

Tradingeye® Quickstart Guide

Quickly set up and configure your online shop

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2 Introduction to Tradingeye

Welcome to Tradingeye, the most versatile and user-friendly shop builder available. Tradingeye is completely customizable, and can be modified to suit any purpose.

This manual is intended as a Quickstart guide, to help those of you who may not be familiar with the Tradingeye system to get your shop up and running as quickly as possible, and with the minimum amount of fuss. Although this is only a brief overview of Tradingeye's full capabilities, with the aid of this guide you will soon understand the basic functions offered by the system, and be well on your way to creating a fully functioning and fully customized online shopping experience. With the right amount of time and care taken, you can then expand your shop and offer your customers even more from your online retail outlet.

Understanding the Tradingeye interface:

After your website has been set up, you will receive your default login details. To log in to your website, first enter your website's URL into your preferred web browser, followed by [/admin/](#).

Example:

<http://www.mywebsite.com/admin/>

This will take you to the Admin login page for your site. Enter your default username and password in to the appropriate boxes, and click on the **Login** button.



The Tradingeye interface is split into 3 main sections:

The **left-hand menu** houses the main options for customizing your shop. Selecting an item from this menu will show its options in the main window. Items in this menu are arranged in the following main sections:

Editor

Switch between the admin and shop front, and logout of the admin section

Builder

Department, product and content options

Orders

Invoices, customer and supplier accounts details

Marketing

Froogle feeds, Email campaigns, promotions and shop reports

Admin

Shop settings, security and product importer

Modules (optional)

Optional Quickbooks, ACT, Sage Line 50 links etc.



The main window will show your current selection, i.e. where you currently "are" in the console. For example, select Menu Builder, and the Menu Builder page will load into the main window.

3 Setting Up Users

You now are logged into the **Admin** area of your website, where you can control the operation and functionality of your online shop. Depending on how many people will be accessing this section, and what they will be doing here, we need to set up the relevant user accounts. This will determine who will be allowed to access certain parts of the admin section, and what they will be allowed to change. For example, if one member of staff is solely responsible for Advertising & Promotion, then there is no need for him / her to access the "VAT / Tax" area, so this option should be disabled for this user.

It is a good idea to have one master login account with "Administrator" privileges. This user will have access to every aspect of the shop, and can be responsible for setting new users up, and retrieving lost password information for existing users.

To set up a new user:

- Once logged in to the admin section, click on the **Admin Login** option, in the left-hand menu under the **Admin** section.
- Click on **Add New User**. Input the new user's login details in the appropriate boxes, and check the boxes below according to what areas of the admin section this user should be granted access to.
- Click the **Set User Account** button to enter this user into the system.

The screenshot shows a web form titled "Admin Login". It has two input fields: "Username:" and "Password:". Below these is a section titled "Authorisations (check Administrator to have full access to console)". This section contains two columns of checkboxes, each with a label:

- Column 1: Administrator, Manage Shop, Settings, Orders, Customers.
- Column 2: Email Campaigns, Suppliers, File Manager, Order Add Ons, Promotions.

 All checkboxes are checked. At the bottom right of the form is a button labeled "Set user account".

Once all users have been set up, the administrator can delete the default User from this list by clicking on the corresponding Delete link.

* **Security Note:** Passwords are best kept to something memorable, and should be a combination of both words and numbers.

3 General Settings

In the **Shop Settings** section, we can set our Company contact information, any promotional offers, a member points scheme, customer reviews and wish list features. We can also set how our shop runs, i.e. how to accept payments, our online payment gateway, and how orders are processed. This section is vital in setting up how we run our shop, and care must be taken to ensure the details on here are entered correctly.

To set the Text Areas:

Set all global text details in this section, such as a welcome note, information on member points, accessibility etc.

- In **Shop Settings**, click on the **Text Areas** link. Then click on the relevant link to edit each specific text area in turn. Simply input and edit the text with the built-in text editor, and click the **Update** button to save.

