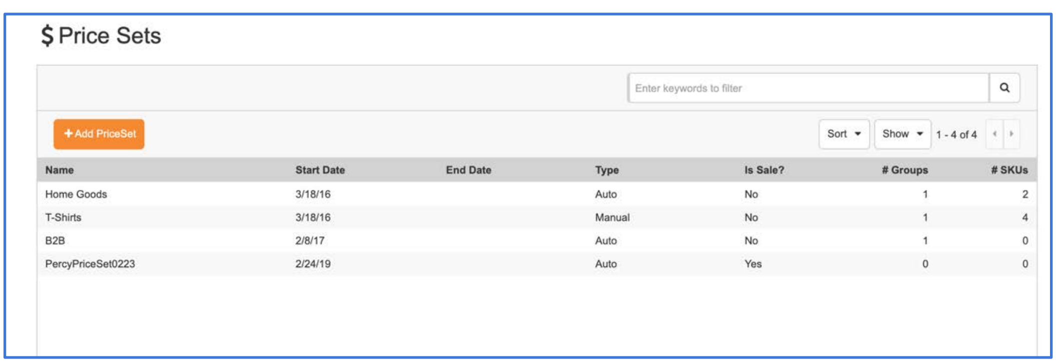


Create a Price Set

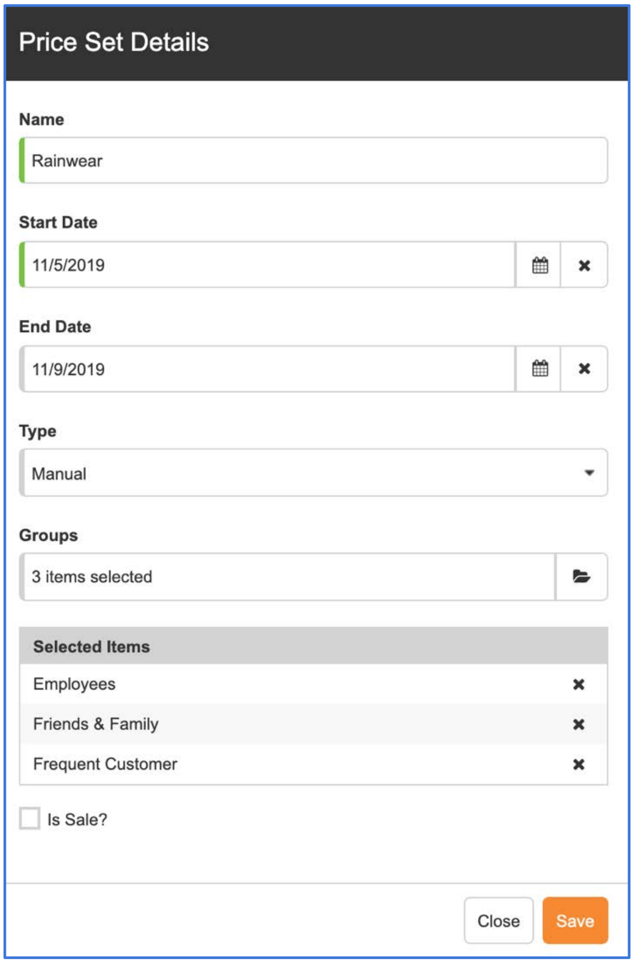
- Under Store Manager – Store, select **Price Sets**.



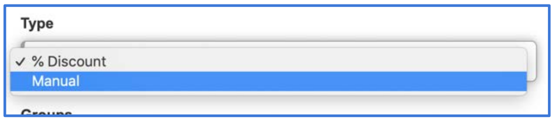
- On the Price Sets page, click **Add Price Set**.



- On the Price Set Details page, give the price set a name and determine the Start Date.

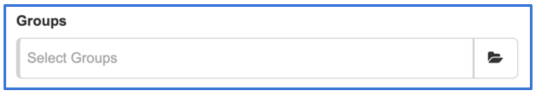


- Optionally, set the End Date.
- Optionally, in the Type field, use the dropdown arrow to determine the Discount Type.

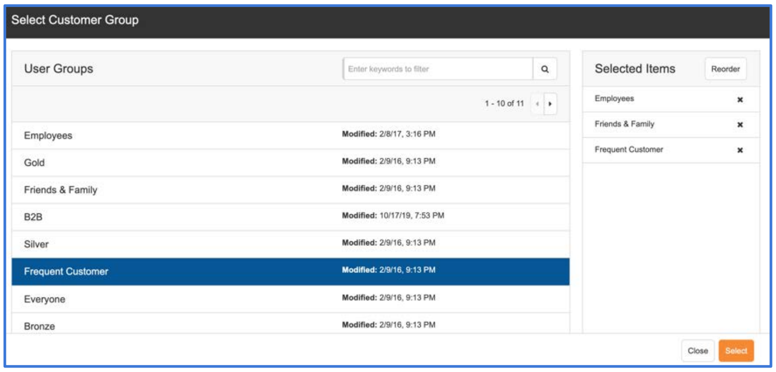


Note: The Discount Type determines some of your options in later steps. Using the **More** dropdown menu, if you have selected "Manual" Discount Type, you have the option of managing SKUs. If you have selected "% Discount" Type, you have the option to Manage Discount Ranges; or Manage Product Types & SKUs".

- Optionally, in the Groups field, click the folder icon to select Groups.



- On the Select Customer Group page, under User Groups, select customer groups.
- In the Selected Items panel, click **Select**; or **Close** to return to Price Set Details.

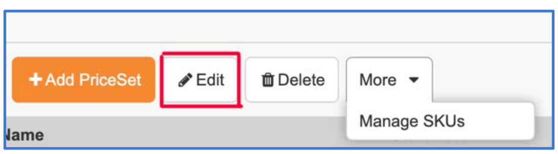


- Optionally, select the check box beside **Is Sale?**

- Click **Save**.

Edit a Price Set

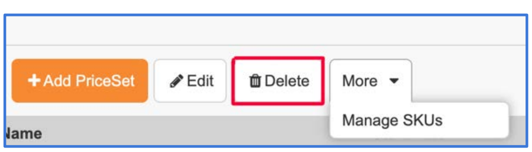
- Select a Price Set and click **Edit**.



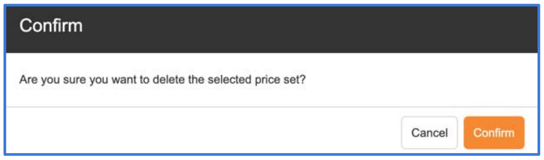
- In the Price Set Details dialog, make any revisions.
- Click **Save**.

Delete a Price Set

- Select a Price Set and click **Delete**.

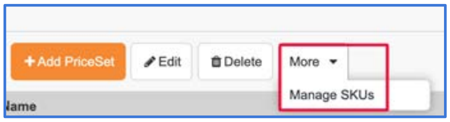


- In the Confirm dialog, click **Confirm**, or **Cancel** to return to Price Sets.

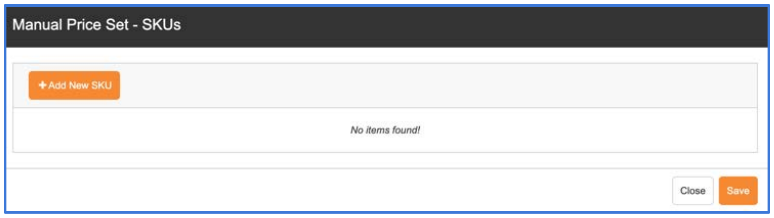


Manage SKUs

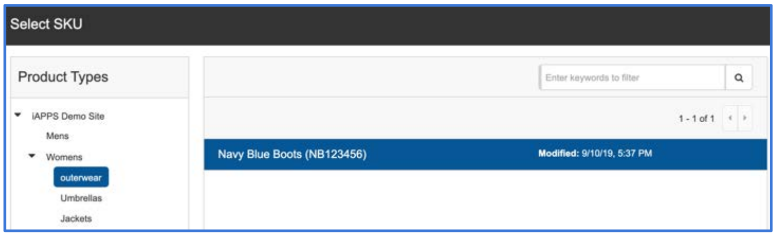
- If, on the Price Set Details page, you have chosen **Manual Discount** as your Discount Type, select a Price Set and, using the More dropdown arrow, select **Manage SKUs**.



- On the Manual Price Set – SKUs page, click **Add New SKU**.

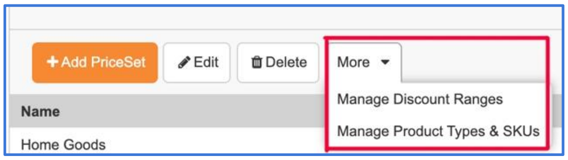


- In the Manual Price Set – SKU dialog, in the Select SKU field, click the folder icon.
- On the Select SKU page, under Product Types, select a SKU type.
- In the SKU list, select an item.



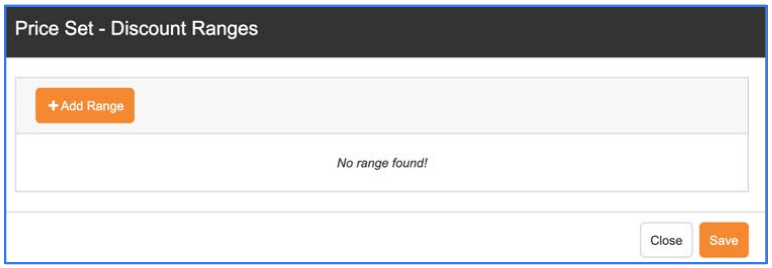
Manage Discount Ranges/Product Types & SKUs

- If, on the Price Set Details page, you have chosen **% Discount** as your Discount Type, select a Price Set and, using the More dropdown arrow, select **Manage Discount Ranges**; or **Manage Product Types & SKU**s.

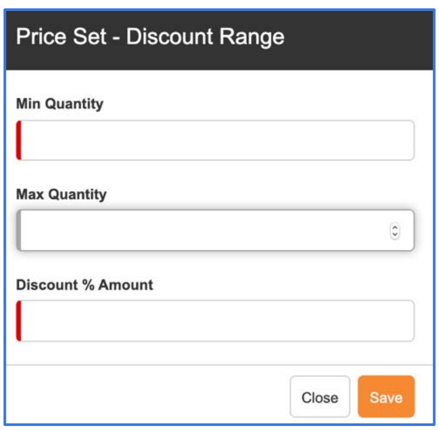


Manage Discount Ranges

- If you choose Manage Discount Ranges, in the Price Set – Discount Ranges dialog, click **Add Range**.



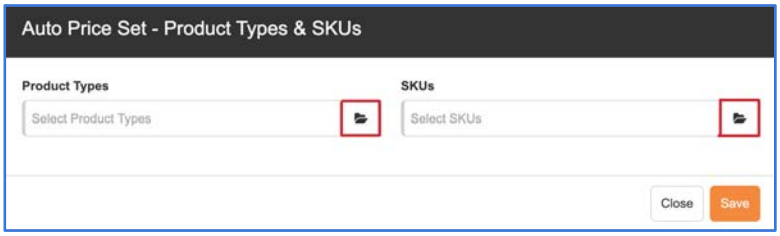
- In the Price Set – Discount Range dialog, enter Min Quantity and Discount % Amount.
- Optionally, enter Max Quantity.



- Click **Save**.

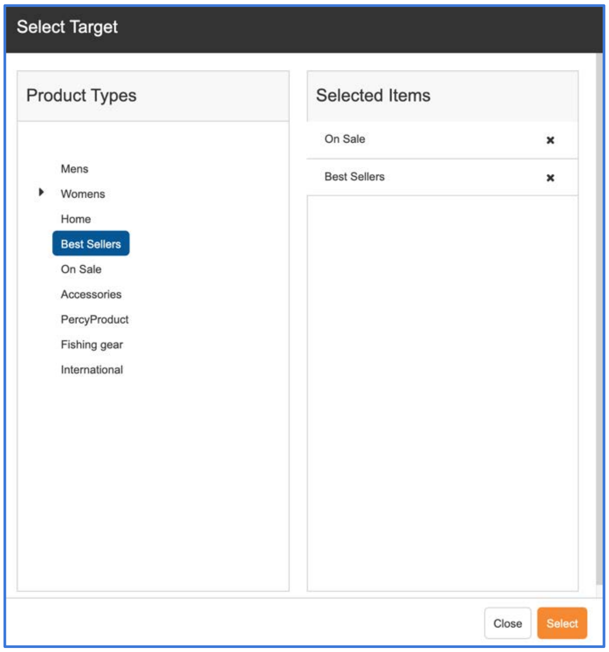
Manage Product Types & SKUs

- If you choose Manage Product Types & SKUs, in the Auto Price Set – Product Types & SKUs dialog, in the Product Types field or SKUs field, click the folder icon.

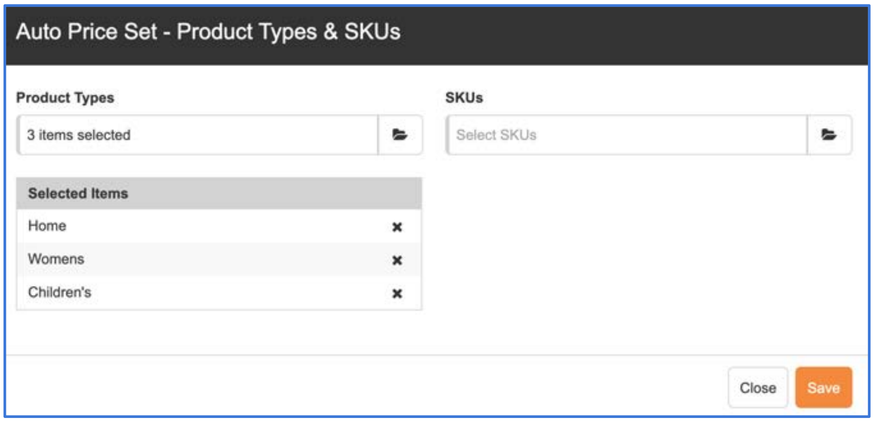


Product Types

- If you select Product Types, on the Select Target page, under Product Types, select a product type.
  - In the Selected Items panel, click **Select**.

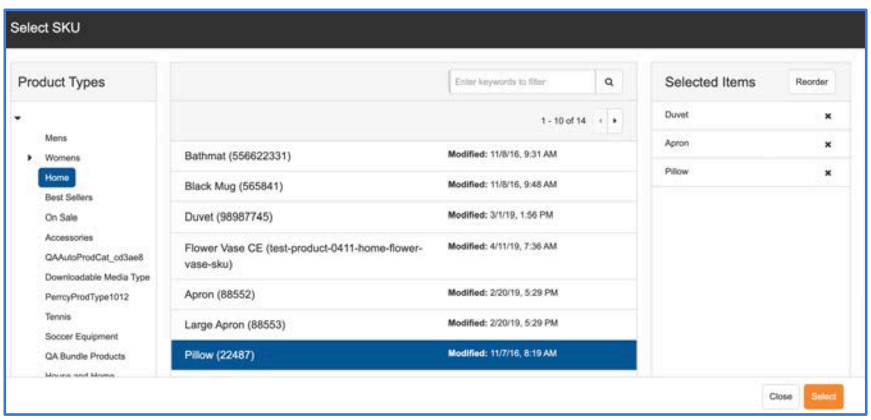


- On the Auto Price Set - Product Types & SKUs page, click **Save** or **Close** to return to the Price Sets page.



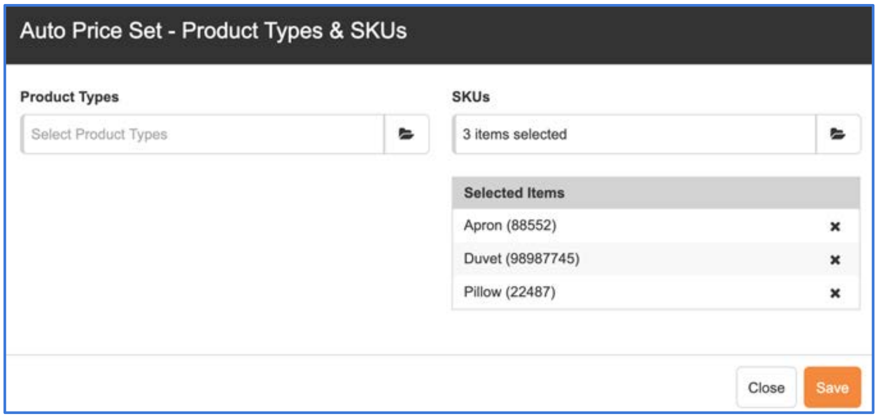
SKUs

- If you select SKUs, on the Select SKU page, select a product type in the Product Types panel.
- Select a product from the list.



  - In the Selected Items panel, click **Select**.

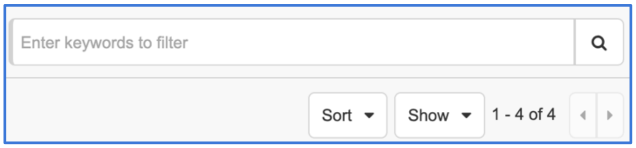
- On the Auto Price Set - Product Types & SKUs page, click **Save**, or **Close** to return to the Price Sets page.



Bundles

You can allow several items to be sold as a set under a new SKU number using Bundles in Store Manager.

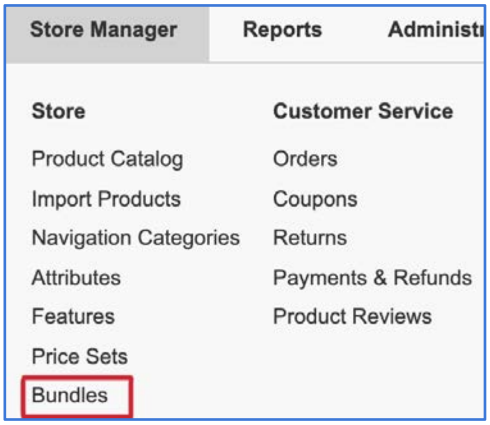
- A search panel helps you to find your bundles by Keyword or by using the Sort and Show menus.



- You can also create new Bundles.

Create and manage Bundles

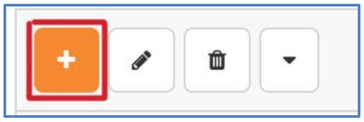
- Under Store Manager – Customer Service, select **Bundles**.



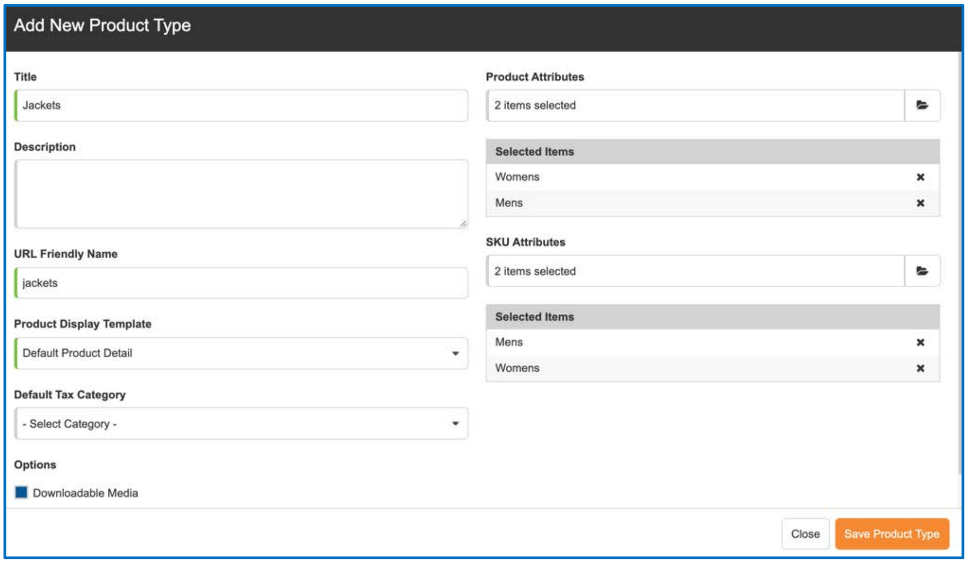
- On the Bundles page, in the Product Types panel on the left, use the icons at the top of the panel to add, edit, delete or use translation options for each Type.

Add a Product Type

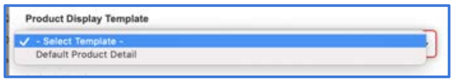
- In the Product Types panel, click the Add icon.



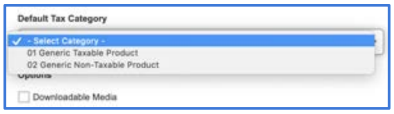
- On the Add New Product Type page, in the Title field, enter a title.
  - This automatically populates the "URL Friendly Name" field.



- Optionally, in the Description field, add a description.
- In the Product Display Template field, use the arrow to make your selection.



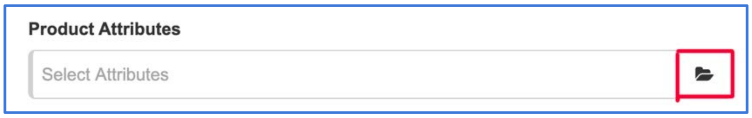
- Optionally, in the Default Tax Category field, use the arrow to make your selection.



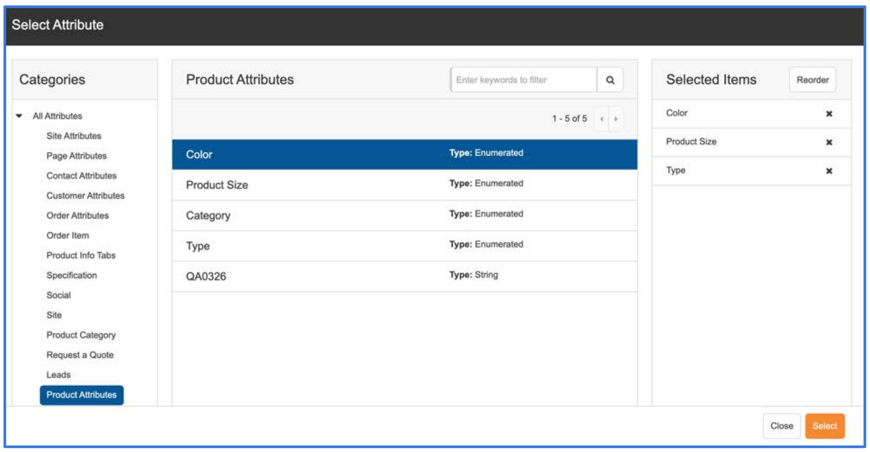
- Optionally, select the check box beside Downloadable Media.

Product Attributes

- Optionally, click the folder icon in the Product Attributes field.

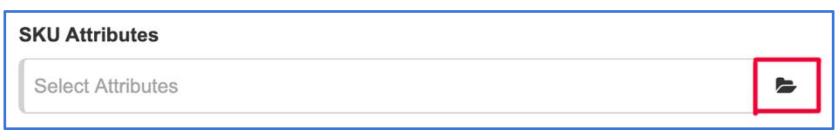


  - On the Select Attribute page, in the Categories panel, select a category.
  - In the panel on the right, in the Attributes for that category, make your selection.
  - In the Selected Items panel on the far right, click **Select**, or **Close** to return to the Add New Product Type page.

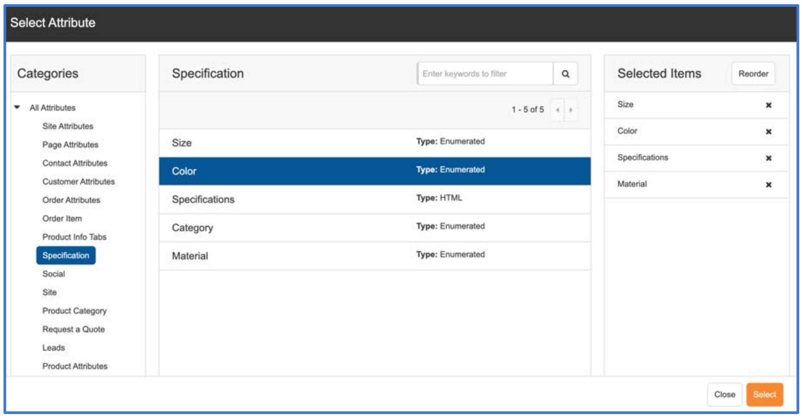


SKU Attributes

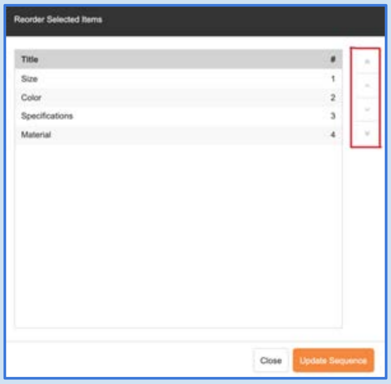
- Optionally, click the folder icon in the SKU Attributes field.



  - On the Select Attribute page, in the Categories panel, select a category.
  - In the panel on the right, in the Attributes for that category, make your selection.
  - In the Selected Items panel on the far right, click **Select**, or **Close** to return to the Add New Product Type page.



Note: In many Selected Items panels, you can click **Reorder** to rearrange your list. In the Reorder Selected Items dialog, use the arrows to change the order of the items. Click **Update Sequence**, or **Close** to return to the previous page.



- On the Add New Product Type page, click **Save Product Type**, or **Close** to return to the Product Catalog page.

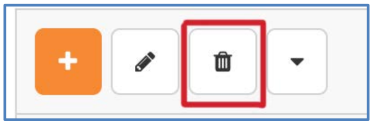
Edit a Product Type

- In the Product Types panel, select a product type. Click the **Edit** icon.

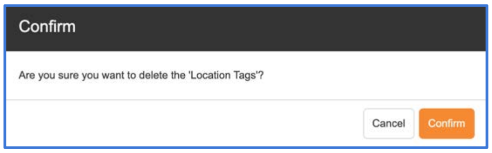
- On the Edit Product Type page, make your revision.
- Click **Save**, or **Close** to return to Product Types.

Delete a Product Type

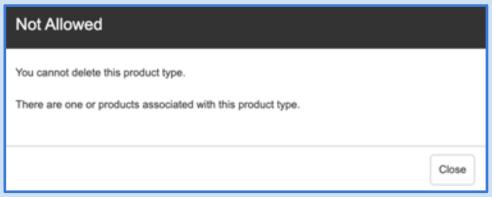
- In the Product Types panel, select a product type. Click the **Delete** icon.



- If there have been no products associated with the product type, in the Confirm dialog, click **Confirm**; or **Close** to return to Product Types.

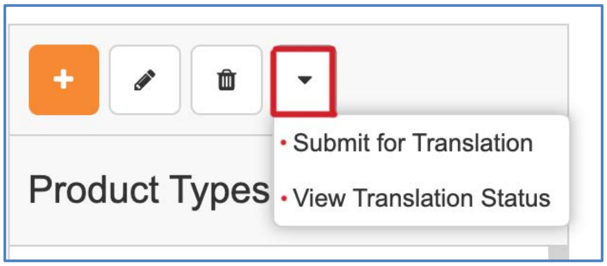


Note: If there are products associated with the product type, you will not be able to delete it.



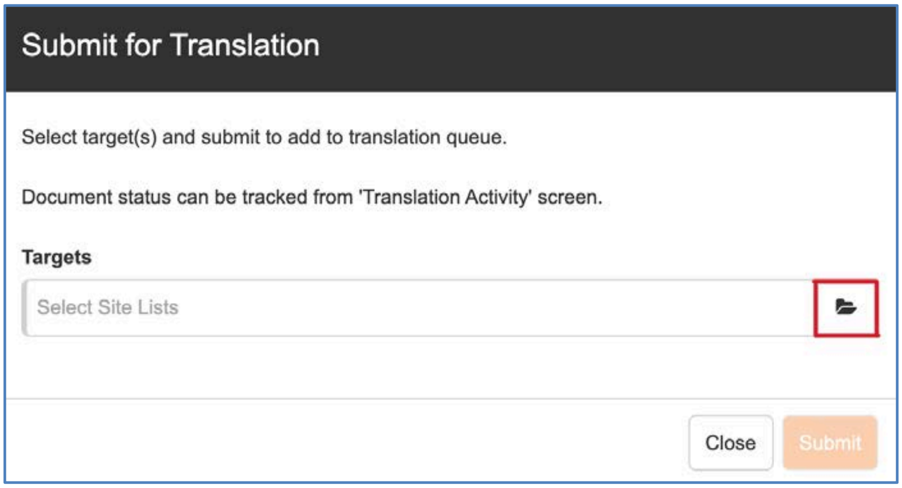
Translate a Product Type

- In the Product Types panel, select a product type.
- At the top of the panel, in the row of icons, use the dropdown arrow to select **Submit for Translation** or **View Translation Status**.

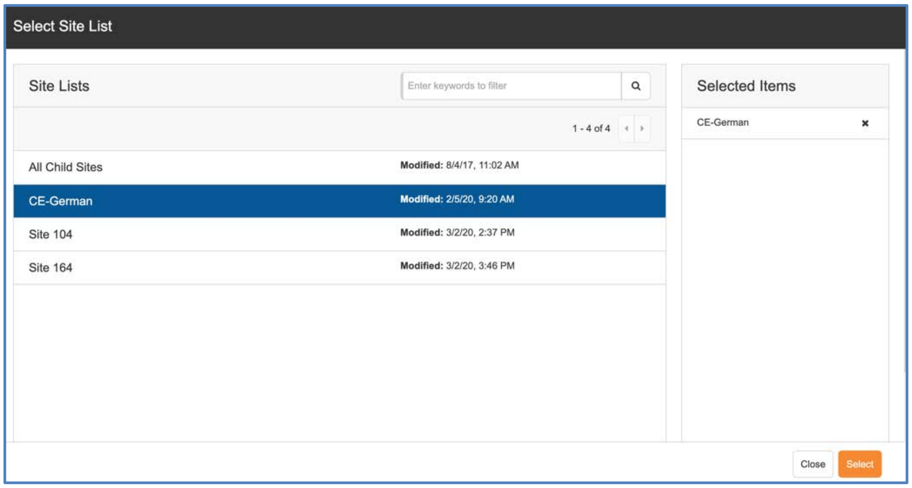


Submit for Translation

- If you choose Submit for Translation, in the Submit for Translation dialog, in the Targets field, click the folder icon.



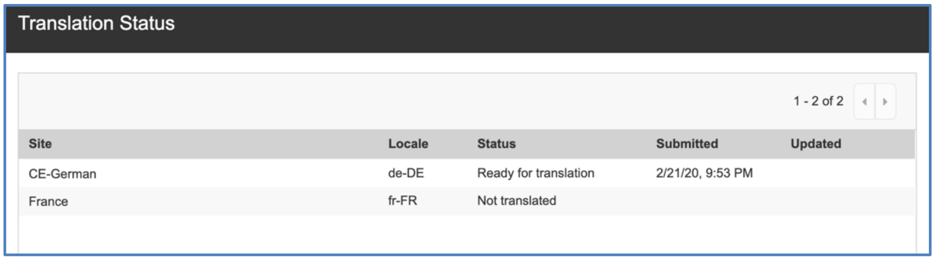
- On the Select Site List page, choose a site or sites.



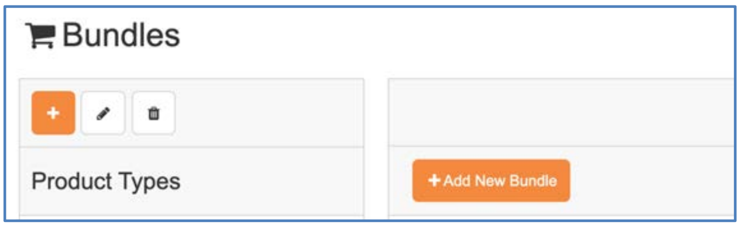
- In the Selected Items panel, click **Select**.
- On the Submit for Translation dialog, click **Submit**.

View Translation Status

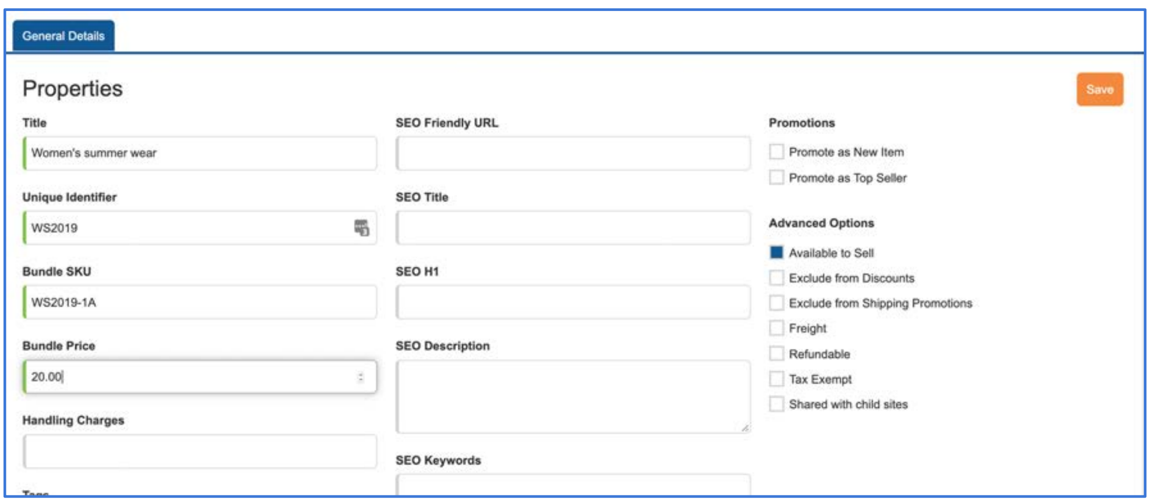
- If you select View Translation Status, you'll see at a glance the status of your variant sites.



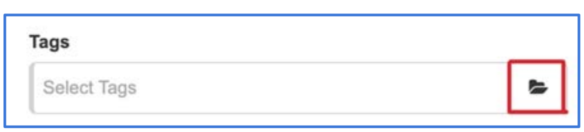
- In the panel on the right, click **Add New Bundle**.



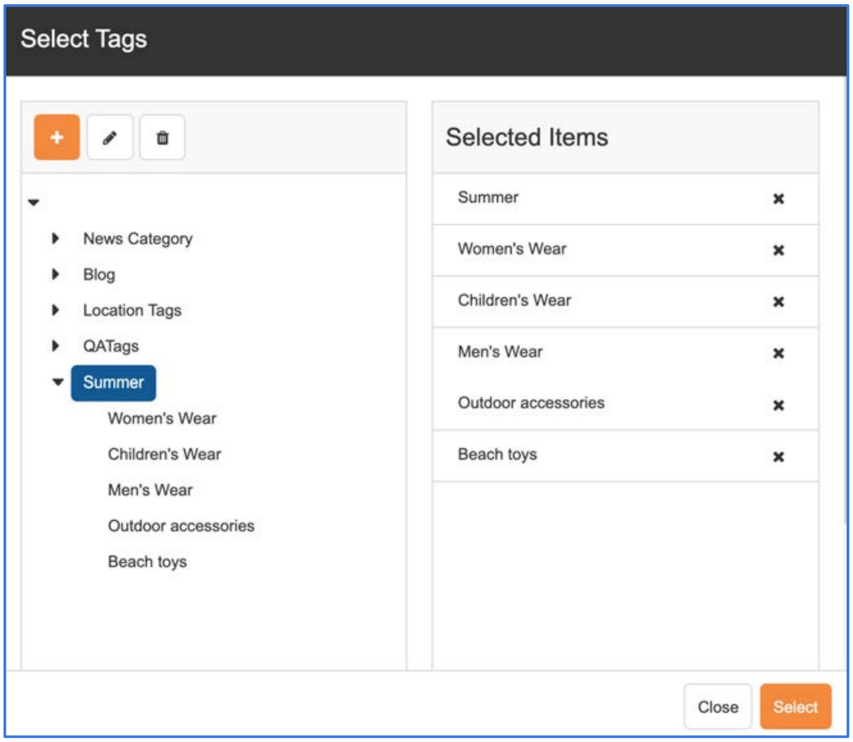
- On the New Bundle page, under General Details – Properties, enter a Title, Unique Identifier, Bundle SKU and Bundle Price.



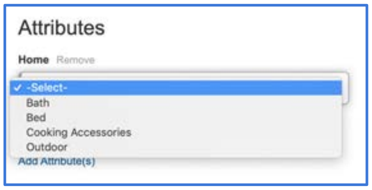
  - Optionally, enter Handling Charges.
  - Optionally, under the Handling Charges field, in the Tags field, click the folder icon.



