

Shopping Cart Basic Instructions

You must be logged in to your shopping cart admin area to perform these steps.

Category Administration

Add a Category

1. In the Left Navigation Menu under Catalog click Add Category. This will bring up the Add Category Screen.
2. Enter the appropriate information in the fields shown.
 - a. Category Name – The Title of this category
 - b. Category Level – Select Top Level or other category
 - i. Select Top Level if this is a main category. Top Level Categories appear in the Category menu.
 - ii. Select the category if this new category is a subcategory of another category. Subcategories do not appear in the Category menu. They appear at the top of the page when customers browse to a Top Level Category.
 - c. Image – add an image associated with this category (optional)
 - i. Images for Top Level Categories appear at the top of the page when customers browse to the Top Level Category
 1. If an image is not added, no image is shown
 2. Top Level Category images are not resized automatically when uploaded. For optimal appearance on the page, we recommend that Top Level Category images be no wider than 400 pixels.
 - ii. Images for subcategories appear in the subcategory list at the top of the page when customers browse to the Top Level Category
 1. If an image is not added, a default “blue folder icon” will be shown
 2. Subcategory images are not resized automatically when uploaded. We recommend that subcategory images be smaller, i.e. no wider than 145 pixels, for optimal appearance on the page.
3. When you finish entering the information, click the Add button.

Modify a Category

1. In the Left Navigation Menu under Catalog click View Categories. This will bring up the Categories Screen.
2. Locate the category you wish to modify either by scrolling down the page.
3. Choose the Edit action near the end of the row for that category. This will bring up the Edit Category screen.
4. You can change anything in the fields shown. This screen is almost identical to the Add Category screen with information already in the fields.
 - a. Category Name – The Title of this category
 - b. Category Level – Select Top Level or other category
 - i. Select Top Level if this is a main category. Top Level Categories appear in the Category menu.
 - ii. Select the category if this new category is a subcategory of another category. Subcategories do not appear in the Category menu. They appear at the top of the page when customers browse to a Top Level Category.
 - c. Image – add an image associated with this category (optional)
 - i. Images for Top Level Categories appear at the top of the page when customers browse to the Top Level Category
 1. If an image is not added, no image is shown
 2. Top Level Category images are not resized automatically when uploaded. For optimal appearance on the page, we recommend that Top Level Category images be no wider than 400 pixels.
 - ii. Images for subcategories appear in the subcategory list at the top of the page when customers browse to the Top Level Category
 1. If an image is not added, a default “blue folder icon” will be shown
 2. Subcategory images are not resized automatically when uploaded. We recommend that subcategory images be smaller, i.e. no wider than 145 pixels, for optimal appearance on the page.
5. When you finish making your modifications, click the Edit button.

Delete a Category

1. In the Left Navigation Menu under Catalog click View Categories. This will bring up the Categories Screen.
2. Locate the category you wish to delete by scrolling down the page.
3. Choose the Delete action near the end of the row for that category. A popup confirmation window will appear asking "Are You Sure You Want to Delete This?" Click OK to confirm deletion or Cancel to cancel the deletion.
 - a. NOTE: Only categories which contain no products can be deleted. If the Delete action appears "grayed out," there are products in that category. First modify the products currently in the category to move them into a different category or delete the products, then return to delete the category.

