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BUiLD™



the quick and easy way to sell online

**Store Builder's Guide
for Click and Build Version 3
Documentation Issue1.0**

About this Guide

This guide provides the information you need to build an Internet store using WorldPay's Click and Build store-building features.

A separate Guide, the 'Hosting Guide', provides the information required to install Click and Build and offer it as a service to store owners / store builders.

For information about this publication (issue dates, updates, readership and so on) please see the Document Information chapter.

We strive to produce the highest quality of documentation and welcome your feedback.

Please send your comments to the <mailto:editor@uk.worldpay.com>. If you have a technical question, please address it to <mailto:support@clickandbuild.com>.

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Introduction

Welcome to Click and Build, the most feature rich, flexible and cost effective way to build an on-line store.

Click and Build is a unique e-commerce web site construction tool. Designed for business people with little or no technical skills, it constructs even the most complex stores quickly and easily. It has built in integration for WorldPay's secure multi-currency pricing and payment gateway, as well as many other features required by businesses who wish to trade via the Internet, such as stock control, order processing, tax, shipping, discounting, key event emailing and reporting. It enables you to offer many thousands of products in a store and has the facilities for you to change the look and feel of your store to suit your individual or corporate needs.

Store building and administration can be done on-line using a standard Internet or Intranet connection and a web browser. No other software needs to be installed on your workstation unless you wish to use the Off-line Inventory Builder tool.

Click and Build is also 'international', which means that you can use the build facilities in different languages, and your shoppers can shop in their own currency (providing you have subscribed to them via WorldPay) secure in the knowledge that they will only have the price displayed deducted from their debit or credit card, with no hidden conversion charges. Tax and shipping has also been designed with cross border trading in mind.

This guide will take you through all the stages required to construct a Click and Build store, so before you continue, finish reading this introductory chapter as the information contained here will introduce you to some important considerations concerning trading on-line, and as such will have a bearing on the text you enter, the choices you make and the way that you build your store.

Features of the Software

Below is a list of the features that make up Click and Build, some of which are new and exclusive to this version. The new features for Click and Build Version3 are highlighted in green.

General features

- **Fully integrated** with WorldPay's secure payment systems.
- **Multilingual** – The administration features and the shopping interface are available in most European languages either automatically set by the browser or selected by the user. (International Version)
- **Multi-currency** – Shoppers can choose to shop in their own currency. Exchange rates are updated automatically each day.
- **Easy to use Graphical User Interface (GUI).**
- **800x600 screen resolution** (increased from 640x480)
- **Extra web pages** – Unlimited user defined web pages.
- **Build View** – The inventory build and shoppers view are separated for clarity.
- **Pagination** – To view the results of functions that return multiple pages, navigation now includes page numbers, and first/last as well as existing forward/back.

Store Building features

- **QuickBuild** – A fast way to set-up a new store based on ready-made store templates.
- **International Tax and Shipping** – An easy to use interface helps you enter the information Click and Build needs to provide automatic calculation of cross border Tax rates and shipping costs.
- **Multi-user** – Define as many administrative users as you need and control their access to various parts of your store administration.
- **Text and HTML** – Write store pages in straightforward text with **multiple embedded images**, or more complex pages using HTML.
- **Downloadable Goods** – Upload software, video, images, music, documents or any other form of software based product for your shoppers to purchase and download.
- **Discounts** – Specify as many global variations of discount as you need, based on percentage over a given value of order, free delivery of a given value of order, or other offers such as 3 for the price of 2. You can apply these discounts to any or all products based on any date ranges that you specify.
- **Inventory Control** – Automatically updates stock levels based on shopping activity and emails when any item falls below your pre-set minimum stock level or is exhausted.

- **Reporting** – Produce almost any report, using the comprehensive and easy to use report generator.
- **Search Engines** – Submit and re-submit details to various search engines
- **Off-line Build** – A stand-alone application run at the administrator's workstation to speed up the process of building large inventories. You can build the entire inventory, and uploaded it to the server when complete.
- **News Pages** – News articles can be produced and linked to/from a product within your store.
- **Guest book** - Enables shoppers to leave comments. The comments can be vetted before making them visible to other shoppers.
- **Nested Product Categories** – If your store has a large inventory you can expand the category, product and variant structure of your store to included unlimited nested categories.
- **Sorting** - Assign sort priorities to categories, products, variants and instructions in order to present your favored products and related information to your shoppers first.
- **Statistics Screen** - See the status of your store. Easily check order activity and resource usage.
- **Colour picker** - An easy way to choose the colours to be used in your store.

Shoppers' features

- **Currency** - Shoppers can select their preferred currency and all prices will be displayed in that currency with no additional exchange charges to be added later.
- **Language** - Shoppers can select their preferred language for using the Click and Build Store Interface.
- **Instructions** – Shoppers can make choices and give other input throughout the store.
- **Order Progress** – Shoppers:
 - receive an email confirming payment clearance (from WorldPay's payment gateway), order acceptance and dispatch.
 - can query the status of their order on-line.

Overview

Where is Click and Build installed

Click and Build is an application that is installed (hosted) on a server. The Manager of the installation uses Click and Build's Installation Management interface to create stores within the installation. The Installation Manager will give the store's web address (URL), user name and password to the store owner, who can then access the store to develop its look and feel and content.

Hosting Yourself or Finding a Host

You can choose whether to host your installation and create your own store or find a pre-existing host. Click and Build store hosting is of course available directly from WorldPay, but due to its appeal for ISPs, Web Design Houses and Consultancies, a growing number of Channel Partners are also supplying hosting services. If you are planning to host yourself you will need to install Click and Build onto your own web server (**Note:** A good understanding of web servers is essential). Installation details can be found within the Hosting Guide.

Obtaining a WorldPay Account and Installation ID number

Whoever is hosting your store, if you wish to take payments through your Click and Build store you must, apply for a WorldPay account. Contact Worldpay's Customer Acceptance department for further information and an application form or apply online at www.worldpay.com. Once you have obtained an account and your payment has been confirmed, you will receive details on both how to access the Customer Management System (CMS), and an installation ID number for your Click and Build store. This normally takes about five days. For further information about obtaining a WorldPay account, refer to the Customer Procedures Guide.

Account Status

The Manager of the Click and Build installation can setup your Click and Build Store in a number of modes, the most common of which are:-

Brochure – the store can display your products and prices but will not have any e-commerce functions, i.e. no shopping cart, tax, shipping, stock control or payment gateway connection.

Test – this provides your store with full e-commerce functionality but the payment gateway will only allow test transactions i.e. no money will be debited from any card used in the transaction.

Live - this status provides your store with full e-commerce functionality with an operating integration to the payment gateway and will allow your store to trade on-line.

A valid installation ID is required for Live status.

A brochure store can easily be converted to a Live site by obtaining an installation ID number from WorldPay and contacting your Installation Manager.

Click and Build's Ease of Use

Click and Build has been developed to provide an easy-to-use interface that enables users to administer and design a well-constructed and functional store. Click and Build is an on-line program, therefore, store owners need only a browser and access to develop a store.

The Structure of Click and Build

Click and Build provides two levels of administration;

- Installation management - This enables a host to create and delete stores and perform a range of administrative tasks related to the Click and Build installation. For further information refer to Hosting Guide.
- Store building- This enables a store builder to construct all aspects of an e-commerce store, from choosing the Look and Feel and setting up a product catalogue, to specifying the tax and shipping costs. The store builder chooses from the navigation tabs which aspect of the store to work on, then Click and Build presents a page of information showing the current configuration of that section. By adding or changing the information and updating the page, the store builder is building the store in easy stages. To make this even easier for new users, a store builder may select from a large number of attractive, pre-defined 'QuickBuild' store style templates.

Using QuickBuild to Build a Store

New users of the Click and Build software, may prefer to use the QuickBuild store building wizard which directs store builders through the main features of Click and Build, while providing a large range of preset web store styles and designs. Refer to the QuickBuild chapter for further information.

How to take payments

When a store is complete and has been authorised to go live, you can receive payments from your shoppers. Payments are received through WorldPay's Payment Gateway.

The WorldPay Payment Gateway

Click and Build has been designed to integrate with WorldPay's renowned multi-currency payment gateway, thus adding secure credit and debit card processing payment facilities to your store. Using WorldPay, a store builder could take payments in over 130 currencies (with settlement in 20 major currencies).

Taking an on-line payment from a shopper is simple and efficient.

The shopper is asked to complete a secure on-line payment form displayed from the payment gateway. The diagram below represents a summary of the WorldPay payment process.