Setting	Description
Company information	Company name, address, and phone numbers
Order settings	Various Tradingeye order settings
Features settings	Various Tradingeye feature settings
Payment Gateways	Various Tradingeye payment gateway settings
Postage & Packing	Tradingeye postage & packing options
VAT/Tax settings	Tradingeye VAT and Tax settings
Text areas	Home page, member points, and policy documents
Global Meta Tags	Search engine optimisation
Google Analytics	Tracking code for your site analytics
File Manager	View all images/files within Tradingeye
System Settings	Datatables, directories, paths and other system settings

Text area	Description
Home page	Body content for the home page
Member points	Customise membership points information
Accessibility statement	Website accessibility statement
Terms & conditions	Website terms & conditions
Privacy policy	Website privacy policy
Contact page	Website contact page

To set the Company Information:

Enter your company information into this section, and all parts of your site referring to your contact details (address, email etc.) will be automatically updated.

- Click on **Shop Settings**, in the left-hand menu, then click on the **Company Information** link.
- Enter the name of your shop and your company details into the appropriate boxes, and click the **Update Company** button at the bottom of the page, to save the information.

To set up the Shop Features:

Tradingeye offers an optional Member Points scheme, allowing users to accumulate points for items purchased through the store. These points can be redeemed as a discount against products bought on the customer's next purchase. Also available in this section is an optional wish list feature, as well as a customer review facility.

- In **Shop Settings**, click on the **Feature Settings** link to access this area's options.
- Check the **Enable tree navigation menu style** so that the user can drill down and see a list of sub departments from its parent department.
- Check the **Enable Stock Control** checkbox to apply the inventory tracking feature. By selecting this, Tradingeye will track inventory for all products across your website.
- The **Customer Review** feature enables customers to post reviews about

products, shown alongside each product in the online shop. Administrators have the ability to delete inappropriate posts.

- The **Wish List** feature allows users to log in and keep track of their desired items within the website, with the ability to email this list to friends and family. Use the checkbox to toggle this feature on and off.

- The **Enable gift wrapping** feature allows customers to have the option of choosing whether or not they would like to have an individual gift wrap added to their order. To configure these settings, from the main navigation menu under **Marketing** select **Promotion** and then select **gift wrapping**. You are now able to set up a **gift wrap** option.

- The **gift wrap title** is how the option will be named.
- **Additional cost** is how much is charged for the extra facility of gift wrapping per item.
- **Short description** is where a brief description of what type of wrapping this option is.
- **Upload Images** – You can supply an image of the gift wrap, so that customers can see what they are buying.

Use the corresponding box to upload your images to the website:

Image A – Is the smaller image to be displayed on the main page.

Image B – an image link to show a larger image.

- Use the **Offer Member Points** checkbox to toggle this feature off and on. The more points a customer accumulates, the higher their discount will be. To configure these settings, from the main navigation menu under **Marketing** select **Promotions** and then select **Member points**.

- The **Member points value** relates to the value of each point awarded per £1.00 spent in the store. For example, if this is set to 5, then for every £1.00 spent in the store, the customer will receive 5 points.
- Set the **Member point calculation** to determine how the points will be converted into monetary discount. For example, if a customer has 1,000 points and this point calculation is set to 0.05 (5%), then the customer has accrued £50.00 worth of discount ($1000 \times 0.05 = 50$).

Once you are satisfied with your settings, click the **Update Settings** button to save your preferences.

To specify the Shopping Basket settings:

This area determines how the 'back end' of your shop will function, i.e. how payments will be dealt with, will gift wrapping be available, and whether an email list signup be offered.

- In the **Shop Settings** section, click on the **Order Setting** link to access the Shopping Basket.

- The **Order Email Address** refers to the Administrators email address that will be used to receive all order details.
- The **Info Email Address** will be the email used to receive all info requests. This can be the same as the Order Email, but we would recommend using separate addresses for different requests.
- If you can receive emails on your laptop, PDA or mobile phone, then enter this address in the **Wireless email address** field.
- Name the default postage method in the **Postage Title** box.
- To allow customers the option of entering a shipping address (other than the billing address) when making an order. To enable this feature, check the **Enable Delivery Address** box.
- Check the appropriate boxes to define which **Payment Types** your shop will offer. You can also set a **COD (Cash On Delivery)** charge.
- If accepting credit card payment on the site, You can specify which (if any) card types you will accept. Simply check the corresponding checkbox in the **Accept Which Credit Cards** section.

Once you are happy with the settings in this section, click the **Update Settings** button to save these preferences.

