



Web Site Mini-Guide: E-Commerce Quick Start

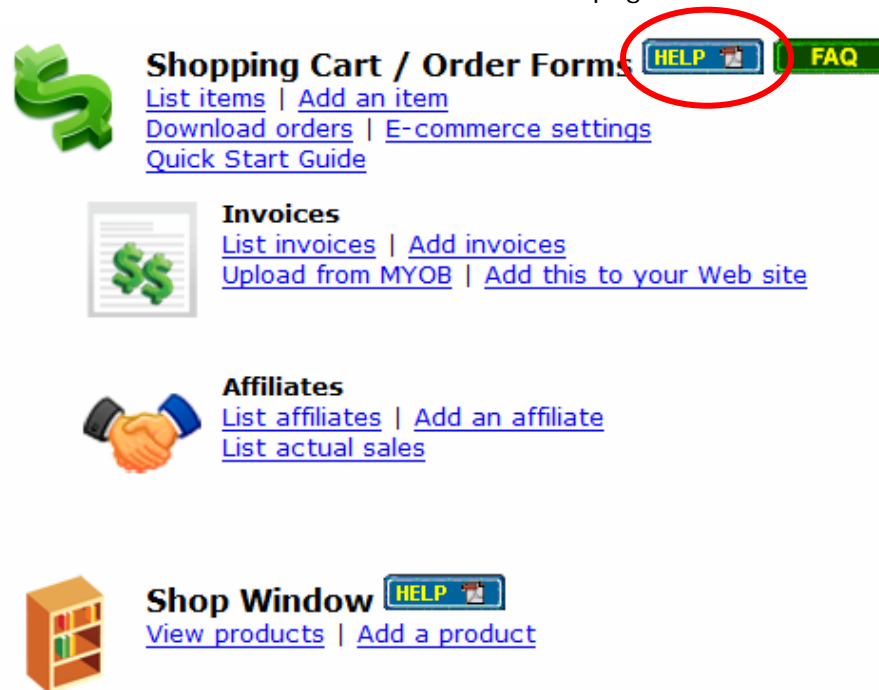
This guide is a “quick start” to using the E-Commerce Module, which you can use for taking orders from your Web site.

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Overview

This guide is a “quick start” to the E-Commerce Module. To find out more about the full features available in the module, download the User Manual, which you can do by clicking the HELP button next to “E-Commerce” in the administration page:



The screenshot shows the E-Commerce Module administration page with several sections. The 'Shopping Cart / Order Forms' section is highlighted with a red circle around the 'HELP' button. The 'Shop Window' section also has a 'HELP' button. The 'Invoices' and 'Affiliates' sections are also visible.

Shopping Cart / Order Forms **HELP** **FAQ**
[List items](#) | [Add an item](#)
[Download orders](#) | [E-commerce settings](#)
[Quick Start Guide](#)

Invoices
[List invoices](#) | [Add invoices](#)
[Upload from MYOB](#) | [Add this to your Web site](#)

Affiliates
[List affiliates](#) | [Add an affiliate](#)
[List actual sales](#)

Shop Window **HELP**
[View products](#) | [Add a product](#)

The full User Manual is quite detailed, and will take you some time to read and understand. That's why we also have this guide, which will help you to get started.



This guide will take you step by step through the most common features of the module:

- Initial set-up
- Shopping cart
- E-book downloads
- Free products

Introduction

The E-Commerce module gives you a secure way of accepting customer payments on the Internet. This is mostly used for credit card payments, though you can use it for cheque payments as well. It includes:

- A “shopping cart” facility (Users can browse around the site, adding items to their “shopping cart”, and can then “check out” when they are ready to buy)
- Secure server for taking credit card orders
- Postage and handling calculations for different countries
- GST calculation
- Currency converter for international customers
- Automatic creation of tax invoices
- E-mail acknowledgements sent to the customer
- Exporting orders to Microsoft Excel for further processing



- Immediate download of electronic products
- Help for people downloading electronic products
- Credit card payments for MYOB invoices
- Affiliate program, so that other people can sell your products for a commission

It's also important to understand what it *doesn't* do for you, so that you know what you have to do yourself:

- Displaying products: You promote and display the products in any way you like on your Web site. However, you can use the Shop Window module to display groups of products.
- Shipping the products
- Processing the credit card transaction (though there *is* an option to automate the processing of these transactions)

How it links to your Web site

The e-commerce system gives you two options for linking to your site:

1. Shopping cart: This is the more common option you see on bigger Web sites, where customers browse around various pages of your site, selecting products and adding them to their "shopping cart". When done, they go to a "checkout" to pay.
2. Order form: This is a simpler option, where a customer selects *one* product and goes immediately to an order form for that product.