The WorldPay Payment Gateway is directly linked to a range of bank processing systems. These secure links provide rapid authorisation of a shopper's transaction. Once authorisation has been received, a confirmation is immediately sent to the shopper with a unique transaction reference, which they can use with WorldPay's Shopper Management System to see what they have spent. In addition the store owner will receive a notification of the order.

For further information about the payment process view the WorldPay web site at:

<http://www.worldpay.com/>

How to make Refunds

When payments have been made from the store into your account, you can administer your WorldPay account using the Customer Management System (CMS) to refund an order. Refer to the CMS User Guide for information about how to make a refund to a shopper. When an order has been refunded using the CMS you will then need to mark or flag the order as refunded in the order administration section of Click and Build. By marking an order as refunded, Click and Build can produce a more detailed order status report.

Advertising a store

A store can be advertised in many different ways. However, most Internet users generally locate web sites by using on-line 'search engines'. Click and Build has included a process of registering a store to over 1000 search engines and indexes, including the popular engines such as Yahoo, Excite and Lycos etc.

Maintenance of Order and Stock Levels

With Click and Build, you can maintain both the store's individual product levels and the order status. Click and Build includes a stock maintenance facility that automatically reduces stock as a result of shopping activity and (optionally) sends you email notification when a product's stock level reaches a specified minimum or is exhausted.

Maintenance of orders is achieved by using both Click and Build's Order Administration that provides tracking and order reporting, and WorldPay's CMS that allows refunding of orders and produces a statement of a store's account (see CMS User Guide).

Enhancing Store Design

Click and Build's standard store building functions are very flexible and can create over 10,000 different permutations. With the inclusion of HTML text, you can produce an even more creative and functional store. Each click and Build page that is viewed by a shopper is produced by a Click and Build template. If you have access to your Click and Build installation and you have reasonable HTML skills, you can alter these underlying templates to make fundamental changes to the way your Click and Build store looks. For more information about customising Click and Build, refer to the Hosting Guide.

Planning Considerations

Building a store involves a sequence of steps each of which require you to provide specific information. We therefore recommend that you collate all the information surrounding your business and the products that you intend to sell prior to commencing any work within Click and Build.

Decide which countries you will trade with

One of Click and Build's unique features is its 'internationality', which means that you can build a store in different languages and enable your shoppers to shop in their own currency. Click and Build's store building facilities are also multilingual in as much as all of the text that is part of Click and Build itself will appear in the browsers default language (international version) unless you choose otherwise. Depending upon your markets, consider what language(s) to use when you enter the store text such as your welcome text, terms and conditions, product descriptions and so on.

Tax and Shipping

Most carriers will charge for shipping based on destination, weight/volume and the delivery time required, therefore we recommend that you obtain a comprehensive list of the rates from each of your chosen carriers for each of your possible destinations. You may also consider applying tax to your store, in which case obtain all the necessary information regarding your tax structure for each of your product types and the chosen market locations before building your store.

To help you navigate the complex subject of cross border Tax, WorldPay in association with Deloitte & Touche and Berwin Leighton have created <http://www.t@xandlegal.com/>. This site contains detailed explanations of how each country's tax systems function, together with an intelligent system that guides you through a series of simple questions to provide you with tailored information relevant to your circumstances.

Discounts

Click and Build enables you to set up a generic discounting structure for your products. You will need to plan your discount structure, based on the following 3 methods.

- **x for y:** for example, 3 for the price of 2
- **% over x:** for example, 10% discount on orders over £50
- **Free Delivery over x:** for example, Free delivery on orders over £25

You can also associate each discount with a date range. This provides a period of time during which a discount applies to a product. For example you can set up a specific discount that provides a shopper with 3 for the price of 2 discount only for the January sales. We recommend that you draw up a list of all of the discounts that you will need for your store before you start entering any products. More

discounts can be added later if needed, and you can change which discount applies to a product at any time.

Instructions

This area enables you to configure Click and Build, so that it can receive instructions as choices or free text, from your shoppers concerning the goods ordered. This could be as simple as choosing a colour or size of a product, but could equally be the shopper choosing a slogan for a T-shirt or greetings card. Decide what instructions you wish to use in your store and draw up a list before entering any products into your store. More instructions can be added later if needed, and you can change which instruction(s) apply to a product at any time.

An example of the instruction are :

- Wrapping Option– Choose from either Xmas, Coloured, Plain
- Greeting Message – Free text entry
- Slogan – Free Text entry
- Preferred Delivery Day – Choose from Mon, Tue, Wed, Thur, Fri

Your products

For each of your products make sure that they are not illegal or subject to any import restrictions for all of your market locations. Check that the descriptions and variants of your products are meaningful and consistent for your markets as products like clothing and shoes vary widely in size types. Some of the most common variations of products are laid out in [Appendix B](#). All weights and measurement units will also need to be understandable in all of your markets. For each product decide the content for the following parameters:

- The short description to identify the product
- The optional long description that fully describes the product, perhaps including a detailed manufacturers specification
- The optional small image (thumbnail) to accompany the short description
- The optional main image to accompany the long description
- Its weight if you will charge for shipping by weight
- Its dimensions if you will charge for shipping by volume
- Its sale price

Images

The use of images will enhance the visual appeal of your store as well as improving its functionality. The number, type and size of the images used within your store will have a significant impact on the apparent refresh speed of your store, especially for screens that contain numerous images.

Start by gathering together your images of products, logos, backgrounds, navigation buttons and any other images that will become part of your store. GIF, JPG and PNG image formats are supported. Click and Build uses image descriptions for reporting purposes and by default, the file names are used as the descriptions. This can be changed if required, however, if you make your file

names as descriptive as possible you will not need to change the descriptions. Click and Build enables you to upload a Zip file containing many images. This speeds up the set up process in this area enormously as is recommended.

Working with GIF or JPG images.

Use JPG files for images of higher resolution and colour depths such as photographs. When saving JPG files, in a graphics application you will have the option to adjust the compression setting. If you use a high compression setting, the resulting file size will be smaller and faster to send to the shopper's browser, however, the viewed quality of the image will be lower. Experiment to find the highest compression setting that retains the level of quality needed.

Use GIF files for images with less than 256 colours such as logos, navigation buttons, charts and graphs etc. Removing data relating to unused colors can also optimise GIFs.

Keep the image size to a sensible minimum and crop your images so that there is no spare "white space" surrounding them. As Click and Build is designed to be displayed on a screen set to 800 x 600 you will need to estimate how large your images will appear to your shoppers. **Design tip:** An image of 65 pixels wide will appear to be around an inch wide for shoppers using a 15" display.

We recommend that your product thumbnail images should be around 70 x 70 pixels and your main product image should be around 300 x 300 pixels.

Colour: Both the PC and Mac have a maximum number of colours that can be displayed at one time. The maximums for a PC are typically 256, 64,000 or 16 Million colours. Problems can occur when your PC or Mac is set to display 256 colours as each uses a different set (palette) of colours. If either is called on to display a colour that is not in its palette it approximates the additional colour by a process called "dithering". This results in an unpredictable and generally much poorer rendition of the original images. There are 216 common colours for both the PC and Mac, which are referred to as the "Web Safe Colours" as they not dither.

These colours are displayed in [Appendix E](#).

Text

We recommend that composition of the text for use within the store is carried out in a word processor, so that spelling and grammar checks can take place before the text is entered into the store.

Click and Build allows the addition of HTML formatted text to enable store builders to have more control over the page style. However, knowledge of HTML is not necessary need to produce a well-designed and functional store.

Much of the text contained in the store will be short and long descriptions for your products. Typically, the short description will be displayed on the brief product page alongside the thumbnail image. The short description and image together should give the shopper enough detail to identify the product. The optional long description should contain the full description or details on the product. The long

description will be displayed together with the main optional product image.

Uploading your product inventory using Online Build, a CSV upload or the Off-line Inventory Builder

Once the basic structure of your store is complete, you have three options for uploading details of your product inventory to your store.

If you choose to build on-line, you will use Click and Build's Catalogue Administration to add a new product to any specific category(s). Enter the product's name, long & short descriptions, thumbnail & main images and details of the product's variants, price and stock levels. This method can be done from any PC connected to the Internet with no additional software.

If you have details of your product range held on an existing database or spreadsheet you may want to use your existing application to produce a Comma Separated Variable (CSV) file. This file can then be directly uploaded, populating your on-line store. The CSV file will need to follow the format described in [Appendix A](#).