  - On the Select Tags page, in the left panel, choose a tag or tags.

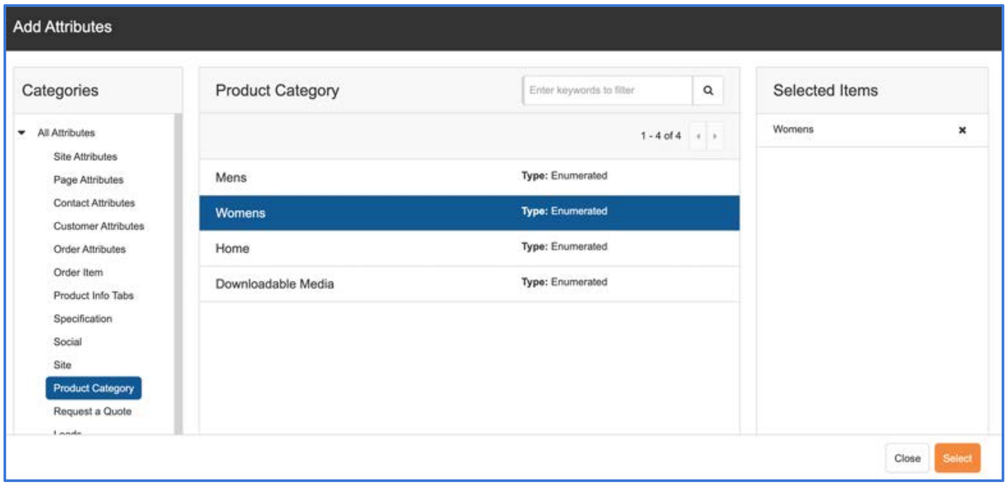


- In the Selected Items panel, click **Select**.
- Optionally, at the bottom of the New Bundle page, add a Short Description or Description.
- Optionally, in the Attributes field, use the arrow to make a selection.

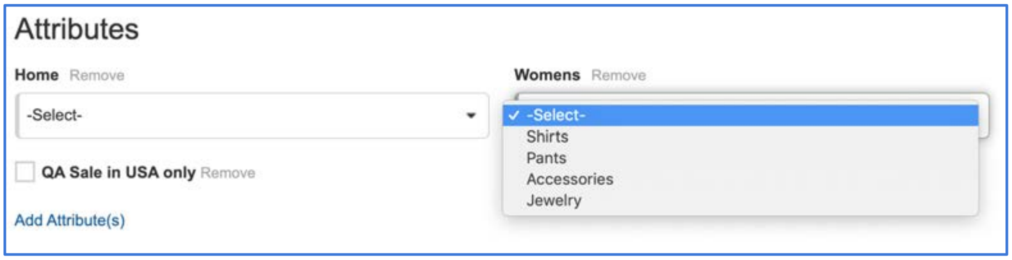


- Optionally, click **Add Attributes**.

- On the Add Attributes page, in the Categories panel, make a category selection.
- In the Product Category panel, make a product category selection.



- In the panel on the right, under Selected Items, click **Select**.
- Optionally on the newly-created Bundle page, under Details, at the bottom of the page, use the arrow in an Attribute field to make a selection.



- Optionally, in the middle panel on the New Bundle page, fill in the fields under:
  - SEO Friendly URL
  - SEO Title
  - SEO H1
  - SEO Description
  - SEO Keywords
- Optionally, in the far-right panel on the New Bundle page, select check boxes under **Promotions**:
  - Promote as New Item
  - Promote as Top Seller
- Optionally, select check boxes under **Advanced Options**:
  - Available to Sell
  - Exclude from Discounts
  - Exclude from Shipping Promotions
  - Freight
  - Refundable

- Tax Exempt
- Shared with child sites

- On the New Bundle page (Properties), click **Save**.

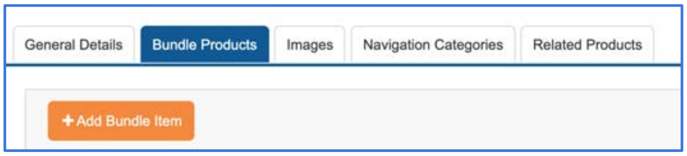
More options for Bundles

On the page for your new bundle, you have several options (beside the General Details tab) with these tabs:

- Bundle Products
- Images
- Navigation Categories
- Related Products.

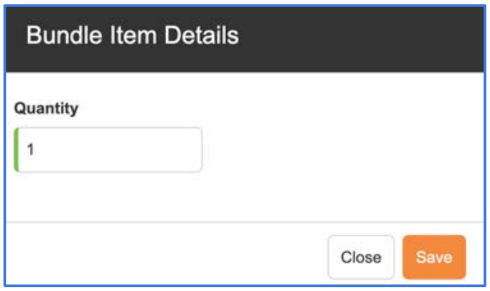
Bundle Products

- Under the Bundle Products tab, click **Add Bundle Item**.



- On the Select Bundle Item page, under Product Types, select a product type.

- Select an Item from the panel on the right.
- Click **Select**.
- In the Bundle Items dialog, add the quantity.



- Click **Save**.
- Do this for each Bundle Item you would like to add to a Bundled Product.

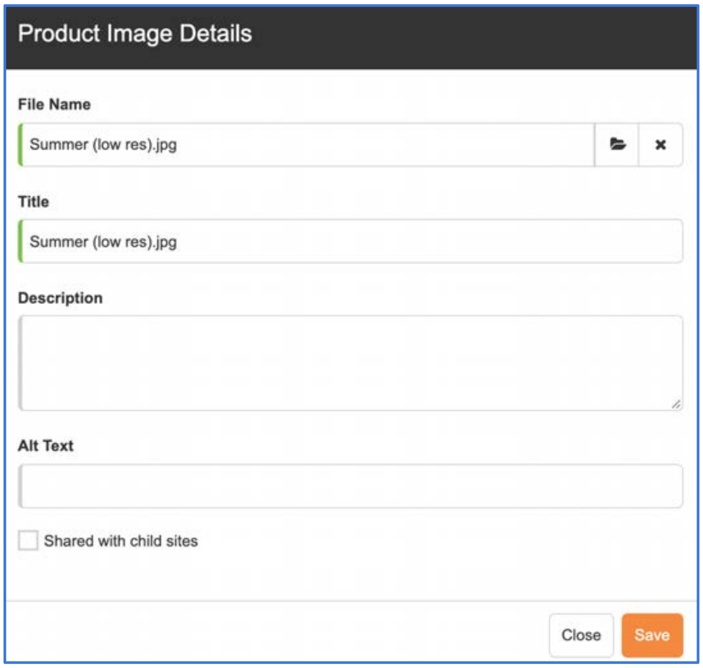
Images

- Under the Images tab, click **Add New Image**.

  - You have the option of adding a Select Single Image or Multiple Images.

Single Image

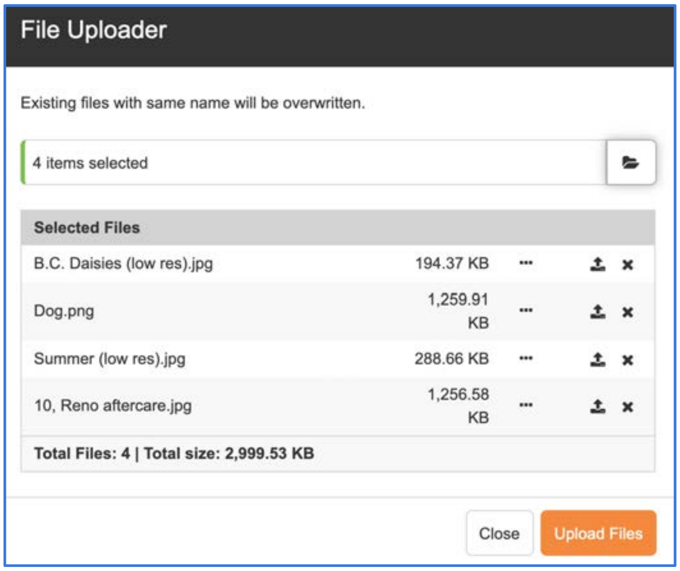
  - If you choose Single Image, on the Product Image Details page, in the File Name field, click the folder icon.



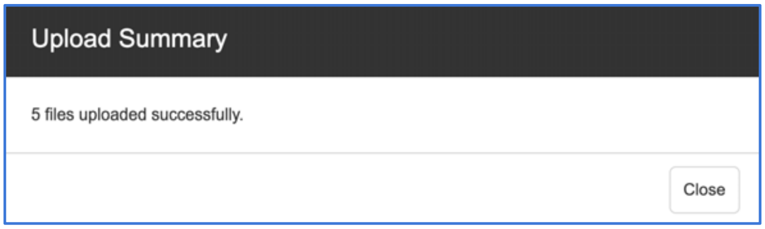
- Choose an image from your files.
- The Title automatically populates as the image file name.
    - Optionally, enter a Description.
    - Optionally, enter Alt Text.
    - Optionally, select the check box beside Shared with child sites.
- Click **Save**.

Multiple Images

- If you choose Multiple Images, in the File Uploader dialog, click the folder icon to Browse for images from your files.
- In the File Uploader dialog, click Upload Files.



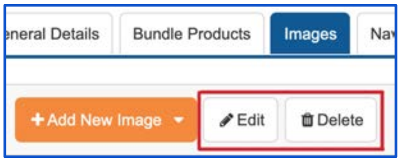
- Click **Upload Files**.
    - Optionally, click the folder icon to select more files.
    - In the Upload Summary dialog, click **Close**.



- In the File Uploader dialog, click **Close**.

Edit an image

- Optionally, click **Edit** to edit an image or images.
- On the Product Image Details page, make revisions or additions.
- Click **Save.**



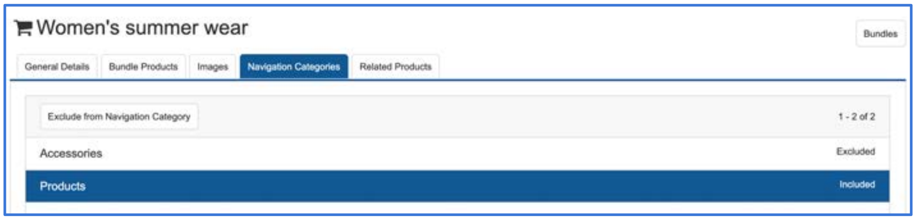
Delete an image

- Optionally, click **Delete** to delete an image or images.

- In the Confirm dialog, click **Confirm**.

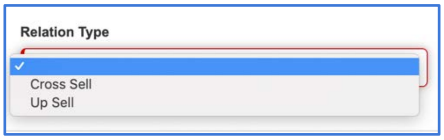
Navigation Categories

- Under the Navigation Categories tab of a product page, you have the option of viewing or removing navigation categories.

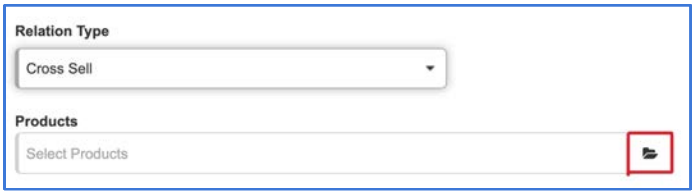


Related Products

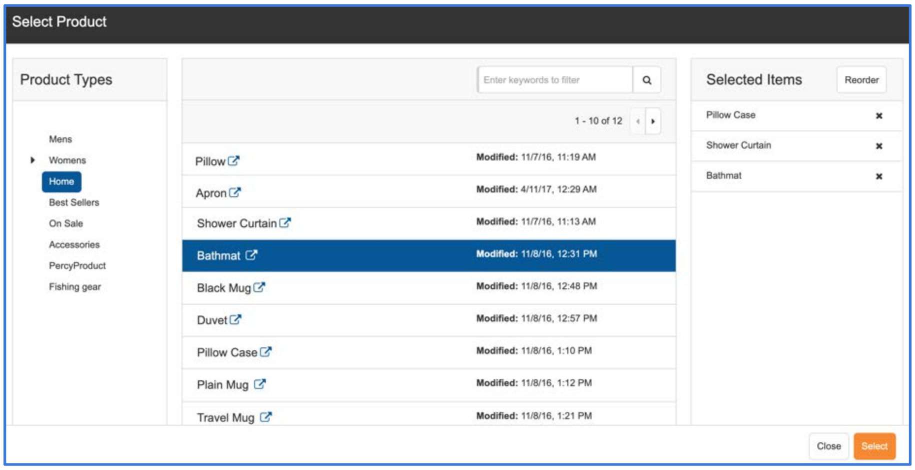
- Under the Related Products tab, select a Relation Type.



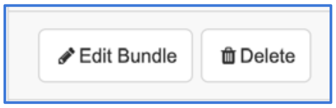
- In the Products field, click the folder icon to select Products.



- On the Select Product page, from Product Types, make a selection.
- From the panel on the right, select the related products.



- In the Selected Items panel on the far right, click **Select**; or **Close** to return to the Bundle page.
- On the Bundle page, click **Save**.
  - Once you have created a bundle, you have the option of editing or deleting it.
  - On the Bundles page, select the bundle. At the top of the panel, click **Edit Bundle** or **Delete**.

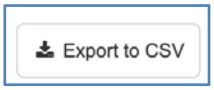


Store Manager – Customer Service

Orders

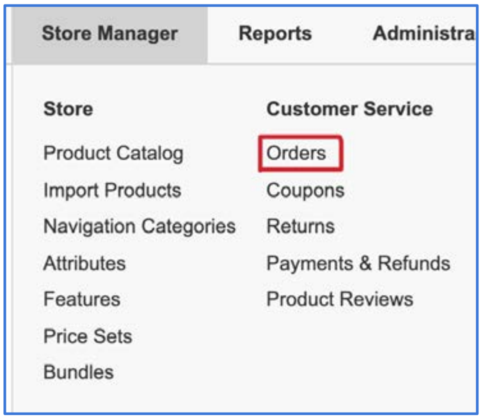
Unbound Commerce Order Management features allow you to help customers place orders, and then to manage them in detail.

- You can export the order list to a CSV file.

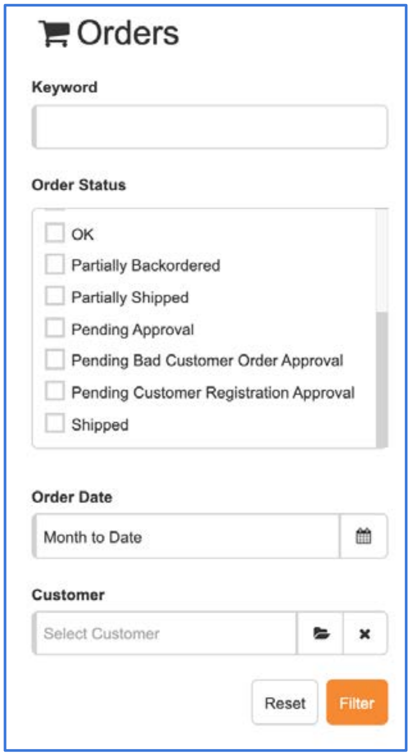


Manage orders

- Under Store Manager – Customer Service, select **Orders**.

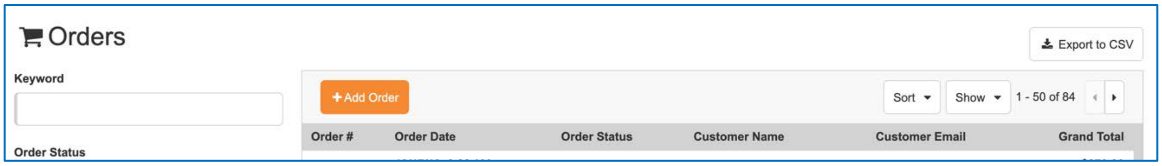


- On the Orders page, in the panel on the left, a full search panel helps you to find your orders by Keyword, Order Status, Order Date, and type of Customer.

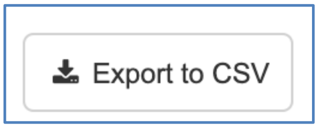


- Alternately, in the panel on the right, you can select an order from the Order list.
    - Orders are grouped by
        - Order #
        - Order Date

- Order Status
- Customer Name
- Customer Email
- Grand Total

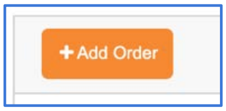


- You can export your Orders list to a CSV file.

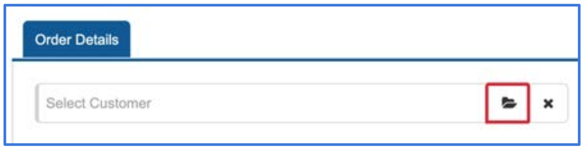


Create Orders

- On the Orders page, click **Add Order**.

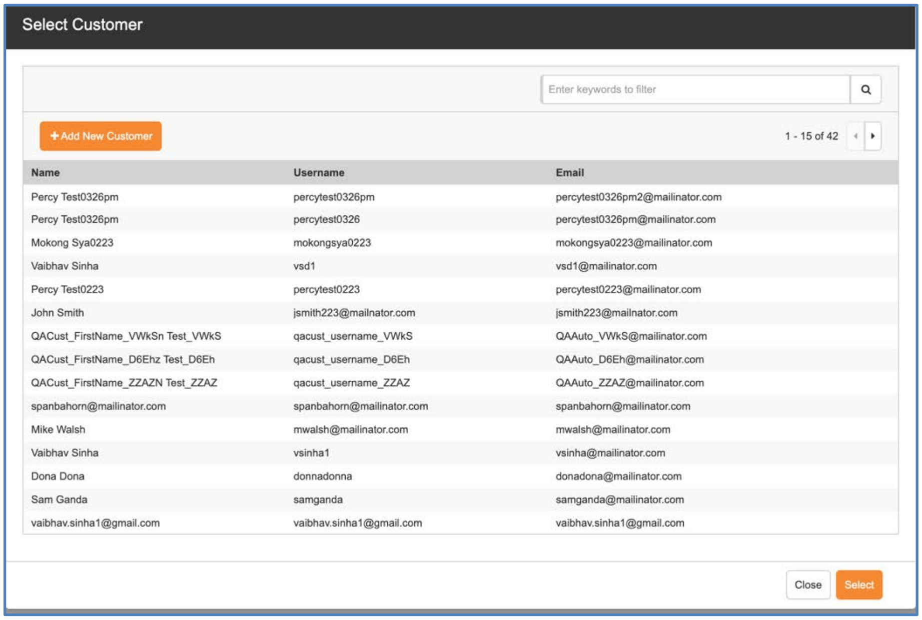


- Under the Order Details tab, click on the folder icon to select or to add a customer.

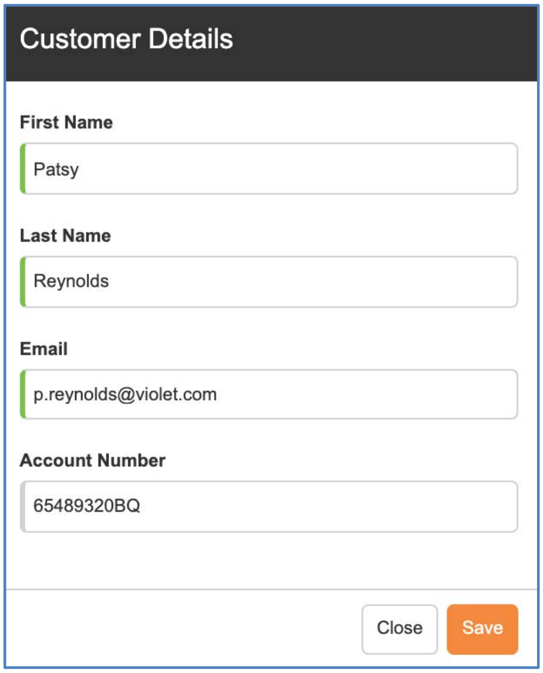


- On the Select Customer page, select a customer. Click **Select.**

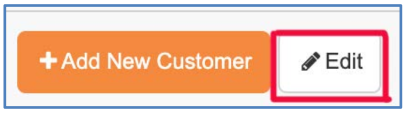
- Optionally, to add a new customer, click **Add New Customer**.



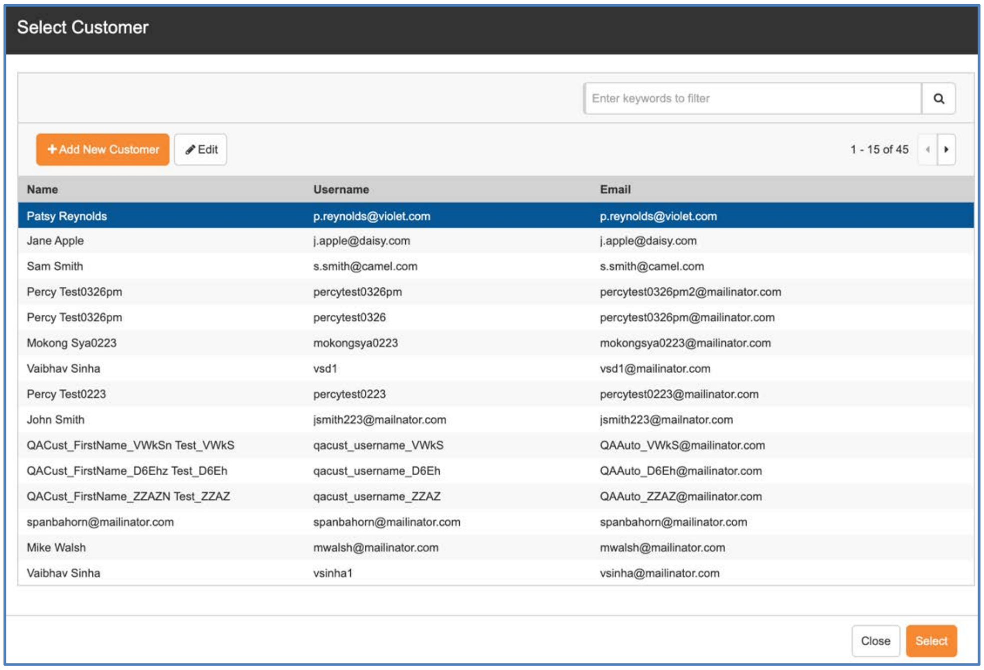
- On the Customer Details page, fill in the information.



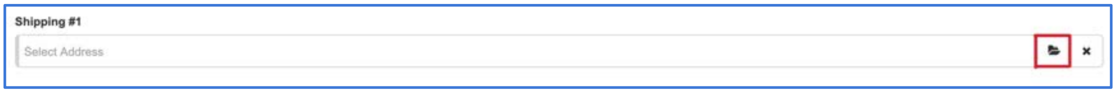
- Click **Save**.
  - Alternately, to Edit customer information, select a customer in the list and click **Edit**.



- To create an order for a customer, select the customer from the list. Click **Select.**

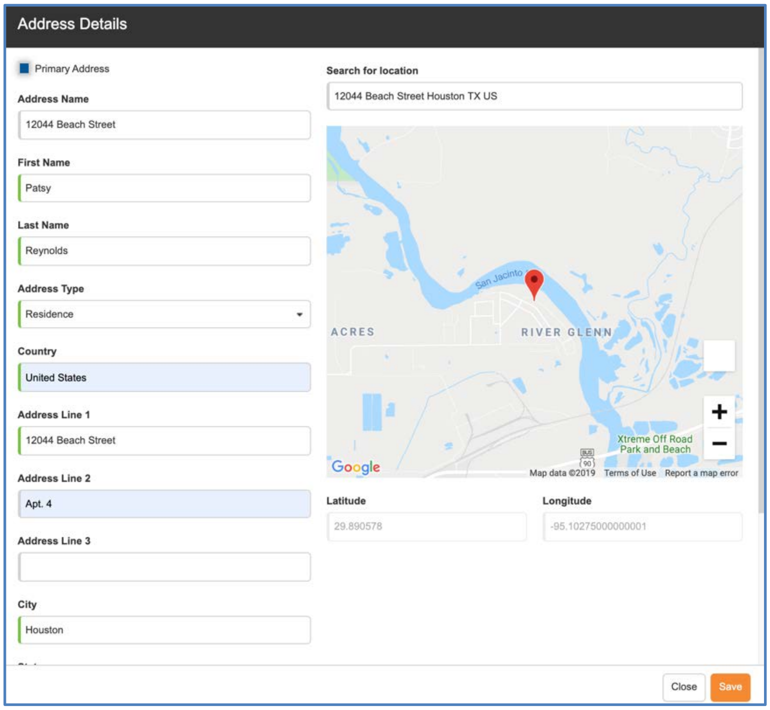


- On the Create Order page, in the Shipping #1 field, click on the folder icon to select the customer's address.



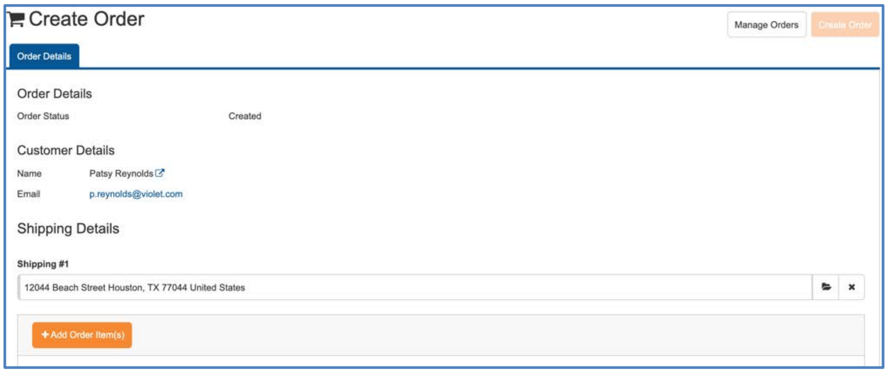
- On the Select Address page, select the customer. Click **Select**.

- Alternately, click **Add New Address** or **Edit** an address.
- On the Address Details page, enter or revise the information.

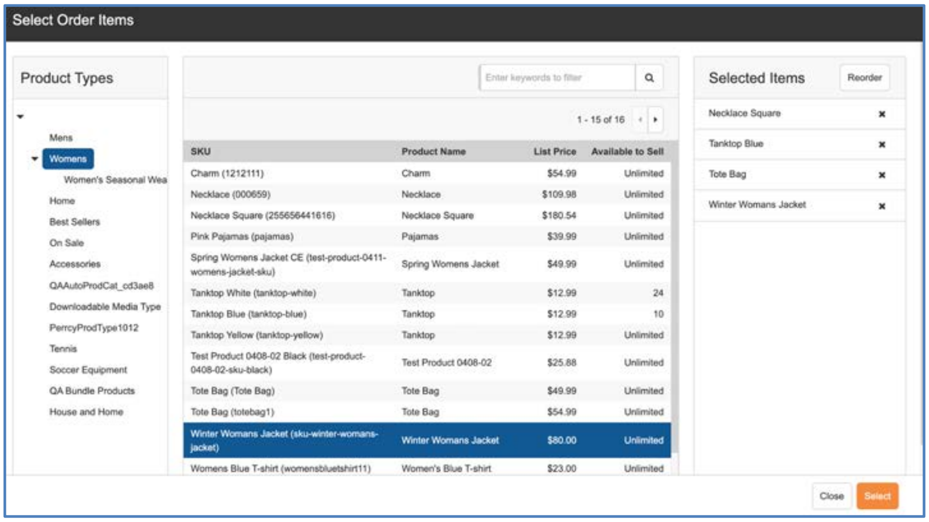


- Click **Save**.

- On the Create Order page, click **Add Order Item(s)**.



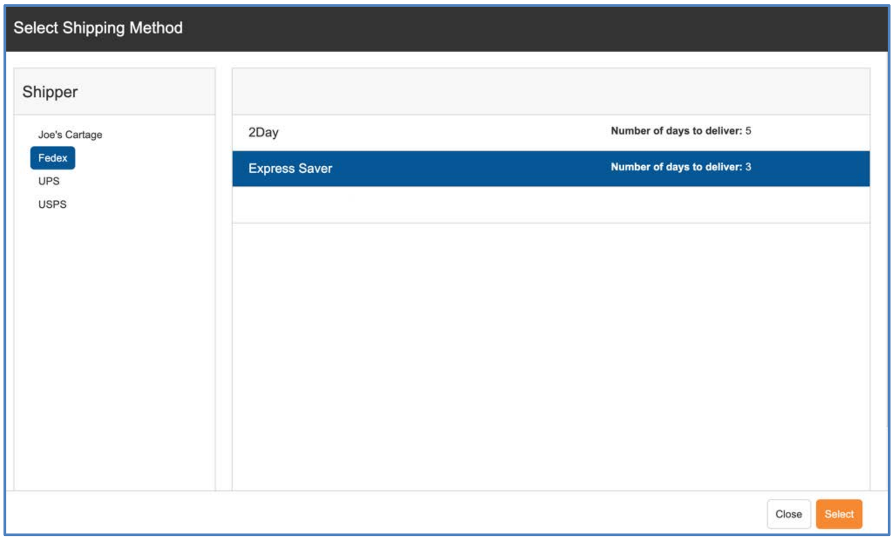
- On the Select Order Items page, in the Product Types panel, select a type.
- In the SKU list for that type, select an item or items.



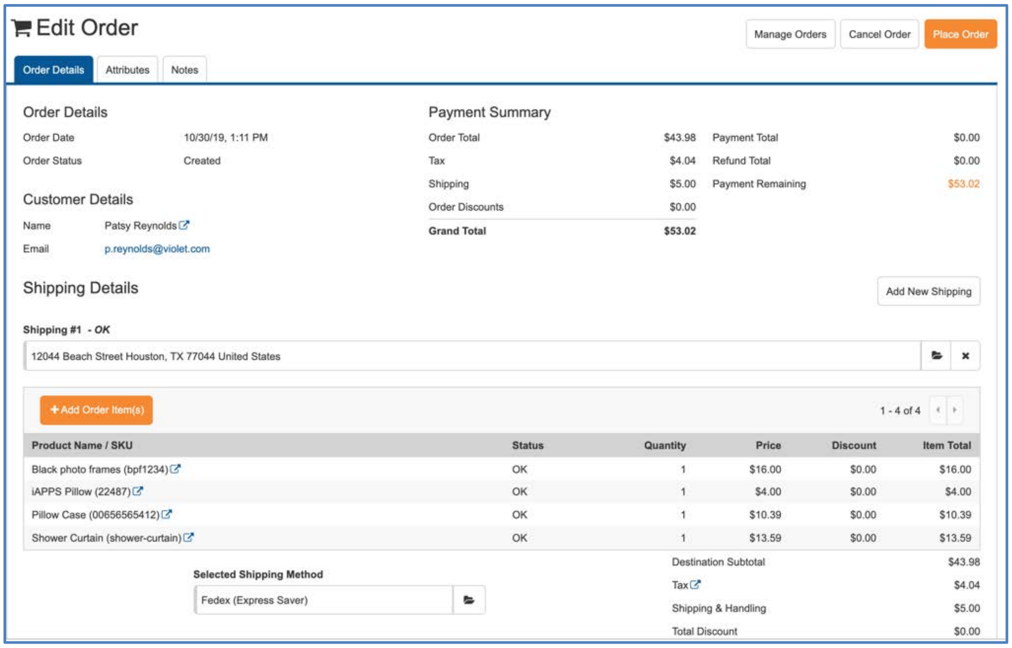
- In the Selected Items panel, click **Select**.
    - Optionally, use the search bar to filter products.
    - Optionally, click **Reorder** to change the order of the selected items.
- On the Create Order page, click **Create Order**.

- On the Edit Order page, under the Product/SKU list, in the Selected Shipping Method field, click the folder icon.

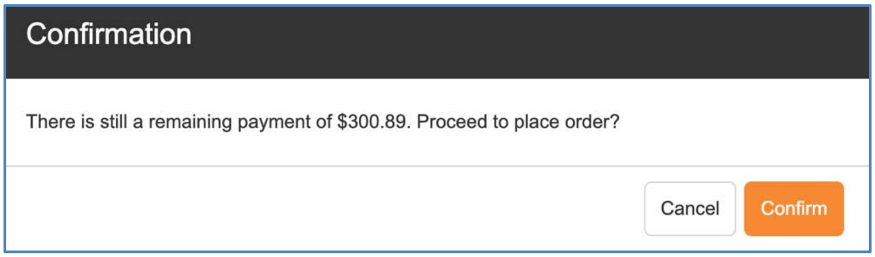
- On the Select Shipping Method page, in the Shipper panel, select the Shipper. In the panel to the right, select the Shipping Method.



- Click **Select**.
- On the Edit Order page, click **Place Order**.



    - In the Confirmation dialog, confirm payment.



- Alternately, click **Cancel Order.**
- Alternately, to return to the Orders page, click **Manage Orders**.

Orders Options

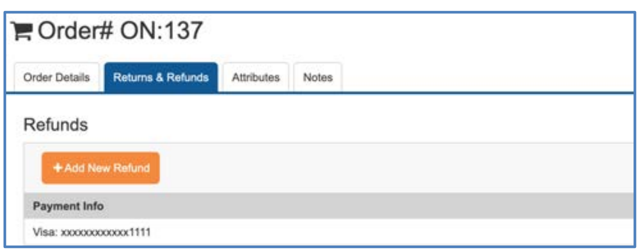
Once you have finished and placed an order, you can still do more.

- On the newly-created Order page, use the tabs beside Order Details for more options.

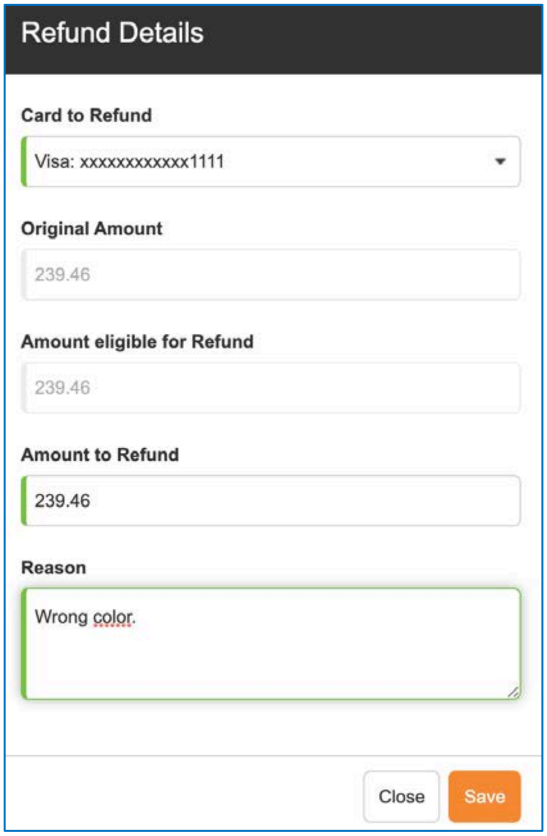
Returns & Refunds

- On the Order page, select the Returns & Refunds tab.

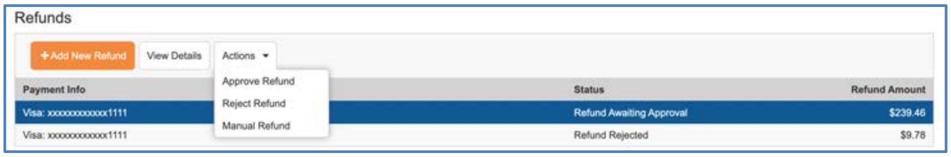
- Under Refunds, click Add New Refund.



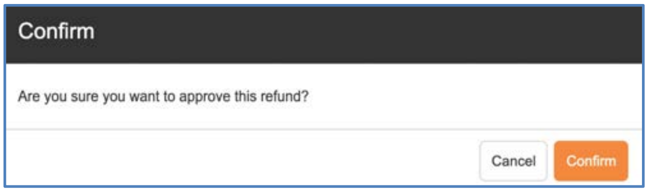
- In the Refund Details dialog, enter a Reason.



- Click **Save**.
  - Optionally, select the Refund item and use the tabs to View Details or to take Action.



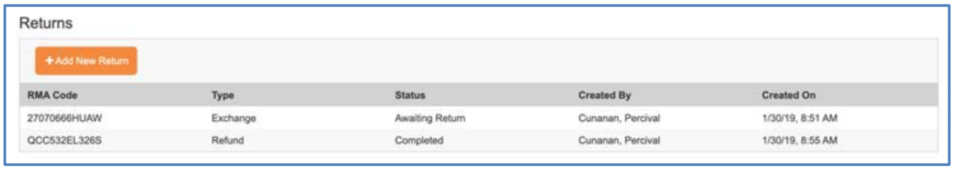
  - A dialog will ask if you want to confirm an action.