Product Administration

Add a Product

1. In the Left Navigation Menu under Catalog click Add Products. This will bring up the Add Product Screen.
2. Enter the appropriate information in the fields shown.
 - a. Product Name – The "Title" of this item
 - b. Product/Stock Number – Your identification number – could be SKU, UPC, or a number you make up so you know what product is being ordered by the customer (can include text, digits, dashes and underlines)
 - c. Description – Description of the product. This field includes a Rich Text Editor to make modifications to this field much like using a word processing program. HTML can also be entered into this field as explained under "HTML"
 - d. Category – Select the category from the drop down box where you want this item to appear
 - e. Image – Add an image associated with this product. This process is explained under "Images"
 - f. Normal Price – The regular price of this item.
 - g. Sale Price – The sale price of this item. (optional field) If a sale price is entered here, the normal price will appear "crossed out" and the sale price will appear next to it. If a sale price is entered, it will automatically replace the normal price when the customer is charged.
 - h. Product Weight – If you base your shipping price on the weight of the product, enter the product weight here in pounds
 - i. Tax Class – select Standard (for Standard Sales Tax) or Tax Exempt (no sales tax) on this item
 - j. Stock Level – Enter the number of this item you have in stock if you will be using Stock Level (see item k)
 - k. Use Stock Level? – Select Yes or No. If you select Yes, customers will be able to see the quantity left in stock and will count down as customers purchase this product. Once the quantity reaches 0, the customer will not be able to purchase this product. If you select No, customers will not be able to see the quantity you have in stock and would be able to make a purchase regardless of whether the quantity reaches 0 or not.
 - l. Product Type – select Tangible (for a physical product that is shipped) or Digital (for a downloadable digital product i.e. e-books, PDF files, software, digital audio files, etc.)
 - i. If you select Digital, a box will appear to enter the location of the downloadable item. Using the server root path rather than standard URL is recommended (more secure), but the actual path varies by server. If you don't know this path, contact your web host.
 - m. Include in Latest/Featured Products on Home Page? Select Yes if you want this item to appear under the Latest Products section on the Home Page, No if you do not. Only the most recent 5 items will appear under Latest Products.
3. When you finish entering the information, click the Add Product button.

Modify a Product

1. In the Left Navigation Menu under Catalog click View Products. This will bring up your product inventory with up to 25 products per page.
2. Locate the product you wish to modify, either by scrolling down the page or by using the filter/search at the top of the page.
3. Choose the Edit action near the end of the row for that product. This will bring up the Edit Product screen.
4. You can change anything in the fields shown. This screen is almost identical to the Add Product screen with information already in the fields.
 - a. Product Name – The "Title" of this item
 - b. Product/Stock Number – Your identification number – could be SKU, UPC, or a number you make up so you know what product is being ordered by the customer (can include text, digits, dashes and underlines)

- c. Description – Description of the product. This field includes a Rich Text Editor to make modifications to this field much like using a word processing program. HTML can also be entered into this field as explained under “HTML”
 - d. Category – Select the category from the drop down box where you want this item to appear
 - e. Image – Add/Modify/Remove an image associated with this product. This process is explained under “Images”
 - f. Normal Price – The regular price of this item.
 - g. Sale Price – The sale price of this item. (optional field) If a sale price is entered here, the normal price will appear “crossed out” and the sale price will appear next to it. If a sale price is entered, it will automatically replace the normal price when the customer is charged.
 - h. Product Weight – If you base your shipping price on the weight of the product, enter the product weight here in pounds
 - i. Tax Class – select Standard (for Standard Sales Tax) or Tax Exempt (no sales tax) on this item
 - j. Stock Level – Enter the number of this item you have in stock if you will be using Stock Level (see item k)
 - k. Use Stock Level? – Select Yes or No. If you select Yes, customers will be able to see the quantity left in stock and will count down as customers purchase this product. Once the quantity reaches 0, the customer will not be able to purchase this product. If you select No, customers will not be able to see the quantity you have in stock and would be able to make a purchase regardless of whether the quantity reaches 0 or not.
 - l. Product Type – select Tangible (for a physical product that is shipped) or Digital (for a downloadable digital product i.e. e-books, PDF files, software, digital audio files, etc.)
 - i. If you select Digital, a box will appear to enter the location of the downloadable item. Using the server root path rather than standard URL is recommended (more secure), but the actual path varies by server. If you don’t know this path, contact your web host.
 - m. Include in Latest/Featured Products on Home Page? Select Yes if you want this item to appear under the Latest Products section on the Home Page, No if you do not. Only the most recent 5 items will appear under Latest Products.
5. When you finish making your modifications, click the Edit Product button.

One Product in Multiple Categories

Many times it is beneficial to have one product appear in multiple categories.