The Off-line Inventory Builder is a user-friendly and standalone method of producing your product inventory and a formatted CSV file respectively. Use this option if you have a larger inventory that you are creating from scratch. The program is available for your PC and it must be installed on a workstation with an Internet connection.

General

- Consideration of other markets and terminology should be made throughout the build process. For example a more generic term such, as "Tax should be used instead of "VAT" or "GST" to describe your specific tax structure.
- If you advertise your telephone number include the international dialing code (a table of which is given in [Appendix C](#)).
- The display format of dates varies from country to country so we would recommend spelling out dates, rather than relying on a shorter numerical format.

Getting started

Open your Internet browser and connect to the Internet. Enter the address (URL) of your store that has been provided to you by your Click and Build host or Service Provider (ISP).

This URL may be in the form of `http://"Host Server Name"/cnb/admin/"Store Name"`

If you have entered the URL correctly you will see the Click and Build store building Login screen.

If you substitute the word 'shop' in place of admin in the above URL, you will be presented with your shoppers' view of the store.

Login

On the login screen, a choice may be made for displaying Click and Build in your local language. This is achieved by simply selecting the required language from the drop down list at the head of the Login screen. Additional language choices to those in the list will be added on an ongoing basis.

When you have selected your desired language, simply enter your assigned user name and password, and click the 'Login' button (clicking the enter button on your keyboard may not work on some browsers). These entries are case sensitive; therefore enter them exactly as assigned to you. If you have forgotten your user name or password, contact your system administrator or your original Click and Build supplier who will reset them for you. Upon delivery of Click and Build, your default user name and password will be 'admin' and 'admin'. We recommend that you change this password as soon as possible. You may find from time to time that, upon clicking a hyperlink to return or progress to another screen within Click and Build, you actually return to the Login screen. This is quite normal, and indicates that after a period of inactivity Click and Build has automatically logged you out. So that unauthorised users of the system cannot gain access if you forget to log out yourself.

The first time that you login to Click and Build you will be asked to read the Terms and Conditions of Use which you must accept before you can proceed. Next you will be presented with an [Introduction](#) or welcome text screen, which will give you brief information about using the Click and Build program. As with the terms and conditions, this page will only be displayed the first time you enter the store builder's software as an Administrator. All Subsequent logins will take you directly to the Statistics Page to check on the store's resource usage and order status.

The login screen also enables you to enter the store view or look back over the Terms and Conditions, by clicking the respective icons. The store view enables you to view your store as your shoppers would.

Note: When reviewing your built store, you will **not** find some of the features common on Web sites today, such as navigation via frames, the use of JavaScript for pop-up windows etc. You will also notice that, if you are using a monitor with a resolution over 800 x 600, your store pages will not fill the entire screen. These omissions are all quite

deliberate, and have been made to ensure compatibility with the widest range of browsers so enabling, the maximum number of shoppers to shop at your store.

Statistics Page

The Statistics Page shows a range of useful information about the stores resource usage and order status.

- The Introduction section displays the name of the last person to login to Click and Build and the date of the login. It also displays the account status, the WorldPay installation ID number and the base currency being used.
- The Order Statistics section gives general information on the order status, the number and value of orders. In addition, you can confirm all new orders simply and quickly from this page by clicking the *Confirm Orders* hyperlink.
- The Store Statistics section shows the total number of visitors to your store, the amount of server disk usage, also the number of products, variants, images and downloadable items being used in your store.

This statistics page can also be customised to only show the statistics that are needed. To do this, select the statistics that you wish to view by checking their adjacent boxes in the 'create new statistics' menu and click the *Update* button. **Note:** Checking all the statistics boxes will delay the loading of this screen considerably in a larger store. You can choose whether to have a number of useful admin links displayed when you view your store in 'shop' mode by checking the *Shop Admin Links Visible* box.

This page also enables you to view the [Introduction](#) or the welcome text again, and email Click and Build support for any further enquires.

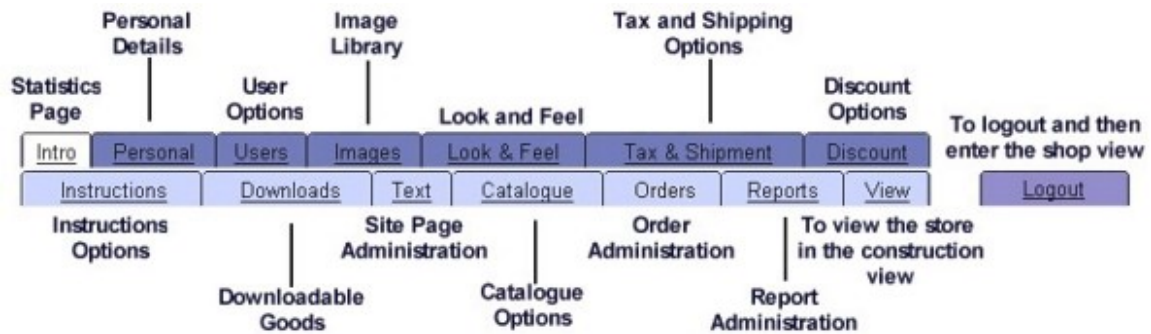
When you are ready to commence, two methods of building your store are available:

- QuickBuild; which takes you step by step through the fastest route to a complete store leaving out many of the sections that may not be relevant to your store.
- The manual design method in which you progress (one by one) through each of the navigational menu tabs options displayed at the top of the screen.

For beginners, or those wishing to establish their store quickly, we recommend that you follow the [QuickBuild](#) route. For those more familiar with store building software, or those who have already followed the QuickBuild route, we recommend that you explore each menu section. Using each section, it is possible to refine the stores style and structure, as well as adding more complex functionality such as tax, shipping and discounting.

Menu Tabs

The Store building process is a logical sequence of steps beginning at the top left with the Personal Tab (Intro will re-display the statistics screen), moving along the top and to the right through the sections Users, Images etc. You then proceed on to the bottom row, starting with Instructions and finishing with Catalogue. The Orders and Reports section are administrative functions that can be used once your Store is complete.



Tab Name	Section Name	Section Description
Intro	Statistics Page	Where information about your stores resource usage and order status are displayed.
Personal	Personal Details	Where you enter your company details that will appear on emails automatically sent to shoppers. You will also enter your email addresses so that Click and Build can email you with events such as incoming orders and stock warnings.
Users	User Options	Where User's privileges are defined.
Images	Image Library	Where the site generic and product images are maintained.
Look and Feel	Look and Feel	Where the site's 'look and feel' choices are made. You can choose the layout of the various shop components, change navigation graphics, add backgrounds, and your logos.
Tax and Shipment	Tax and Shipping Options	Where tax and shipping rules and values are defined. You will need to enter the countries that you will be trading with, how you will ship to them, the types of goods that you will be selling and the appropriate tax rates. Once this information is entered, Click and Build can automatically calculate the appropriate tax and shipping costs to the shopper.
Discount	Discount Options	Where you define a range of Store wide discount options that you can then apply to products, as you require.
Instructions	Instructions Options	Where you define a range of Store wide instructions options that you can apply to products to collect instructions from the shopper, using drop down choices or free text.
Download	Downloadable Goods	Where downloadable goods are uploaded and maintained.
Text	Site Pages Administration	Where you can supply the text for the various pages that you shoppers will read as they navigate through

		the store, such as Welcome, Contact, Terms and Conditions, user defined pages and news articles The guest book entries are also administered here.
Catalogue	Catalogue Options	Where product categories and products are defined and your inventory is managed
Orders	Order Administration	Where order fulfillments are checked and confirmed.
Reports	Reporting Administration	Where reports from the Click and Build database are set up.
View		Where you can look at the store, as your shopper would view it.
Logout		When clicked, you will be logged out of the Click and Build Store Building administration and returned to the login screen. In the Login screen you can view your store as a shopper would by clicking the 'Enter Shop' icon.

To enter a set up area, click the section's Menu tab that you require. We recommend that you read the appropriate sections within this guide at least once (for detailed descriptions, and to obtain **Design** or **Operational** tips), before you proceed within that section.

Some of the choices in the set up areas are optional and you may wish to skip some complete sections that may not be relevant to your business (for example, tax and shipping, discounting and instructions), your store will still operate properly.

When you have completed all of the sections or only the sections relevant to your company you will just need to ask WorldPay to activate your Store and you are ready for business.

QuickBuild

QuickBuild offers users a quick and easy way to construct an on-line store with the minimum design effort. QuickBuild enables store builders to choose from a range of preset web store styles and designs. To start QuickBuild, click on the Intro Menu tab then click on the Quickbuild icon.