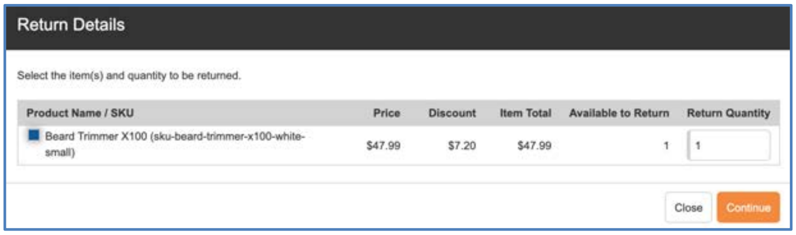
  - Click **Confirm**, or **Close** to return to the Refunds section on the Order page.

Returns

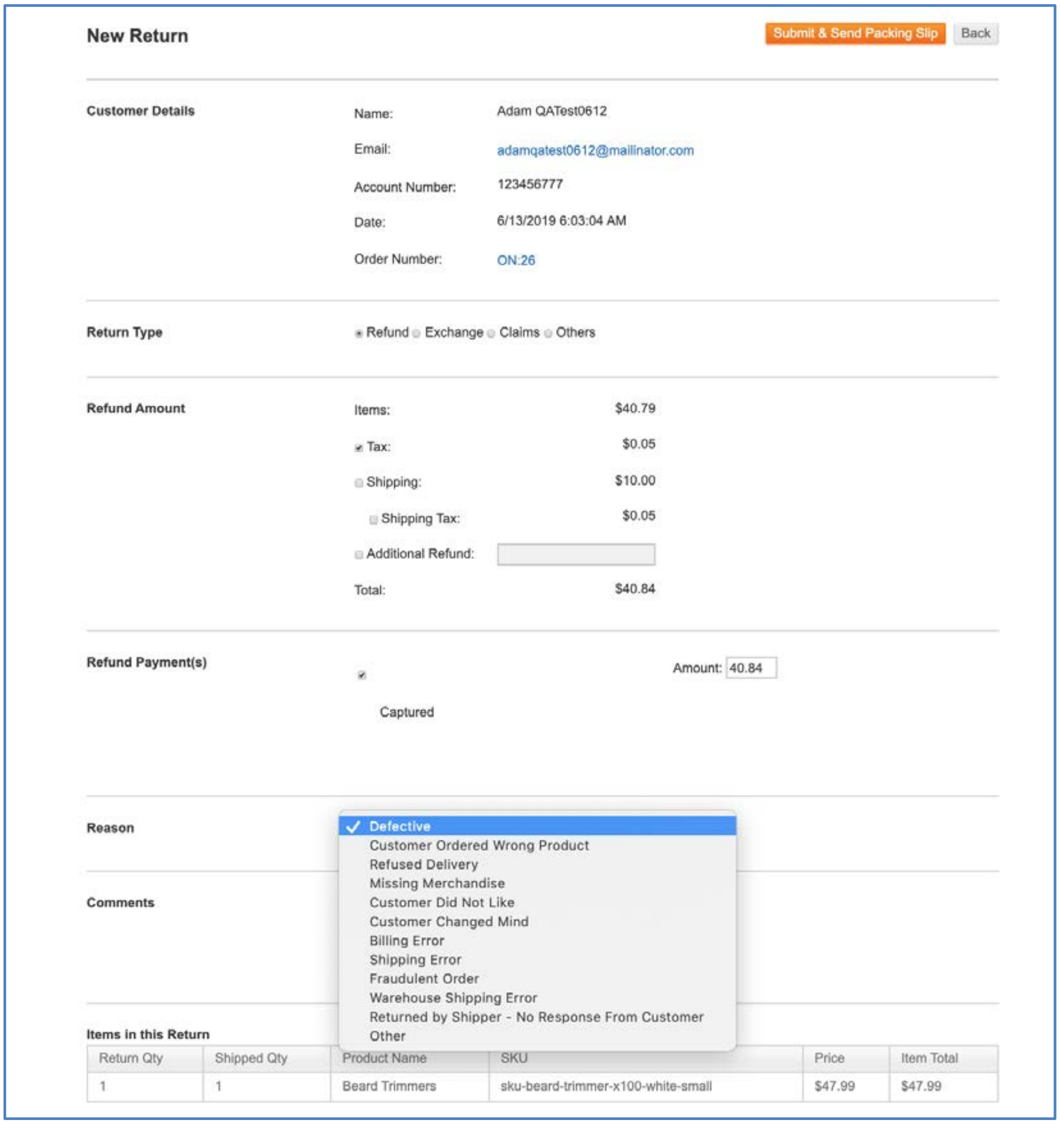
- On the Order page, under the Refunds section, click **Add New Return**.



- In the Return Details dialog, select the check box beside the item to be returned.



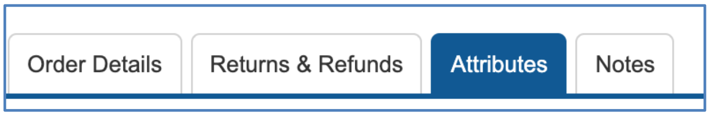
- Click **Continue**.



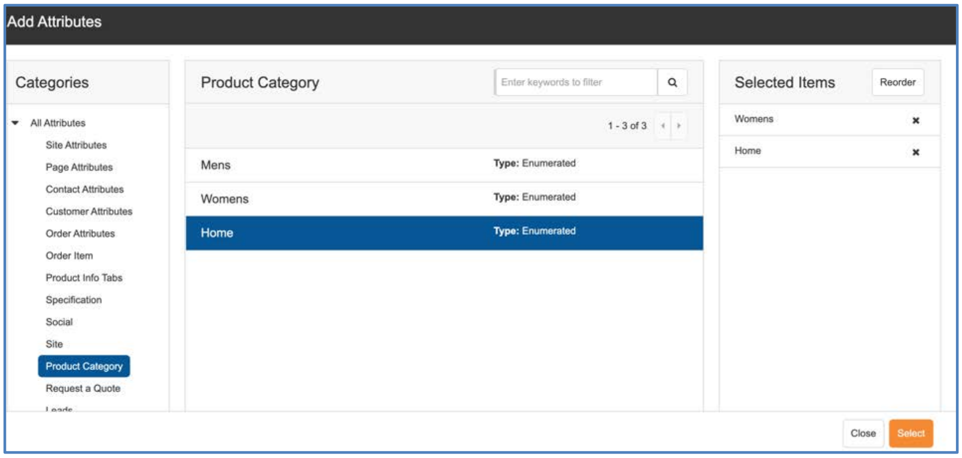
  - Optionally, under Return Type, select Refund, Exchange, Claims, or Others.
  - Optionally, under Refund Amount, select Shipping, Shipping Tax, and add Additional Refund.
  - Optionally, under Refund Payment(s), make any revisions.
  - Optionally, on the New Return page, in the Reason field, use the dropdown arrow to make a selection.
- Click **Submit & Send Packing Slip**.

Attributes

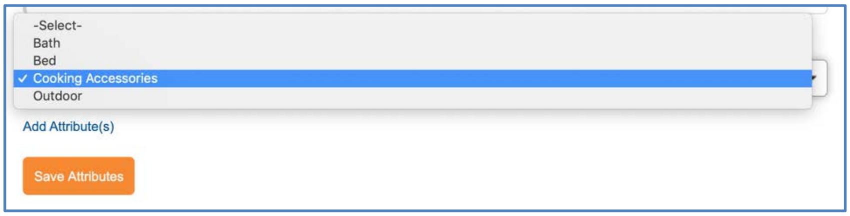
- On the Order page, select the Attributes Tab.



- Under the Attributes tab, enter the Customer Purchase Order Number and/or European values.
- Optionally, click **Add Attribute(s)**.
- On the Add Attributes page, under Categories, choose a category.
- In the panel to the right, select Attributes in that category.
- In the Selected Items panel, click **Select**.



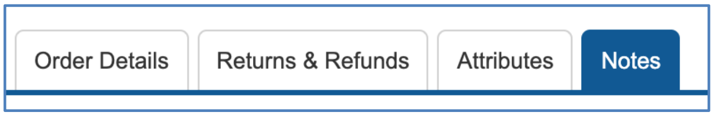
- On the Edit Order page, under the Attribute categories selected, use the dropdown arrow to choose an Attribute.



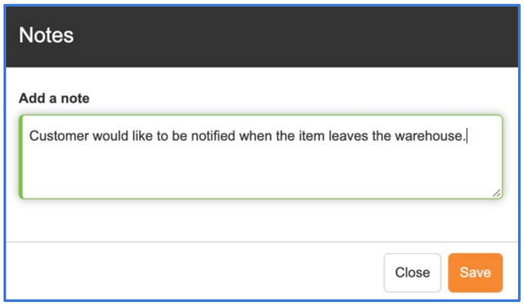
  - Click **Add Attribute(s)** to add more, or click **Save Attributes**.

Notes

- Optionally, under the Notes tab, to add a note, click **Add New Note**.



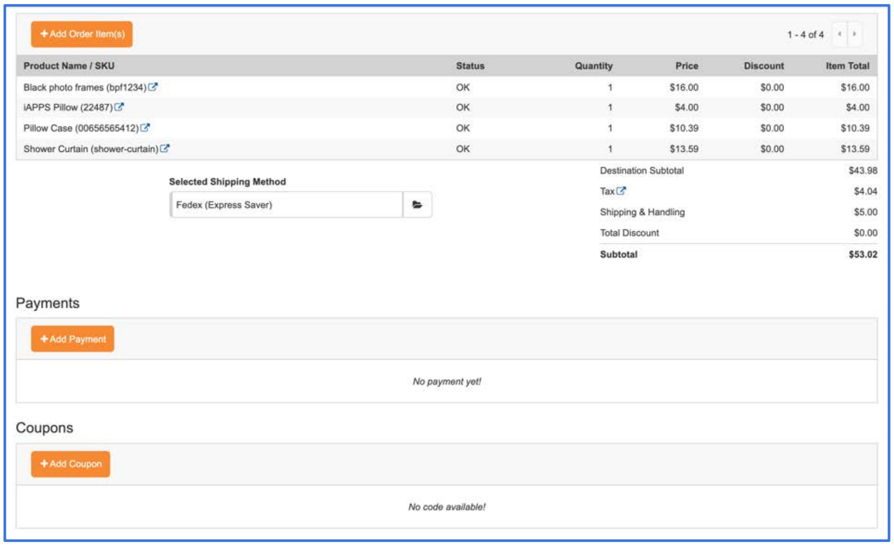
- In the Notes dialog, enter your note.



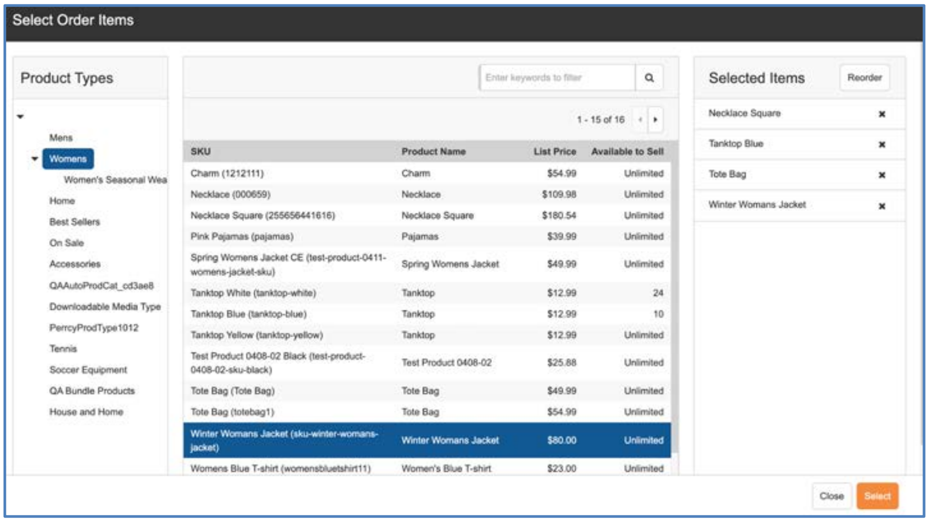
- Click **Save**.

Add more orders

- Optionally, to add to an order that hasn't yet been shipped, in the lower half of the Order page under the Order Details tab, click **Add Order Item(s)**.



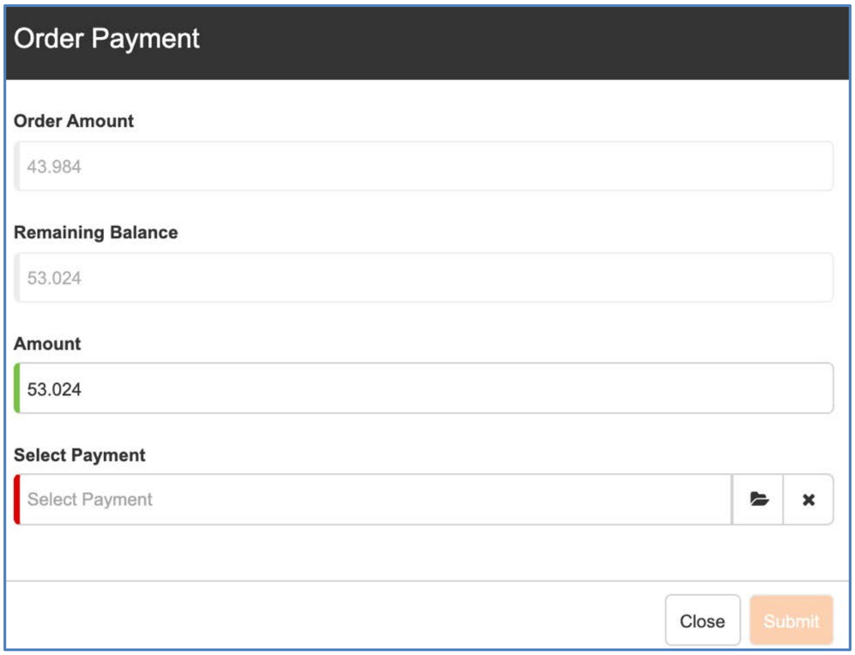
- On the Select Order Items page, in the Product Types panel, select a Type.



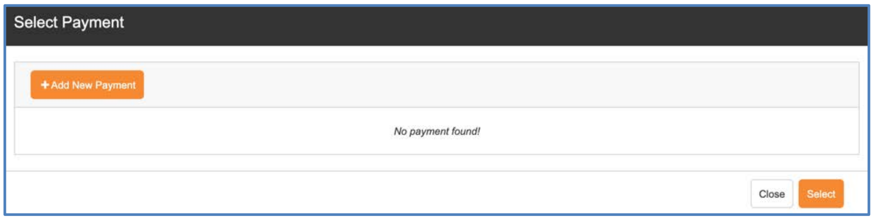
- In the SKU panel, select an item from the list.
- In the Selected Items panel, click **Select**.

Add a Payment

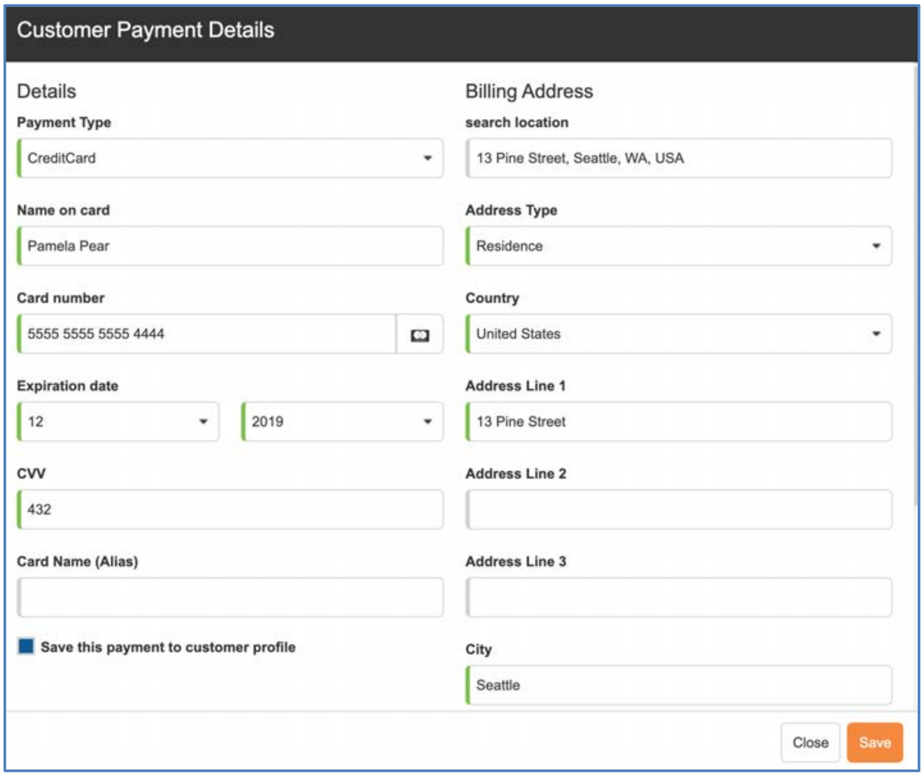
- Optionally, under Add Order Items on the Order page, click **Add Payment**.
  In the Order Payment dialog, in the Select Payment field, click the folder icon.



- In the Select Payment dialog, click **Add New Payment**.



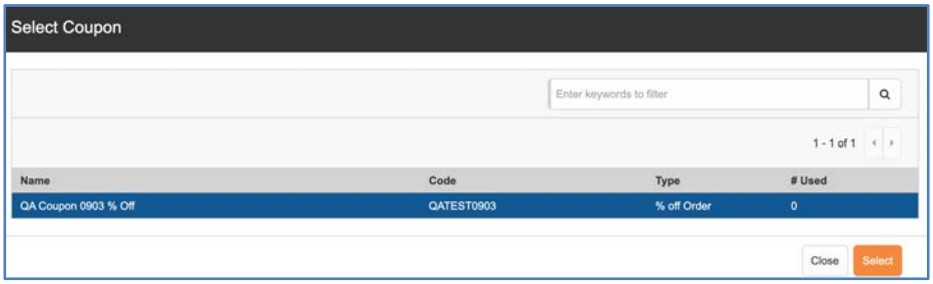
- On the Customer Payment Details page, enter the information.



- Click Save.
- In the Order Payment dialog, click **Submit**.

Add a Coupon

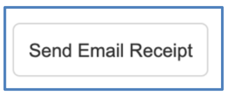
- Optionally, under the Payments section on the Order page, click **Add Coupon**.
- On the Select Coupon page, select a coupon in the list.



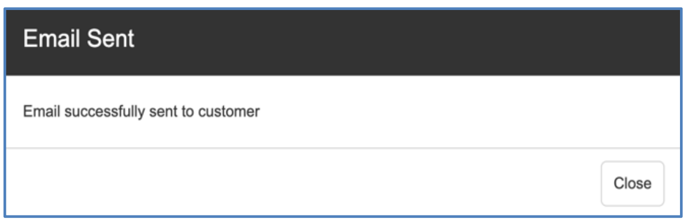
- Click **Select**.

Send an email receipt

- At the top of the Order page, click **Send Email Receipt**.



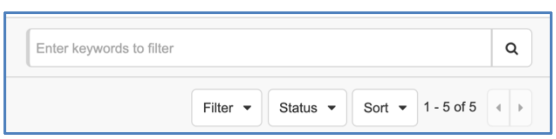
- A dialog confirms this.



Coupons

In this section, you can manage all the coupons your business has to offer.

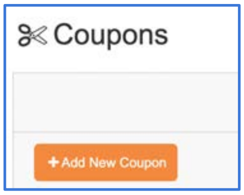
- A search panel helps you to find your orders by Keyword or by using the Filter, Status or Sort menus.



Create a new coupon

- Under Store Manager – Store, select Coupons.

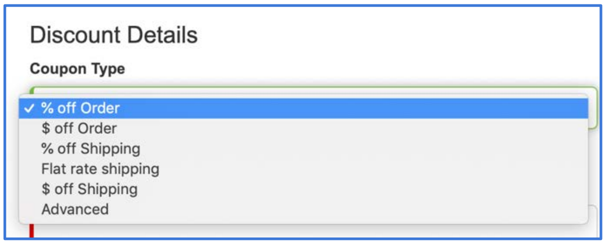
- On the Coupons page, click **Add New Coupon**.



- On the New Coupon page, enter a Title and Start Date (as well as time of day).

Discount Details

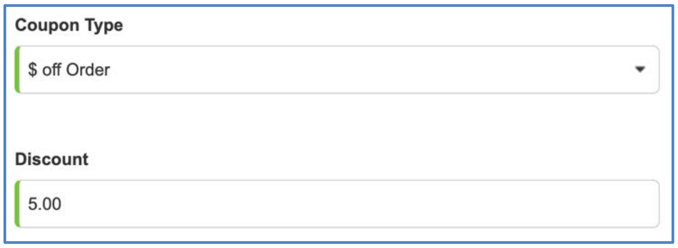
- Under Discount Details, use the dropdown arrow to select a Coupon Type.



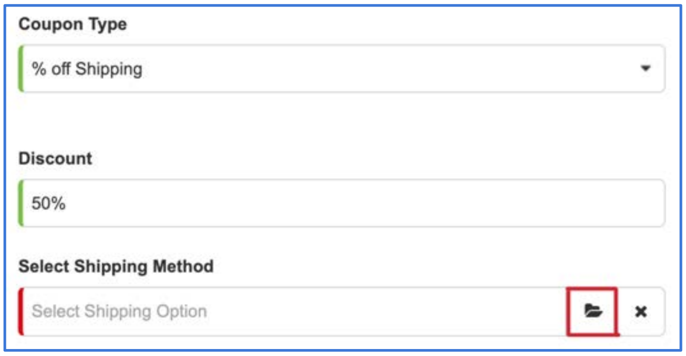
Depending on the Coupon Type, Discount Details requires further steps.

Coupon Type options

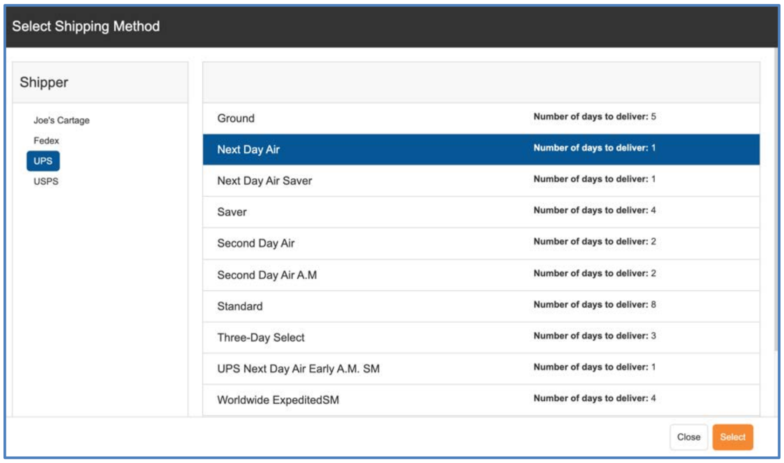
- If you choose **% or $ off order**, in the Discount field, state the amount of the Discount.



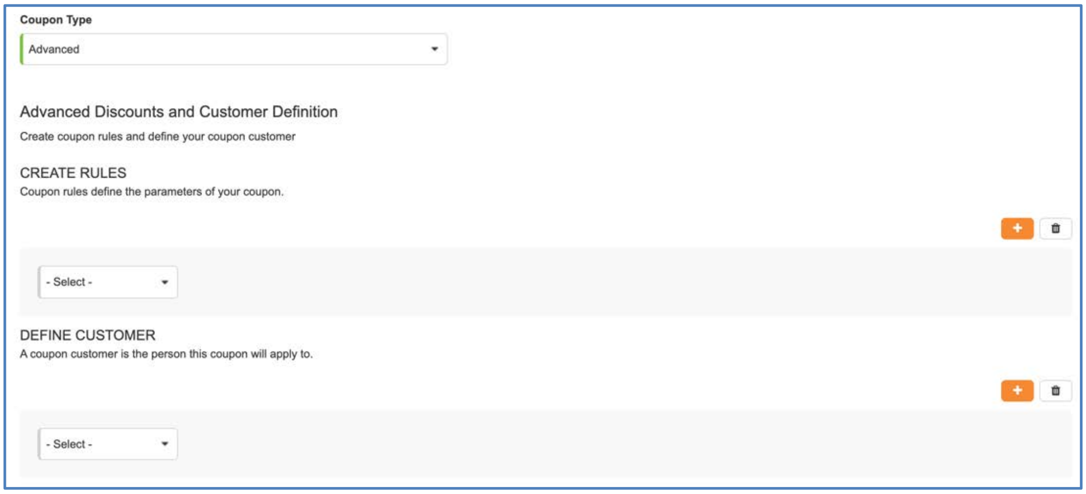
- If you choose **% off Shipping, Flat Rate Shipping**, or **$ off Shipping**, state the amount of the Discount.
    - In the Select Shipping Method field, click the folder icon.



    - On the Select Shipping Method page, select the Shipper and the Shipping Method. Click **Select**; or **Close** to return to the New Coupon Page.

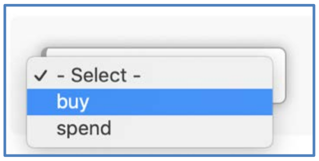


- If you choose **Advanced**, there are options for creating Coupon rules.

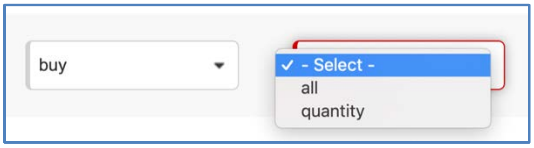


Create Coupon Rules

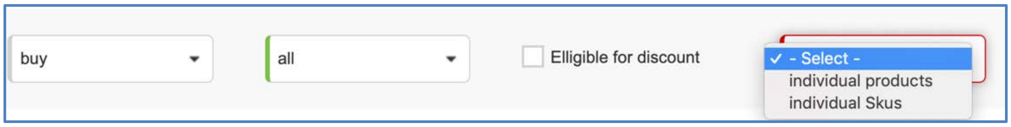
- Using the Advanced Coupon Type, use the dropdown arrow to make a selection.



- If you choose **Buy**, make a selection from the next field.

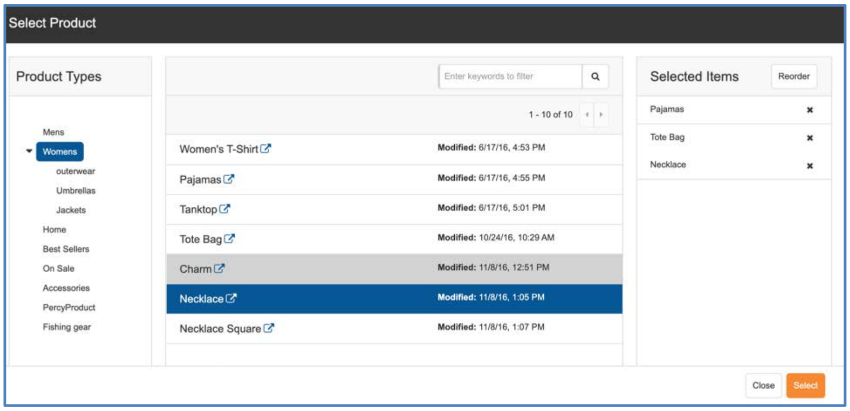


- If you choose **All**, select or leave clear the check box beside Eligible for discount.
- Make a selection from the next field (products and SKUs).



- If you choose **Individual Products**, in the Select Products field, click the folder icon.

- On the Select Product page, select a category from Product Types and an item in that category in the panel on the right.

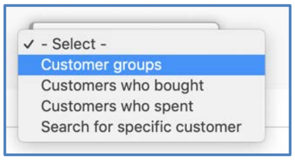


  - Similarly, if you choose **Individual SKUs**, use the folder icon in the Select Skus field, and on the Select SKU page.
  - Similarly, if you choose **Quantity** rather than Buy, select or clear the check box beside Eligible for discount. In the At Least field, name the quantity. In the next field, use the dropdown arrow to make your selection of Individual products or Individual SKUs.
- In the Selected Items panel, click **Select**; or **Close** to return to the New Coupon page.
  - Alternately, click the Add icon to add another Rule selection.

  - Similarly, click the Delete icon to remove rules.

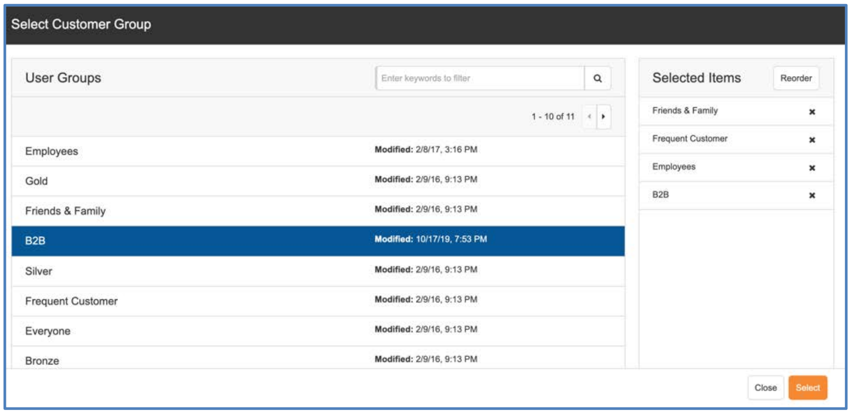
Define your Customer

- Using the Advanced Coupon Type to define Customer rules, use the dropdown arrow to make a selection.



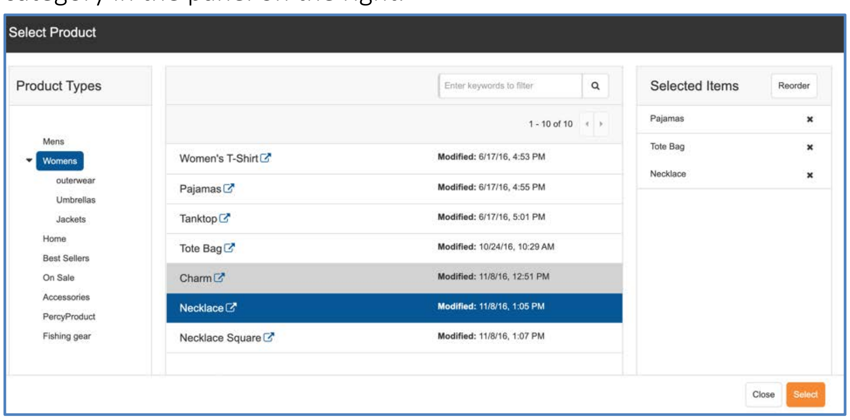
- If you choose **Customer Groups**, in the Select Customer field, click the folder icon to make a selection.

- On the Select Customer Group page, under User Groups, select a group.
- In the Selected Items panel on the right, click Select; or Close to return to the New Coupon page.



- If you choose **Customers who bought**, in the Select Products field, click the folder icon to make your selection.

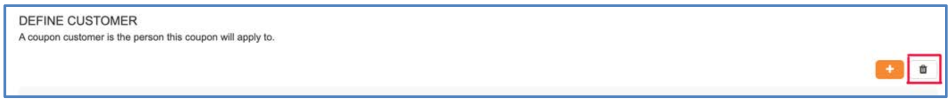
  - On the Select Product page, select a category from Product Types and an item in that category in the panel on the right.



  - In the Selected Items panel, click **Select**; or **Close** to return to the New Coupon page.
- If you choose **Customers who spent**, fill in the fields for Min and Max amounts, and in the date fields.

- Alternately, click the Add icon to add another Rule selection.

- Similarly, click the Delete icon to remove rules.



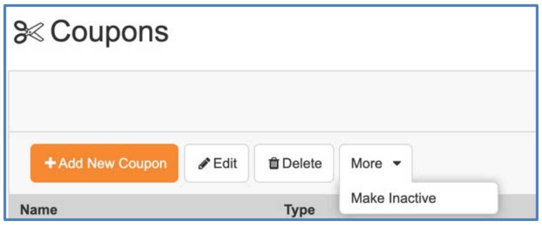
Other Coupon options

- Optionally on the New Coupon page, fill in the fields for:
  - Maximum Uses (total)
  - Maximum Uses (per person)
  - Maximum Uses (per code)
  - Maximum Discount Amount
  - Minimum Purchase Amount
- Optionally, select check boxes beside:
  - Auto apply this coupon
  - This coupon is stackable
  - Refund requires return of all items
  - Calculate tax before discount

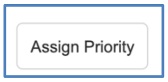
- At the top of the New Coupon page, click **Save Coupon**.

Manage coupons

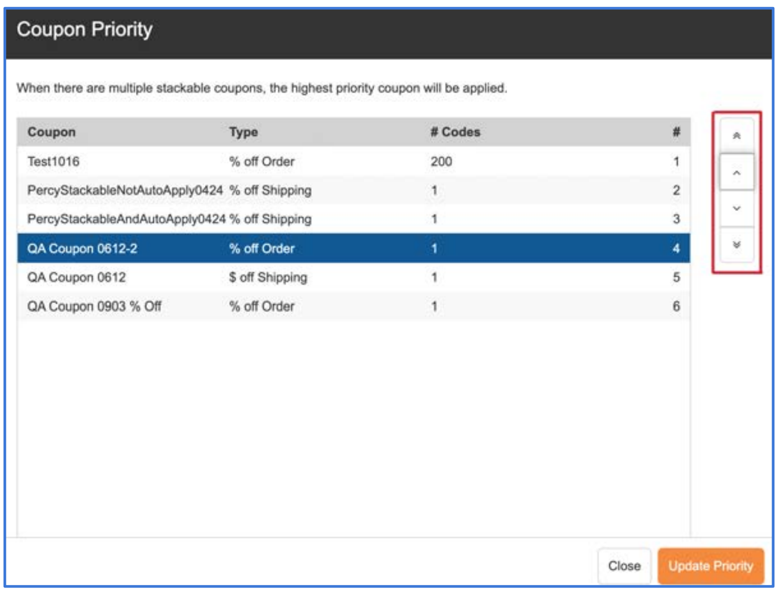
- On the New Coupon page, click **Manage Coupons**.
  - On the Coupons page, select a Coupon from the list and use the options at the top of the page to:
  - Add New Coupon
  - Edit
  - Delete
  - or, using the More arrow, Make Inactive/Active.



- Optionally, you can Assign Priority of the coupons in your list. At the top of the page, on the right, click Assign Priority.



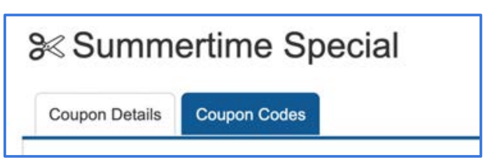
- On the Coupon Priority page, use the arrows at the right to reorder your coupons.



- Click **Update Priority**.

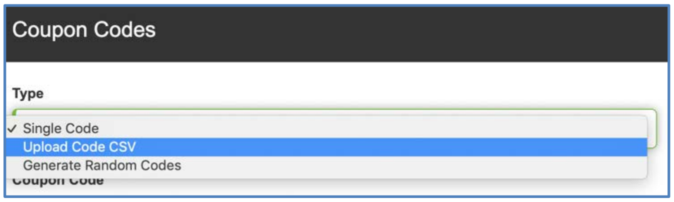
Coupon Codes

- On the Coupons page, select a Coupon. Click Edit.
- On the page for that coupon, click the Coupon Codes tab.

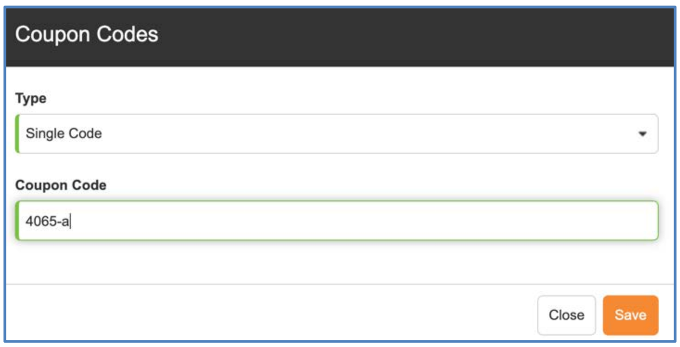


- To add a code, click **Add New Codes**.