1. Select the primary category for the product when adding or modifying the product via the Category dropdown box.
2. To add a product to additional categories, in the Left Navigation Menu under Catalog click View Products. This will bring up your product inventory with up to 25 products per page.
3. Locate the product you wish to add to additional categories, either by scrolling down the page or by using the filter/search at the top of the page.
4. In the Master Category column under the category tree for that product you will find a link to “Manage Categories” for that product. Clicking the link will bring up the Manage Categories window for that product showing the master category and all other categories.
5. Click the Add or Remove links as applicable to add or remove the product to additional categories.
6. When you are finished, click the Close Window link at the bottom of the window.

Additional Product Images

The shopping cart allows you to show multiple images for a single product if you wish. If more than one image is associated with a product, a “[+] More Images” link will appear on the product page. Clicking the link will open a popup window showing all images associated with the product.

FYI: Additional images can also be added to the description field using the RTE as described under section 4 of Managing Images below.

1. Select the main image for the product when adding or modifying the product via the image field (browse existing or upload new image). The main image will also be converted into a thumbnail image for category view and featured product listings.
2. To add additional images to a product, they must first be uploaded to the server either via FTP to (store root folder)/images/uploads or via File Manager – Image Upload (as explained below). Once the image is uploaded, proceed to step 3.
3. In the Left Navigation Menu under Catalog click View Products. This will bring up your product inventory with up to 25 products per page.
4. Locate the product to which you wish to add additional images, either by scrolling down the page or by using the filter/search at the top of the page.

5. In the Image column under the mini thumbnail for the main image you will find a link to “Manage Images” for that product. Clicking the link will bring up the Manage Images window for that product showing all uploaded images other than the main image that are available to be associated with the product.
6. Click the Add or Remove links as applicable to add or remove additional images to the product.
7. When you are finished, click the Close Window link at the bottom of the window.

Delete a Product

1. In the Left Navigation Menu under Catalog click View Products. This will bring up your product inventory with up to 25 products per page.
2. Locate the product you wish to delete, either by scrolling down the page or by using the filter/search at the top of the page.
3. Choose the Delete action near the end of the row for that product. A popup confirmation window will appear asking “Are You Sure You Want to Delete This?” Click OK to confirm deletion or Cancel to cancel the deletion.

Product Options

To add size, color, or other variations or options to a product, product options need to be added.

1. In the Left Navigation Menu under Catalog click Product Options. The Product Options screen will appear.
2. First, create an option in the top left table i.e. Size
 - a. Enter the option name and click Add Option
3. Second, create the option values in the top right table i.e. XL
 - a. Enter the option value and click Add Attribute
 - b. Repeat this step for all your option values
4. Third, assign the option value to the desired product i.e. Polo Shirt option XL
 - a. Select the product from the dropdown to which you want to add the option (Polo Shirt)
 - b. Select the option you want to add to this product (Size)
 - c. Select the option attribute you want to add to this product (XL)
 - d. Enter an additional price or discount amount for choosing this option (optional – this field can be left blank for no addition/subtraction from the item’s active (regular/sale) price) (i.e. XL option value costs \$2.00 more than S, M, or L)
 - e. Select whether to add or subtract the option price. (i.e. for \$2.00 more choose +)
 - f. Click Add Product Option
 - g. Repeat this step for all your option values for this item
5. Once an option is added to a product, a drop down box listing the option and option values will appear on the product listing, and the customer’s selection will be included in their order.
6. A product can have more than one option – Size, Color, Model Number, Pattern, Type, Brand, etc.)
7. Options and Option Values can be used on more than one product.

Site Pages Administration

Pages can easily be added, edited or deleted from the site.

Add a Page

1. In the Left Navigation Menu under Documents click Site Documents. This will bring up the Site Documents Screen.
2. Click the Add New link in the top right corner. This will bring up the Site Documents add/edit screen.
3. Enter the appropriate information in the fields shown.
 - a. Document Name – Enter the Page Title that will appear in the list of pages
 - b. Contents – Enter the contents of the page. This field includes a Rich Text Editor to make modifications to this field much like using a word processing program. HTML can also be entered into this field as explained under “HTML”
4. When you finish entering the information, click the Save Document button.