Style Templates

Upon entering the QuickBuild path you will be presented with a selection of store style templates for you to choose from. These style templates include background images, graphical menu items, a main logo, example product images and the inclusion of replaceable 'example' text. To select your preferred style simply click on the thumbnail image and this will take you to an enlarged view before the need to confirm the design. Below the enlarged view you will find two buttons, *Use This Store* and *Choose Again*, also two check boxes that allow you to use the default site page text and catalogue structures. To confirm the style template that you wish to use for your store depress the *Use this Store* button.

Note: If you have chosen to use default text or categories you will see a confirmation dialogue box, check to confirm the entries and click the *Use This Store button* again. The template will transfer its design theme into your store and present you with a message stating, "*Your choice has been saved under your account*".

If you have decided against the style template chosen, then by clicking on the *Choose Again* button you will be taken back to the previous screen so that you can re-select. Once your choice of design has been saved to your account you can continue configuring your store by clicking on the *QuickBuild* button again, and you will be taken to Personal Details

Personal Details

Here you enter details about your store, such as you business contact details and your order confirmation email addresses. This information appears on both your contact detail's page by default, and on all 'key event' emails sent by Click and Build to your shoppers. When this form is correct and complete click on the *Update Details* button to save the information. To continue click the *QuickBuild* button, and you will be taken to [Site Page Administration](#).

Site Pages Administration

This page enables you edit the text that appears on the main and user defined pages of your site. **Note:** The Guest Book entry on this page is blank until a shopper adds the first guest book entry. See the [Site Pages Administration](#) section of this publication for more information on text pages. Once each page is completed you can advance to the [Catalogue Options](#) by clicking the *QuickBuild* button.

Catalogue Options

This section is provided to add / edit the store catalogue and the products in this catalogue. Please refer to the [Catalogue Options](#) section for further information about the construction of the store catalogue.

Personal Details

This area is where you enter in the key details relating to your business and your company's web site. This information appears by default on both your contact detail's page, and on all 'key event' emails sent by Click and Build to your shoppers (such as transaction and order fulfillment confirmations).

Company Name

The company's name will be displayed on the contact details page, optionally at the head of all other pages (if a company logo is not uploaded), on all 'key event' emails sent by Click and Build to your shoppers (such as transaction and order fulfillment confirmations), and also to the Internet search engine registrars with your store details ([see Search Engine Details](#)).

Address, Town, State/Region/County, Country, Post/Zip Code

Will be displayed on the contact details page, on all emails to your shoppers, and sent to the Internet search engine registrars with your store details ([see Search Engine Details](#)).

Telephone Number, Fax Number & Email Address

Will be displayed on the contact details page, and on all emails sent to your shoppers. The email address will be a hyperlink, which will enable shoppers to send emails to you from the contacts page. This detail will also be sent to the Internet search engine registrars with your store details ([see Search Engine Details](#)).

Low Stock / Stock Depleted Email Address

By entering an email address (for example stock@mysite.com) you can receive warnings of low stock or out of stock situations in your inventory (as a result of stock depletion following authorised order transactions).

Note: that this warnings only works if the *Activate low-stock warning emails* box is checked.

Order Confirmation Email Address

By entering an email address (for example orders@mysite.com) you will receive automatic confirmation of any authorised orders from your store. **Note:** That this warnings only works if the *Activate order confirmation emails* box is checked.

Web Address

When the web address is entered, it can be displayed as an additional hyperlink from all store pages using the Home navigation option in the Look and Feel section (this enables navigation back to a home site for those who have one). The entry format for this parameter is http://xxxxxxxxx /, where xxxxxxxxx equates to the parent site address.

Mall Category

Full mall functionality is not in place yet, but we request that you select a category that best describes your site from the drop down list provided, so that when Click and Build malls are in place, shoppers can locate your products in this way in addition to the

existing methods.

When all the above fields have been defined, simply click the *Update Details* button at the foot of the page to save your details.

Search Engine Details

For an e-commerce store to be successful, it must be advertised. Click and Build has the capability of submitting your web store details to over 1000 search engines worldwide (including - Yahoo, Web Crawler, HotBot, Excite, Alta Vista, Lycos, AOL Netfind and Magellan) so that users of those directories can find your store. The first Submission of your site is included with the purchase of the Click and Build Software. Re-submitting of your store requires an additional payment to your Click and Build supplier. Contact your Click and Build supplier for more information about search engines and (re-)submission fees.

In the boxes provided, enter the:

- Store identifying keywords- 10 only, comma separated (for example, garden center, plants, flowers, paving). These keywords are used by the search engines as part of their indexing process, so choose the words that customers are most likely to enter at a search engine when looking for you products.
- Site description- 300 characters only. Most search engines will send this description to the user when your site is located so make this description clear and concise.
- Store category- selected from the drop down list. This will be used by web indexes that list your site by a category.
- The URL of the store (http://xxxxxxxxx/, where xxxxxxxxx equates to the store's address). **Note:** if you have registered a domain name then enter the domain URL instead.
- Contact email address for search engines responses. **Warning:** This email address will receive a large number of responses therefore; we recommend that you use a specific email address for example 'spam@myshop.com'.

When all the above fields have been defined, simply check the *Submit The Search-Engine Fields* box and click the *Submission* button to submit your entries to the search engines.

User Options

This area enables you to set up additional users of the administration facilities, with restricted access privileges if required.

Adding a new user

In the current system users menu you are given access to add a new user, by selecting the *Add* user button. This will take you to the add user screen in which you can enter the new user name, password and privileges.

Editing the User

From the drop down selection list (which by default will include a system administrator 'admin') any user can be selected and displayed for privilege editing, password changing, or complete removal, by clicking the 'edit' button below the selected user name. The only option for the *admin* user is to change the password.

User Passwords

When editing users, the user name will be greyed out, however, you can still modify the user password. Passwords are case sensitive.

Operational Tip: We recommend that passwords be changed on a monthly basis, they are not "flip-flopped" (two passwords alternated), and that a mixture of letters and numbers be used.

Forgotten Passwords

If the have forgot your password contact your system administrator to be allocated a new one, however if the system administrator forgets the entry password you will need to contact your Click and Build provider to re-initialise the system 'admin' user.

User Privileges

When the Edit user screen is displayed, simply check/un-check the appropriate boxes for the privileges required for the user in question. Selection of the system administrator from the drop down list will automatically assign "global" privileges, which can then be edited. Users can also have their access privileges withdrawn temporarily by un-checking the *user active* box.

When additions/modifications have been made, simply click the *Update* button at the foot of the screen.

Deleting a User

In the current system users menu select the user that you wish to delete, once selected click on the *Delete* button. When deleting, a *confirm* checkbox is displayed in order to avoid accidental deletions. This box needs to be checked before the delete button becomes effective.

Note: You cannot delete the system administrator and you cannot delete yourself.

Image Library

This area enables you to upload and manage all of the images that you will use, for example logos: navigation buttons, product photos and so on.

Operational Tip: Click and Build offer three resources to obtain useful images.

- <http://www.clickandbuild.net/imagelib.html> (free web graphics designed by Click and Build to help with the construction of your store they include products, backgrounds and navigation buttons).
- <http://www.graphicsplanet.com/> (purchasable web graphics suitable for a Click and Build store they include backgrounds, buttons, icons, tiles, bars, splashes and photo clip-art).
- <http://photostore.co.uk:8000/> (purchasable photos suitable for a Click and Build store).

Image Folders

Image folders (or libraries) are used to organise your images and have to be defined prior to uploading images. It is recommended that one folder be exclusive for images that will be used throughout your store (for example. Sitewide or Generic) and for each of the product categories that have been defined there is a separate image folder. This recommendation does not have to be followed as you could for example put all of your images into one folder instead, but it does make later maintenance easier as your store evolves and grows and changes need to be made.

Adding a folder

Click the *Add* folder button, to enter the add folder menu, enter your new folder's name, then click either the *Store and Add another folder* button or the *Store and Return to Menu* button to store the new folder.

View / Edit a folder

Once the folder has been defined; you can *View/Edit* the contents of the folder. The edit menu enables you to change the folder's name or delete previously uploaded images. When deleting, a *confirm* checkbox is displayed in order to avoid accidental deletions. To delete an image, this box needs to be checked before the delete button becomes effective.

Operational Tip: Deleting multiple images from a folder is not possible in one action although you can delete the entire folder. Use of additional image folders will allow you greater control of your image library.

Deleting a folder

In the folder options menu select the folder name that you wish to delete from the drop down list. Check the confirm checkbox and click the *Delete* button.