In general, we recommend the shopping cart option because it's more flexible for customers, includes a currency converter, and supports an affiliate program.

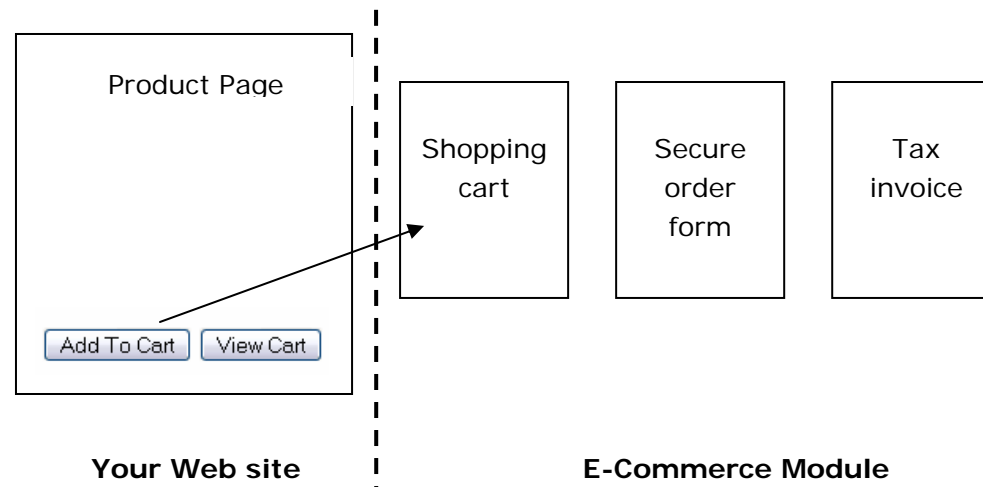


However, sometimes the order form is better. For example, if you're promoting a particular product in your e-mail newsletter, you can link directly to the order form for that product. If you were using the shopping cart instead, you would have to create a page on your Web site with the shopping cart buttons on it.

In this quick start guide, we'll describe both options.

Shopping cart

Broadly, the order process is split into two main areas. Your Web site displays and promotes the product, and the E-Commerce module processes the order. The link between them is the "Add to Cart" button, which you display on each product page:



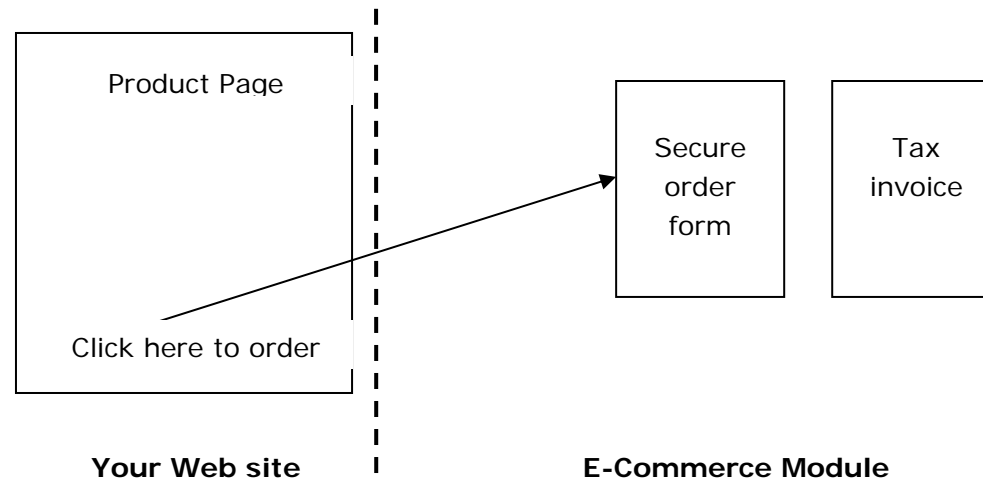
So the general sequence for you to add a new product to your Web site is:

1. Add the product to the E-Commerce Module database.
2. Create a page on your Web site to promote the product.
3. Add the "Add to Cart" button and "View Cart" buttons to that product page.