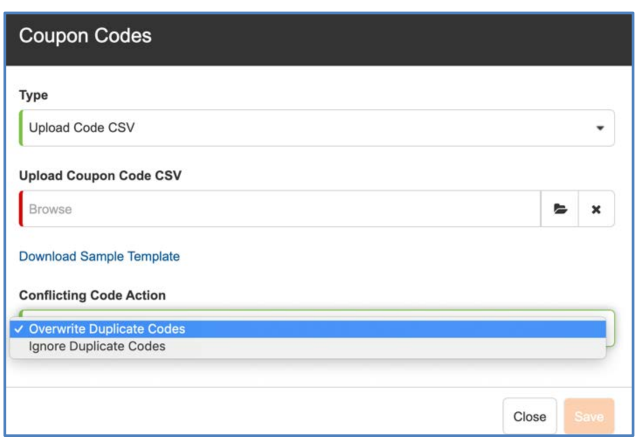
- In the Coupon Codes dialog, using the dropdown arrow, select a code type.



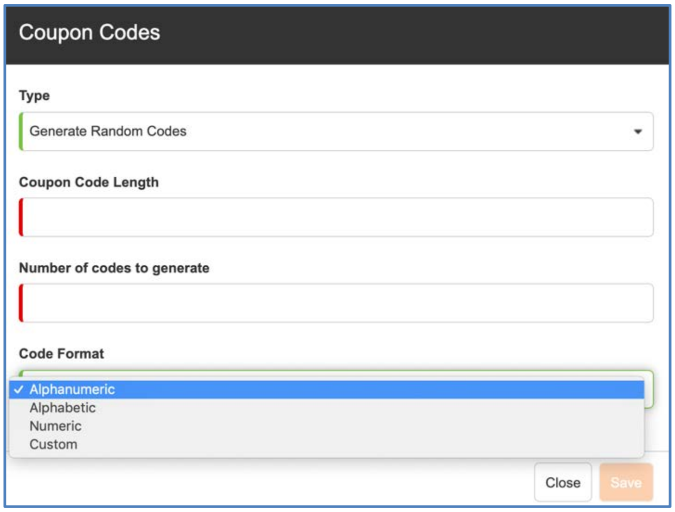
- If you choose a **Single Code**, in the Coupon Codes dialog, the Coupon Code field, state the Code.



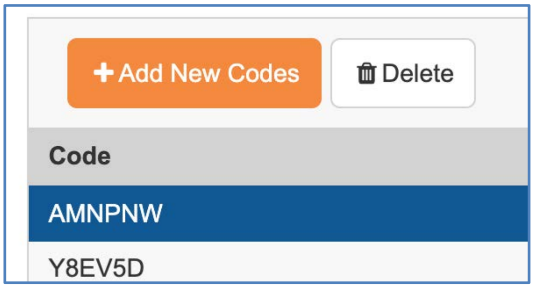
- If you choose **Upload Code CSV**, in the Coupon Codes dialog, in the Upload Coupon Code CSV field, click the folder icon to make a selection from your files.
  - Optionally, click **Download Sample Template** to select one from your files.
  - In the Conflicting Code Action field, use the dropdown arrow to select **Overwrite Duplicate Codes** or **Ignore Duplicate Codes**.



- If you choose **Generate Random Codes**, in the Coupon Code Length and Number of codes to generate fields, enter the information.



- In the Code Format field, use the dropdown arrow to select Alphanumeric, Alphabetic, Numeric, or Custom.
- Click **Save**; or **Close** to return to the Coupon page.
- To delete a code, select the code from the list and click Delete.



- In the Confirm dialog, click **Confirm** or **Cancel** to return to the Coupon page.
- Click **Save Coupon**.

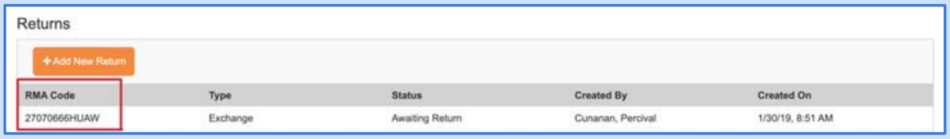
Returns

Note: Only these Users have access to Returns activity:

- Site Administrator
- Fulfillment Manager
- Customer Service Representative
- Customer Service Representative Manager

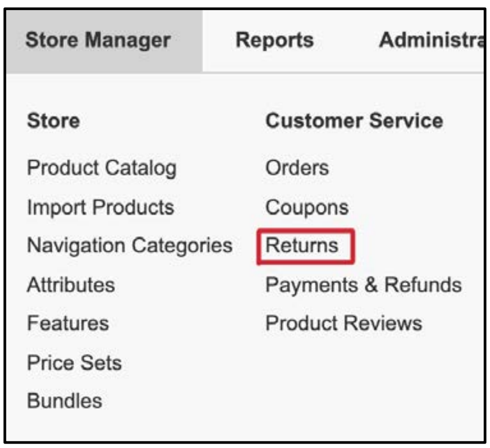
When an item in an Order is slated for return, a Return Merchandize Authorization (RMA) code appears in the Returns section of the Order page. The RMA code is generated when the item is given a Return status.

Note: This code is useful when you are managing returns, payments and refunds.

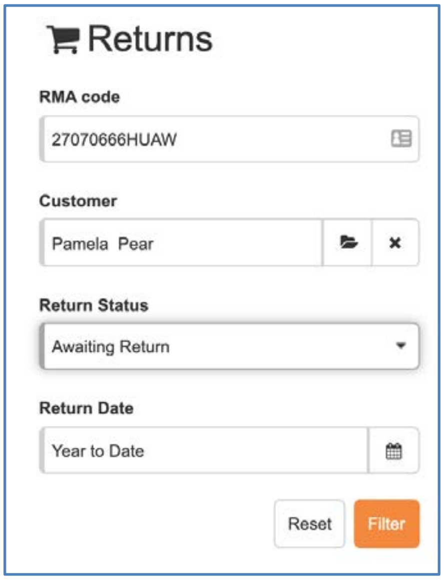


Manage Returns

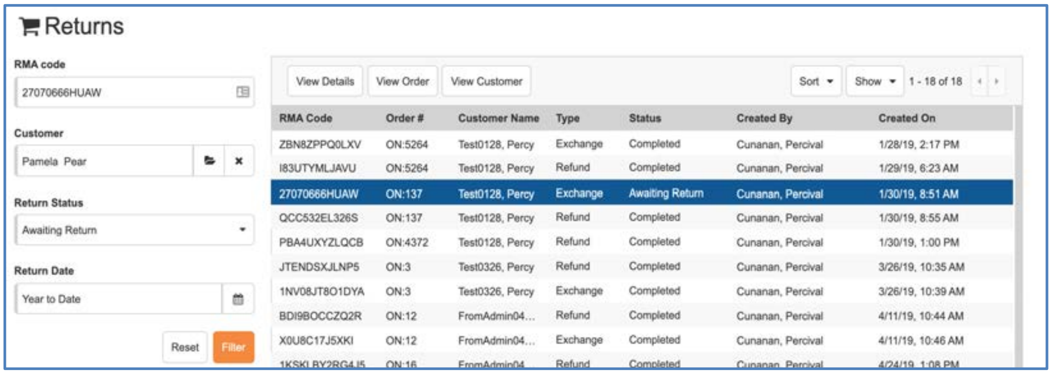
- Under Store Manager – Customer Service, select **Returns**.



  - Optionally, on the Returns page, in the Returns panel, filter a customer's returns by entering the RMA (Return Merchandise Authorization) code, the customer’s name or the other fields. and click **Filter**.

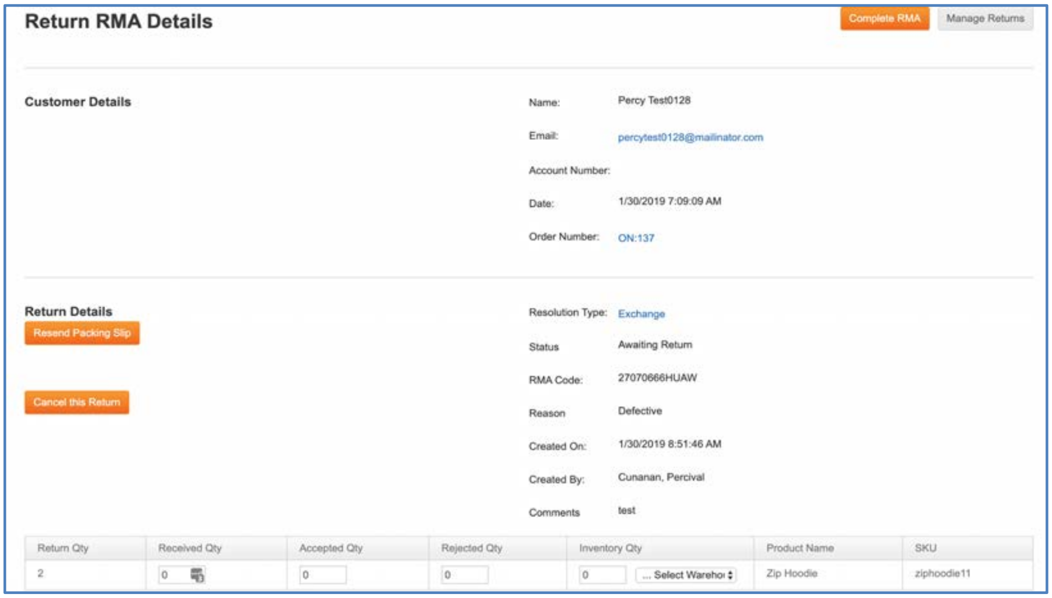


- In the panel on the right, returns are listed in columns under:
  - RMA Code
  - Order#
  - Customer Name
  - Type
  - Status
  - Created By
  - Created On.
- In the panel on the right, select an item from the list and use the tabs to:
  - View Details
  - View Order
  - View Customer.



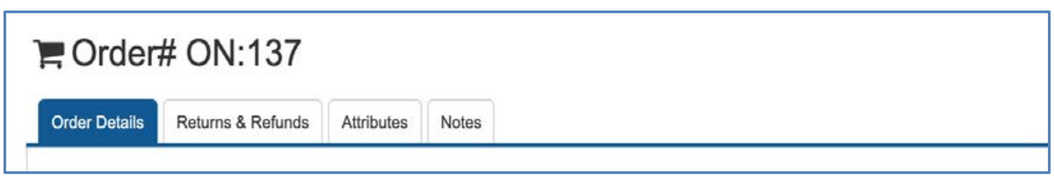
View Details

- Select the **View Details** tab to see the basic details about a return.

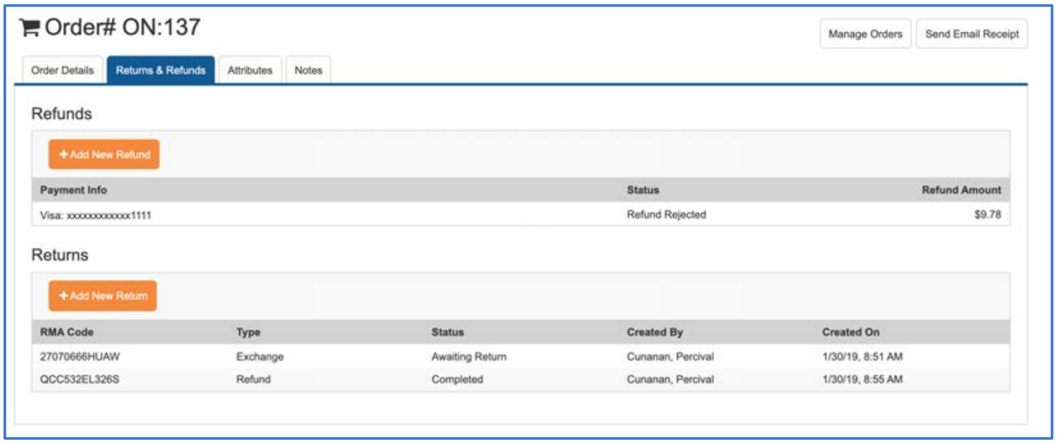


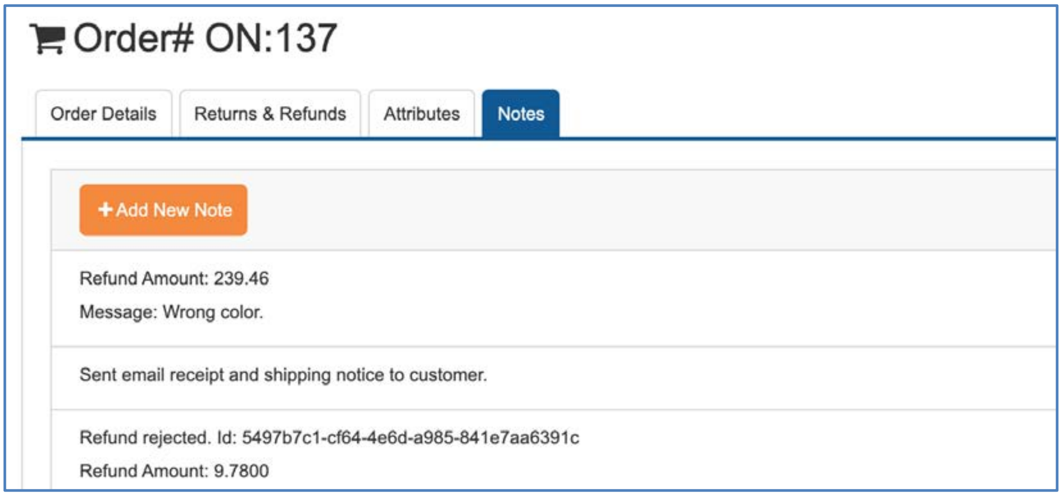
View Order

- Select the **View Order** tab.



- On the Order page, using the appropriate tabs, view or manage
    - Returns and Refunds
    - Attributes
    - Notes





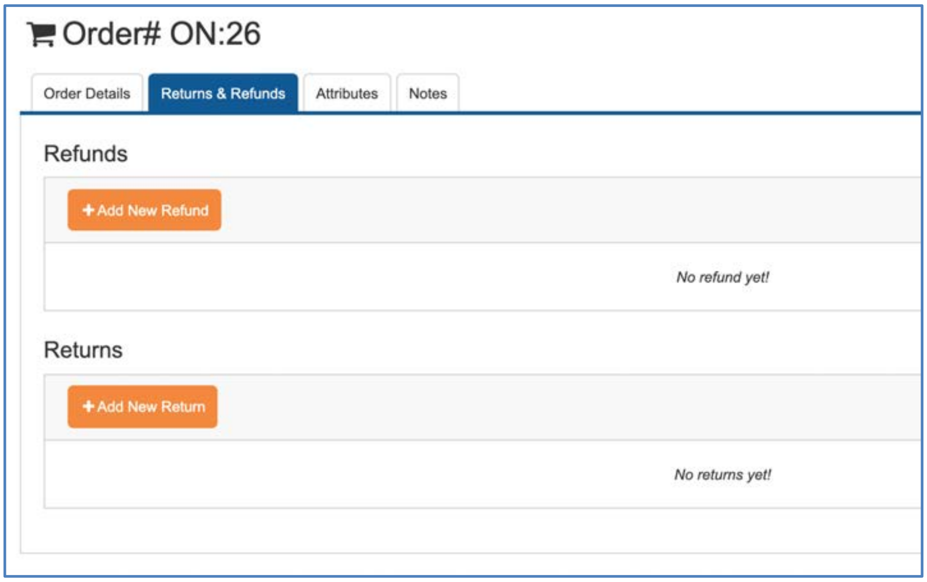
View Customer

- On the Returns page, select an RMA Code from the list.
- Click **View Customer**.
- On the Customer's page, use the tabs to view or manage:
  - General Details
  - Shipping
  - Payment
  - Orders

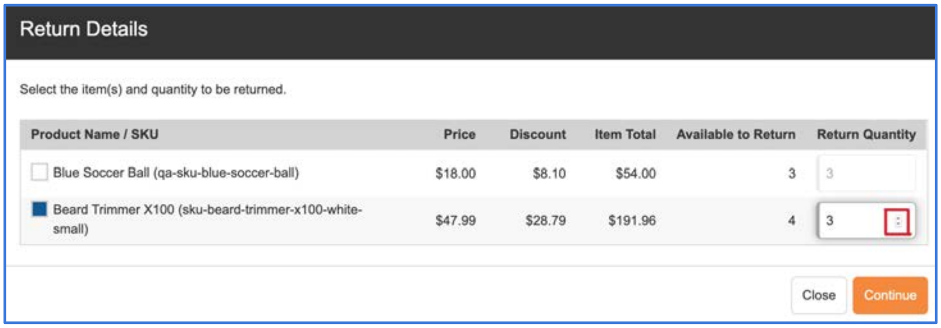
- Additional Logins
- Notes
- Emails Received
- Recent Activity

Add a Return

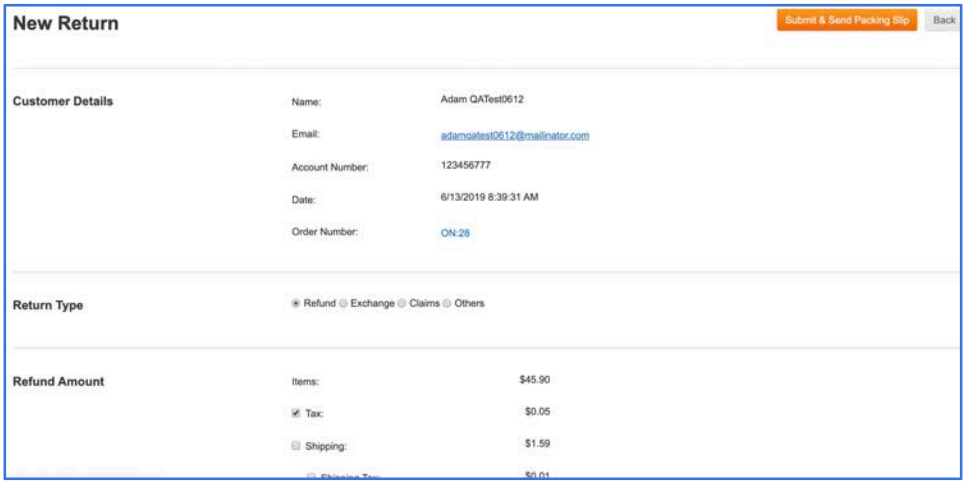
- On the Returns page, in the filter panel on the left, enter the information for the order you are seeking and click **Filter**; or
- in the Returns list panel on the right, use the Sort and Show menus to find a Return; or
- select the item directly from the list.
- Click the **View Order** tab.
- On the order page, select the Returns & Refunds tab.
- On the order page, in the Returns section, click **Add New Return**.



- In the Return Details dialog, select the check box beside the item to be returned.
- Optionally, use the arrows in the Return Quantity column to determine how many items are to be returned.



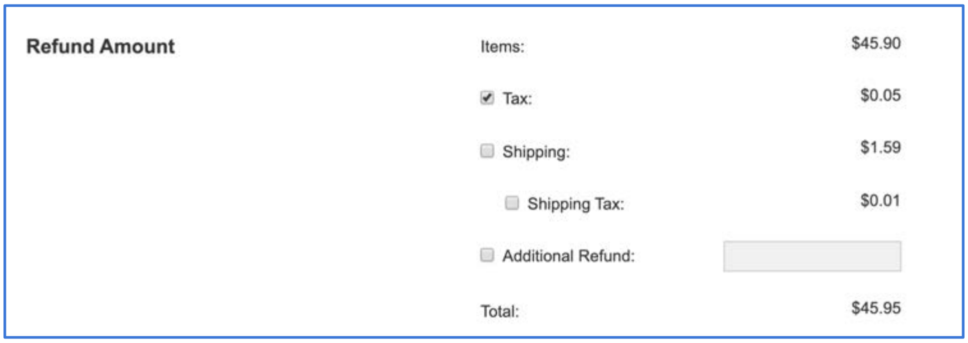
- Click **Continue** and use the New Return page to enter information.



- Optionally, on the New Return page, beside **Return Type**, select Refund, Exchange, Claims, or Others.

  Note: Options on the New Return page will change slightly depending on which Return Type you choose.

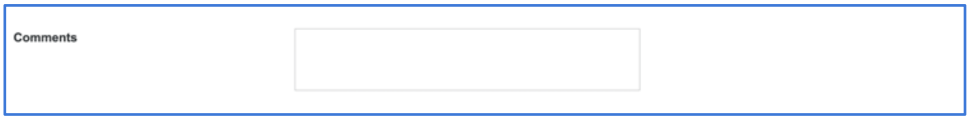
- Optionally, on the New Return page, beside **Refund Amount**, select Tax, Shipping, and/or Shipping Tax; and/or Additional Refund.



- Optionally, on the New Return page, beside **Refund Payment(s)**, select the check box.

- Optionally, on the New Return page, in the **Reason** field, use the dropdown arrow to make a selection.

- Optionally, on the New Return page, in the **Comments** field, enter any comments.



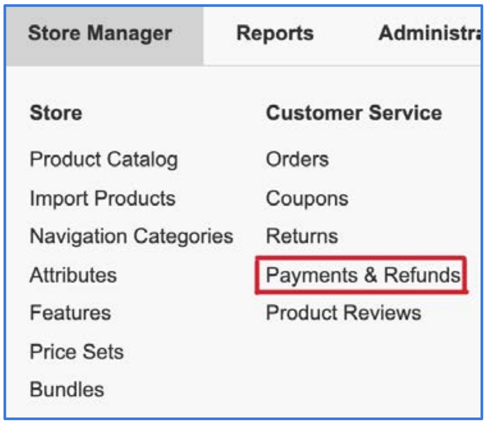
- At the top of the New Return page, click **Submit & Send Packing Slip**.

Payments & Refunds

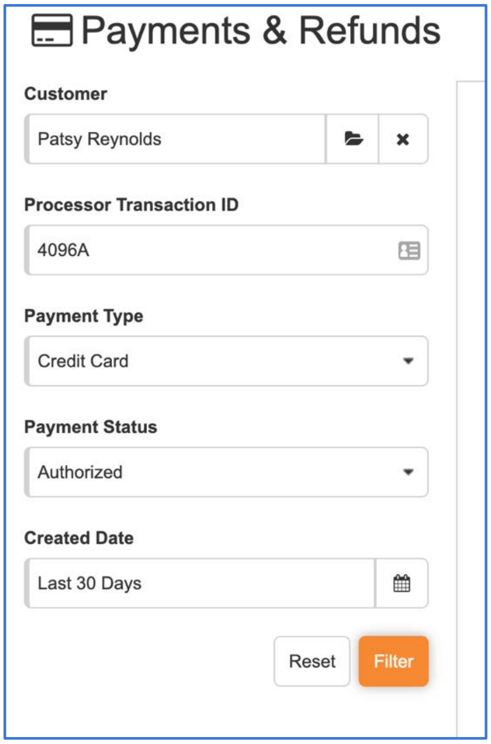
Note: Only Customer Service Representative managers or Commerce Administrators can approve refunds.

Manage payments and refunds

- Under Store Manager–Customer Service, select Payments and Refunds.



- Optionally, to filter Payments and Refunds, on the Payments & Refunds page, in the panel on the left, select Customer, Processor Transaction ID, Payment Type, Payment Status, and/or Created Date. Click **Filter**.

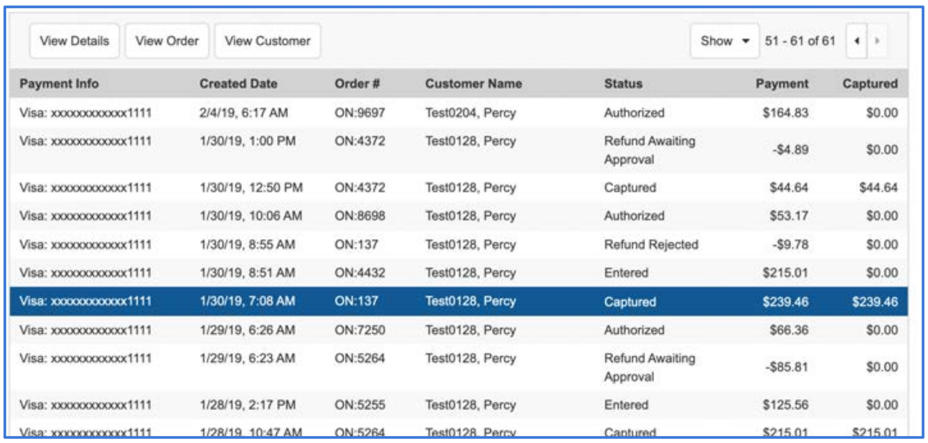


- Click **Filter**.
    - In the Payments & Refunds list in the panel to the right, payments and refunds are listed under these columns:
        - Payment Info

- Created Date
- Order #
- Customer Name
- Status
- Payment
- Captured

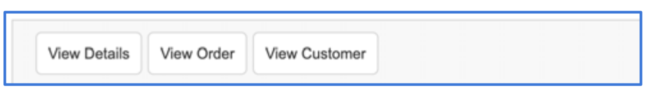
View Details, Orders, and Customers

On the Payments & Refunds page, select an order from the list.

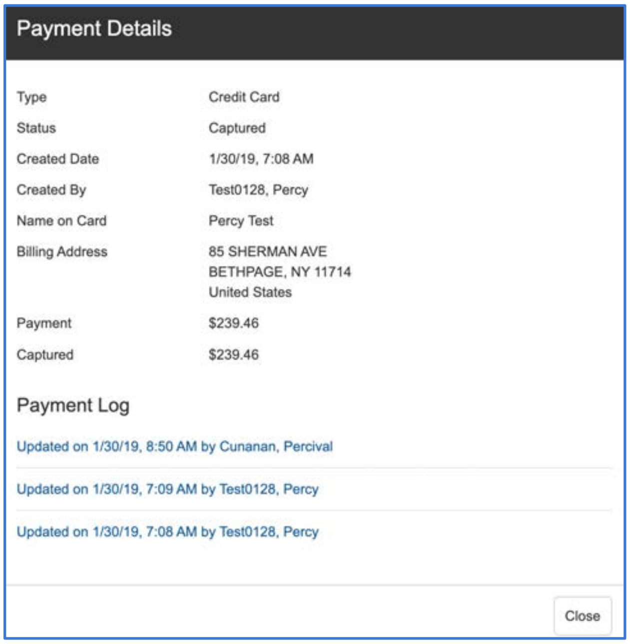


Payment Info	Created Date	Order #	Customer Name	Status	Payment	Captured
Visa: xxxxxxxxxxxx1111	2/4/19, 6:17 AM	ON:9697	Test0204, Percy	Authorized	$164.83	$0.00
Visa: xxxxxxxxxxxx1111	1/30/19, 1:00 PM	ON:4372	Test0128, Percy	Refund Awaiting Approval	-$4.89	$0.00
Visa: xxxxxxxxxxxx1111	1/30/19, 12:50 PM	ON:4372	Test0128, Percy	Captured	$44.64	$44.64
Visa: xxxxxxxxxxxx1111	1/30/19, 10:06 AM	ON:8698	Test0128, Percy	Authorized	$53.17	$0.00
Visa: xxxxxxxxxxxx1111	1/30/19, 8:55 AM	ON:137	Test0128, Percy	Refund Rejected	-$9.78	$0.00
Visa: xxxxxxxxxxxx1111	1/30/19, 8:51 AM	ON:4432	Test0128, Percy	Entered	$215.01	$0.00
Visa: xxxxxxxxxxxx1111	1/30/19, 7:08 AM	ON:137	Test0128, Percy	Captured	$239.46	$239.46
Visa: xxxxxxxxxxxx1111	1/29/19, 6:26 AM	ON:7250	Test0128, Percy	Authorized	$66.36	$0.00
Visa: xxxxxxxxxxxx1111	1/29/19, 6:23 AM	ON:5264	Test0128, Percy	Refund Awaiting Approval	-$85.81	$0.00
Visa: xxxxxxxxxxxx1111	1/28/19, 2:17 PM	ON:5255	Test0128, Percy	Entered	$125.56	$0.00
Visa: xxxxxxxxxxxx1111	1/28/19, 10:47 AM	ON:5264	Test0128, Percy	Captured	$215.01	$215.01

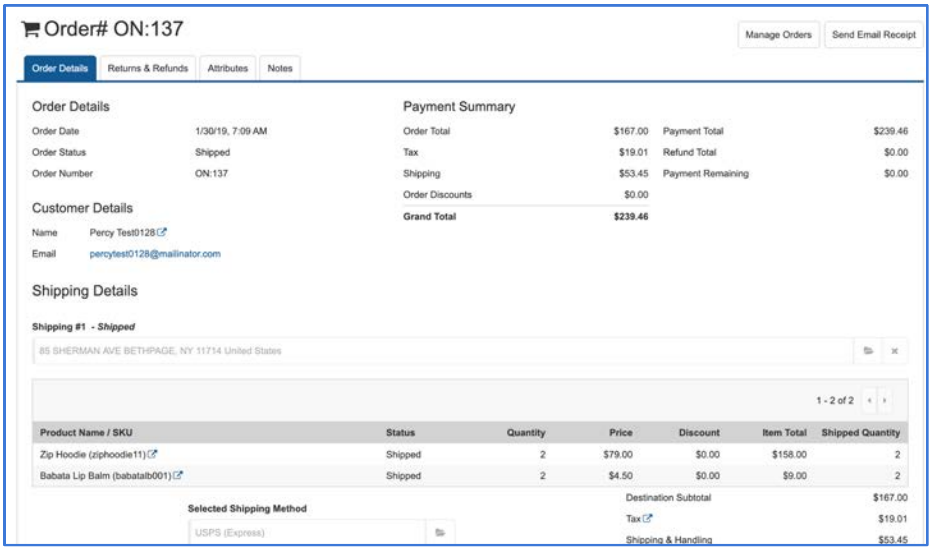
- Using the tabs at the top of the list, choose View Details, View Order, or View Customer.



- **View Details** shows you the Payment Details for an order.



- **View Order** shows you the page for the order and gives you further options.

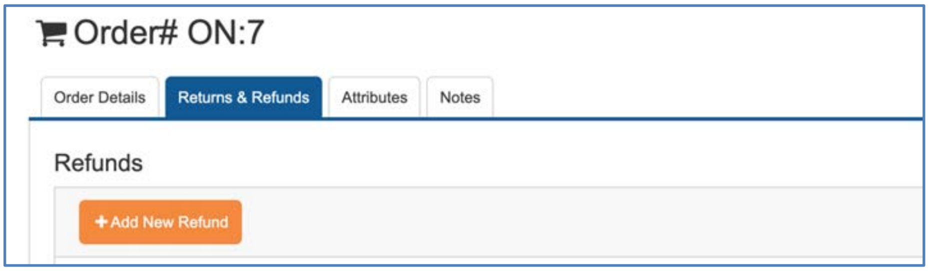


  - For further options, on the page for the order, use these tabs:
    - Returns & Refunds
    - Attributes
    - Notes for further options.

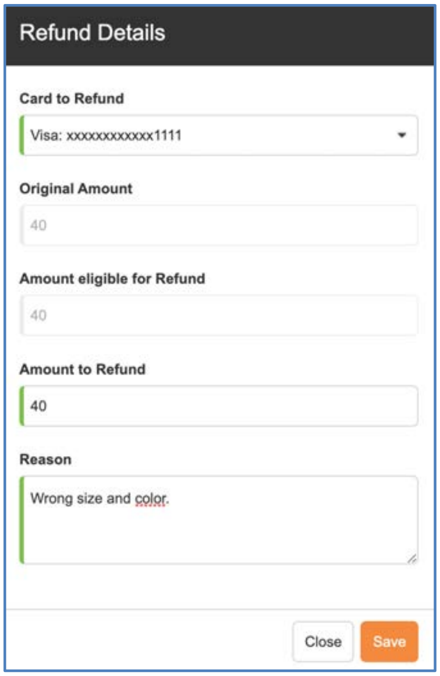
- You can also opt to Send an Email Receipt.

Add a New Refund

- On the page for the order, select the **Returns & Refunds** tab.
- In the Refunds section, click **Add New Refund**.



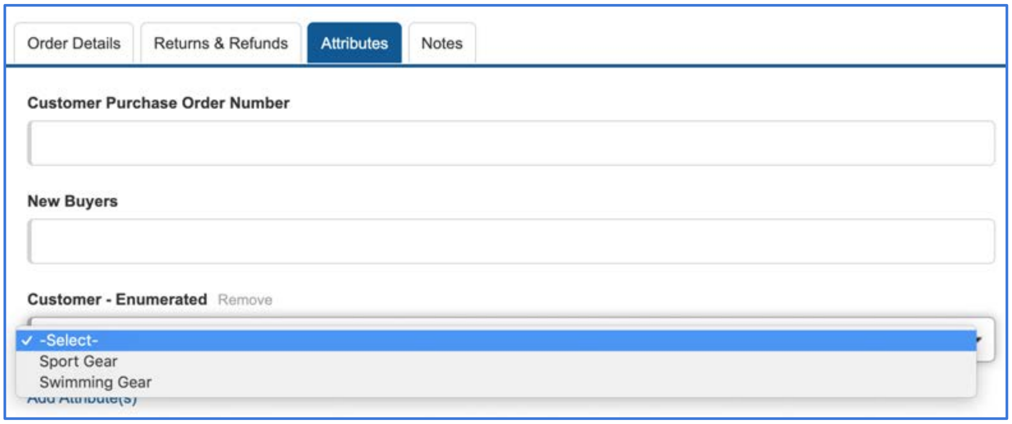
- In the Refund Details dialog, enter a Reason for the refund.



- Click **Save**.

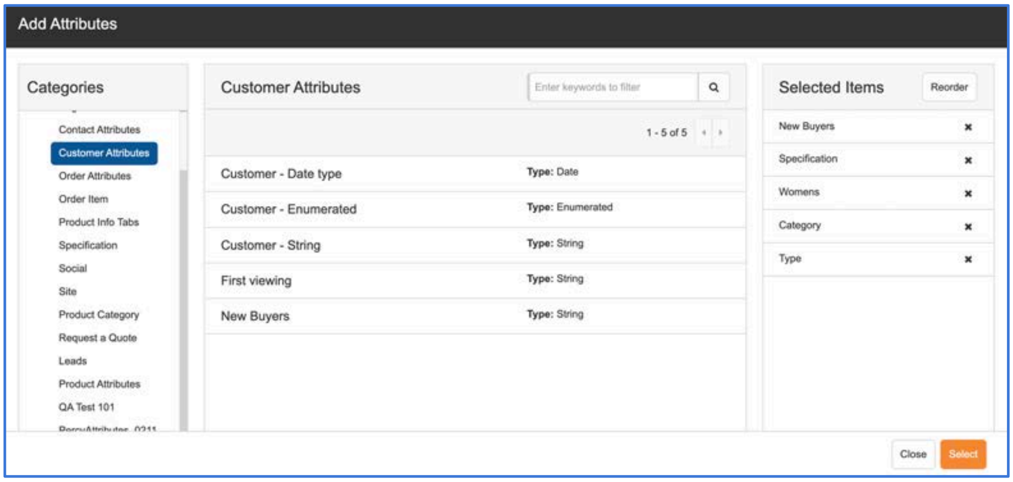
Add Attributes

- On the page for the order, select the Attributes tab.
- Optionally, enter information in the fields for Customer Purchase Order Number and New Buyers.
- Optionally, if there is a Customer-Enumerated field, use the arrow to select a category.



- Click **Add Attribute(s)**.

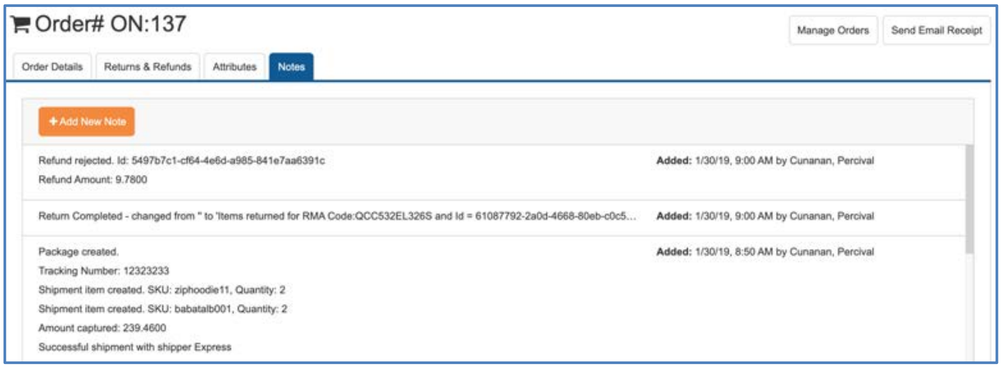
- On the Add Attributes page, in the Categories panel, select a category.