Adding an image to a folder

In the Folder Options menu, select the folder to take the new image from the drop down list then click the *Add Image button*, this will take you to the Add Image menu. Click the

Browse button to search for the image to be added. When you have selected the image click the *Open* button to upload your image to the image library. Note: Click and Build supports JPG, GIF and PNG image.

You can use the Description field to add a description to the image; this makes your Image Reporting more descriptive and provides the image with an ALT text message, which appears when your shoppers' mouse runs over the image in their browser. If you don't enter a description, the file name is used as the description by default

When the details are complete click either the *Add and return to Add Image* button or the *Add and return to menu* button to add the image to the folder.

In addition to single image files, Click and Build will upload Zip files containing many images. This can speed up the Image set up process enormously. To upload a Zip file, click the *Browse* button to search for the appropriate Zip file on your computer or network, click the *Open* button, check the *Zip Archive* checkbox and click either the *Add and return to Add Image* button or the *Add and return to menu* button

Once the file has been uploaded it is automatically unzipped, and the folder is populated with the images. Dependent on the number of images within the Zip file, a response to clicking *Add* could take some time. **Note:** If you enter a description, it will be used for all the images from the zip file, however, for each image the description label changes by allocating a number suffix. Should you wish to find out more about Zip archiving software, contact your Click and Build supplier, or visit <http://www.winzip.com/>.

Image Options

Uploaded images can be viewed, modified (detail only), overwritten or deleted from this menu. You can select an image to edit by either the image ID number or by finding the image name in the folder catalogue using the drop down lists.

Click and Build manages images internally using Image ID Numbers and each image is assigned a unique ID automatically when it is uploaded. When you chose an image by name, for example choosing an image for a product in the Catalogue section, you are in fact just using the name to select an Image ID. This is why you can change both the name and description of an image associated with a particular ID number. Most menu options that offer image selection also provide an ID field should you wish to specify the image by its ID number.

View/Overwrite image

The name field can be used to change the name of the image that is displayed in drop down lists that refer to images. You can also browse for a new file to associate with an Image ID number, this can be very useful because if you need to change an image that appears in many places throughout your store you simply select the original image in Image Options, click *View/Overwrite* and browse for the new image. The new image will be associated with the ID number and it will be replaced everywhere it is used in your store.

Change image details

This enables you to change the name of the image and the description that is used in the

image report. To confirm any changes click the *Update and Return to Menu* button.

Deleting an image

Select the image to be deleted using the folder and name drop downs lists, check the *Confirm* checkbox and click *Delete*.

Operational Tip: Unused images should be regularly removed from the Click and Build libraries, as they increase the server space that your store uses, and may increase you're hosting charge as a result.

Image Library Report

To view the report of the image folders click the *Go* button in the report menu. This report will display each of the image folders and the content of the folder. The report displays the image ID numbers for each image in the folder (which is hyperlinked to the image for viewing), the image name and the description.

Look and Feel

This area enables you to define, and subsequently modify, the 'look and feel' of your store. You choose your store design from a series of templates, and then fine-tune the results to taste. To select any of the following areas, click the 'Go' button adjacent to the menu title.

Logo and Menu Images

Logo image

Select your logo image using the Folder and Image drop down lists. Make your logo visible by checking the visible checkbox. If you have the visible box checked but no image selected, the company name entry in the Personal Details section will be displayed.

Menu items

The menu Items are the navigation links that will be displayed to shoppers. Enable the link by checking the relevant Item Visible box. If you want to use an image instead of a text link choose an image from the folder and image drop downs and check the *Image Visible* checkbox.

User Text pages will be added to the item list as they are created and they will not be visible by default. Refer to the [Site Page Administration](#) chapter for more information.

Note: Links that refer to text pages that have no content will not be displayed even if Item Visible is checked.

Logo and Menu Positioning

To define the border elements of your page layouts, which determine where your company logo/name and menu appear on the screens within your store, select one of the layouts displayed and click the *Use this layout* button below it. The shop layout will be updated and a red outline will appear around the layout that you have selected. If the store is only using graphics for its navigational menu, you may wish to also include a text menu at the foot of the store's pages. Checking the box labeled *Include Text Links at Foot of Page* and clicking the *Update* button will activate the text links

Colour Scheme

This section sets up the basic colours displayed on the pages within your store. Select one of the schemes displayed and click the *Use this Scheme* button below it. The store's colour scheme will be updated and a red outline will appear around the layout that you have selected.

You may use the *Fine Tune Colour Scheme* menu to refine your colour choice or you can use Fine Tune to create your colour scheme from scratch with considerably greater control.

Fine Tune Colour Scheme

Background Image

You have the option to use a background image for your store, this is achieved by simply entering in the appropriate image ID number (if known) or selecting the name of the image from the drop down folder and image lists.

Changing Colours

To change a colour, select the item to change using the radio buttons, then use either the colour picker palette to choose a colour, the colour name or the Hex or RGB values to input the required colour. To use a Hex or RGB value, enter the value then click either *Use Hex Code* or *Use RGB* as appropriate. If you have a Javascript enabled browser, when you select any colour, a preview box appears which displays a sample of all of the currently selected colours.

When you have selected a colour from the palette, you will notice that the colour is highlighted with a flashing dotted box, and the Hex Code and the RGB numbers are automatically updated. An entry will appear in the Use Colour box only if you have chosen a colour for which there is a corresponding name. Named colours are Web Safe and further information about them is given in [Appendix E](#).

The five choices in the *Standard Setting Menu* enables you to choose the default text colours used in your store (these can then be changed in areas using Site Text Styles as outlined below). The choices are:

- Background Colour, which need not be selected if a background image, has been selected (above)
- Standard Link Colour, defines the colour of the hyperlinks displayed in the store, except those that are set up in the text type section. **Design Tip:** Using a different colour from the default text colour makes identification of un-clicked links easier for your shoppers.
- Active Link Colour, defines the colour of hyperlinks when they are clicked.
- Visited Link Colour, defines the colour of a hyperlink once the user has clicked it once.
- Default Text Colour, defines all entered textual content, except those that are set up in the text type section.

Design Tip: Keep your colour choices simple and complementary, green text on a red background will not encourage your shoppers to stay in your store for long. Similarly, using very similar colours will render your text invisible on some displays. By mirroring the real life shopping experience, lessons can be learnt from global franchises, whose stores that are clean and uncluttered, are a pleasure to shop in.

Text Type

Once you have selected your store colours, you can further refine text areas in your store using the style selector. This will allow you to override in areas the text colours (which will use the default settings made above unless changed), change fonts (typeface), sizes and style. To change a text style, select the type by clicking the radio button, select the font and size from the dropdown lists, then check Bold or Italic styles as appropriate. The choices for the font type are deliberately limited, (compared to the

pre-installed sets on most computers) in the interests of viewing similarity across the wide range of browsers and operating systems. The font sizes displayed in the drop down list are those used by your browser, and do not relate to point sizes that may be displayed in other software such as Word Processors; size 7 is the largest and size 1 the smallest:

Example Size 1 Font

Example Size 2 Font

Example Size 3 Font

Example Size 4 Font

Example Size 5 Font

Example Size 6 Font

Example Size 7 Font

Design Tip: Font size 3 is usually the browser default, but size 2 is sometimes preferable to save space, be careful with sizes 7 and 1. Be sparing with emboldening and italicising styles, as they should only really be used to emphasise a point here and there. There is no underline option as underlined text can be very easily confused with hyperlinks.

The styles that can be modified are as follows:

Normal Text:	The default text that is used throughout the store unless overridden
Category Link:	Category hyperlinks
Company Name:	Company name, which is only displayed if no company logo is uploaded
Discount Text:	Discount text
Main Header:	The main header on store screens
Sub Header:	Sub-headers on screens with more than one header
Label:	Text that describes input boxes, images, buttons etc. in your store
Navigation:	Store navigation hyperlinks
Product Links:	Product hyperlinks

Design Tip: To highlight discounts within your store, use a different colour for discounts to the rest of your text. You may wish to embolden the text and increase its size too.

Simply click the *Update* button at the foot of the form to update your choices.

Note: More than one text style can be changed prior to clicking the *Update* button.

Product Catalogue Layout

Categories are the top level of your product catalogue that shoppers will view, a top level product menu in effect. The Product Catalogue Layout section defines the arrangement of these Categories on the page. Options are available for graphics only navigation using image buttons, Image with text links or a drop down list. Text links only, are achieved by not specifying an image when creating the Category. Your categories need not all fit on a

single page, as Click and Build will automatically create additional pages if needed with forward, backward navigation for the shopper.