Modify a Page

1. In the Left Navigation Menu under Documents click Site Documents. This will bring up the Site Documents Screen.
2. Locate the Document you wish to modify and choose the Edit Action near the end of that row. This will bring up the Site Documents add/edit screen.

3. Edit the appropriate information in the fields shown.
 - a. Document Name – Enter the Page Title that will appear in the list of pages
 - b. Contents – Enter the contents of the page. This field includes a Rich Text Editor to make modifications to this field much like using a word processing program. HTML can also be entered into this field as explained under “HTML”
4. When you finish entering the information, click the Update Document button.

Modify the Home Page

1. In the Left Navigation Menu under Documents click Homepage. This will bring up the Homepage Screen.
2. Edit the appropriate information in the fields shown.
 - a. Language – Select the language for the homepage you wish to modify
 - b. Enabled – Select whether the chosen language is active on the site or not
 - c. Title – Enter the Page Title
 - d. Contents – Enter the contents of the page. This field includes a Rich Text Editor to make modifications to this field much like using a word processing program. HTML can also be entered into this field as explained under “HTML”
3. When you finish entering the information, click the Update Homepage button.

Delete a Page

1. In the Left Navigation Menu under Documents click Site Documents. This will bring up the Site Documents Screen.
2. Locate the Document you wish to delete and choose the Delete Action near the end of that row.
3. A popup confirmation window will appear asking “Are You Sure You Want to Delete This?” Click OK to confirm deletion or Cancel to cancel the deletion.

Customers Menu

You manage your Customers, Mail List, and Orders from the Customers Section

View Customers

1. In the Left Navigation Menu under Customers, click View Customers. The Customers Screen will appear showing you a list of customers including Name, Email, Address, Phone, Registration Date/IP Address, Number of Orders and Action

Email Customers

2. In the Left Navigation Menu under Customers, click Email Customers. The Email Customers Screen will appear giving you the option of downloading your customers email addresses for use in another program or sending an email directly from Cube Cart only to those customers who have subscribed to your mailing list.

Orders

3. In the Left Navigation Menu under Customer, click Orders. The Orders screen will appear showing you a list of orders including Order Number, Status, Date/Time, Customer, IP Address, Total, and Action.

Managing Images

In Cube Cart, images are used in a variety of locations including products, categories/subcategories, and site pages. They can be uploaded to the server a few different ways.

1. File Manager.
 - a. In the Left Navigation Menu under File Manager click Upload Images. This will bring up both the Image Manager screen and an Upload Image popup window.
 - b. In the popup window, browse your computer for the image you want to upload. When selected, click the Upload Image button.
2. Under Edit/Add Products
 - a. When adding or editing a product, under the image field you will have 2/3 options:
 - i. Upload New Image – click this to upload an image to be associated with this product that has not already been uploaded