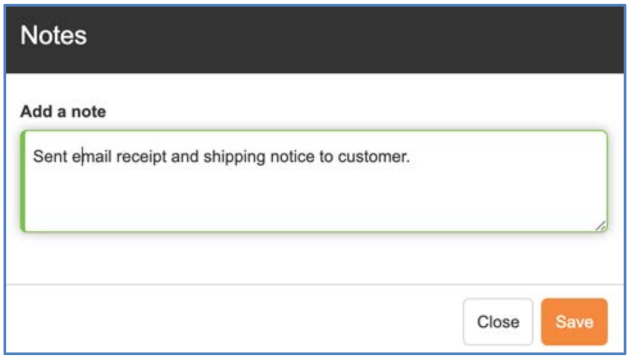
- In the Attributes panel, select attributes.
- In the Selected Items panel, click **Select**.

Add Notes

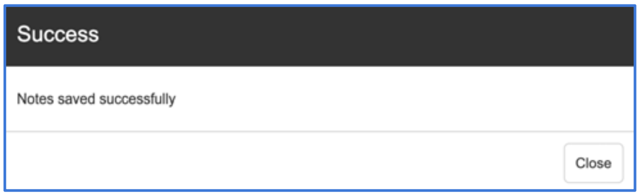
- On the page for the order, using the Notes tab, view notes for that order.



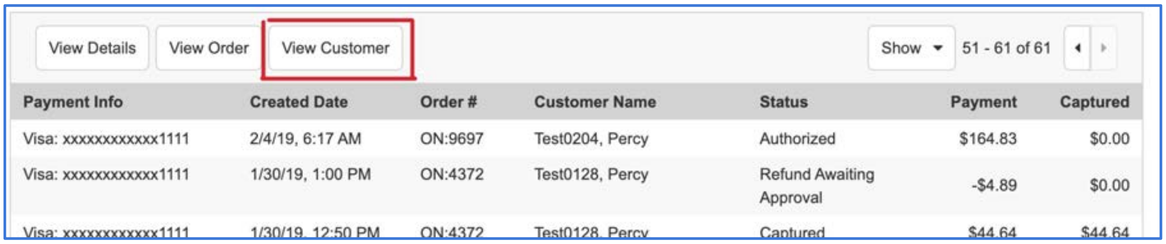
- Optionally, click **Add New Note**.
- In the Notes dialog, enter a note.



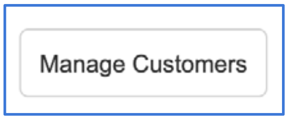
- Click **Save**. A dialog will confirm.



- **View Customer** takes you to the page for a particular customer and gives you many other options.
- On the Payments & Refunds page, select an item from the list. Click **View Customer**.

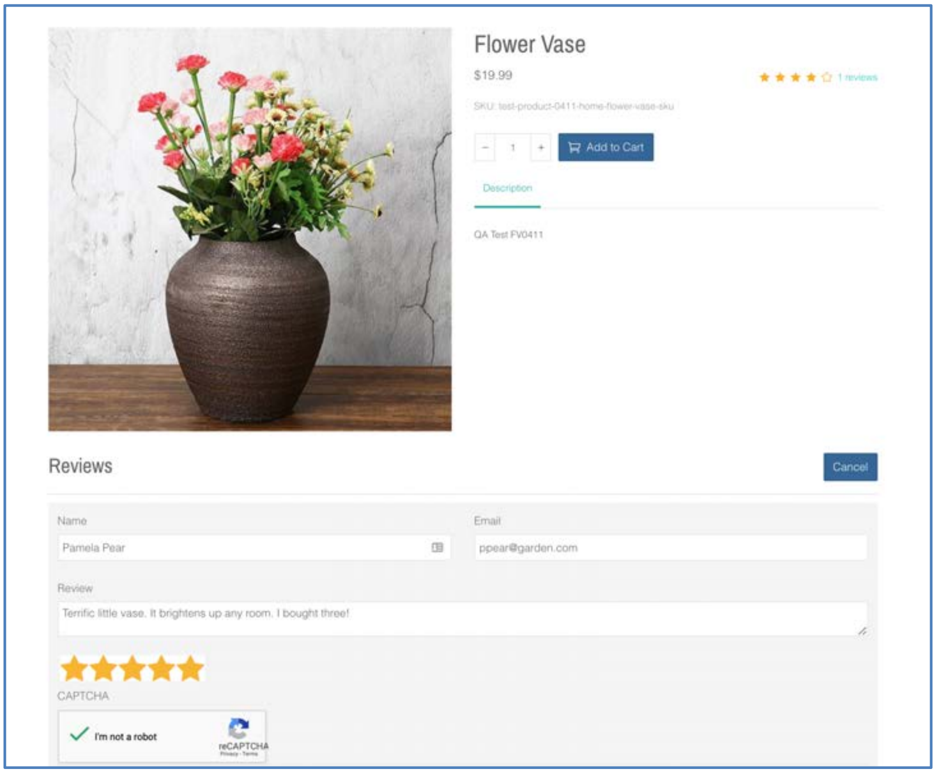


- On the Customer's page, use the tabs to view or manage:
    - General Details
    - Shipping
    - Payment
    - Orders
    - Additional Logins
    - Notes
    - Emails Received
    - Recent Activity
- To Add, Edit, or Delete a customer or customers, at the top of the page,click **Manage Customers**.



Product Reviews

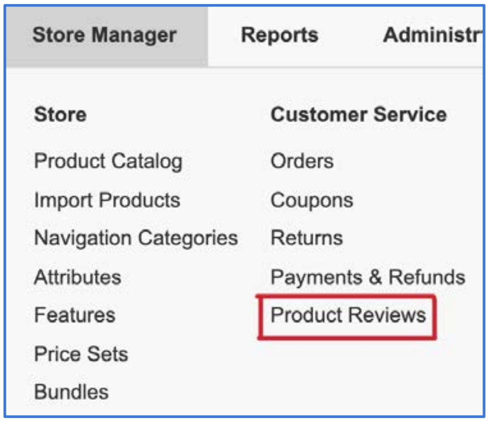
See what your customers are saying about your products.



Note: Site Manager and Fulfillment Managers can unapprove, edit or delete comments.

Manage product reviews

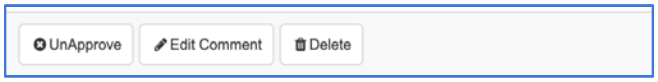
- Under Store Manager–Customer Service, select Product Reviews.



- To filter your reviews, in the Product Reviews panel, enter information about the product review you are seeking.

- Click **Filter**.
- In the panel on the right, view the product review or reviews.

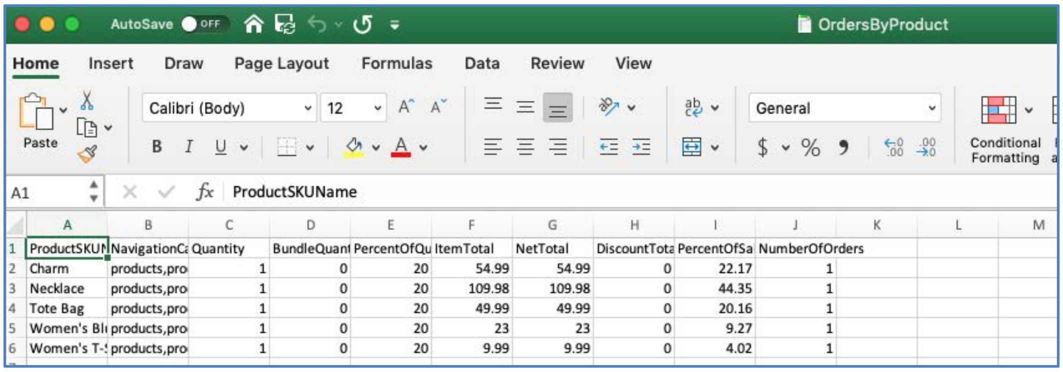
- Alternately, select a review from the list to UnApprove, Edit Comment, or Delete.



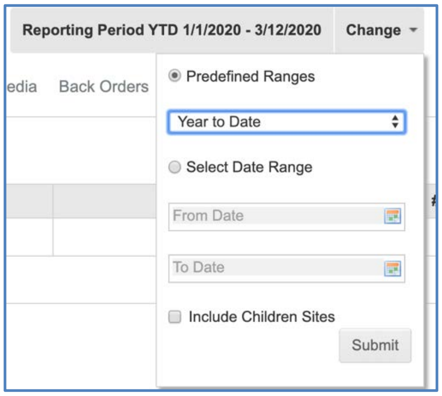
Reports

This section provides reports about Sales, Orders, Backorders, Sales Tax, Shipping Charges, Abandoned Carts, Product Management, Customers Statistics, and Downloadable Media.

- You can export your information to an Excel file.

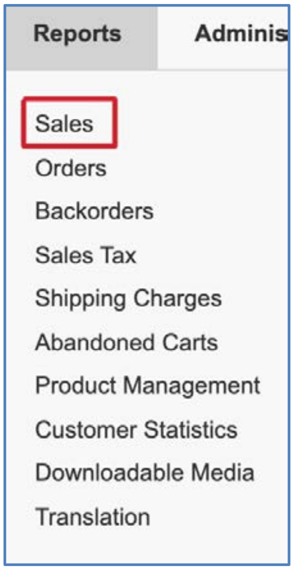


- Optionally, use the filter at the top of each page in this section to change the reporting period.



Sales

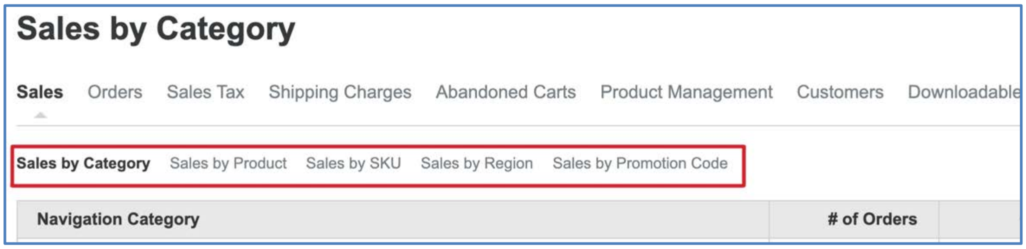
- Under Reports, select Sales.



- On the Sales by Category page, there are many reporting options under these tabs:
  - Sales
  - Orders
  - Sales Tax
  - Shipping Charges
  - Abandoned Carts
  - Product Management
  - Customers
  - Downloadable Media

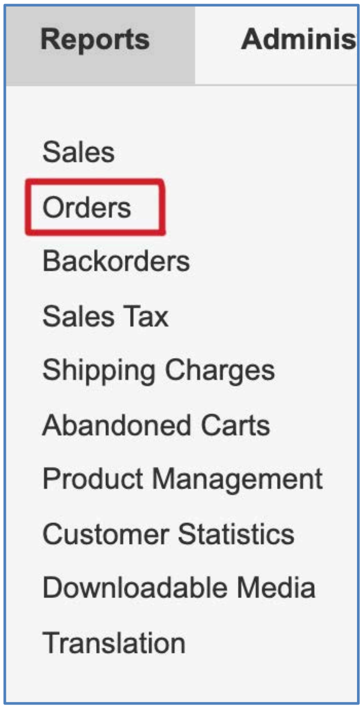
- Back Orders

- You can also view information about sales by
  - Sales by Product
  - Sales by SKU
  - Sales by Region
  - Sales by Promotion Code

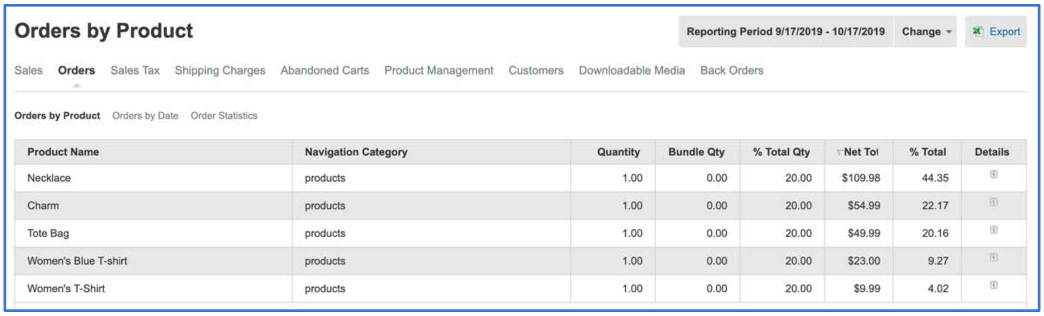


Orders

- Under Reports, select **Orders.**

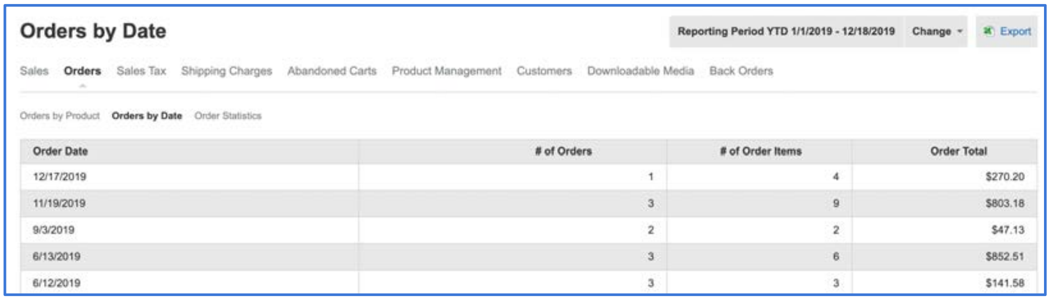


- On the Orders by Product page, view information about orders by product. In addition to Orders by Product,

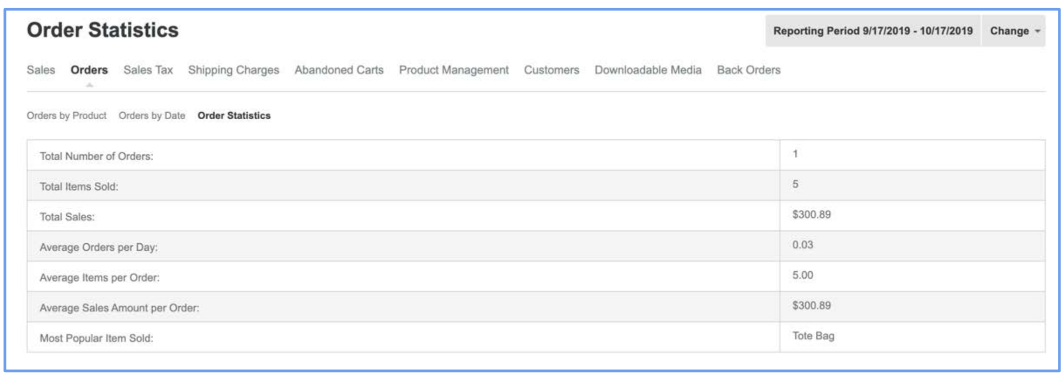


use the tabs to view:

- Orders by Date



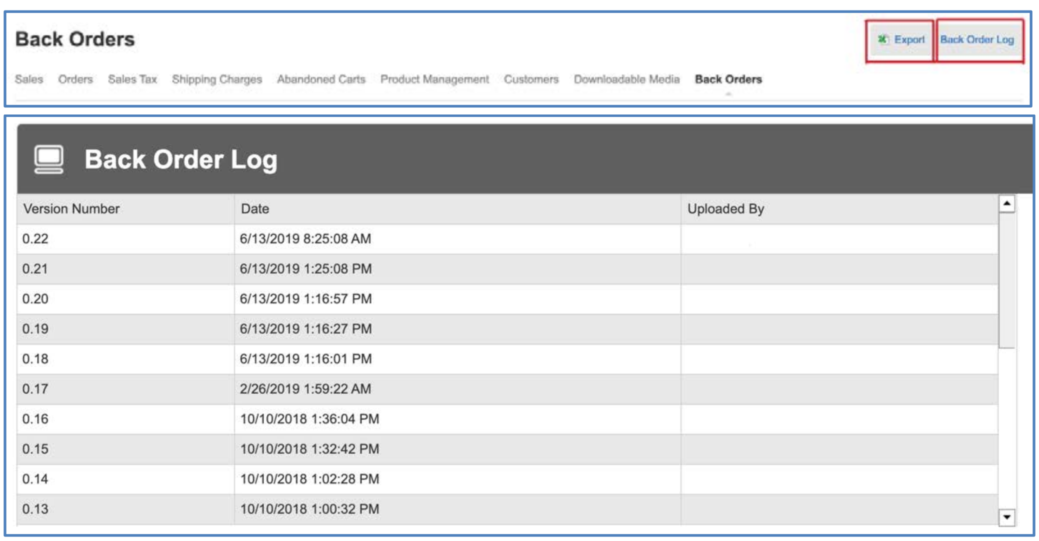
- Order Statistics



Back Orders

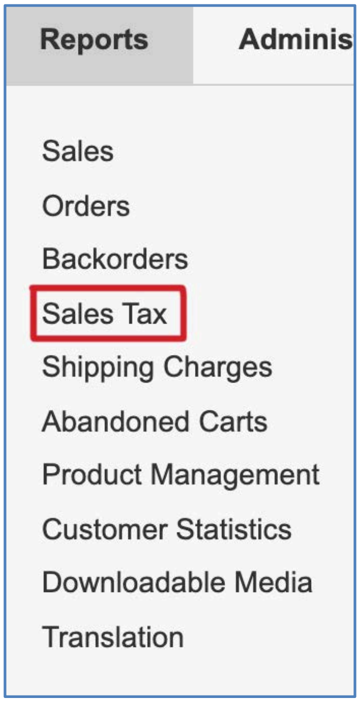
- Under Reports, select **Backorders**.

● On the Back Orders page, view your back orders, export your information to an Excel file, or view your Back Order log.



Sales Tax

● Under Reports, select Sales Tax.



- On the Sales Tax page, view sales tax information by category – i.e., by country.

Shipping Charges

- Under Reports, select Shipping Charges.

- On the Shipping Charges page, view information about shipping charges by Shipper Name – i.e., Fedex.

Abandoned Carts

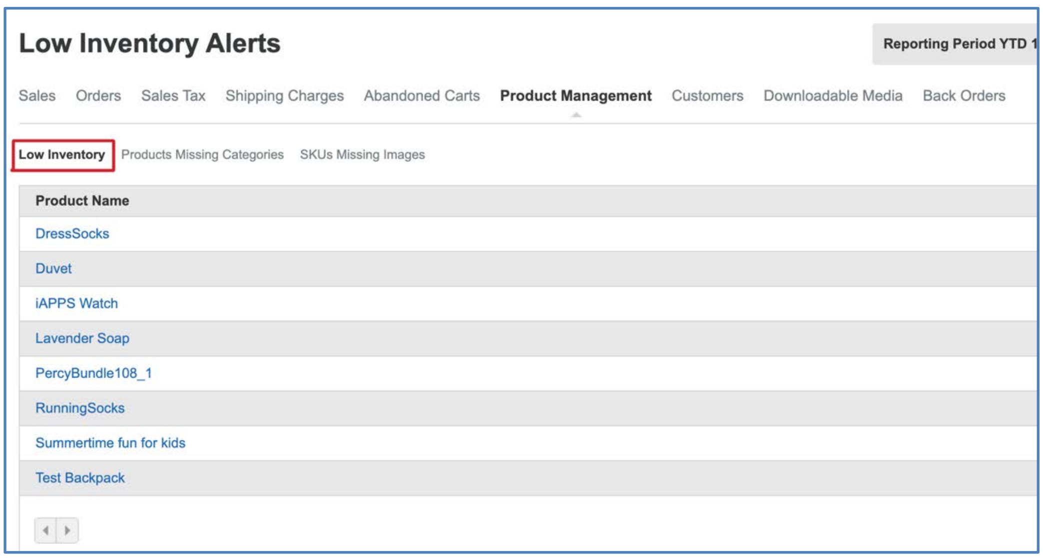
- Under Reports, select Abandoned Carts.

- On the Abandoned Carts page, view abandoned online carts by Customer Name, Email Address, and Cart Total.

Product Management

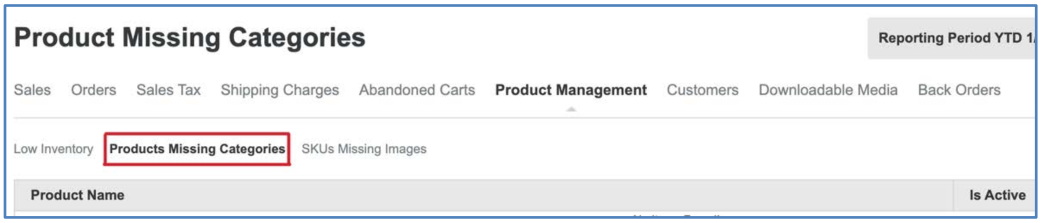
- Under Reports, select Project Management.

- On the Low Inventory Alerts page, view information about products with Low Inventory,

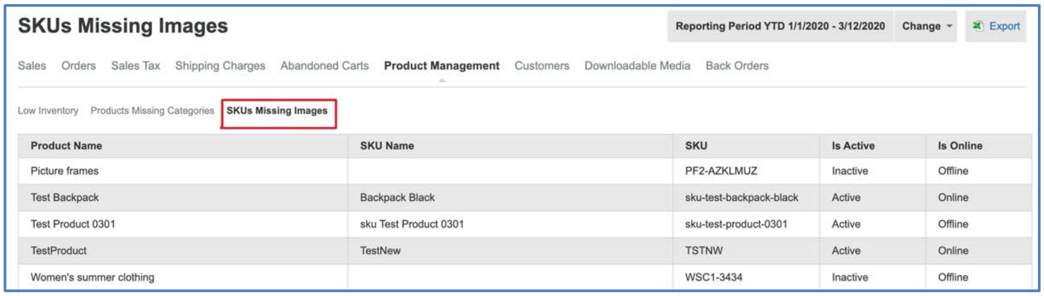


and also:

- Products Missing Categories



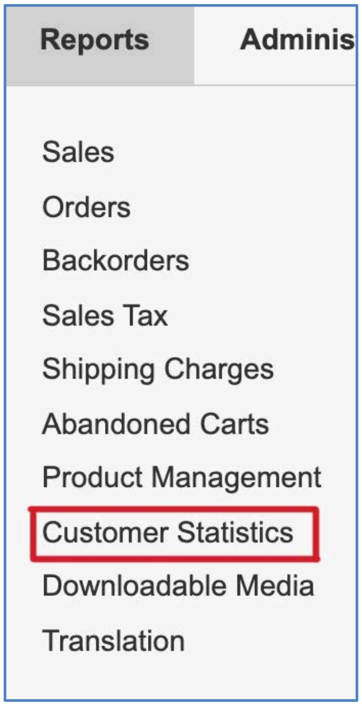
- SKUs Missing Images



Product Name	SKU Name	SKU	Is Active	Is Online
Picture frames		PF2-AZKLMUZ	Inactive	Offline
Test Backpack	Backpack Black	sku-test-backpack-black	Active	Online
Test Product 0301	sku Test Product 0301	sku-test-product-0301	Active	Offline
TestProduct	TestNew	TSTNW	Active	Online
Women's summer clothing		WSC1-3434	Inactive	Offline

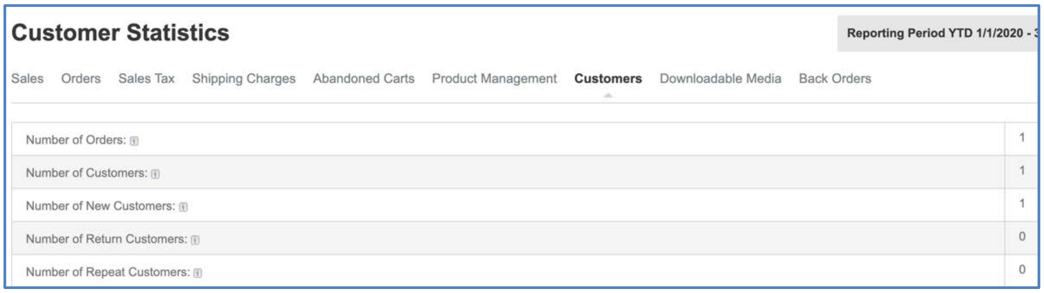
Customer Statistics

- Under Reports, select Customer Statistics.



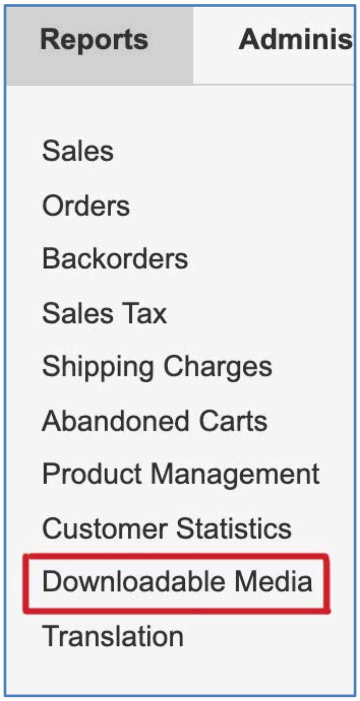
- On the Customer Statistics page, view information about
  - Number of Orders

- Number of Customers
- Number of New Customers
- Number of Return Customers
- Number of Repeat Customers



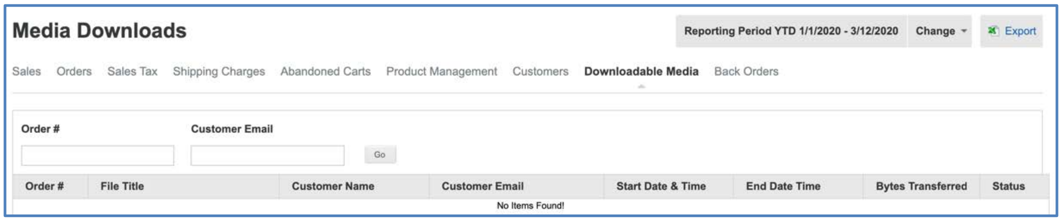
Downloadable Media

- Under Reports, Select **Downloadable Media**.



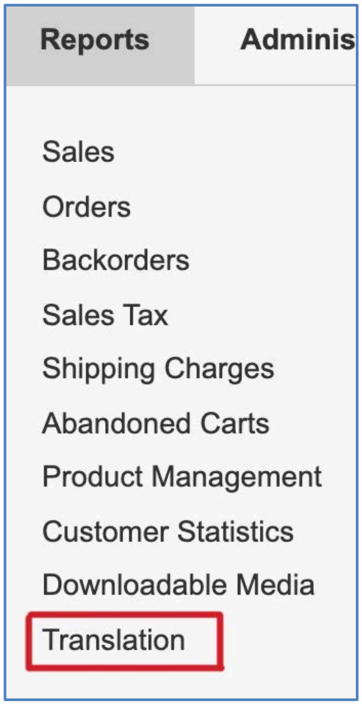
- On the Media Downloads page, filter by Order number or Customer Email to view information. Information categories include:
- Order#
- File Title
- Customer Name
- Customer Email
- Start Date and Time
- End Date Time
- Bytes Transferred

- Status.



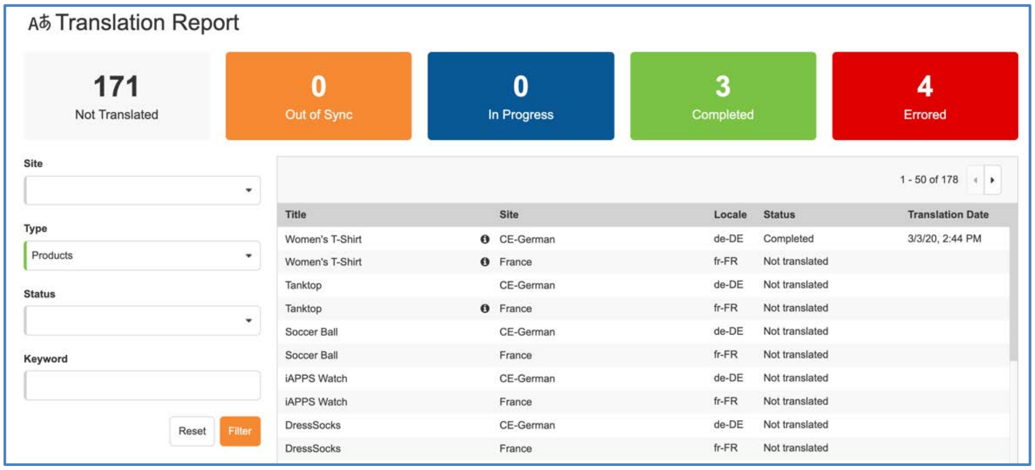
Translation

- Under Reports, select **Translation**.

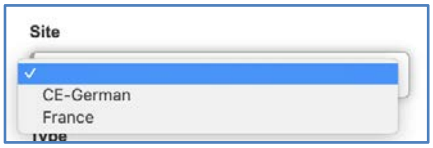


- On the Translation Report Page, at the top of the page, is a quick-access view of statistics – related to the type of item – regarding:
  - Not Translated
  - Out of Sync
  - In Progress
  - Completed

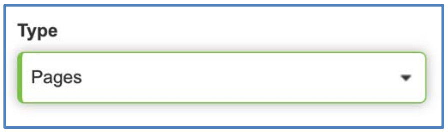
- Errored

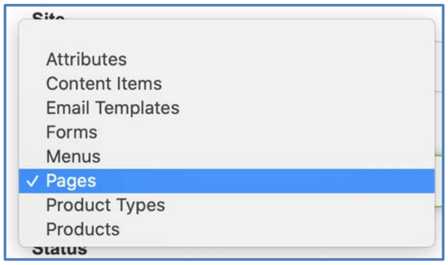


- Use the panel on the left to filter your items.
- In the Site field, use the dropdown arrow to select a site.

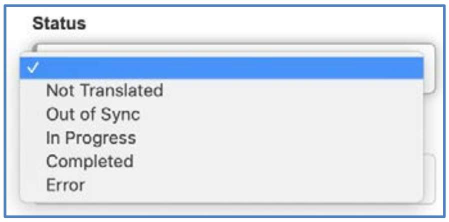


- In the Type field, use the dropdown arrow to make a selection.



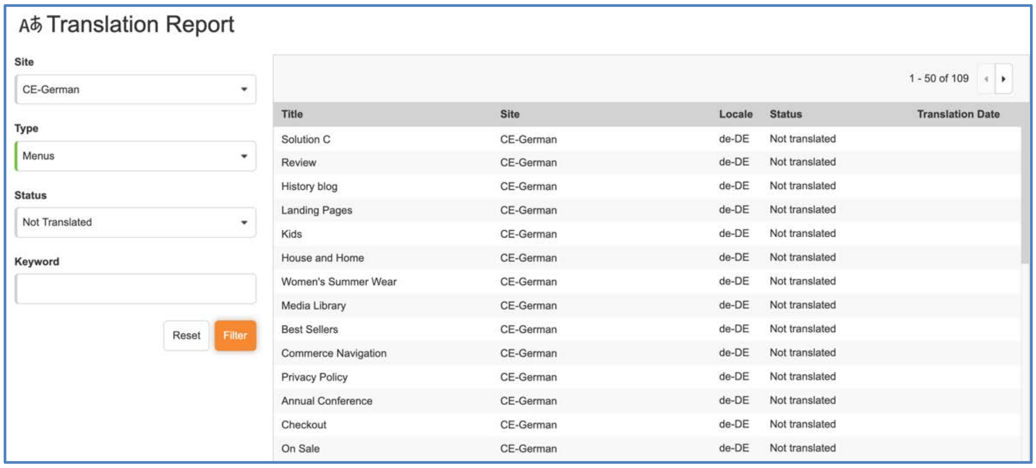


- In the Status field, use the dropdown arrow to make a selection.



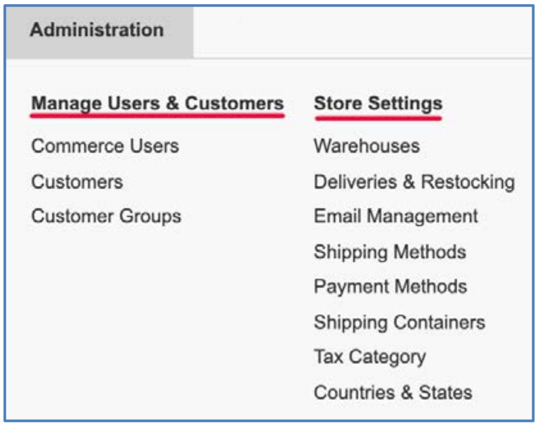
- In the Keyword field, enter the information.
- Click **Filter.**

- In the panel on the right, your items are displayed giving Translation information (according to your filters) under
- Title
- Site
- Locale
- Status
- Translation Date



Administration

There are two sections under Administration. Choose an item from **Manage Users & Customers** or **Store Settings**.



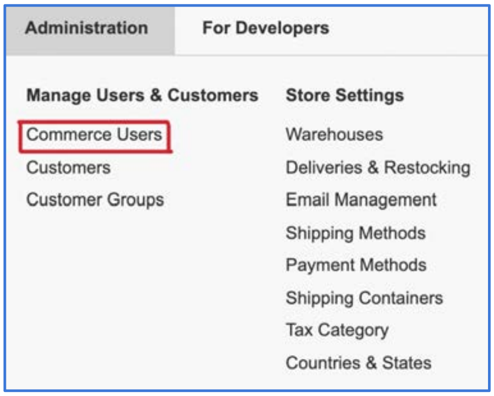
Manage Users and Customers

Commerce Users

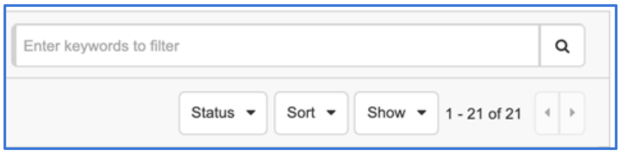
An administrator can manage users and permissions for each of the products in the Bridgeline Unbound suite.

Manage users

- Under Administration – Manage Users and Customers, select Commerce Users.



- To search for users, on the Manage Users page, use the search bar to find users by Keyword; or by Status, Sort or Show menus.



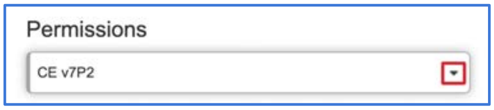
Add a user

- On the Manage Users page, click **Add New User**.
- On the New User page, enter:
    - Username
    - Password and Confirm Password
    - First Name
    - Last Name
    - Email

    - Optionally, add Expiration Date and Lead Score.
    - Optionally, select the check box to Enable email notifications.

User Permissions

- On the bottom half of the New User page, under Permissions, in the Site field, select the site.

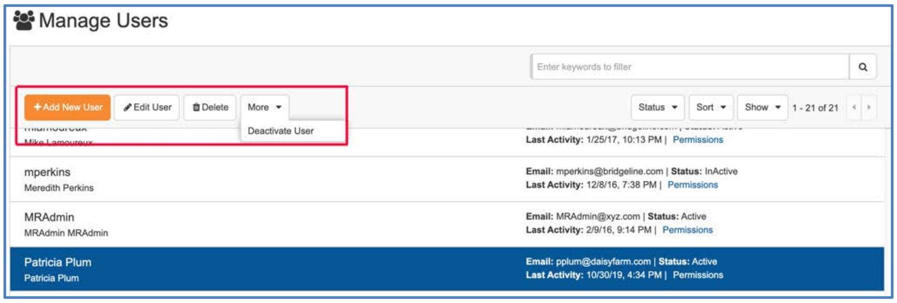


- In the Permissions section, select check boxes in the Commerce column.

- Alternately, click **Add All Admin Permissions**.
- At the top of the New User page, click **Save**.

Edit or Delete Users

- On the Manage Users page, select a user from the list.
- Use the icons at the top of the list to take further actions.



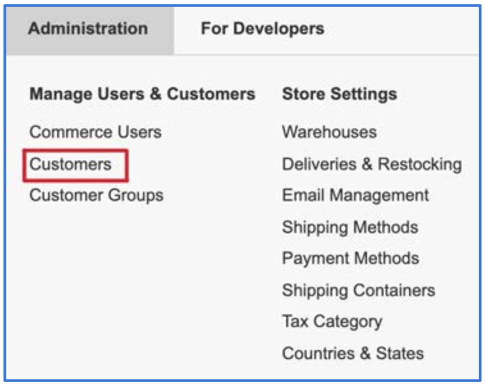
- To edit user information, click **Edit User**.
    - Optionally, to Delete user information, click **Delete**.
    - Optionally, to deactivate or activate a user, use the **More** dropdown arrow.
- Click **Save**.