Select one of the layouts displayed and click the *Use this layout* button below it. The store's catalogue layout will be updated and a red outline will appear around the layout that you have selected

Brief Product Layout

The brief product layout is the next level down of the product catalogue designed to give the shopper enough information to identify a product. Although each example shows two products on each page this is an example only. Choose the number of products you wish displayed per page in the *Product displayed per page* field and click the *Update* button.

Design Tip: Don't make this number too high as images (for which there will in all likelihood, one for each product), take longer than text to display and if you have too many on one page, it may cause your shoppers to abort the loading of the page.

To define the layout that your shoppers will see when they have clicked a category; select one of the layouts displayed and click the *Use this layout* button below it. The store's brief product layout will be updated and a red outline will appear around the layout that you have selected.

Note: your shoppers can access the long product areas by clicking either the product name, or thumbnail image, therefore the ability to use a more graphical method of navigating the shopper to the product detail page can be achieved. This method is similar to making the catalogue layout more graphical.

Long Product Layout

Clicking on the product name or image in the Brief Product Layout for a product will take the shopper to the Long Product Layout. This will usually have a larger product image and a fuller description of the product. See [Catalogue Options](#) for more detail upon the product detail fields. If you wish to use just use the brief product pages, turn off the long product pages by un-checking the box labelled *Allow Long Product Pages In The Shop?* and clicking the *Update* button.

Defining the Long Product Layout is identical to defining Brief Product Layout.

Shopping List Settings

The shopping list appears to shoppers once they have placed the first item in their shopping basket and it can display a list of items in the basket, cost of each item and the total cost.

Layout

To choose the shopping list format, simply check the radio button next to format name, and click the '*Update Shopping List Options*' button.

- *Type A Full Listing* - The item description, item cost and total cost,
- *Type B Reduced Listing* - The number of items in the basket and the total cost.

To choose the shopping list format simply check the radio button next to format name, and click the 'Update Shopping List Options' button.

Changing Colours

To change a colour, select either *Shopping List Colour*, the *Text Colour* or the *Cell Colour* using the radio buttons, then either use the colour picker palette to choose a colour, choose the colour name or input the Hex or RGB values if you require a specific colour. To use a Hex or RGB value, enter the value then click either *Use Hex Code* or *Use RGB* as appropriate. If you have a Javascript enable browser, when you select any colour, a preview box appears which displays a sample of all of the currently selected colours (the preview does not show the listing type i.e. Full or Reduced)

When you have selected a colour from the palette, you will notice that the colour is highlighted with a flashing dotted box, and the Hex Code and the RGB numbers are automatically updated. An entry will appear in the Use Colour box only if you have chosen a colour for which there is a corresponding name. Named colours are Web Safe and further information about them is given in [Appendix E](#).

Font and text settings

You can change the font used on the shopping list by selecting the font from the drop down list. (See the Fine Tune Colour Scheme section of Look and Feel for more information on Fonts). Once you have selected a font, you can change any of the text displayed on the list by modifying the appropriate text box. The alignment of each of these can also be changed using the adjacent radio buttons.

Once you are happy with the look and feel of the shopping list click the *Update Shopping List Options* button to save the changes.

Tax and Shipment Options

Note: The examples given in this section are intended for clarification only, and should not be used as a template for any real taxation or shipping situation. If you are uncertain about taxation rules, duties or any other legal implications of trading on-line, professional guidance should be sought from an Accountant, Solicitor or other qualified advisor. For additional guidance on your tax and legal obligations WorldPay plc in association with Deloitte & Touche and Berwin Leighton have created <http://www.t@xandlegal.com/>. This intelligent system will guide you through a series of simple questions to provide you with tailored information relevant to your circumstances. To enter the web site simply click on their logo at the top of the screen.

Tax and shipping has to be flexible and that makes it appear complicated at first sight. But imagine you were going on holiday and had to give your new dispatcher simple instructions so that he could raise invoices and handle dispatch while you were away. You would need to tell the dispatcher.

- Which groups of goods to charge tax on (tax goods groups).
- What tax to charge on goods to various destinations (tax rate groups).
- What to charge for the various carriage types (shipping rates groups).
- Whether to calculate the shipping charges based on unit or weight etc. (shipping goods groups).

This could get pretty complicated, so to make it simpler you would gather things with identical characteristics into groups and give the values to the whole group.

For example lets say that you dispatch to every country in Europe (except France) and that they all share the same carriage charge and tax rate. Why give your dispatcher a table that lists your shipment charges and tax rates to each European country, it's always the same. Simply call the whole group of countries 'Europe' and tell him which carriage charge and tax rate to use for Europe.

This is the principle used by Click and Build's Tax and Shipping system, specify a common group name, assign values to the group and then add items to the group as needed. Need to ship to France now?, just add France to the Europe group and in one operation your dispatcher knows what carriage and tax rate to use.

How it works for the shopper

When the shopper is ready to buy they are offered a Despatch Choice, which you defined earlier. Lets say that they choose UK First Class Post. This choice clearly implies that they want delivery in the UK so this choice will bring the following to the order:

- UK Tax rates.
- The shipping cost by First Class Post.
- And the user will be limited to a delivery address in the UK (The country dropdown list for delivery address will only have UK in it).

So to make this work we have to predefine the tax rates, the shipping costs and the limits

for delivery address.

Run through the example below to get a feel for how the system works. Most of it won't make much sense at first but as far as understanding it goes, it will all come together when you set up Dispatch Choices at the end.

Shopper Locations

The shopper location allows you to define the limits for delivery addresses when the customer is choosing their dispatch method. This is how you stop someone choosing a UK delivery charge then giving a delivery address in Australia.

EXAMPLE

In our example we have 3 markets – the UK, US and Canada. The tax we charge and the delivery costs to the US and Canada are the same so we can consider these to be one market or 'Shopper Location'. So we need to set up 2 Shopper Locations – 'UK' and 'US & Canada'

- Click on the Tax and Shipping tab.
- Click the *Go* button for Shopper Locations.
- Click the *Add* button.
- In the Description Field type 'UK'.
- Click the *Selected Countries Only* radio button.
- Scroll down the countries list until you find the 'UK' then click on it once to select it.
- Click the *Add and Return to Add* button.
- In the Description Field type 'US & Canada'
- Scroll down the countries list until you find 'Canada' then click on it once to select it.
- Hold down the 'Ctrl' key on your keyboard to maintain the selection then scroll down and select the 'US'.
- Click the *Add and Return to Menu* button.

When you come to set up your own system the other two radio buttons can help with selection. The Local Selection button assumes the country of the store that was set in the Personal Details page.

Adding a Location

To add a new delivery location, click the *Add* button in the menu. You will now need to add a location description (i.e. as above) and the countries that are included in this location. You can state that the location is local therefore, all the listed countries are ignored or you can state which countries to include/exclude. To include a country to your delivery location variable simply select it from the list, (you can highlight multiple countries by holding down the 'CTRL' key when selecting) and confirm the *Selected Countries Only* radio button is selected before storing the location variable.

View / Edit a Location

Select the shopper location from the drop down list and click the *View/Edit* button to

change the description and the selection of the countries. To confirm any changes click the *Update* button.

Deleting a Location

When deleting, a *confirm* checkbox is displayed in order to avoid accidental deletions. This box needs to be checked before the delete button becomes effective.

Tax Configuration

There are two sections for setting up the tax parameters they are:

Tax Goods Groups

Tax goods groups are groups of products that have the same tax applied to them.

Example

In our example we will sell books and CD's. We sell over 1000 CD titles, which are all individual products, but they will all have the same tax rate applied to them, so we will have a Tax Group for CD's. The same applies to our 800 book titles so we will have another Tax Group called books.

- Click on the Tax and Shipment tab.
- Click the *Go* button for Tax Configuration.
- Click the *Add* button.
- In the Description Field type 'CDs'.
- Click the *Add and Return to Add* button.
- In the Description Field type 'Books'.
- Click the *Add and Return to Menu* button.

View / Edit Tax Goods Groups

Select the Tax Goods Group from the drop down list and click the *View/Edit* button to change any of the entries. To confirm any changes click the *Update* button.

Deleting a Tax Goods Group

When deleting, a confirm checkbox is displayed in order to avoid accidental deletions. This box needs to be checked before the *Delete* button becomes effective.

The tax goods groups will be selected when setting up products in [Catalogue Options](#).