Alternatively, you can replace steps 2 and 3 by using the "Shop Window" module to display a page of products. See the *Shop Window User Guide* for more information.

Order form

Again, the order process is split into two main areas. Your Web site displays and promotes the product, and the E-Commerce module processes the order. The link between them is the order form link, which you display on each product page:



So the general sequence for you to add a new product to your Web site is:

1. Add the product to the E-Commerce Module database.
2. Create a page on your Web site to promote the product.
3. Add the order form link to that product page.

Initial set-up

Settings

We have configured the E-Commerce module for you. To check the configuration, log in to the administration page and click the "E-commerce settings" link to see the current settings:



You will see a page of settings like this:



Gateway	<input type="text"/>
Merchant	<input type="text"/>
E-Mail	<input type="text" value="gihan@firststep.com.au"/>
Gateway Mode	<input type="text"/>
Password	<input type="text"/>
ABN	<input type="text" value="91 094 652 794"/>
Take Prices From	<input checked="" type="checkbox"/> Database <input type="checkbox"/> Form Other: <input type="text"/>
First Step Commission (%)	<input type="text"/>
GST Exemption	<input type="text"/>
Currency (Symbol, Full Name, TLA, conversion TLA)	<input type="text" value="\$, Australian Dollars,"/>
Encryption Key	<input type="text"/>
Other Payments	<input type="text"/> Cheque <input type="checkbox"/> Amex <input type="checkbox"/> Diners <input type="checkbox"/>

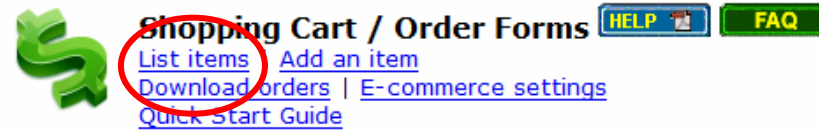
Check that your e-mail address and ABN are correct.

If the Gateway and Merchant fields are set, it means that you're using a payment gateway for automatic processing of credit card transactions. In this case, make a note of the Gateway field and then set it to blank for the duration of working through this guide. At the end of the process, you'll set it back to its previous value.



Sample Products

To see all the products in the system, scroll down to "E-Commerce Price List" and click "List items":



The initial set-up includes two test products:

Code	Description	Delivery	Quantity	Form	Actions
ETEST	Test E-Book (\$20, affiliates get 10%)	E-Book		ORDER FORM SHOPPING CART	Change Delete Copy
TEST	Test Product (\$10, affiliates get 10%) Postage: Australia,4,other,6	Physical	1-5	ORDER FORM SHOPPING CART	Change Delete Copy

We will use these in the following steps to experiment with the system.

Selling a physical product (e.g. a book)

We'll now demonstrate how to use the system to sell a typical physical product.



Shopping cart

Start by clicking the SHOPPING CART link next to the "Test Product" in the list above:

TEST	Test Product (\$10, Physical 1-5 affiliates get 10%)	ORDER FORM SHOPPING CART	<input type="button" value="Change"/>
	Postage: Australia,4,other,6		<input type="button" value="Delete"/> <input type="button" value="Copy"/>

This displays a page for the shopping cart code:

Copy the HTML below and paste it into your Web page.

```
<form action="http://www.eservice.com.au/cart"
method=post>
<input type=hidden name="db_table" value=shoppingcart>
<input type=hidden name=account value="billzheng">
<input type=hidden name=product value=1>
<input type=submit name=addcart value="Add To Cart">
<input type=submit name=viewcart value="View Cart">
</form>
```

[Close this window](#)

Copy all the HTML code from the box and paste it into a page on your Web site. This will create the two buttons for this product:

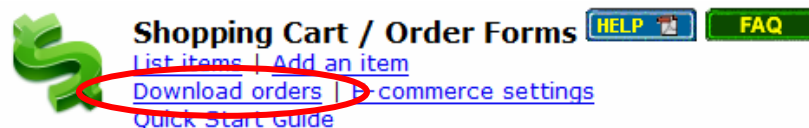


For demonstration purposes, you can just create a blank Web page, though of course for real products you would add these buttons to appropriate places on a page promoting that product.