Customers

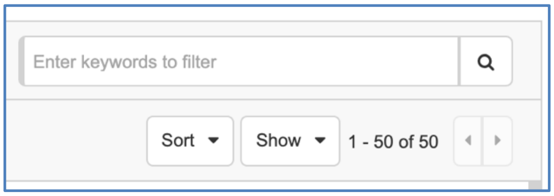
An administrator can manage customers of each of the products in the Bridgeline Unbound suite and export the information to a CSV file.

Add and manage customers

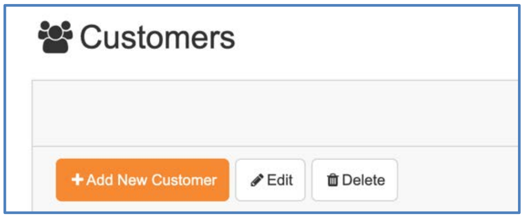
- Under Administration – Manage Users and Customers, select Customers.



- To search for customers, on the Customers page, use the search bar to find users by Keyword; or by Sort or Show menus.



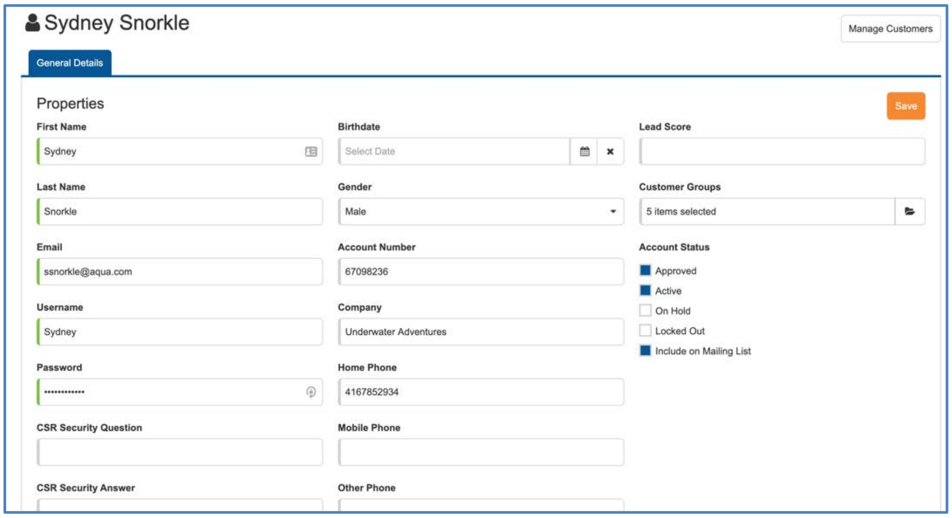
- To add a customer, on the Customers page, click **Add New Customer**.



  - Optionally, to edit or delete a customer, select a customer from the list. Click **Edit** or **Delete**.

Customer Details

- On the New Customer page, under the General Details tab, Properties, enter:
  - First Name
  - Last Name
  - Email
  - Username
  - Password

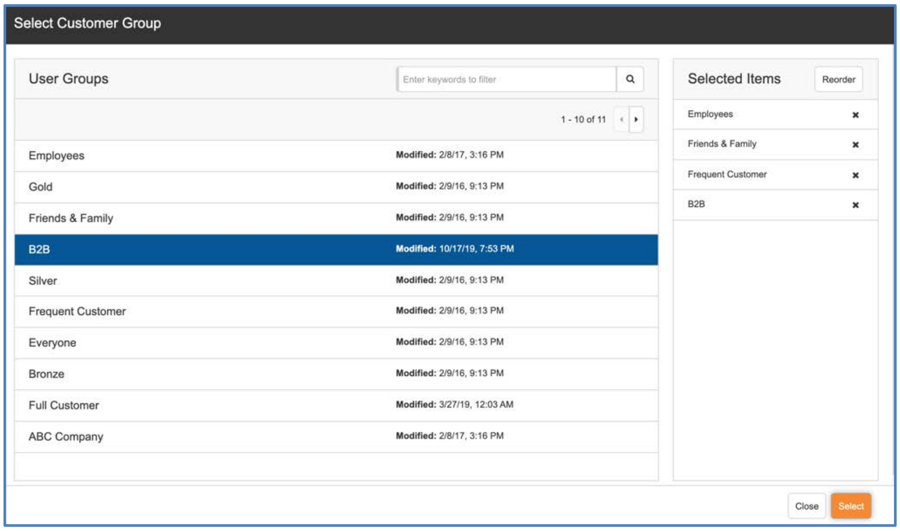


Options

- Optionally, enter information in these fields:
  - CSR Security Question
  - CSR Security Answer
  - Birthdate
  - Gender
  - Account Number
  - Company, Home Phone
  - Mobile Phone, Other Phone
  - Lead Score.

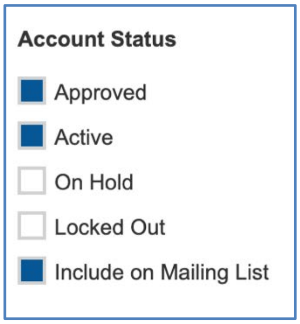
Customer Groups

- Optionally, in the Customer Groups field, click the folder icon.
- In the Select Customer Group, under User Groups, make a selection.
- In the Selected Items panel, click **Select**.



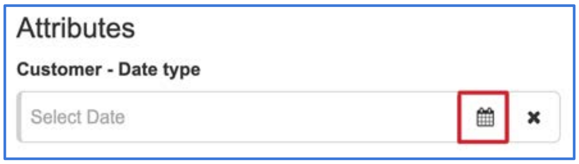
Account Status

- Optionally, under Account Status, select check boxes beside Approved, Active, On Hold, Locked Out, and Include on Mailing List.

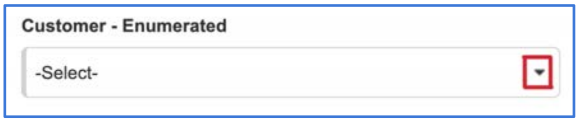


Attributes

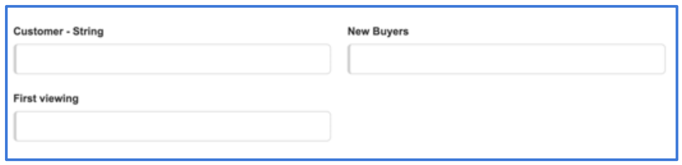
- On the bottom half of the New Customer page, in the Customer-Date type field, select a date using the calendar icon.



- In the Customer-Enumerated field, use the arrow to select from the dropdown menu of categories

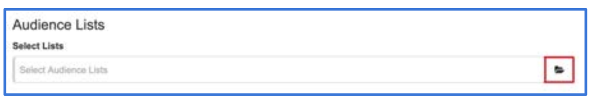


- Optionally enter information in these fields:
  - Customer-String
  - First Viewing
  - New Buyers

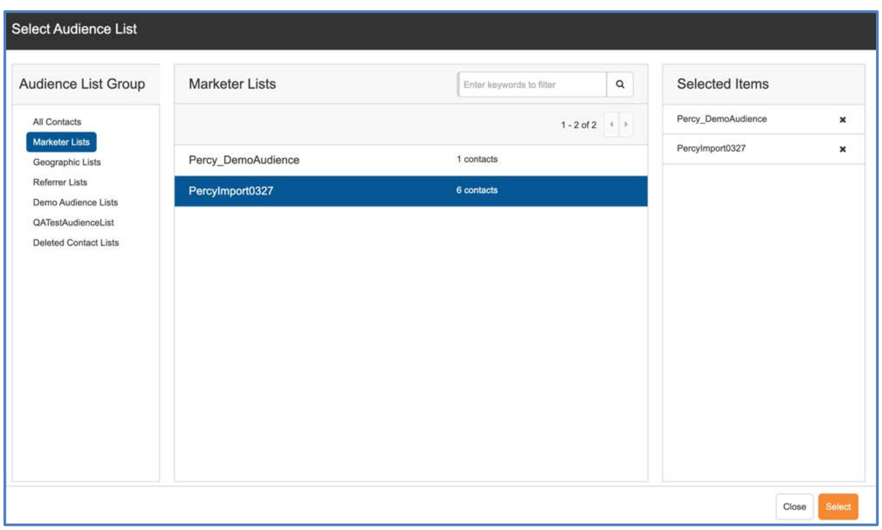


Audience Lists

- Optionally, under Audience Lists, in the Select Lists field, click the folder icon.



- In the Select Audience List, from the Audience List Group, select from that group's List.
- In the Selected Items panel, click **Select**.



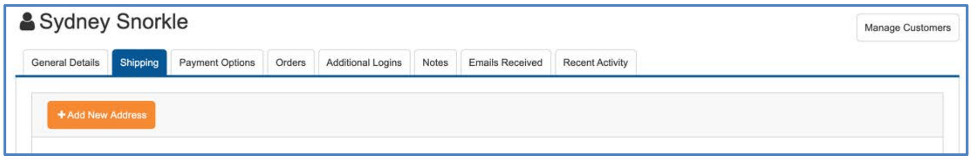
- On the New Customer page, Click **Save**.

Once you have finished and placed an order, you can still do more.

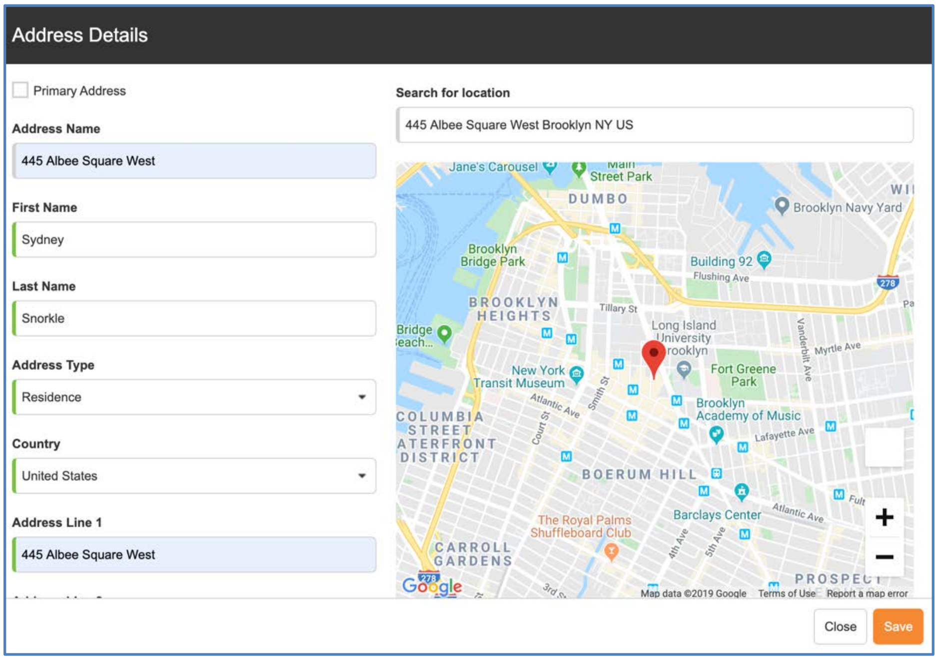
- Optionally, on a customer page, use the tabs for:
    - Shipping
    - Payment Options
    - Orders
    - Additional Logins
    - Notes
    - Emails Received
    - Recent Activity.

Shipping

- If you choose the Shipping tab, click **Add New Address**.



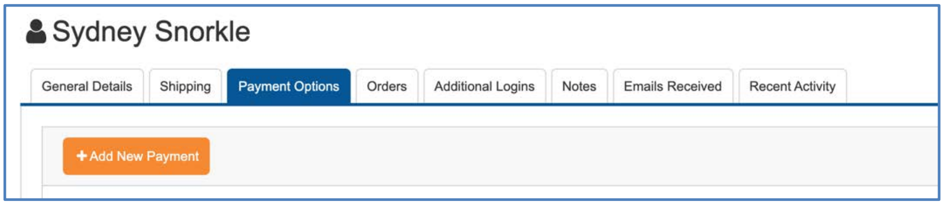
- On the Address Details page, enter customer information.



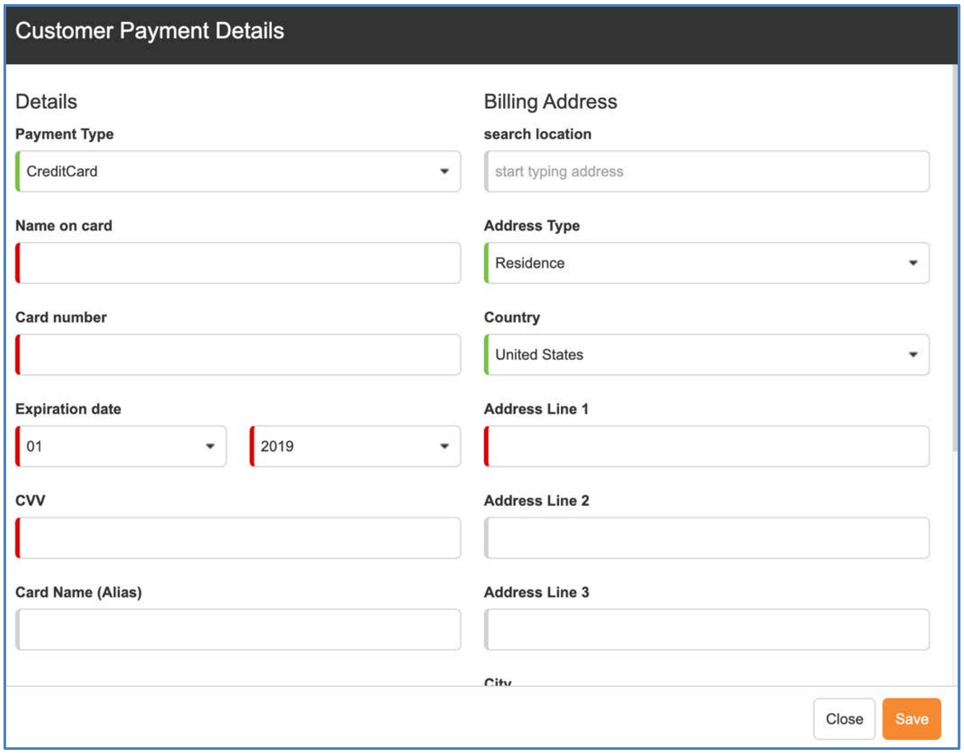
- Click **Save**.

Payment Options tab

- If you choose the Payment Options tab, click **Add New Payment**.



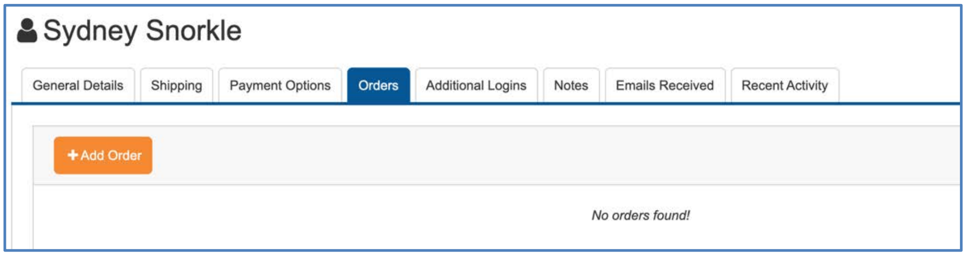
- On the Customer Payment Details, enter payment information.



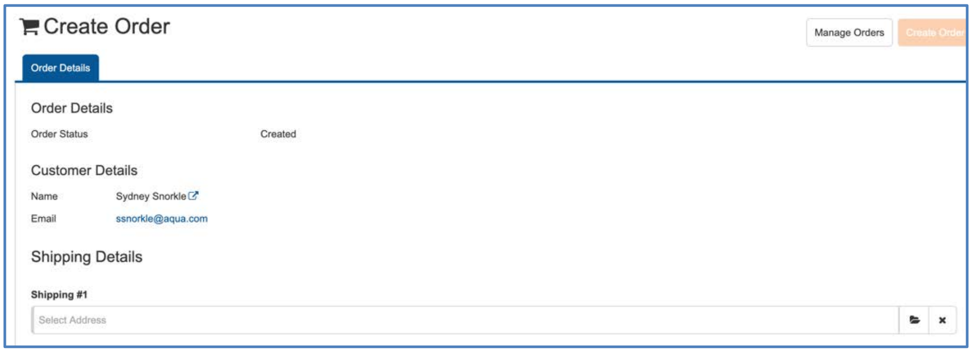
- Click **Save**.

Orders

- If you choose the Orders tab, click **Add Order**.

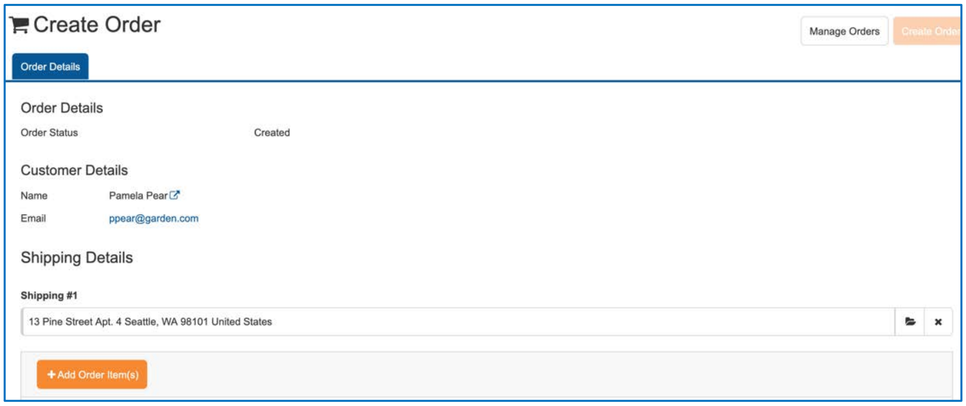


- On the Create Order page, in the Shipping #1 field, click the folder icon.

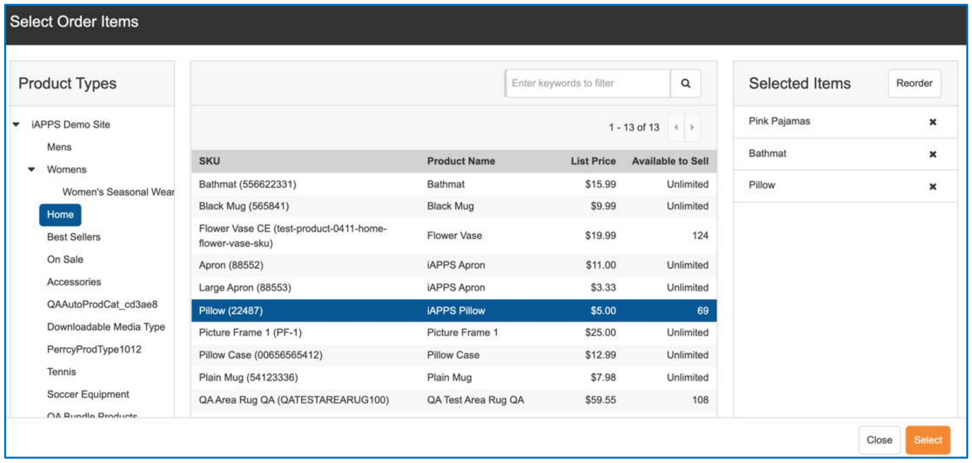


- On the Select Address page, select the customer address and click **Select**.
- Optionally, Add a New Address or Edit the address.

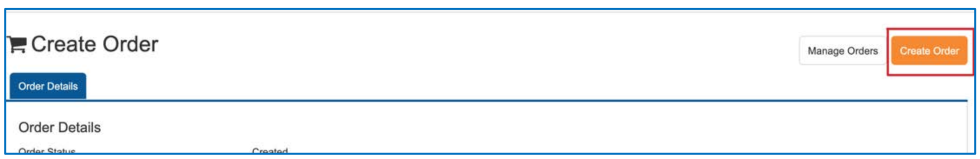
- Optionally, on the Create Order page, click **Add Order Items**.



- On the Select Order Items page, under Product Types, select a Type.
- Under SKU, select products.

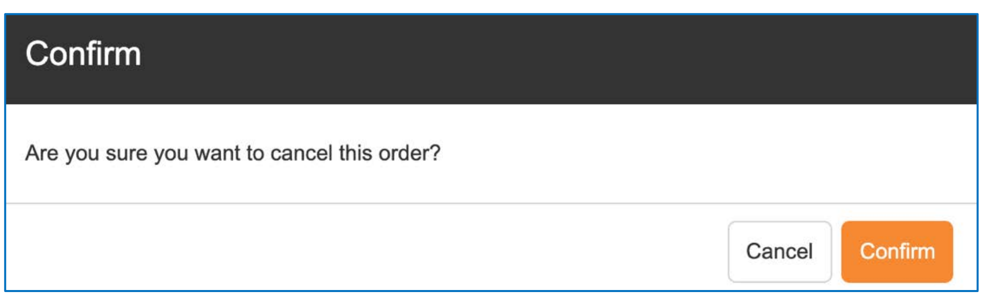


- In the Selected Items panel, click **Select**.
- On the Create Order page, click **Create Order**.



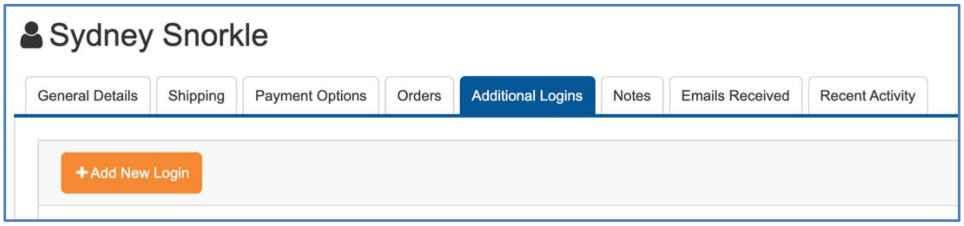
- Optionally, on the Edit Order page, make any additions or revisions; or add a payment or coupon.
- Click **Place Order**; or, alternately, **Cancel Order**.

- If you choose Cancel Order, in the Confirmation dialog, click **Confirm**; or, alternately, **Cancel**.

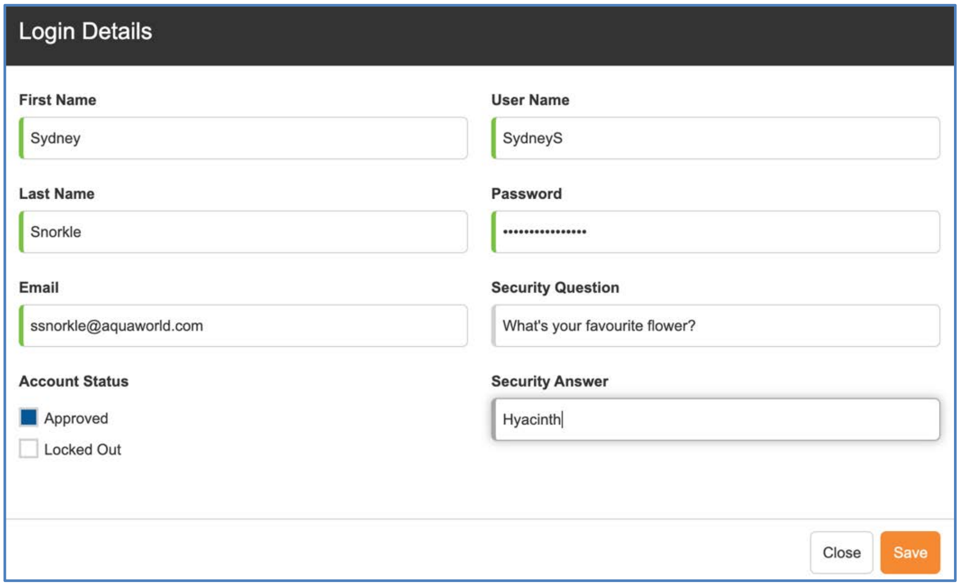


Additional Logins tab

- If you choose the Additional Logins tab, on the customer's page, click **Add New Login**.

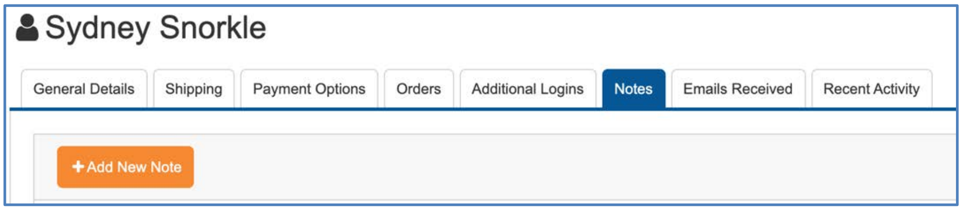


- On the Login Details page, enter the information. Click **Save**.



Notes

- If you choose the Notes tab, on the customer's page, click **Add New Note**.



- In the Notes dialog, add a note. Click **Save**.

Emails and Activity tabs

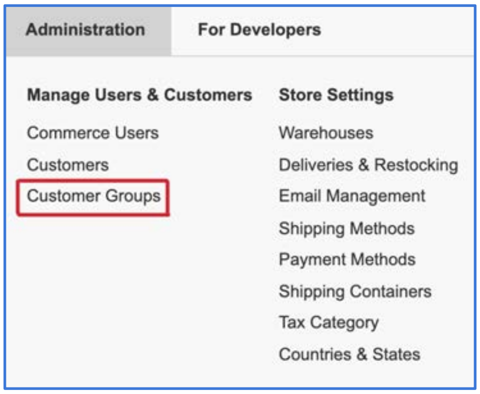
- The Emails Received tab allows you to view emails received.
- The Recent Activity tab allows you to see customer activity.

Customer Groups

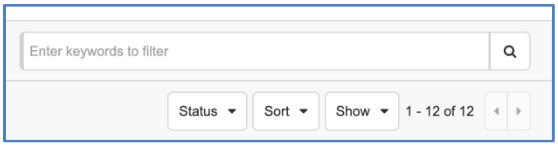
Customer Groups allow you to associate certain customers in order to give them special pricing through Price Sets or to undertake other group actions, such as assigning Tags or special security levels on the site.

Create a Customer Group

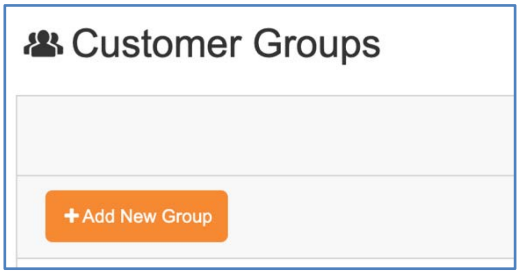
- Under Administration – Manage Users and Customers, select Customer Groups.



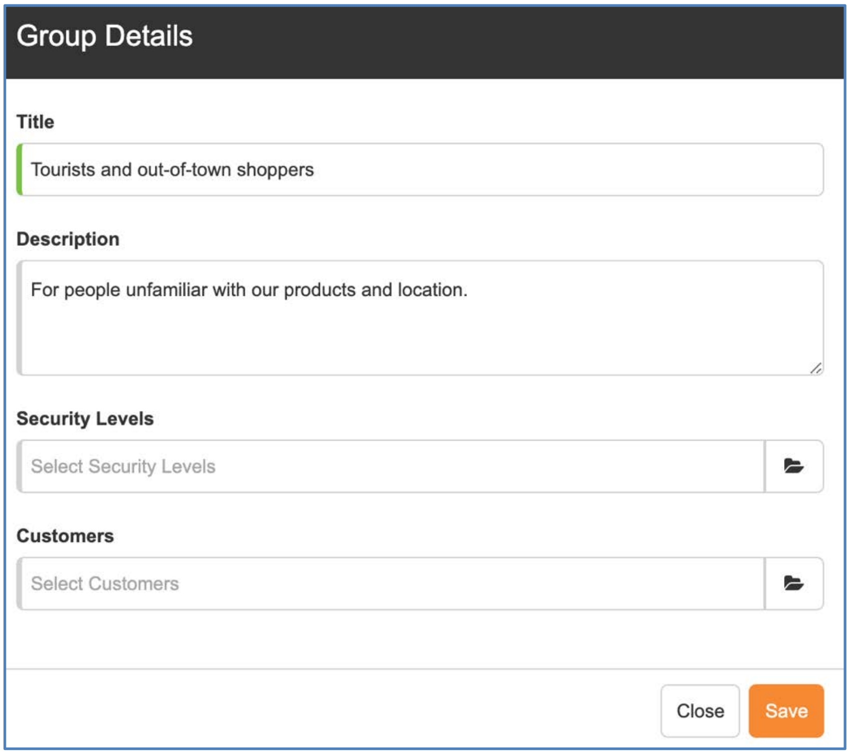
- To search for customer groups, on the Customer Groups page, use the search bar to find users by Keyword; or by Status, Sort or Show menus.



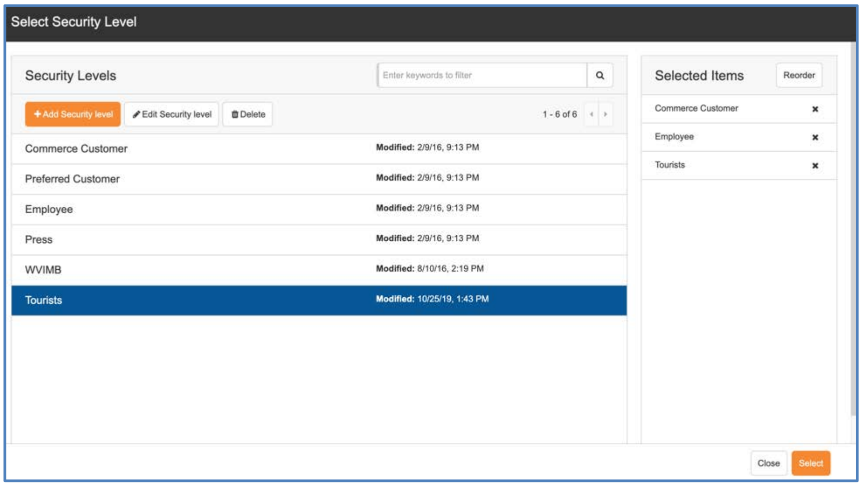
- To add a customer group, on the Customer Groups page, click **Add New Group.**



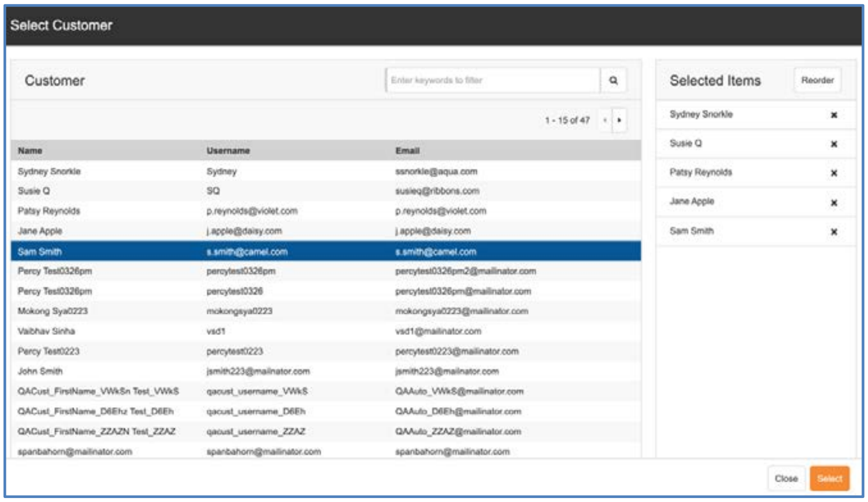
- In the Group Details dialog, enter a Title.
- In the Group Details dialog, enter a Description



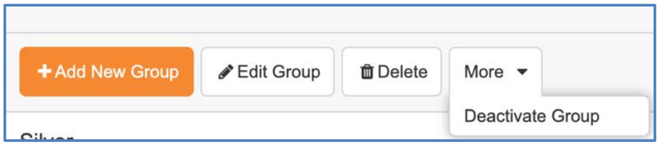
- Optionally, in the Security Levels field, click the folder icon.
- On the Select Security Level page, under Security Levels, click **Add Security Level**.
- Optionally, select a security level or levels from the list. In the Selected Items panel, click **Select**.



- Optionally, in the Group Details dialog, in the Customers field, click the folder icon.
- On the Select Customer page, under Customer, select customers.
- In the Selected Items panel, click **Select**.



- In the Group Details dialog, click **Save**.
  - Optionally, to edit or delete a customer, select a customer group from the list. Click **Edit** or **Delete**. Using the More dropdown arrow, Deactivate or Activate the group.



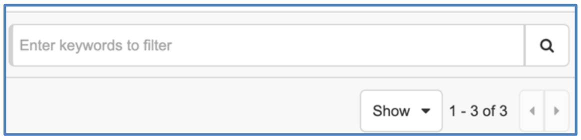
Store Settings

Warehouses

Bridgeline Unbound Commerce helps you to manage digital, internal or external warehouses for inventory.

- Under Administration – Store Settings, select Warehouses.

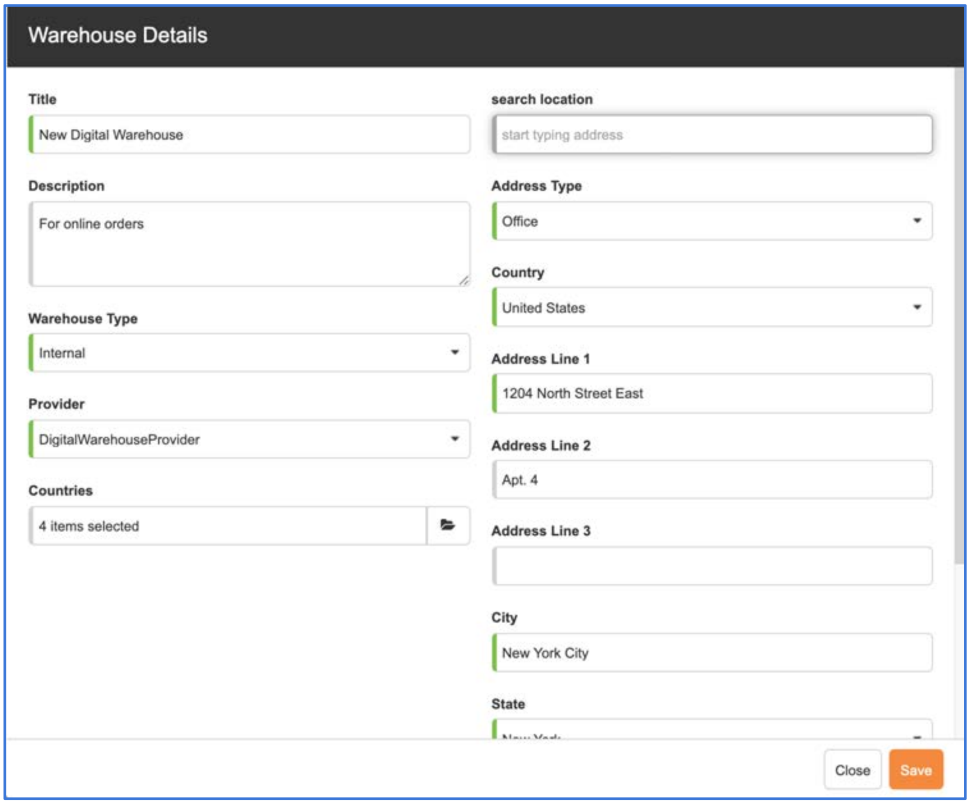
- On the Warehouses page, use the search bar to find users by Keyword; or by the Show menu.



Add a warehouse

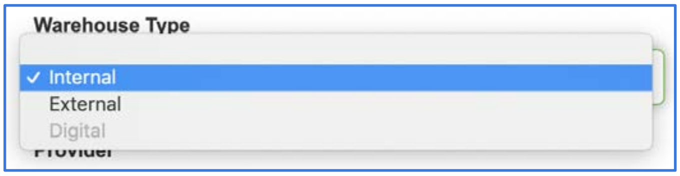
- On the Warehouses page, click **Add New Warehouse.**

- On the Warehouse Details page, enter a Title.

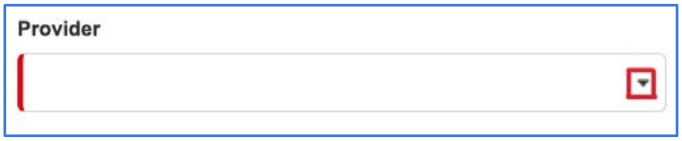


- Optionally, enter a Description.