It should be clear that the international rules regarding the taxation on goods sold by you to shoppers anywhere in the world, regardless of where you are located, are irrelevant as far as Click and Build is concerned, as the functionality of this software enables you to specify your own tax rules.

Tax Rate Groups

Tax Rates Groups are the rates of tax applicable on each product to each location.

Example

In our example we will need to specify the tax for our two Goods Groups (CD's and Books) to our two Shopper Locations (UK and US & Canada).

- Click on the Tax and Shipment tab.
- Click the *Go* button for Tax Configuration.

- In the Tax Rates Group Menu Click the *Add* button.
- In the Description Field type 'UK Tax'.
- In the UK, books are rated at 0% and CD's at 17.5% so enter these two figures in the boxes provided.
- Click the *Add and Return to Add* button.
- In the Description Field type 'Export Tax'.
- If we are exporting, both books and CD's will be at 0% so enter this in both boxes.
- Click the *Add and Return to Menu* button.

View / Edit Tax Rates Groups

Select the Tax Rates Group from the drop down list and click the *View/Edit* button to change any of the entries. To confirm any changes click the *Update* button.

Deleting a Tax Rates Group

When deleting, a confirm checkbox is displayed in order to avoid accidental deletions. This box needs to be checked before the *Delete button* becomes effective.

Shipping Configuration

The first time you enter this section you will be presented with the shipping model options. These screens will allow the option of including additional fields for greater details when setting up both the shipping goods group and the shipping rates group. To re-enter the Shipping model options after the initial set up, enter the Shipping Configuration menu and at the bottom of the menu you will have the option to change the shipping model contents again.

Shipping Model Options

Click and Build Standard Model

You have three additional options for setting up your shipping parameters they are:

- Use Cost Limit - this enables you to set a maximum and minimum cost for your shipping, regardless of the amount of goods dispatched.
- Apply Tax on Shipping - this option enables you to add a tax component to your shipping charges.
- Allow CSV Upload of Rates - you can apply variable rates to the different shipping rate groups by uploading a CSV file with the information pre-set. See [Appendix F](#) for more details on the format of the CSV format.

To include any of these options simply check their adjacent boxes and these additional entries fields will then be added for configuring the shipping parameters.

Click the *Store Options* button to update the options.

Shipping Goods Group

Shipping Groups are groups of goods that have the same shipping charges scheme i.e. you charge the same per unit or the same per unit of weight.

Example

In our example we will have a fixed shipping charge for CD's, but for books, which vary widely we will charge by weight so we need two Shipping Goods Groups which we will call CD's and Books.

- Click on the Tax and Shipment tab.
- Click the *Go* button for Shipping Configuration.
- In the Shipping Goods Group Menu Click the *Add* button.
- In the Description Field type 'CDs'.
- Click the *Add and Return to Add* button.
- In the Description Field type 'Books'.
- Click the *Add and Return to Menu* button.

View / Edit Shipping Goods Groups

Select the Shipping Goods Group from the drop down list and click the *View/Edit* button to change any of the entries. To confirm any changes click the *Update* button.

Deleting a Shipping Goods Group

When deleting, a confirm checkbox is displayed in order to avoid accidental deletions. This box needs to be checked before the *Delete* button becomes effective.

Shipping Goods Group Options

In this section you choose whether to apply shipping costs at product item level, shipping group level or on the whole order. When selecting the *Whole Order level* you must also choose a previously entered shipping goods group (see above) as no costs will have been previously assigned. **Operational Tip:** If your store is selling a wide range of different product then you must only apply shipping at a product item level. However, if you store is selling only one type of product like CD's then you can apply shipping to the whole order level.

The Shipping Goods Group will be selected when setting up products in [Catalogue Options](#).

Shipping Rates Group

Shipping Rates Groups are individual tables of our shipping charges by each shipping method to each location for each Goods Group. **Note:** These are the charges that you will charge the shopper and not costs from the carriers. You will need to get price lists from your chosen carriers but you do not necessarily need to duplicate them here, you may set up a much simpler pricing structure if you wish.

Example

In our example we will use two carriers. First Class Post in the UK and United Parcels Service (UPS) for the US and Canada. (None of the prices used reflect real rates)

- Click on the Tax and Shipment tab.
- Click the *Go* button for Shipping Configuration.
- In the Shipping Rates Group Menu Click the *Add* button.
- In the Description Field type 'UK First Class Post'.
- Our Goods Groups are already displayed and we will charge for books by weight,

so for Books select a rate type of Weight from the drop down list.

- In the Books Rate box type '2.50' – this is the rate in our default currency (set by the installation Manager when you store was created) per unit of weight we you will charge. **Note:** You can choose your own unit of weight, which can be whatever is appropriate, but you must use the same unit when you specify the weight of products later.
- In the Min box type '2.45' this will be our minimum shipment charge for Books.
- In the Max box type '45' this will be our maximum shipment charge for Books.
- In Tax Rate type '17.5' we will add 17.5% tax to our shipping charge.
- For this example we won't use rates from a CSV file so leave this blank (Further information on CSV Rate files can be found in [Appendix F](#)).
- In the CD section choose a Rate Type of Fixed and enter 1.50 in the Rate box.
- Duplicate all of the other figures from Books for the CD section. Now we are set up to charge for 1.50 each to ship CD's with a minimum charge of 3.00 and a max of 45.00.
- Click the *Add and Return to Add* button.
- In the Description Field type 'US & Canada by UPS'.
- Duplicate the set up from First Class post using your own rates, (don't forget you won't be able to charge tax on shipping to the US and Canada).
- Click the *Add and Return to Menu* button.

Shipping Rate Types:

- By Fixed Price - An uncommonly used method, as the figure derived is not variable according to the number of products ordered. The shipping cost is derived from the figure entered in the rate box.
- By Unit - A commonly used method, where the shipping cost per unit (as entered in the rate box) is multiplied by the amount of items bought.
- By Value Percentage - the shipping cost is derived from the percentage entered in the rate box, multiplied by the product cost.
- By Weight - the price per weight unit is entered in the rate box. Used in combination with the weight of the product (as entered in [Catalogue Options](#)), a shipping cost is derived by multiplying one figure with the other. The actual weight unit (g, Kg) used in both areas is irrelevant, as all that is required is the result of the multiplication (the weight figures are not actually displayed to shoppers).

View / Edit Shipping Rates Groups

Select the Shipping Rates Group from the drop down list and click the *View/Edit* button to change any of the entries. To confirm any changes click the *Update* button.

Deleting a Shipping Rates Group

When deleting, a confirm checkbox is displayed in order to avoid accidental deletions. This box needs to be checked before the *Delete* button becomes effective.

Shopper Dispatch Choices

This area is used to draw together the tax and shipping rates and the delivery location enabling a single choice to be made by your shoppers prior to shopping (this is made upon entry to the stores catalogue at the same time as the choice of currency, so it will not inconvenience them).

Example

In our example we will set up two Dispatch Choices, one for UK shoppers and one for US and Canadian shoppers.

- Click on the Tax and Shipment tab.
- Click the Go button for Shopper Dispatch Choices.
- In the Add Shopper Dispatch Choice Menu Click the Add button.
- In the Description Field type 'UK Shopper'.
- In the Tax Rate Group drop down list select 'UK Tax'.
- In the Shipping Rate Group drop down list select 'UK First Class Post'.
- In the Shopper Location drop down list select 'UK'.
- Click the *Add and Return to Add* button.
- In the Add Shopper Dispatch Choice Menu Click the *Add* button.
- In the Description Field type 'US or Canada Shopper'.
- In the Tax Rate Group drop down list select 'Export'.
- In the Shipping Rate Group drop down list select 'US and Canada by UPS'.
- In the Shopper Location drop down list select 'US and Canada'.
- Click the *Add and Return to Menu* button.

Now we can offer the shopper a single choice that will select the tax and shipping rates that will be applied to the order and limit where the order can be dispatched.

If the shopper selects 'US or Canada Shopper' their order will have tax charged at the Export rate, they will be charged for delivery by UPS, and when they enter their delivery address the country drop down list will only have options for the US and Canada.

View / Edit Shopper Dispatch Choice

Select the Shipping Rates Group from the drop down list and click the *View/Edit* button to change any of the entries. To confirm any changes click the *Update* button.

Deleting a Shopper Dispatch Choice

When deleting, a confirm checkbox is displayed in order to avoid accidental deletions. This box needs to be checked before the *Delete* button becomes effective.

Reporting

To enter any of the tax and shipping reports simply click the Go button adjacent to the reports title.