? + Order Settings

Enable delivery address	<input type="checkbox"/>
Order email address	<input style="width: 100%;" type="text"/>
Contact email address	<input style="width: 100%;" type="text"/>
Wireless email address	<input style="width: 100%;" type="text"/>

Text Settings

Postage Title *	<input style="width: 100%;" type="text"/>
R.R.P. Text	<input style="width: 100%;" type="text" value="VAT"/>
VAT/Tax Name	<input style="width: 100%;" type="text" value="R.R.P."/>

Payment types

Credit cards	<input type="checkbox"/>
Credit Cards over the phone	<input type="checkbox"/>
Electronic funds transfer	<input type="checkbox"/>
Cheque	<input checked="" type="checkbox"/>
Cash on delivery	<input style="width: 50px;" type="text" value="0.00"/>

Accepted credit/debit cards

Visa	<input type="checkbox"/>
Visa Delta	<input type="checkbox"/>
Visa Electron	<input type="checkbox"/>
Mastercard	<input type="checkbox"/>
American Express	<input type="checkbox"/>
Dinners Club	<input type="checkbox"/>
Solo	<input type="checkbox"/>
Switch	<input type="checkbox"/>
Maestro	<input type="checkbox"/>

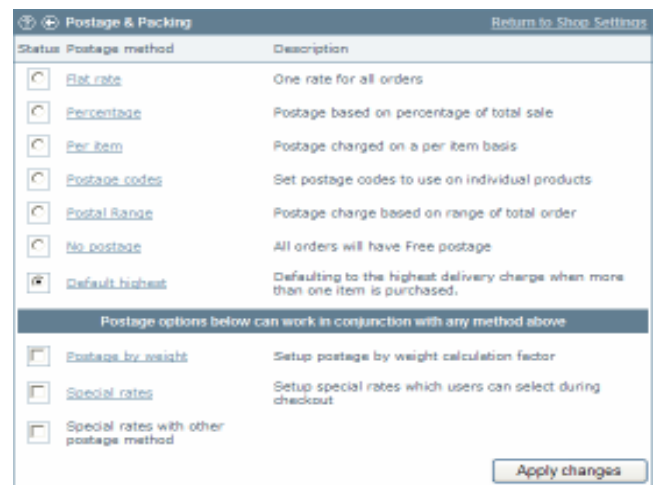
5 Postage & Packing

Next, we need to set up **Postage & Packing** charges for our products. There are many options available; covering just about any postage method and cost you should need in your shop. The reason we specify our **Postage & Packing** rates now is so that when we come to upload our products, the correct postage rates can be attached with a simple click, rather than having to partially enter the product details, then set up the correct postage rates, before returning to the product builder to attach these postage setting.

Select a postage option that is best suited to the needs of your online shop by clicking on its name in the main window. Enter the desired rates and values in the submenu, and click the **Set Shipping Rate** button to apply the changes.

To set a Postage & Packing rate:

- Click on **Postage & Packing** in the left-hand menu. This will bring up the complete list of options available for Postage & Packing options & costs.
- Click on the desired Postage option. Each option is self-explanatory, and can be customized to suit your needs. The options available include:





- | | | |
|--------------------------|---|---|
| Set Flat Rate | - | One flat rate for all orders regardless of quantity |
| As a Percentage | - | Postage calculated from total order value |
| Per Item | - | Flat postage charge per item |
| Using Codes | - | Set Minimum postage charge using codes |
| Using Ranges | - | Set postage charge for various price ranges |
| No Postage | - | Shipping price is included in the item price |
| Default Highest | - | Defaulting to the highest delivery charge when more than one item is purchased. |
| Postage by weight | - | Setup postage by weight calculation factor |
| Special Rates | - | Set special rates (next day / recorded delivery etc) |

6 Option Builder

Before we upload our products, we need to set up the list of options that might be available to them, for each product. Many options are universal, such as size (S, M, L, XL) and colour (red, green, blue, etc.). Options such as these can be reused and applied to many products throughout the shop. We set up our options at this point simply to save time when we upload our products.

To set up an Option:

- Click on **Product Options** in the left-hand menu. This will bring up the **Standard Options** list in the main window. We can use this to set up as many options as we need for our products, and view what options we currently have set up.
 