Then go to that Web page and click the "Add To Cart" button, and go through the entire order process. For testing purposes, use 4242 4242 4242 4242 as the credit card number.

You should get a confirmation e-mail (as the customer) and also an e-mail to notify you of the order (as the merchant). As a merchant, you would process the credit card transaction and ship the product.

The order is also saved on the Web site for you to download into Excel. Click the "Download orders" link to see it:



Order form

Start by clicking the ORDER FORM link next to the "Test Product" in the list above:

TEST	Test Product (\$10, Physical 1-5 affiliates get 10%)	ORDER FORM	<input type="button" value="Change"/>
	Postage:	SHOPPING CART	<input type="button" value="Delete"/>
	Australia,4,other,6		<input type="button" value="Copy"/>

This opens a new window, which is the order form itself. Copy the Web address from your browser and paste it into a page on your Web site as a link.



Then go to that Web page, click the order form link, and go through the entire order process. Everything else is exactly the same as described above for the shopping cart.

Selling an electronic product (e.g. e-book)

The process for e-book downloads is similar to physical products, except for two things:

- You have to tell the E-Commerce Module where the e-book is located, so that it can display a download link to the customer.
- The ordering process is one step simpler, because there's no postage charge, so the system doesn't have to display a confirmation page with the total.

To start, click the Change button next to the Test E-Book:

EATEST	Test E-Book	E-Book	ORDER FORM	<input type="button" value="Change"/>
	(\$20, affiliates get 10%)		SHOPPING CART	<input type="button" value="Delete"/>
				<input type="button" value="Copy"/>

Notice how the Text for Receipt field (which appears on the tax invoice) and the Text for E-Mail Acknowledgement field (which is e-mailed to the customer) both have instructions for downloading the e-book:

```

Text for Receipt HELP
Thank you for ordering the test e-book. You can download it here:
* [*http://example.com/docs/test-ebook123.pdf Test E-Book]

```



If you already have an e-book available for download, change the sample e-book Web address (<http://example.com/docs/test-ebook123.pdf> in the example above) to your e-book's full Web address, and click the Change button at the bottom of the form. Otherwise, just leave the sample e-book as is.

Now go through the same process as you did for ordering the physical product: Get the SHOPPING CART code (or the ORDER FORM link), paste it into a blank Web page, click the Add To Cart button, go to Checkout, fill in the form, and get the tax invoice.

In this case, you will see that the tax invoice includes a download link for the e-book, as well as instructions to help the user with the download.

Free products

In this final test, we'll demonstrate how to use the E-Commerce Module for free products. From a customer's viewpoint, ordering a free product is exactly like ordering a paid product, except that they don't have to provide credit card details.

Of course, if you have a free product, it's not necessary to take the customer through the ordering process (For example, you could just provide a direct download link to a free e-book). However, you might choose to do so anyway, because you get the other advantages of the E-Commerce Module, such as recording the user's contact details, showing instructions for download, and so on.

We're going to change the sample e-book into a free product, so start by clicking the Change button:



E-TEST	Test E-Book	E-Book	ORDER FORM	<input type="button" value="Change"/>
	(\$20, affiliates get 10%)		SHOPPING CART	<input type="button" value="Delete"/>
				<input type="button" value="Copy"/>

To make a product free, simply set its price to "0":

Price	0
--------------	---

and click the Change button at the bottom of the form to confirm the change.

Then go back to the page with the Add To Cart button (or order form link) you created in the previous test. Click the View Cart button and remove any old products from your shopping cart, then go through the order process again. It will be exactly the same, except that you won't be required to enter credit card details.

Tidy Up

Right back at the start of the process, if you changed the Gateway field in the E-commerce settings page, go back now and reset it to its original value.





More Help

- Frequently Asked Questions: <http://first-step-support.info/>
- Help Desk <http://firststep.com.au/help-desk.html>
- Other support options: <http://firststep.com.au/support.html>
- Consulting: <http://gihanperera.com/consulting.html>
- Products: <http://gihanperera.com/products.html>
- Other User Guides: <http://www.firststep.com.au/fast-forward-guides>



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