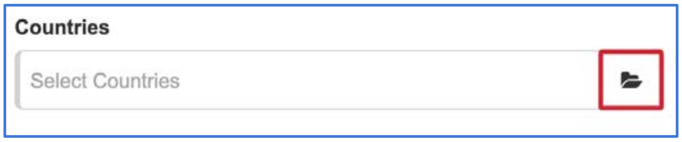
- In the Warehouse Type field, use the dropdown arrow to make a selection.



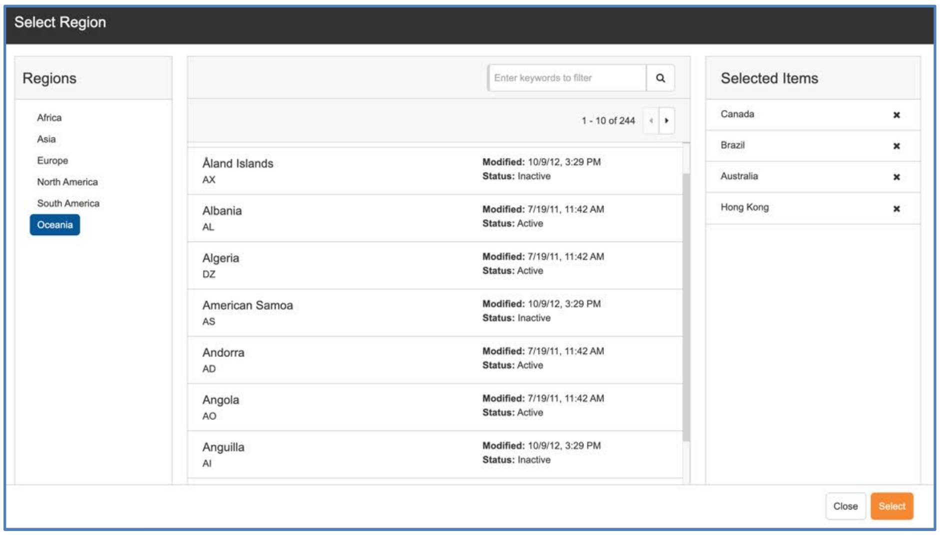
- In the Provider field, use the dropdown arrow to select:
  - DigitalWarehouseProvider
  - ExternalWarehouseProvider
  - InternalWarehouseProvider.



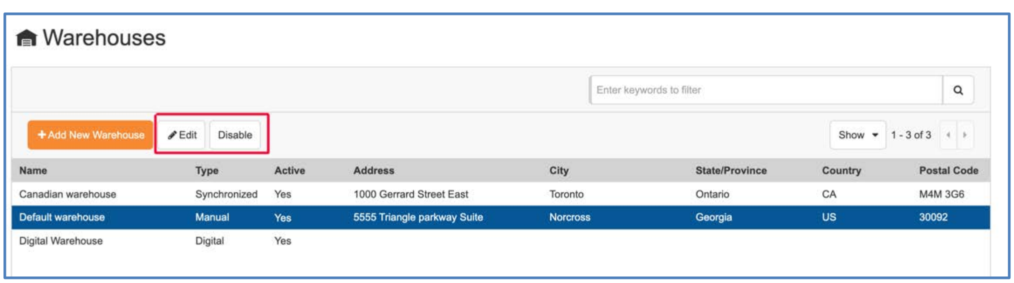
- Optionally, in the Countries field, click the folder icon.



- On the Select Region page, under Regions, select a region. Select countries by scrolling through the list or by using the search bar.
- In the Selected Items panel, click **Select**.



- On the Warehouse Details page, add the street address, City, State (or province or other area), and Postal Code.
- Click **Save**.
- Optionally, to edit or disable a warehouse, select a warehouse from the list. Click **Edit** or **Disable/Enable**.

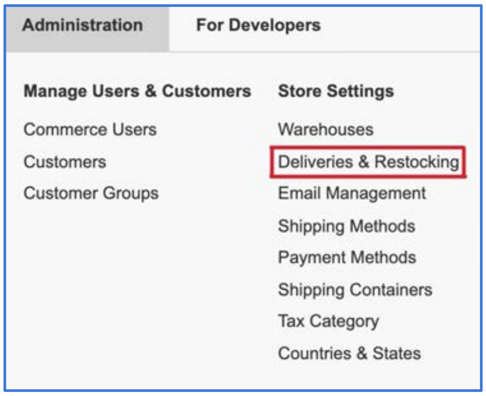


Deliveries & Restocking

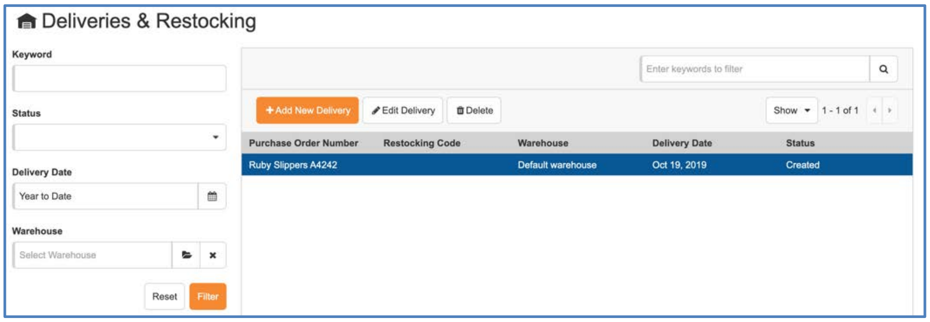
Bridgeline Unbound Commerce helps you to manage your deliveries and restocking.

Manage Deliveries and Restocking

- Under Administration – Store Settings, select Deliveries & Restocking.



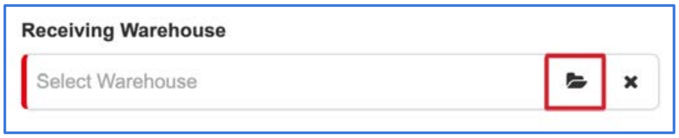
- On the Deliveries & Restocking page, in the panel on the left, filter by Keyword, Status, Delivery Date, and Warehouse.



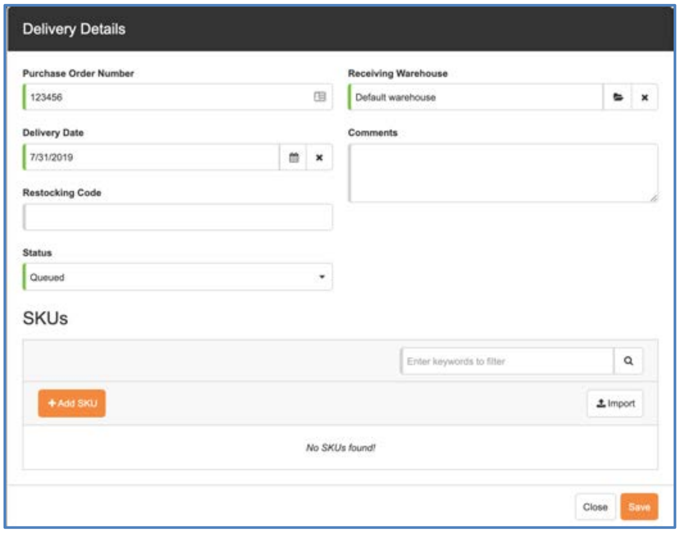
  - Alternately, use the search box to look for items in the Deliveries and Restocking list.

Add a Delivery

- On the Deliveries & Restocking page, click **Add New Delivery**.
  - Alternately, to make changes to a delivery, select the delivery from the list and click **Edit Delivery** or **Delete**.
- On the Delivery Details page, fill in Purchase Order Number, Delivery Date, and Status.
- In the Receiving Warehouse field, click the folder icon to make a selection.

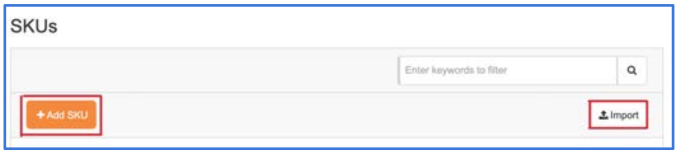


- On the Select Warehouse page, select a Warehouse and click **Select**.
    - Optionally, state the Restocking Code and make any comments.
- Click **Save**.

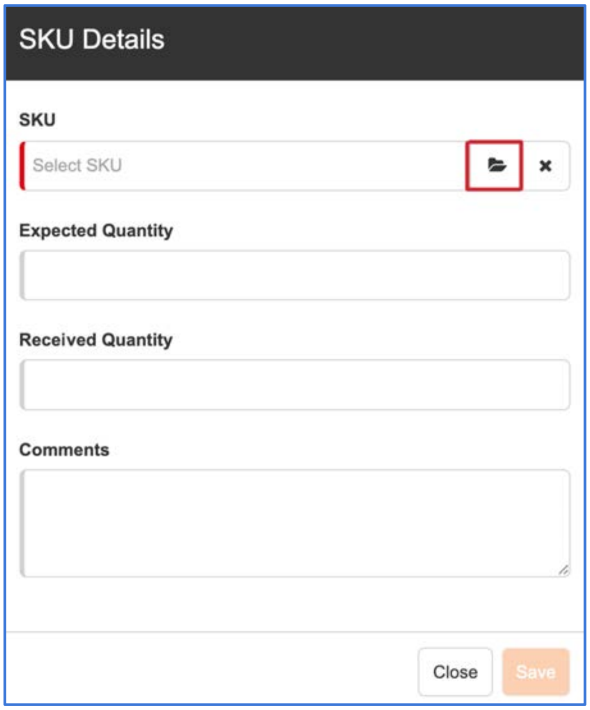


Add SKU

- Optionally, on the Delivery Details page, in the SKUs section, click **Add SKU** (or use the search box to find one).



- Optionally, in the SKUs section, click **Import** to import Delivery Details.
- In the Import Delivery Details dialog, select the folder icon to browse your files for the information. Click **Save**.
- In the SKU Details dialog, select the folder icon to browse for the information from Product Types and Products.



- On the Select SKU page, select a Product Type, then a product. Select a product. Click **Select**.
- Optionally, in the SKU Details dialog, state the Expected Quantity and Received Quantity, or leave Comments.
- Click **Save**.
- On the Delivery Details page, click **Save**.

Email Management

Bridgeline Unbound Commerce provides a set of system-generated emails for Administrators to manage. For example, when the inventory dips below a certain level, a "Low Inventory Alert" is automatically sent to the Administrator.

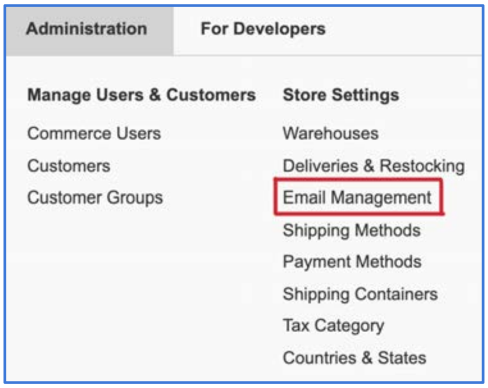
Other email messages go to customers and are triggered by their actions on the site — for example, registering, ordering or changing a password.

Website users can also generate emails by sending friends a copy of their Wish List.

These Email templates are set up by developers when the site is created, but Administrators can change the wording.

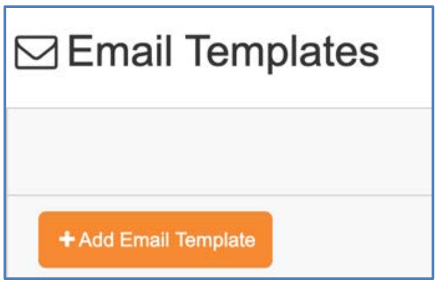
Email templates

- Under Administration – Store Settings, select **Email Management**.



Add an Email Template

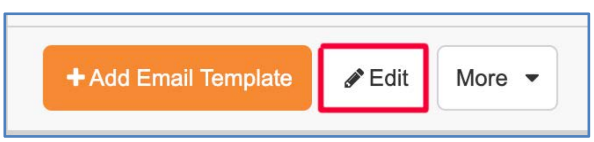
- On the Email Templates page, click **Add Email Template**.



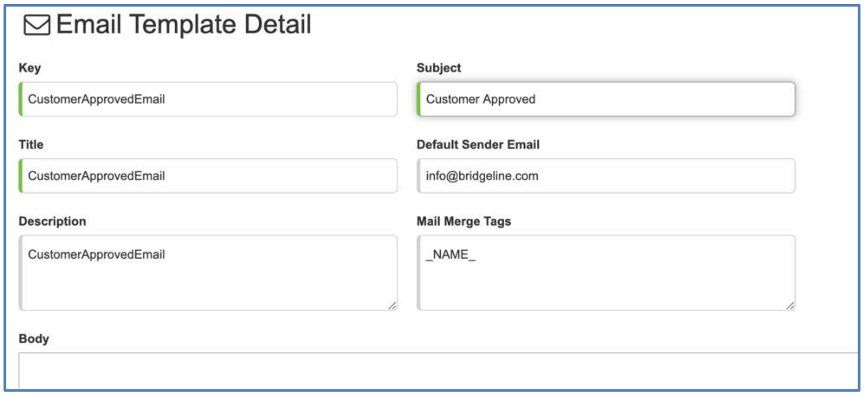
- On the Email Template Detail page, in the Key field, enter the information.
- In the Title field, enter a title.
- Optionally, in the Description field, enter a description.
- In the Subject field, enter the subject.
- Optionally, in the Default Sender Email, enter the information.
- Optionally, in the Mail Merge Tags field, enter the information.
- In the Body text box, enter your text.
- At the top of the page, click **Save**.

Edit an Email Template

- On the Email Templates page, select a template from the list.
- In the row of icons at the top of the list, click **Edit**.



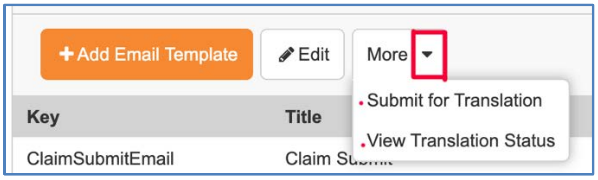
- On the Email Template Detail page, make any revisions.



- Click **Save.**

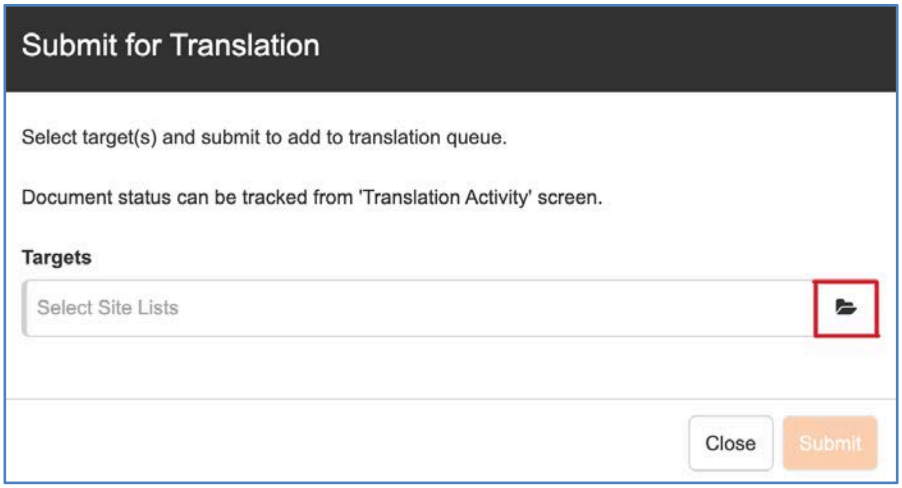
Email Template Translation options

- Select an Email Template from the list.
- In the row of icons at the top of the page, use the More dropdown arrow to select **Submit for Translation** or **View Translation Status**.

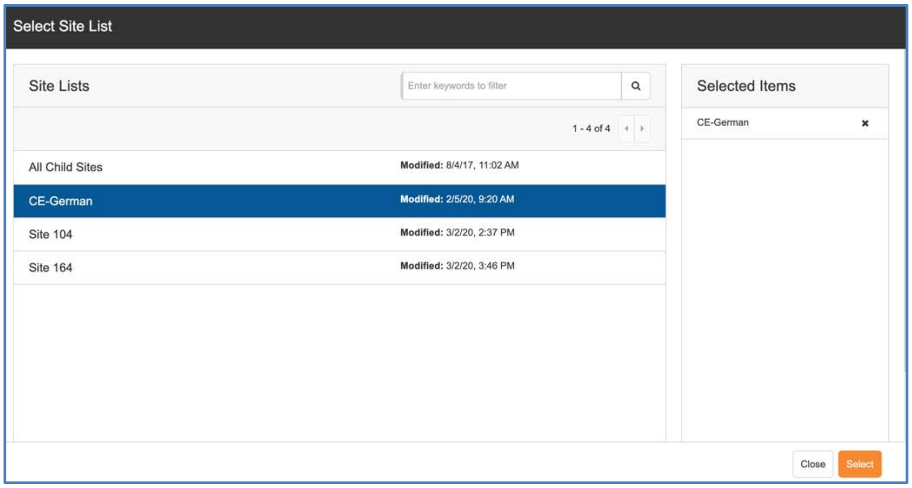


Submit for Translation

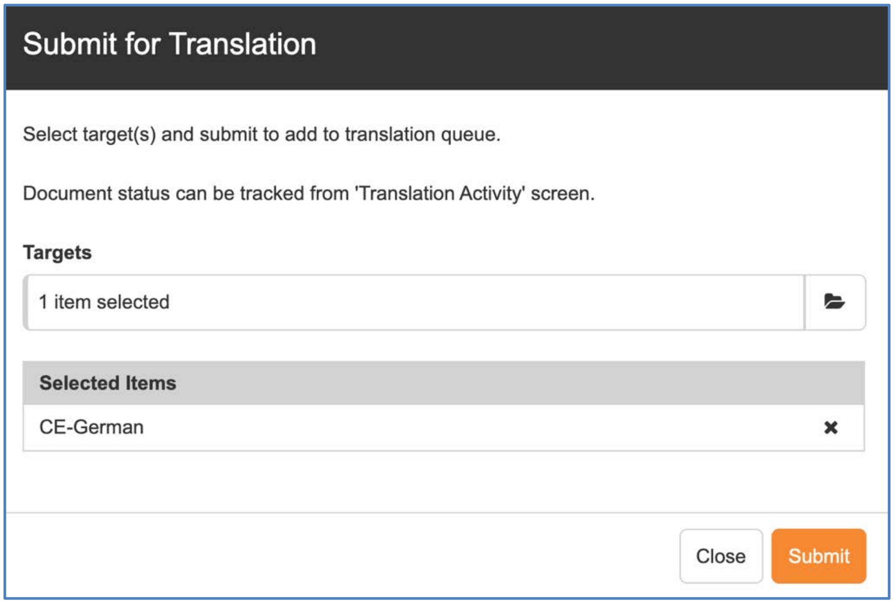
- If you choose Submit for Translation, in the Submit for Translation dialog, in the Targets field, click the folder icon.



- On the Select Site List page, choose a site or sites.

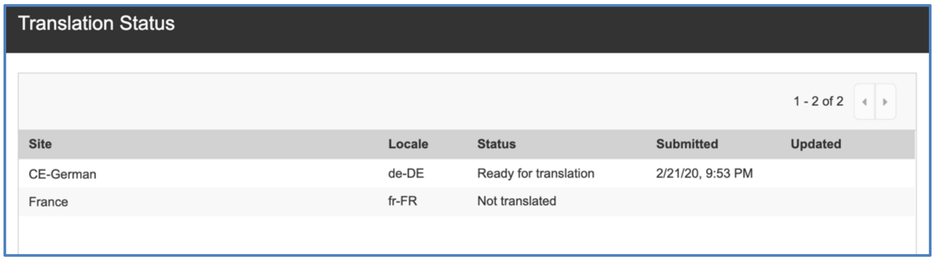


- In the Selected Items panel, click **Select**.
- On the Submit for Translation dialog, click **Submit**.



View Translation Status

- If you select View Translation Status, you'll see at a glance the status of your variant sites.



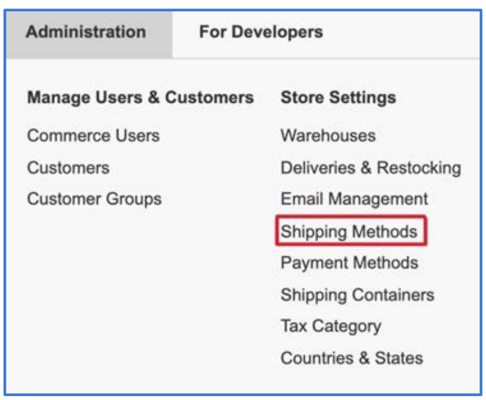
Shipping Methods

A shipping method combines a shipping type (such as Ground Shipping) with an associated shipping vendor (for example, UPS).

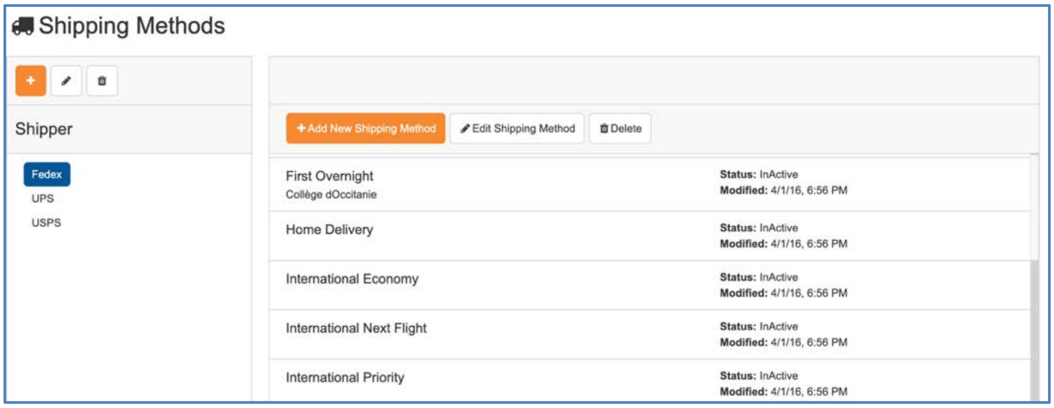
Most shipping methods are set up prior to your site launch, but administrators can later revise them for each approved shipping vendor. (This is not typically done, however.)

Manage Shipping Methods

- Under Administration – Store Settings, select Shipping Methods.

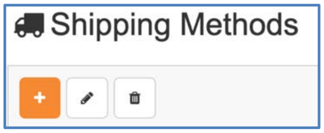


- On the Shipping Methods page, in the Shipper panel on the left, select a Shipper. In the panel on the right, choose a Shipping Method.

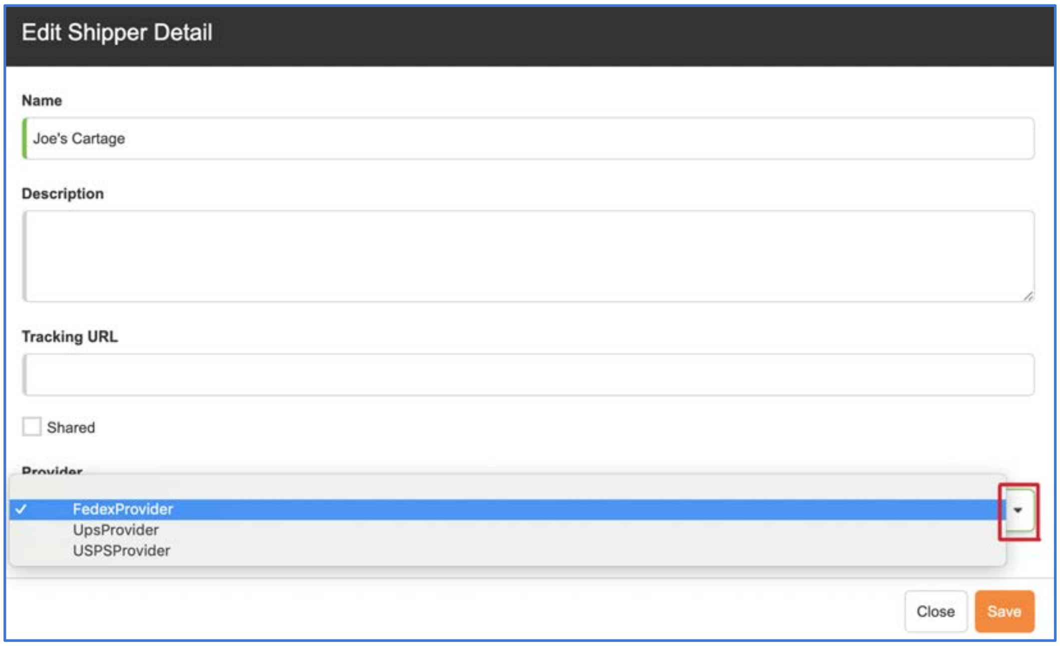


Add or edit a Shipper

- On the Shipping Methods page, in the **Shipper** panel, click the add icon.



- On the Edit Shipper Detail page, name the Shipper. In the Provider field, use the arrow to make a selection.

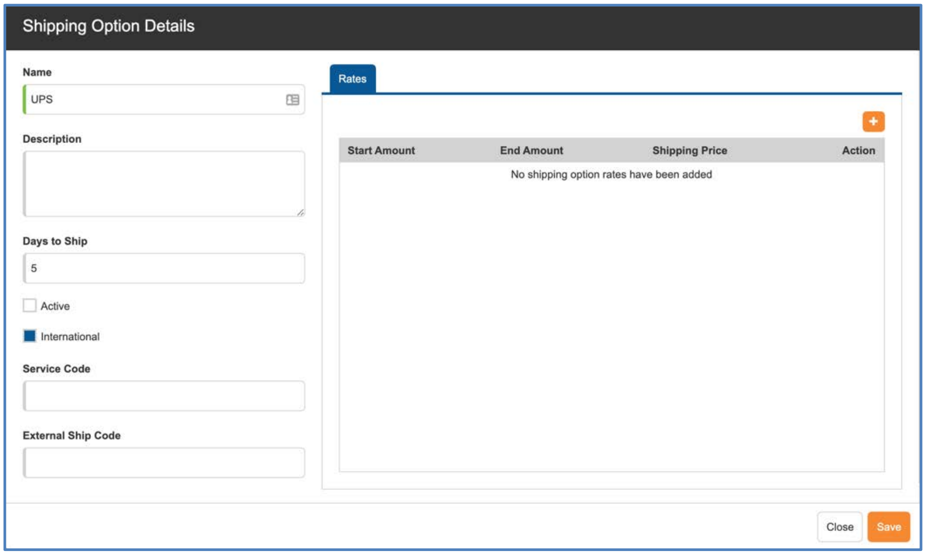


- Click **Save,** or **Close** to return to the Shipping Methods page.

Add a Shipping Method

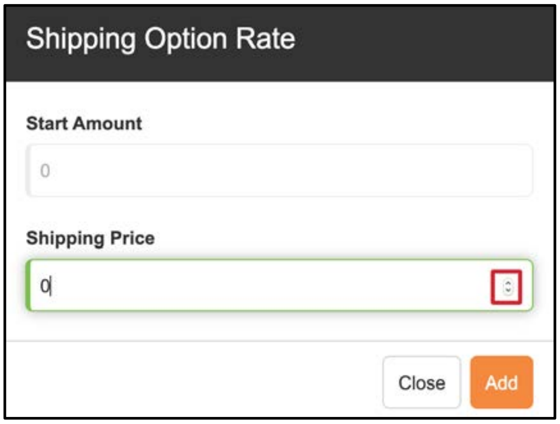
- On the Shipping Methods page, in the panel on the right, click **Add New Shipping Method**.

- On the Shipping Option Details page, name the Shipping Method.

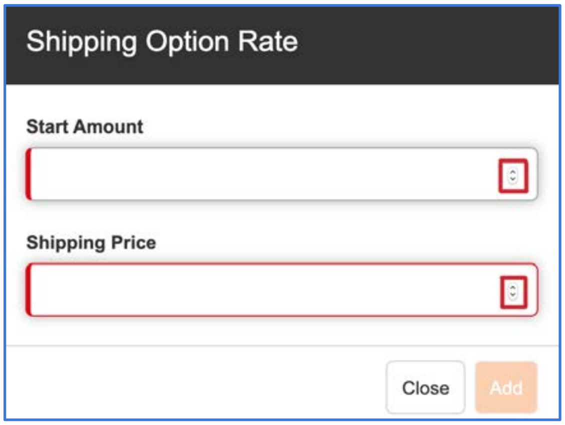


  - Optionally, enter a Description, Days to Ship, Service Code and External Ship Code.
  - Optionally, select a check box beside Active and/or International.
  - Optionally, under Rates, click the add icon.

- In the Shipping Option Rate dialog, use the arrows in the Shipping Price field to enter the Shipping Price.



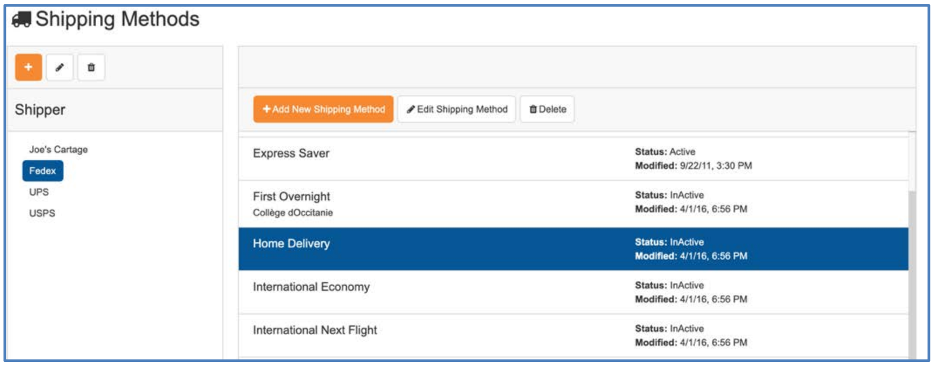
- Click **Add**; or **Close** to return to Shipping Option Details.
- On the Shipping Option Details page, if you click Add again, in the second Shipping Option Rate dialog, use the arrows in the Start Amount field to enter a Start Amount; and also use the arrows in the Shipping Price field to add a Shipping Price.



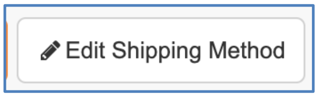
- Click **Save**, or **Close** to return to the Shipping Methods page.

Edit a Shipping Method

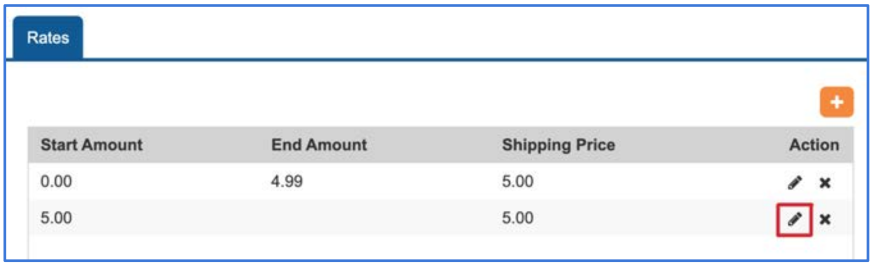
- On the Shipping Methods page, select a Shipping Method from the panel on the right.



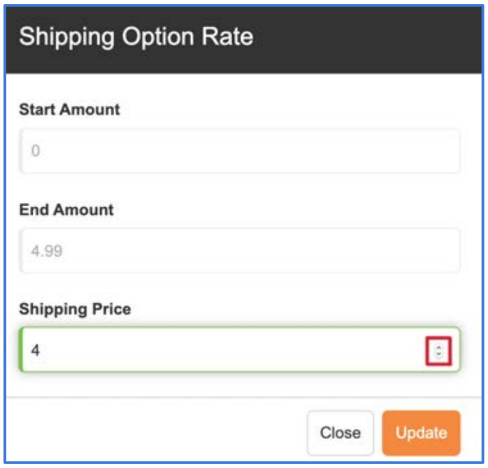
- Click **Edit Shipping Method**.

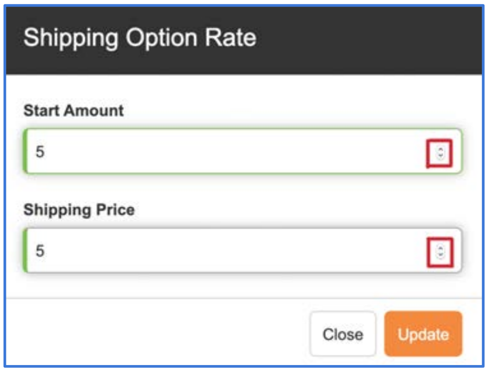


- On the Shipping Option Details page, make any revisions.
- Under the Rates tab, click the **Edit** icon beside a Shipping Rate.



- In the Shipping Option Rate dialog, make any revisions.

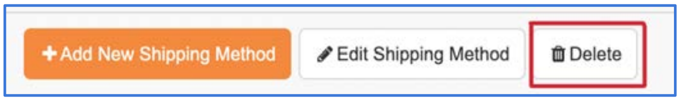




- Click **Update** or **Close** to return to the Shipping Option Details page.
  - Alternately, to delete a Shipper, in the Shipper panel, click the trashcan icon.

Delete a Shipping Method

- To delete a Shipping Method, in the Shipping Method panel, click **Delete**.



- In the Confirm dialog, click **Confirm**, or **Cancel** to return to the Shipping Methods page.

Payment Methods

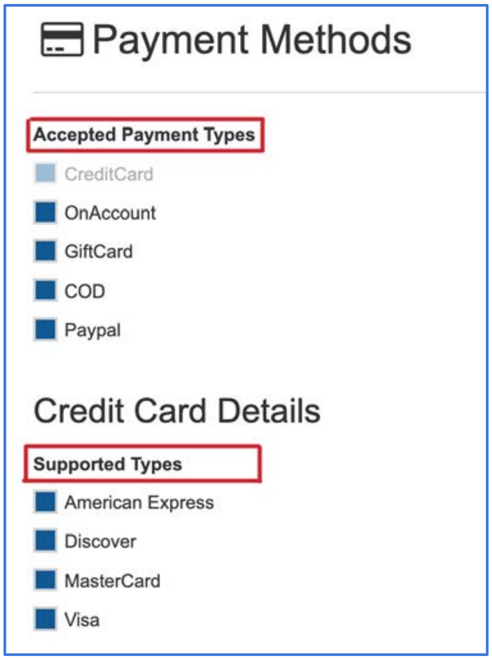
The payment process is initially set up during custom development of Bridgeline Unbound Commerce. Much of this will depend on the payment gateway your company chooses in whatever currency.

Bridgeline Unbound enables payments with credit cards, Paypal, gift cards and other popular methods. It is a simple way for customers to pay for items and for the company to manage authentication between store server and payment gateway; and also to keep track of payment.

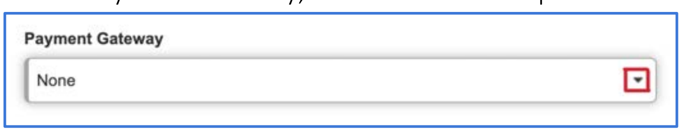
Manage Payment Methods

- Under Administration – Store Settings, select **Payment Methods**.

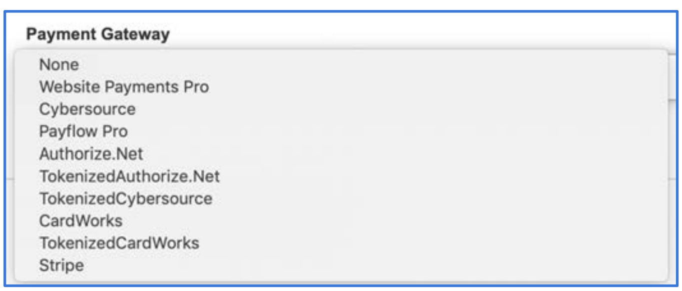
- On the Payment Methods page, select the checkboxes under Accepted Payment Types and Supported Types.



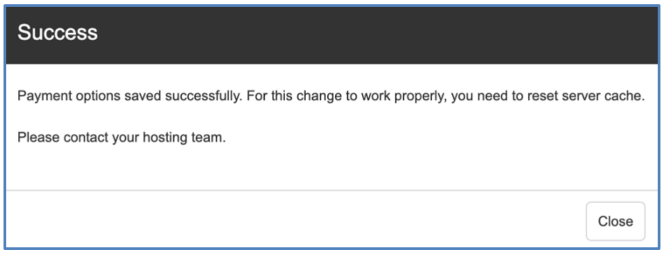
- Under Payment Gateway, use arrow for a dropdown menu.