Option title	Description	Edit	Delete
Choose Colour	Colours001	Edit	Delete
Choose Size	Sizes001	Edit	Delete
- In the **Option Editor**, enter the number of option items your new option will have. If we were creating an option for T-Shirt size for example, we would need 4 option items (small, medium, large & extra-large). Enter the desired amount and click **Build Option**. Now we are in the option builder, where we can assign values to these option items.
 
- The **Description** refers to the name the option will be given in the shop itself.
- The **Option Title** is how the option will be named in the **Current Option List**. Use this feature to give your option a name that will distinguish it from other, similar options (different size options for different garments, for example).
- The **Option Item** column refers to the choices available to the customer. Enter your desired options in these boxes (such as Small, Medium, Large, etc.).
- **Added Costs** allows you to specify any extra charges applicable when selecting a certain option. For example, a XXX-Large shirt may have an extra £2.00 charge applied due to the extra manufacturing costs involved.
- The **Use Stock** feature allows you to monitor your stock from the Tradingeye admin section. If a customer purchases a product from the online shop, then this feature will automatically update your stock level accordingly.
- Used in conjunction with the **Use Stock** feature as described above, you can enter the number of items you have available in the **Stock** box. When items are sold, this number is automatically recalculated.
- The **Backorder** feature lets customers order a number of products higher than that which is currently in stock. Check the **Backorder** box to enable this feature.

Once you have entered your option details, click **Create Option** to apply. This new option will now appear in the **Option Builder's Current Option List**.

7 Shop Builder

The Shop Builder is essentially the front page of the online store. In this section we can set up departments, sub-departments and set up the actual content of our website.

Just like in 'real' high street shops, your shop should be comprised of sections, departments and sub-departments. Once this department structure has been set up, then we can start populating the shop with our products.

By default, Tradingeye is set to focus on updating your home page first of all. The Shop Builder is split into three sections:

Current Department: Home Page

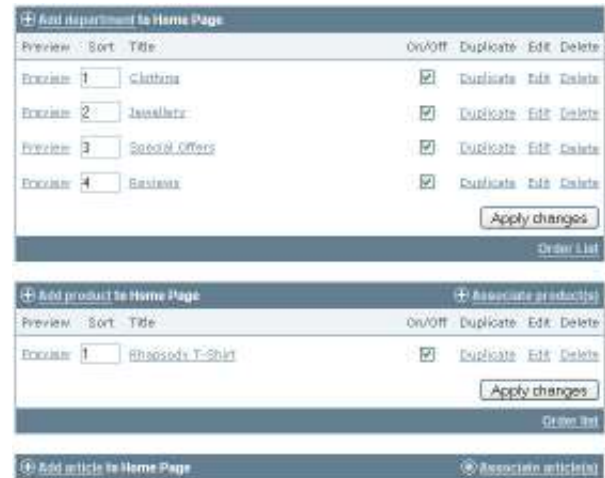
The current department is what section of your site we are currently working on. In this case, we are editing the Home Page. This box is used to set up a hierarchy of additional departments and sub-departments within your shop, much like a department store

Attach Products to Home Page

This gives us the option to attach specific products to our home page, to promote them further in a 'Featured Products' spotlight

Attach Content to Home Page

Here we can add text / image content to our home page, for example latest updates, news, company information etc.



To create a New Department:

- Select **Shop Builder** from the left-hand menu. This will load in the **Shop Builder** options in the main window, as described above. Now in the top box, click on the **Add New Department** link. This will show us the options available for a new department.
- Insert the **Department Title** of our new department, for example 'Outdoor Clothing'.
- Specify the **Site Layout** - left-hand navigation is recommended.
- Select a **Template** - as we are creating a new department, select **Department** from the drop-down menu.

- **Upload Images** - Our products need images, so that customers can see what they are buying.

Use the corresponding box to upload your images to the website:

Image A – shown in the left-hand navigation section of your shop

Image B – an image link shown in the department section

It is very important that images are compressed and formatted for use on the web, before uploading them to your website. For more information on how to compress your images and format them for the web, please see our "Preparing Your Images for the Web" guide.