1. An Upload Image popup window will appear. In the popup window, browse your computer for the image you want to upload. When selected, click the Upload Image button.
 - ii. Browse Existing Images – click this to associate an image that has already been uploaded to the server (via File Manager, via another product, or via a category)
 1. The Image Browser popup window will appear. In the popup window, you will see 2 panes – the left pane lists the files already uploaded to the server, the right pane is the preview window. Click a file name on the left to see the preview of it on the right. When you have selected the image you want to associate with the product, click the OK button. Otherwise click the Cancel button.
 - iii. Remove Image (Edit Screens only – where image has already been associated) – click this to remove the association of the current image with this product.
 1. NOTE: CAUTION! Clicking this button will immediately remove the association. There is not confirmation popup.
 2. If you remove an image association accidentally, just don't click the Add or Edit button at the bottom of the page. Return to the View Products list and return to the item to start over.
 3. Removing the image does not delete the image from the server. It only removes the association with the product.
 - b. FYI, uploading/associating images to a product automatically creates the thumbnail image used in the shopping cart. We recommend uploaded product images be 400 pixels wide.
 - c. When you finish associating a new image with a product, make sure you click the Add or Edit button at the bottom of the page to save the modification.
3. Under Edit/Add Categories
 - a. When adding or editing a category, under the image field you will have 2/3 options:
 - i. Upload New Image – click this to upload an image to be associated with this category that has not already been uploaded
 1. An Upload Image popup window will appear. In the popup window, browse your computer for the image you want to upload. When selected, click the Upload Image button.
 - ii. Browse Existing Images – click this to associate an image that has already been uploaded to the server (via File Manager, via another product, or via a category)
 1. The Image Browser popup window will appear. In the popup window, you will see 2 panes – the left pane lists the files already uploaded to the server, the right pane is the preview window. Click a file name on the left to see the preview of it on the right. When you have selected the image you want to associate with the category, click the OK button. Otherwise click the Cancel button.
 - iii. Remove Image (Edit Screens only – where image has already been associated) – click this to remove the association of the current image with this category.
 1. NOTE: CAUTION! Clicking this button will immediately remove the association. There is not confirmation popup.
 2. If you remove an image association accidentally, just don't click the Add or Edit button at the bottom of the page. Return to the View Category list and return to the item to start over.
 3. Removing the image does not delete the image from the server. It only removes the association with the category.
 - b. We recommend uploaded category images be 400 pixels wide and subcategory images be 145 pixels wide.
 - c. When you finish associating a new image with a category, make sure you click the Add or Edit button at the bottom of the page to save the modification.
4. Using the RTE under Product Descriptions or Site Documents/Homepage
 - a. In the RTE panel, click the image icon. The Image Properties popup window will appear. Click the Browse Server button. The FCK Editor Resources Browser popup window will appear.
 - i. If the image is already uploaded to the server, click the file name and it will automatically be inserted into the field in the Image Properties popup window. Make any adjustments to width, height, border, Hspace, Vspace, or align and click OK. The image will be inserted into the Description field or Document body field at the location of your cursor.
 - ii. If the image is not yet uploaded to the server, go to the bottom of the screen and click Browse. Browse your computer for the file you want to upload. Once selected and the file name appears in the text field box, Click the Upload button. The file will upload and then be added to the list. Click the file name and it will automatically be inserted into the field in the Image Properties popup window. Make any adjustments to width, height, border, Hspace, Vspace, or align and click OK.

The image will be inserted into the Description field or Document body field at the location of your cursor.

5. Via FTP

- a. Any images associated with products, categories, product descriptions, or site pages can be uploaded via FTP to the following folder: *shoppingcartfolder/images/uploads/*

HTML/RTE

The Product Description Field and the Site Pages Body Field includes a Rich Text Editor (RTE) with a variety of functions much like a word processing document. Enter/Edit your information as you wish including font, colors, images, tables, etc. If you wish to enter or modify the HTML code for these items, Click the Source button at the top left of the RTE. The content in the field will convert to HTML code. Switch back to Standard Mode at any time by clicking the source button again.

Languages

Additional languages can easily be added to any product, category or site page.

1. Site Pages – In the Left Navigation Menu under Documents select Site Documents which will bring up the list of Site Documents. Locate the Document you wish to add another language to and choose the Languages Action near the end of that row. Site Documents (Other Languages) will appear.
 - a. If the document in another language has already been created it will appear in the list. Click the Edit link to modify the page for that language.
 - b. If the document has not been created in the desired other language, click the Add New link at the top right of the page.
 - i. Select the new language in the drop down box.
2. Products – In the Left Navigation Menu under Catalog select View Products which will bring up the Product Inventory list. Locate the Product you wish to add another language to and choose the Languages Action near the end of that row. Product Inventory (Other Languages) will appear.
 - a. If the product in another language has already been created it will appear in the list. Click the Edit link to modify the page for that language.
 - b. If the product has not been created in the desired other language, click the Add New link at the top right of the page.
 - i. Select the new language in the drop down box.
3. Categories – In the Left Navigation Menu under Catalog select View Categories which will bring up the Categories list. Locate the Category you wish to add another language to and choose the Languages Action near the end of that row. Categories (Other Languages) will appear.
 - a. If the category in another language has already been created it will appear in the list. Click the Edit link to modify the page for that language.
 - b. If the category has not been created in the desired other language, click the Add New link at the top right of the page.
 - i. Select the new language in the drop down box.