- Make your selection.



- Click **Save**.
    - You will see this message:



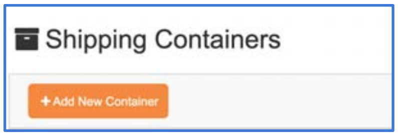
Shipping Containers

This feature is useful when you want to manage and view shipping containers – by shipper, size, weight, value and packing preference.

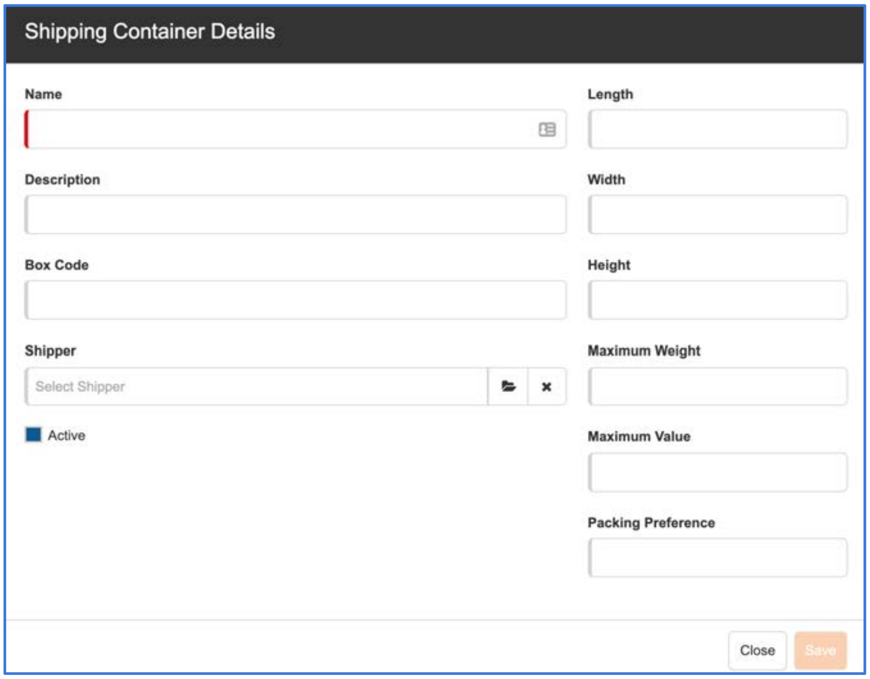
Add a Shipping Container

- Under Administration – Store Settings, select **Shipping Containers**.

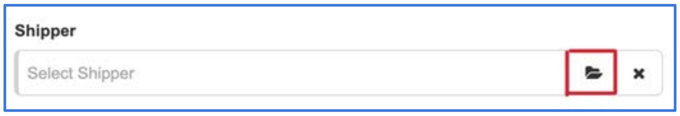
- On the Shipping Containers page, click **Add New Container**.



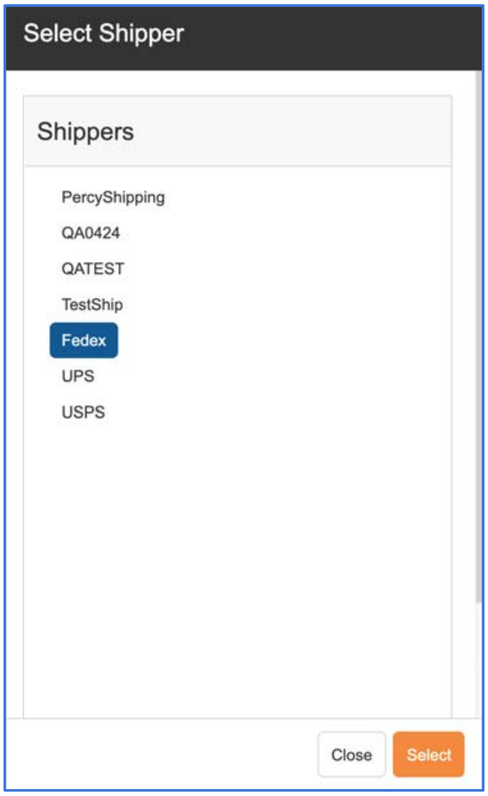
- On the Shipping Container Details page, enter a Name.



- Optionally, enter:
  - Description
  - Box Code
  - Length
  - Width
  - Height
  - Maximum Weight
  - Maximum Value
  - Packing Preference
  - Optionally, select the check box beside Active.
- In the Shipper field, click the folder icon.



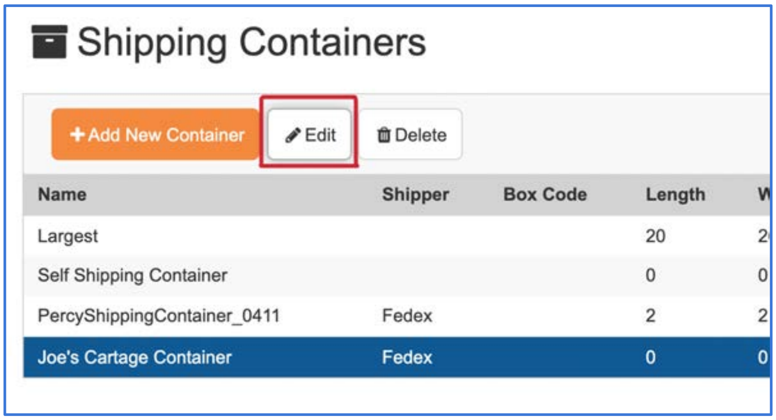
- On the Select Shipper page, under Shippers, select a Shipper.



- Click **Select** or **Close** to return to the Shipping Container Details page.

Edit a Shipping Container

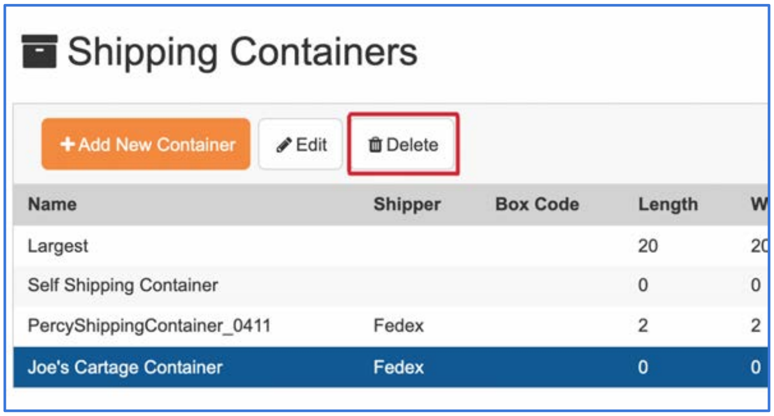
- On the Shipping Containers page, select a Shipping Container and click Edit.



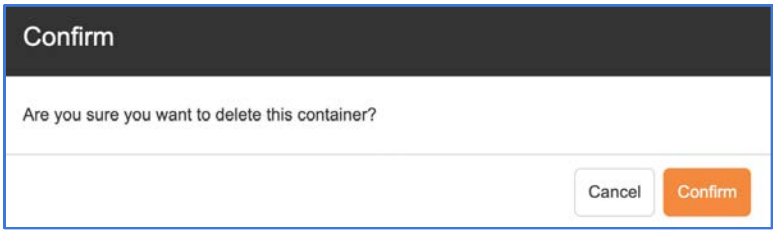
- On the Shipping Container Details page, make any revisions or additions.
- Click **Save**.

Delete a Shipping Container

- On the Shipping Container page, select a Shipping Container and click Delete.



- In the Confirm dialog, click **Confirm**, or **Cancel** to return to the Shipping Containers page.



Tax Category

Tax Categories most likely been set up in development and will rarely change. If you do need to change them, however, this is the place.

Manage Tax Categories

- Under Administration – Store Settings, select **Tax Category**.

- On the Tax Category page, click **Add New Category.**

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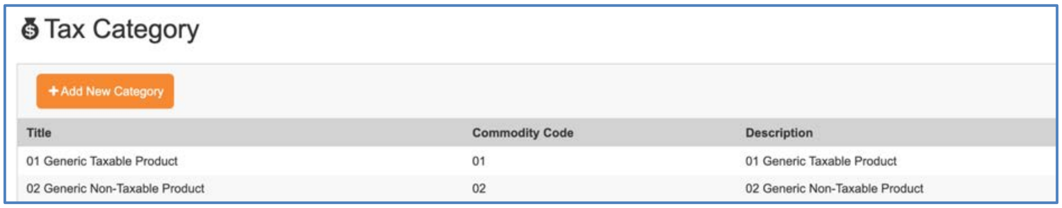
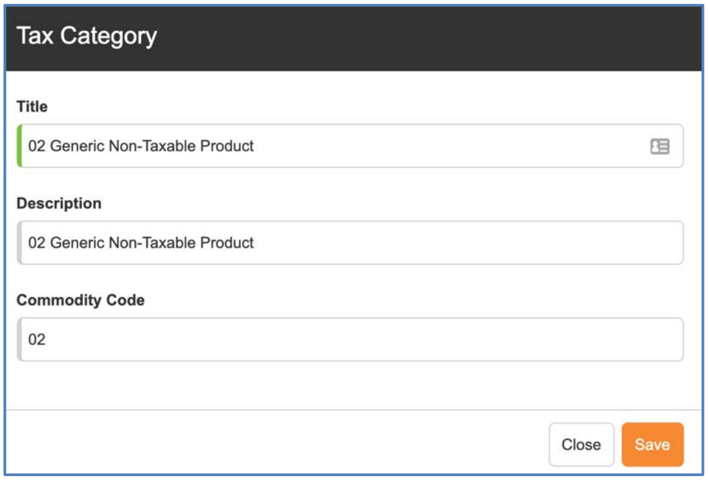


- In the Tax Category dialog, enter the required information in the Title, Description and Commodity Code fields.



- Click **Save**.

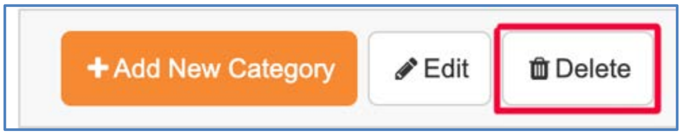
Edit a Tax Category

- On the Tax Category page, select a category.
- Click **Edit**.

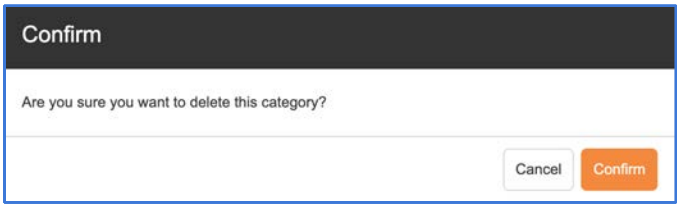
- On the Tax Category page, add or revise the information.
- Click **Save**, or **Close** to return to the Tax Category page.

Delete a Tax Category

- On the Tax Category page, select a category.
- Click Delete.



- In the Confirm dialog, click **Confirm**, or **Cancel** to return to the Tax Category page.

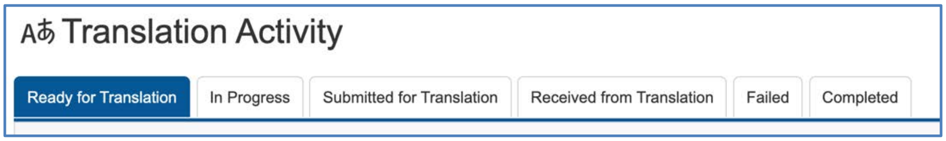


Translation Activity

This section allows you to keep track of your translated items in six different ways.

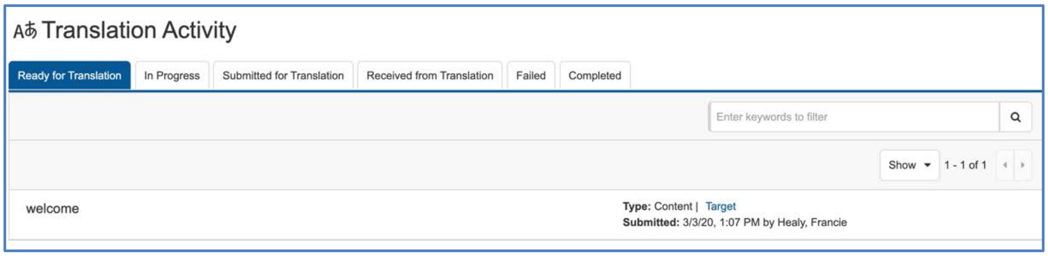
- Under Administration – Site Functions, select **Translation Activity**.

- On the Translation Activity page, there are options under these tabs:
    - Ready for Translation
    - In Progress
    - Submitted for Translation
    - Received from Translation
    - Failed
    - Completed



Ready for Translation

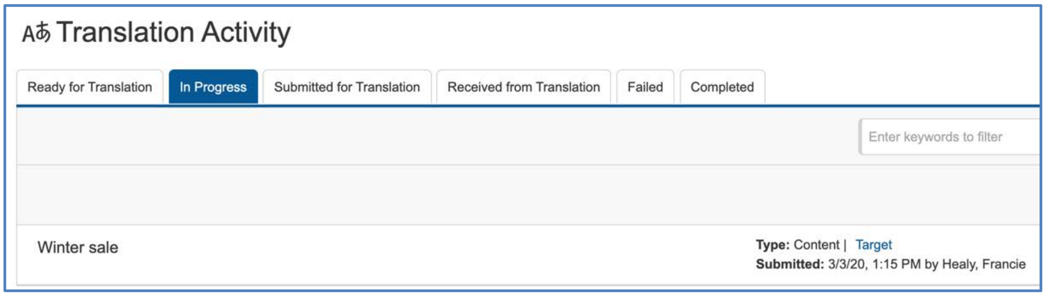
- When you submit a content item for translation, Under the Attention Required tab, the item awaiting translation appears.



- You have the option of deleting an item for translation.
- Select the item.
- Click **Ignore Translation**.

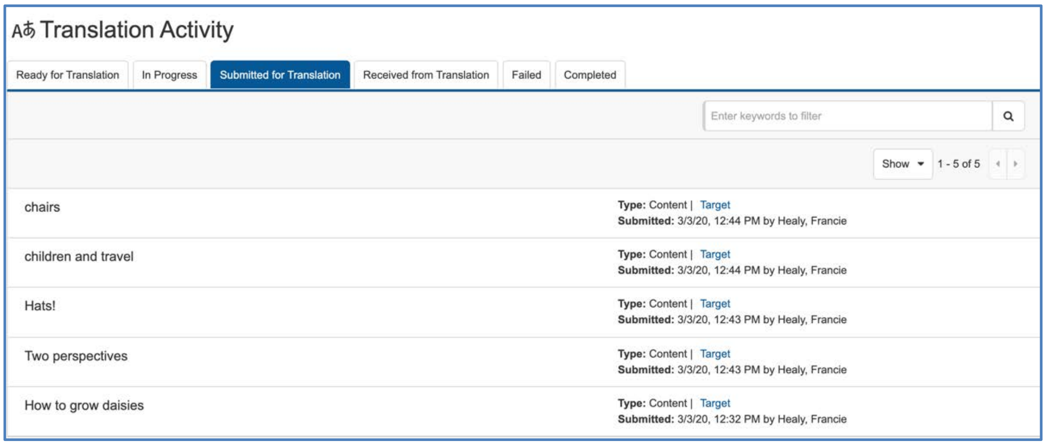
In Progress

- Under the In Progress tab, you can see the items that are in the process of being translated.



Submitted for Translation

- Under the Submitted for Translation tab, you can see a list of your submissions.

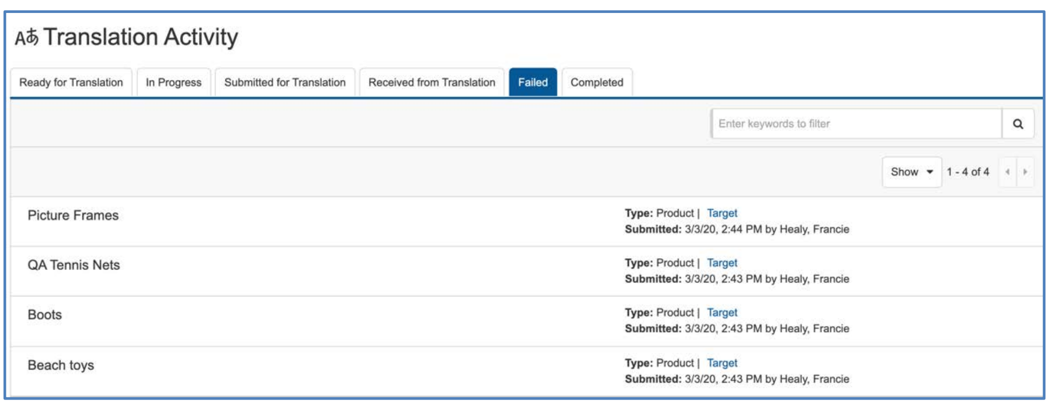


Received from Translation

- Under the Received from Translation, you can see the items that have been translated.

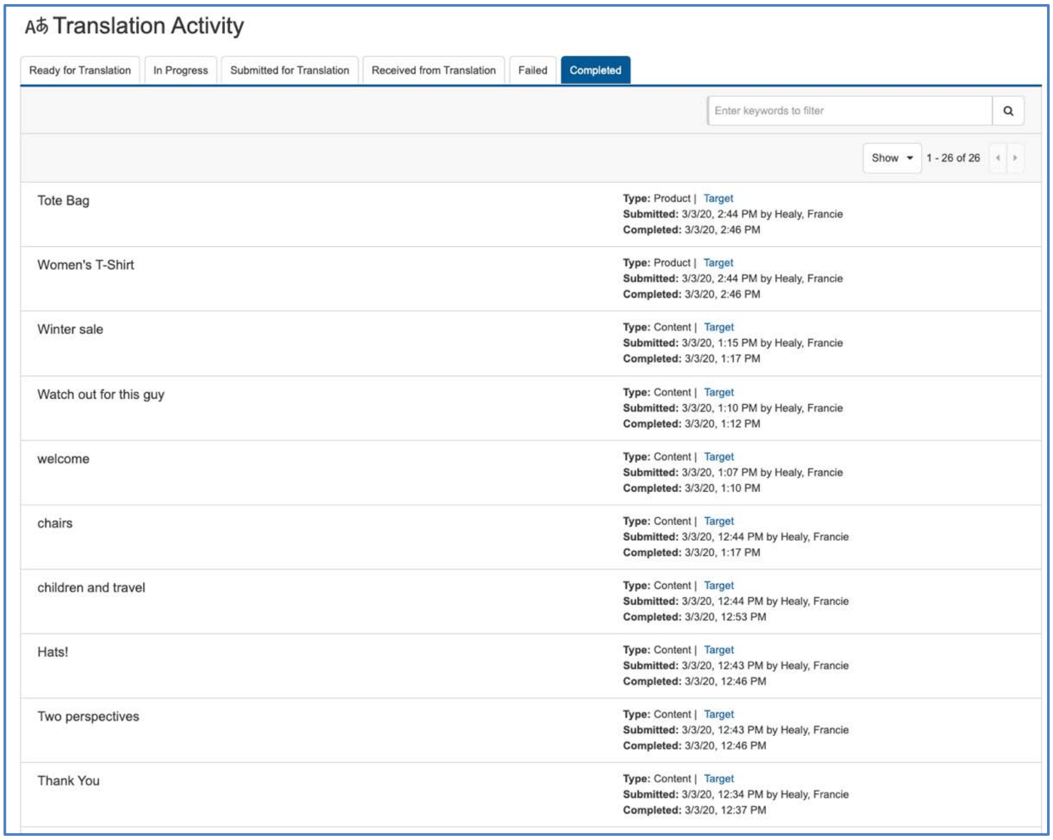
Failed

- Under the Failed tab, you can see Translations that were rejected or failed.



Completed

- Under the Completed tab, you can see a list of all your completed translations.



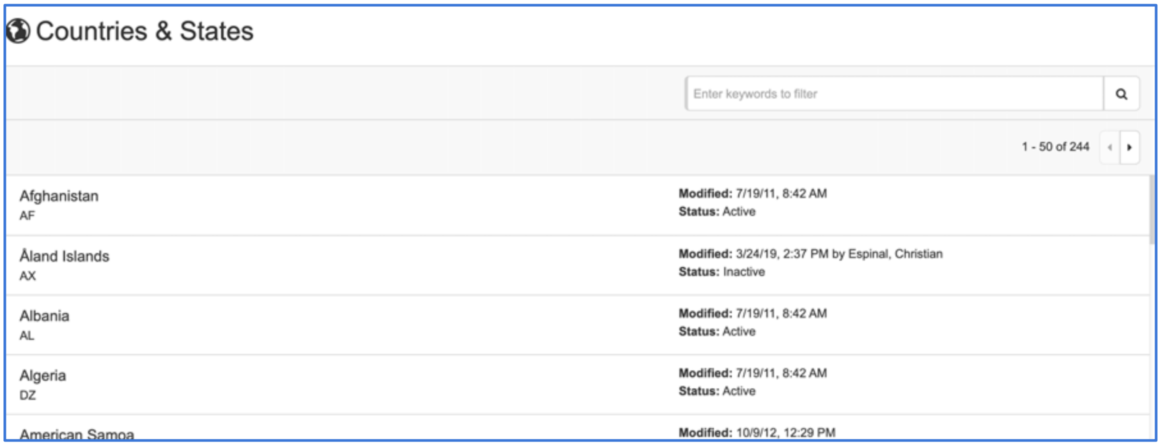
Countries & States

This section provides Administrators with the codes for most countries and States (or Provinces and Counties).

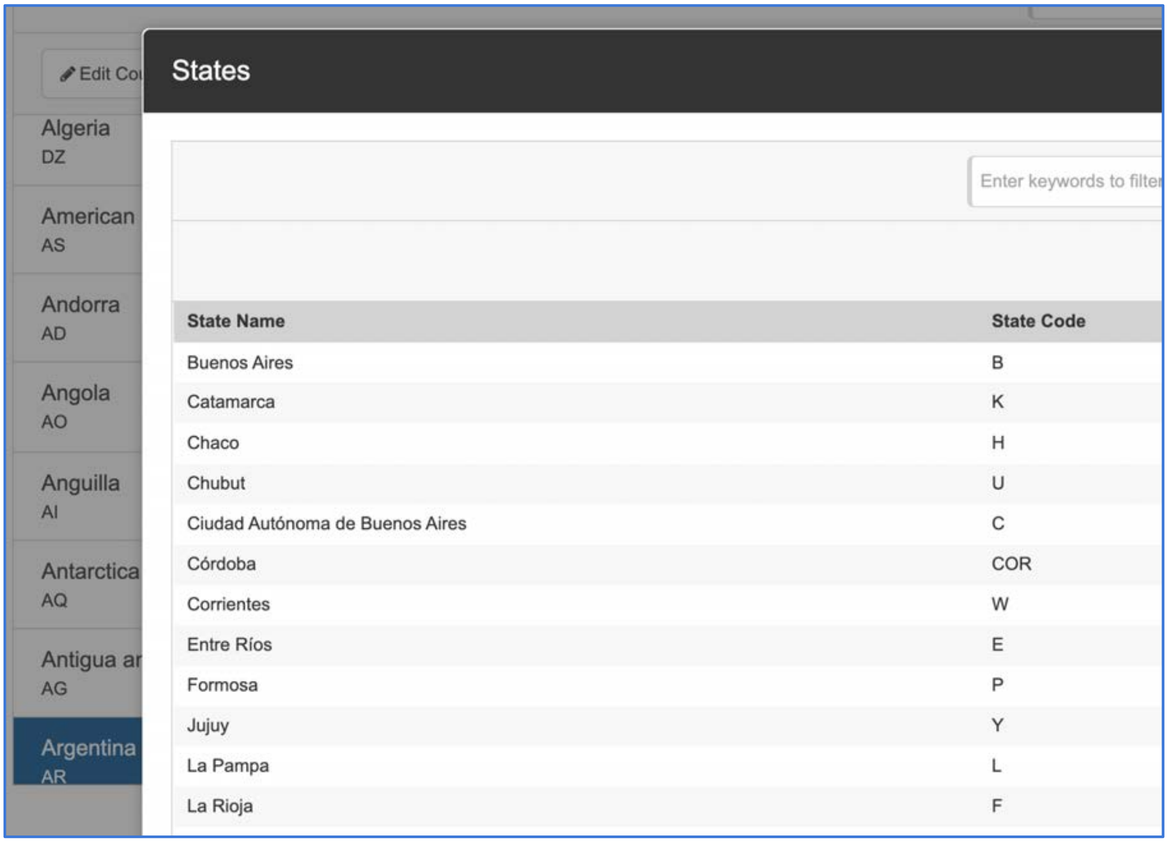
View Geographical Information

- Under Administration – Store Settings, select **Countries & States**.

- On the Countries & States page, select a country.

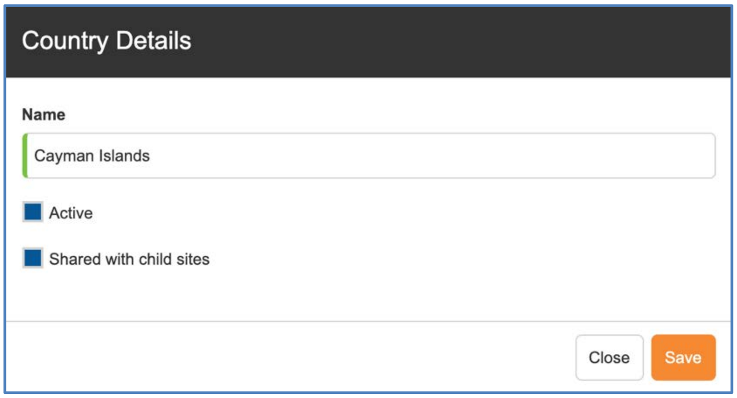


- Click **View States**.



Edit information

- On the Countries & States page, select a country.
- Click **Edit Country**.
- In the Country Details dialog, make any revisions.

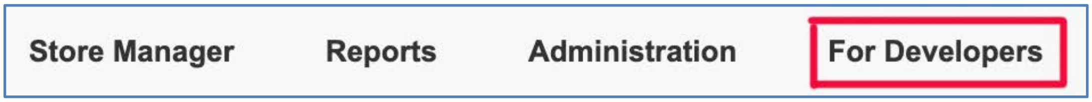


- Click **Save**, or **Close** to return to the Countries & States page.

For Developers

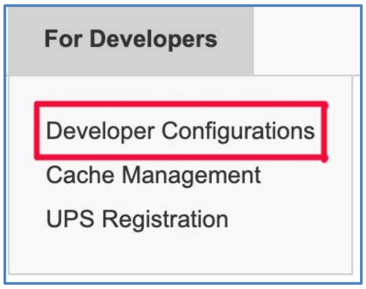
Developer Configurations

If you are a developer, choose an item from **For Developers.** The first is Developer Configurations.



Manage Developer Configurations

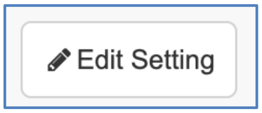
- Under For Developers, select **Developer Configurations**.



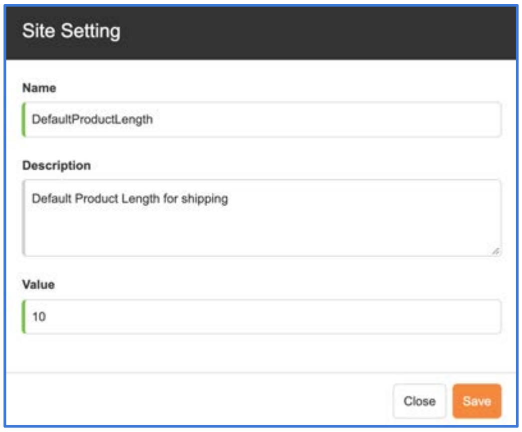
- On the Developer Configurations page, in the panel on the left, select a Category.
- In the panel on the right, select a setting.

Edit a Setting

- On the Developer Configurations page, select a category and then setting.
- Click **Edit Setting**.



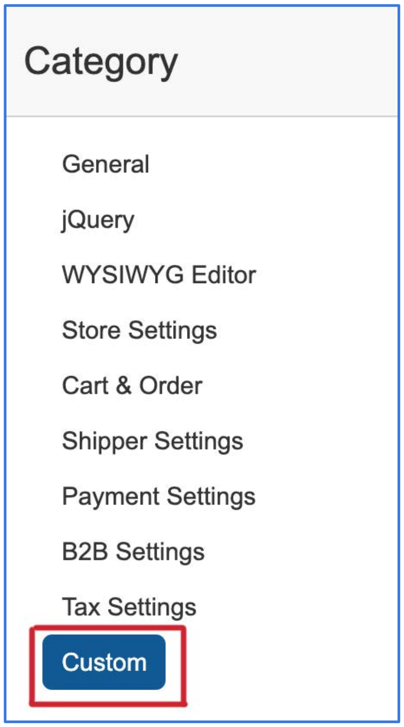
- In the Site Setting dialog, add or revise information.



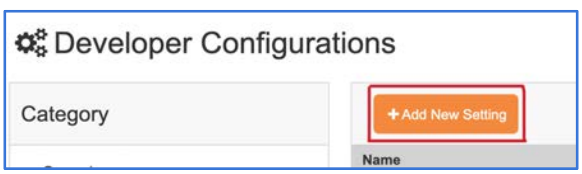
- Click **Save** or **Close** to return to the Developer Configurations page.

Add a Setting

- On the Developer Configurations page, in the Category panel, select Custom.



- Click **Add New Setting**.



- In the Site Setting dialog, add or revise information.
- Click **Save**, or **Close** to return to the Developer Configurations page.

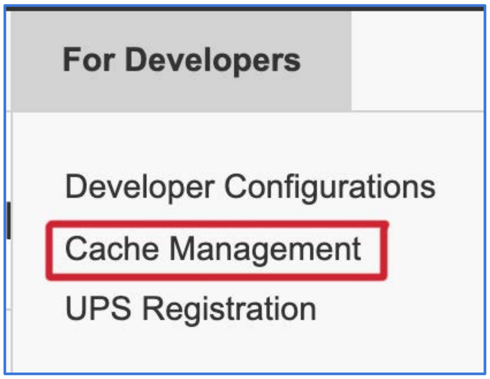
Cache Management

Your Product Catalog can be very large – in some cases, hundreds of thousands of products. Of course, with five to 10 Attributes per product, the amount of data adds up.

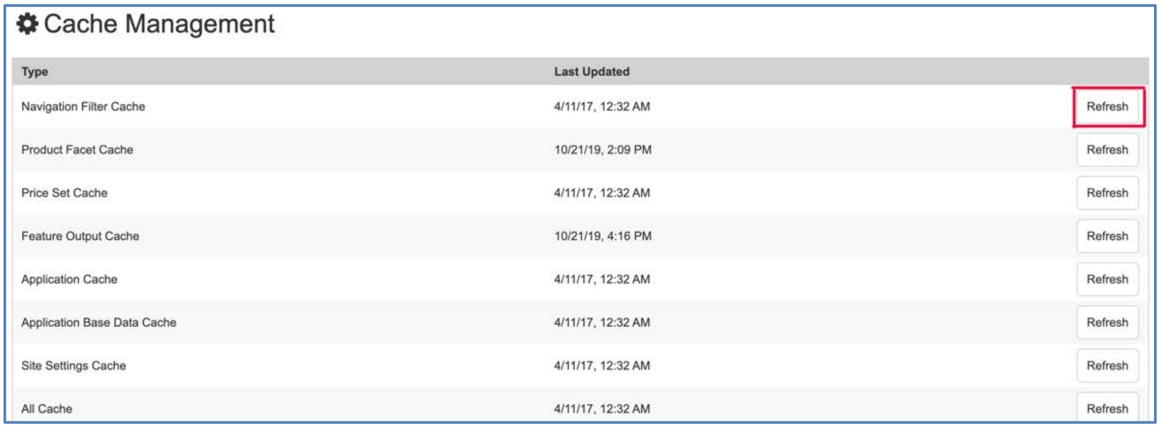
Also, of course, it needs to be refreshed at periodic intervals.

Refresh your cache

- Under For Developers, select **Cache Management**.



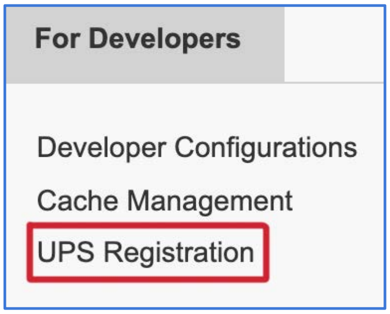
- On the Cache Management page, beside the cache you'd like to refresh, click **Refresh**.



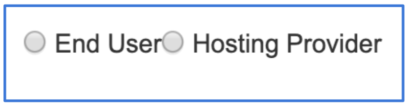
UPS Registration

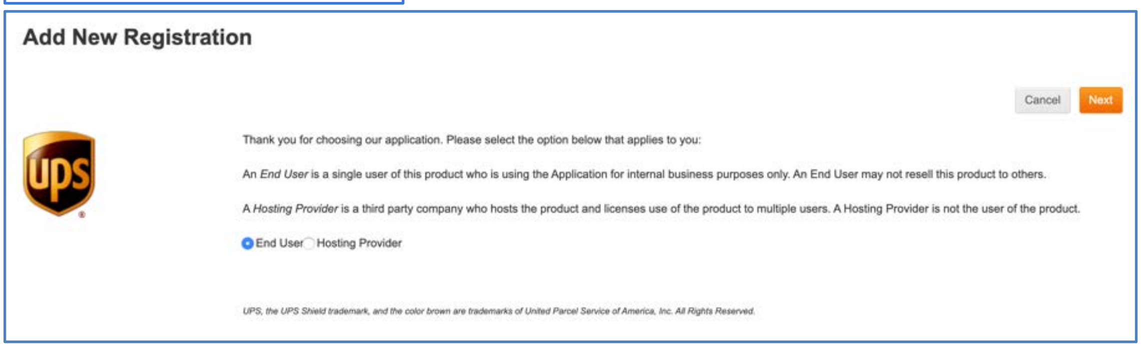
Add a new registration

- Under For Developers, select **UPS Registration**.



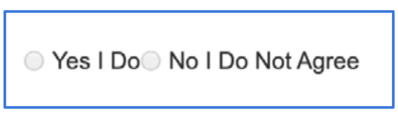
- On the Registration page, click **Add New**.
- On the Add New Registration page, select the appropriate option.

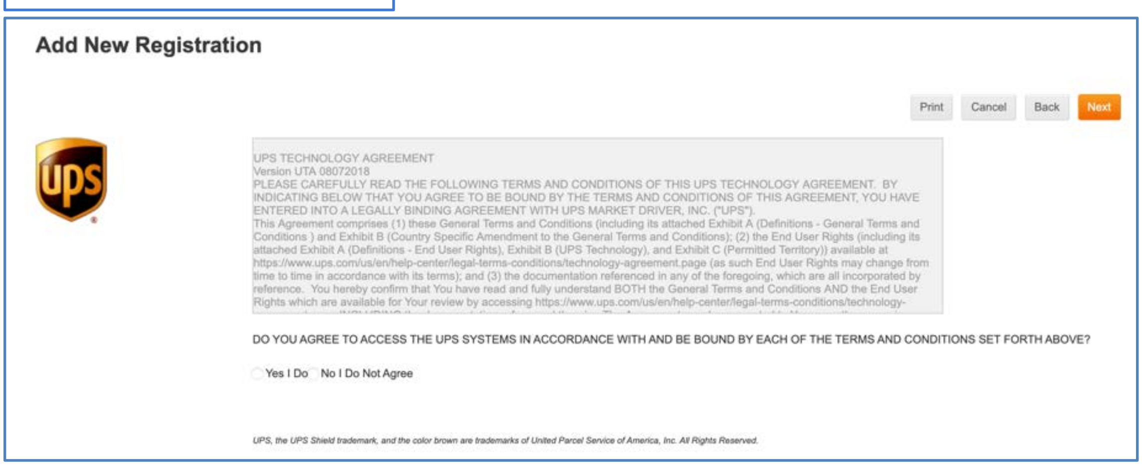




- Click **Next** or **Cancel** to return to the Registration page.

- If you have selected **End User**, on the next page, select **Yes I Do** or **No I Do Not Agree.**





- If you have selected **Hosting Provider**, select **Yes I do** or **No I Do Not Agree**, and enter the information in the fields that follow.

- Click **Finish**.
    - Optionally, click **Print**, **Cancel**, or **Back**.