- You can enter your own filename as this page's **URL** – this is very handy for search engine optimization purposes. By default, the item's name is filled in here, although you can change it to whatever you prefer.
- The **Meta Description** is similar to the Short Description, only this description will be used for search engines. Make sure to use a lot of descriptive keywords in order to get the most from this feature.
- **Meta Keywords** are extremely important for search engine ranking. Make sure to use specific keywords that you think your customers will have in mind, so to attract as specific market as possible.
- You can specify whether the department will be available now, or remain unavailable indefinitely by checking the **On / Off** checkbox. Selecting this will make the department live as soon as you have created it. Leaving the box unchecked will leave it set up, but hidden and disabled from the site. This is useful if you want to add your departments, products and options in advance, before the department is ready to go live.
- **Short Description** - This is where you put in a short description of your department. To take the 'Outdoor Clothing' department title as an example: you might enter 'Quality Outdoor Clothing for Extreme Weather Conditions' as the short description.

- **Long Description** - Similar to above, although this lets you go into more depth, and add style, formatting and images to your text.
- Once you are satisfied with the particulars of your new department, click the **Add Department** button. This will add the department, and present you with options to duplicate the previous department, add another department, preview the shop or return to the admin console.

Now you have created one new department, the process for creating a whole department structure, or hierarchy will be easy. This makes selling a larger selection of products easier, for example by arranging an Outdoor Clothing department into sub-departments of Jackets / Trousers / Footwear etc. There is no limit to the number of sub-departments you can have in your store.

Your new department will appear in the **Shop Builder** section.

To create a Sub-Department:

We may wish to divide our 'Outdoor Clothing' department into sub-departments of jackets, fleeces, trousers, footwear and accessories, where our products will be housed. This allows for a more categorized shop, where the user can head straight to the appropriate department to find exactly what they are looking for.

Click on the title of your new department to access its options. Although visually similar to the previous screen, you can now add a sub department inside of the previous department, by clicking on **Add New Department**. Simply fill in the details for this sub-department in the same way you did for the main department. Remember that in order for your new department to go live, you must check the appropriate **On / Off** box in the shop builder section.

Repeat these steps as many times as necessary to create your entire site's department structure. This structure can be as complex or as simple as needed, depending on how big your online shop needs to be.

8 Adding Products and Attaching Options

Now that our department structure is set up, we can begin to populate our shop with products. Be sure to have all relevant information to hand, including stock figures, item numbers and images (correctly sized and optimized for the web – see our training manual 'How to Optimize Images for the Web'). Good planning throughout the shop setup can save a massive amount of time!

To Add a Product to a Department:

- In the **Shop Builder**, select the desired department in which to place your new product by clicking on the department's title. Click on the **Add New Product** button to access the **Product Builder** page.
- If this product has **Standard** or **Custom Options**, or has associated **Volume Discounts** (and these have been built in the Product Builder) then these can be set in the text links at the top of this page. If options aren't needed or haven't been set up yet, then these can be either disregarded or added at a later date.
- Check the **Volume Discount** box if you want to offer a discount for orders of a higher volume.
- **Product Title** refers to the actual name of the product, as viewed in both the shop and the product list in the **Shop Builder**. Name your product as appropriately as possible, for your sake and your customers!
- Each product needs a unique **Product Code**. This will be used for invoices, stock control and help you keep track of your items in the shop.
- The **Price** of your item is what you will be selling the product for. Use this together with the **RRP** box and the **On Sale** check box to show customers the previous and currently reduced price of items on sale or special offer.
- As with your **Option Builder**, you can specify how this product will be linked to your current **Stock Levels** and if it is available for backorder. You can also show whether this item is currently out of stock, on order, and its due date, if applicable.
- **Postage** settings can be input here, along with the item's weight, and any notes that you may need to show.
- You can also specify a **Supplier Logo** from a drop-down list. Use this in combination with the **Manufacturers** option in the left-hand menu to hold suppliers contact details. Attach this **Manufacturer** information to your products so that customers can view information on these companies, and link to their websites for added peace of mind.

The screenshot shows the 'Product Builder' interface with the following sections and fields:

- Product Builder** (Title bar)
- Volume discounts - Standard options - Custom options (Sub-headers)
- Last updated 08/25/2006 08:35:14 AM by demo1 (Status)
- Product title * (Text input)
- Product code * (Text input)
- Price * (Text input)
- R.R.P. (Text input)
- Item cost (Text input)
- Select a layout: layout.cfm (Dropdown menu)
- Select a template: product.cfm (Dropdown menu)
- On order (Text input)
- Due date (Text input)
- Postage & supplier** (Section header)
- Postage code: - Select code - (Dropdown menu)
- Item weight (Text input)
- Postage weight (Text input)
- Product notes (Text input)
- Free postage (Checkbox)
- Supplier Logo: - Select supplier - (Dropdown menu)
- Images / Files** (Section header)
- Image A (Small): [Edit image](#)
- Image B (Medium): [Edit image](#)
- Image C (Large): [Edit image](#)
- Downloadable file: [Add file](#)
- Search engine optimisation** (Section header)
- File name (URL)* (Text input)
- Meta title (Leave blank for product title) (Text input)
- Meta description (Text input)
- Meta keywords (Text input)
- Status & description** (Section header)
- On/off (Checkbox, checked)
- VAT/Tax (Checkbox, checked)
- On sale (Checkbox, unchecked)
- Add to basket button (Checkbox, checked)
- Short description (Text input)
- Long description (Text area with rich text editor toolbar)
- Update product (Button)

- There are 3 Image Options available per product:

Image a (small) - shown next to the short item description in a product list

Image b (medium) - shown next to the full item description, details and price

Image c (optional) - used as a larger preview image or detail view

Make sure that your images have been saved and optimised in the correct format for the web. For more information on how to compress your images and format them for the web, please see our "Preparing Your Images for the Web" guide.

- You can enter your own filename as this item's **URL** – this is very handy for search engine optimization purposes. By default, the item's name is filled in here, although you can change it to whatever you prefer.
- The **Meta Title** is the title of the page, as shown in the header bar of your browser. You can enter your own here, or leave this area blank to use the product title as default.
- **Meta Description** - This is to enable search engines to sort page content. This should be a keyword heavy description relative to the product.
- **Keywords** - A simple list of keywords, separated by commas, to help search engines index the page's content.
- Use the **On / Off** button to set whether or not the product will be visible and live on the website.
- As mentioned previously, use the **On Sale** check box to state whether this item is currently retailing at a reduced or discount rate. Both the sale price and the RRP (crossed through) will be shown in the item description.
- Check the **Shopping Basket** button to state whether the item is currently for sale via the website or not.
- **Short Description** - This is where you put in a short description of your product. This description will be shown alongside the thumbnail image and should only give a brief description of the product details.
- Use the **Long Description** text editor to input the full description of your product using HTML. For best results, stick to simple text formatting.
- Once you are satisfied with the product details you have entered, then click the **Add Product** button to submit this item and upload it to the website.

Now you have created and uploaded your first product, simply use the steps described above to add more products to your shop. To enter products into different departments of your shop, simply navigate to the correct section using the **Shop Builder**.

9 Order Manager

Options in the **Order Manager** lets you keep track of all your past orders. and includes a search facility so users can search. Alternatively you can search for a specific invoice order number by using the **Find Invoice** feature.

- Access your **Invoices** by clicking the **Invoices** link, found under the **Orders** heading in the left-hand menu.
- Use the **View Invoice** search to look through all past invoices based on either date, payment method, name or location, as well as payment / shipping status. Use the second select menu to determine whether the results are displayed in ascending or descending order.
- To search for a specific invoice order number, type the required number into the **Find Invoice** field, and click the **Search** button. The full details of the order will then be displayed below.



By default, the **Invoices Manager** is set up to show only **New Orders**. To view **All Orders** (or all orders of a specific status) then click the drop-down menu and select the desired option.

- Each order has a unique **Invoice Number**. These numbers are used to keep track of each individual sale made through the online shop.
- Tradingeye records the **Date** of each order for future reference.
- The **Customer** details are also kept on file, attached to the corresponding order. Click on the customer name to view the customer's payment, contact, delivery and order details.
- The **Payment Method** shows how the customer paid for the order, be it by credit card online or over the telephone, cash on delivery, Paypal etc.
- The order's current **Status** is shown, alongside a drop-down menu giving the option to change this. For example, if a customer has placed several orders at once, then once these orders have been paid for and shipped; the administrator would then select **Dispatched** from the appropriate menus, and click the **Update Orders** button to confirm.