Tax Rules Report

The tax rules report displays an ID number of each of the [Tax Goods Groups](#) and enables you to edit each of the group's details by checking the radio button next to the

groups name and clicking the edit button at the bottom of the report.

Shipping Rules Report

The shipping rules report displays an ID number of each of the [Shipping Goods Group](#) and also enables you to edit each of the groups details by checking the radio button next to the groups name and clicking the edit button at the bottom of the report.

Discount Options

Discounts are defined globally, that is you define as many different discount options, as you need for your whole store and then apply the relevant discount(s) to each product when you create your inventory.

Methods of Discounting

Click and Build has 3 different methods of discounting:

- **x** items for the price of **y** items (for example, 3 for the price of 2 of a particular product.)
- **x** % discount on goods value over **y** (for example, 10% off if you spend over £100 in total, 5% discount if you order \$10 worth of this product.)
- Free shipping on orders over **x** value (for example, free shipping if you order over £100 worth of goods.)

When applied at product or whole order value, before or after tax, this equates to 10 possible variations of the methods (tax is irrelevant in **x** for the price of **y** calculations).

Note: The use of the maximum shipping rate method, as explained in [Tax and Shipping Options](#), introduces a further method).

Adding a New Discount

To add a new discount click, the *Add* button in the discount menu. You will now enter the add new discount menu which will require you to enter the following criteria:

Description

Used to identify the different schemes you have set up when choosing one during product/variant set up within the [Catalogue Options](#).

Valid From

Used to set a duration for the discount: - the start date and number of days the discount, is valid (non-entry into this field makes the discount apply all of the time)

Then, one of:

- **x** items for the price of **y** items - enter **x** and **y** figures, and whether the lowest or highest price item should be discounted (when applying the discount at order level).
- **x** % off over **y** value ordered - enter **x** and **y** figures, and whether the discount is to be applied before tax, or after.
- No shipping charge for orders over **x** value - enter **x** figure, and whether the discount is to be applied before tax, or after.

Click either the *Add and Return to Add Discount* or *Add and Return to Menu* buttons at the foot of the form to accept the screen input.

Repeat this process for each discount method that you wish to add.

Viewing / Editing a Discount

From the drop down list, choose the discount that you wish to amend then click on the *View/Edit* button to enter the existing discount menu. **Note:** You can only change the specific discount values and you cannot change the method of the discount. To save the changes made to the discount click the *Update* button.

Deleting a Discount

In the discount menu select the discount from the drop down list that you wish to delete, once selected click on the *Delete* button. When deleting, a *confirm* checkbox is displayed in order to avoid accidental deletions. This box needs to be checked before the delete button becomes effective.

Choosing a Discount Level

Click the "Choose a Discount Level" *Go* button to apply a discount at a product/variant level or to the basket order as a whole. If basket level is selected, a pre-entered discount scheme must be associated with it in order to let the software know which scheme from the ones previously entered applies. The pre-entered discount scheme is selected from the drop down list labelled basket level. You also have the option of applying the discount pre or post tax. Click the *Update* button to apply the level.

Discount Report

To view all the discounts currently being used click the *Go* button in the Run Discount Report menu. This report displays the discount ID number and description. To view details of the discount check the *link to discount edit* radio button adjacent to the discount description and then click the *View/Edit* button at the bottom of the report.

Instructions Options

This area enables you to configure Click and Build, so that it can receive instructions from the shoppers concerning the goods they have ordered. Instructions are defined globally, that is you define as many different Instruction options as you need for your whole store and then apply the relevant Instruction(s) to each product when you create your inventory.

The shopper provides instructions by selecting them from either a drop down list, or by keying in free text. Choices can be used to collect the shoppers preference for packaging type, preferred delivery day and so on. Free text can be used to make a slogan for a T-shirt or a greetings card message.

Adding a New Instruction

To add a new instruction, click the *Add* button in the instruction menu. You will enter the add new instruction menu which will require you to enter the following criteria:

Description

Used to distinguish different instructions, it is also displayed when your shopper reviews their basket content.

Prompt

A prompt displayed to the shopper on the actual product page to enter or select an instruction. Examples of Instruction Prompts could be 'Choose a Colour' or 'Add your greeting'.

Variables

These can either be entered as a series of items that present the shopper with a drop down list. Each item is entered on a separate line in the variables box. If the variables box is left blank the shopper will be prompted to enter text rather than make a choice from a list.

Design Tip: If you wish to prompt for size, colours etc, but wish to maintain discrete stock amounts for these variations on product, use variants instead of instructions (explained in the [Catalogue Options](#)).

Maximum Length

If the variables box (above) is left blank, indicating that you wish to accept text from your shoppers, you can specify the maximum length of the input box that is presented to the shopper here.

Options (Empty input not allowed)

Click the checkbox to force the input of data from the shopper.

Sort Priority

A sort priority enables an instruction to have an importance level. By associating an instruction with a priority number, you can apply an order in which the instructions are displayed on the long detail product page. You may use any numbering scheme that you wish however; lower numbered items will be displayed first.

Click either the *Add and Return to Add Instructions* button or the *Add and Return to Menu* button to submit the new instruction. You can also clear the form by clicking the *Clear Form* button.

Viewing / Editing an Instruction

From the drop down list choose the instruction that you wish to amend then click on the *View/Edit* button to enter the existing instruction menu. To save the changes made to the instruction click the *Update* button.

Deleting an Instruction

In the instruction menu select the instruction from the drop down list that you wish to delete, once selected click on the *Delete* button. When deleting, a *confirm* checkbox is displayed in order to avoid accidental deletions. This box needs to be checked before the delete button becomes effective.

Instructions Report

To view all the instructions currently being used, click on the *Go* button in the Report Menu. This report displays the instruction ID number and description. It will also give you the chance to view/edit details of the instruction, check the *Edit Instruction* radio button adjacent to instruction description, and then click the *View/Edit* button at the bottom of the report.

Downloadable Goods

Downloadable Goods are software, documents, images etc. that can be downloaded by the shopper following a successful order transaction, as opposed to those that are shipped physically in the traditional way.

Downloadable goods are uploaded and administered in a similar fashion to the Image Library. The upload method and allocation of ID numbers (for later attachment to products) is also very similar. A time limit is attached at product set up level (within [Catalogue Options](#)), which dictates the amount of time the 'virtual' page holding the download link to the file is available to shoppers following authorised payment.

Download times are determined by the shopper's connection speed (see table below) and by bandwidth throttling at the server. Bandwidth throttling is used by a Web Server Manager to limit the speed for individual download connections to control the load placed on the server and it's communications channels.

Guideline Download Times

Connection speed	File Size					
	100K	500K	1MB	1.5MB	2MB	5MB
9600 bps 9.6 Kbps	1 min. 25 sec.	7 min. 7 sec.	14 min. 13 sec.	21 min. 20 sec.	28 min. 27 sec.	71 min. 7 sec.
14400 bps 14.4 Kbps	57 sec.	4 min. 44 sec.	9 min. 29 sec.	14 min. 13 sec.	18 min. 58 sec.	47 min. 24 sec.
28800 bps 28.8 Kbps	28 sec.	2 min. 22 sec.	4 min. 44 sec.	7 min. 7 sec.	9 min. 29 sec.	23 min. 42 sec.
33600 bps 33.6 Kbps	24 sec.	2 min. 2 sec.	4 min. 4 sec.	6 min. 6 sec.	8 min. 8 sec.	20 min. 19 sec.
56000 bps 56 Kbps	15 sec.	1 min. 13 sec.	2 min. 27 sec.	3 min. 39 sec.	4 min. 53 sec.	12 min. 11 sec.
128 Kbps (ISDN)	6 sec.	32 sec.	1 min. 4 sec.	1 min. 36 sec.	2 min. 8 sec.	5 min. 20 sec.
1.5 Mbps (T1)	<1 sec.	3 sec.	5 sec.	8 sec.	11 sec.	27 sec.
45 Mbps (T3)	<1 sec.	<1 sec.	<1 sec.	<1 sec.	<1 sec.	1 sec.

Download Goods Folders

Download folders have to be defined prior to including downloadable goods. It is recommended that more than one folder be used, enabling a more structured download inventory.

Adding a folder

Click the *Add* folder button to enter a new folder menu, now enter the new folder name into the form, then click either the *Add and Return to Add folder* button or the *Add and Return to Menu* button to include the new folder.

View / Edit a folder

Once the folder has been defined; you can *View/Edit* the contents of the folder. This edit menu enables you to change the folder name and edit or delete any of the download files included in this folder. When deleting, a *confirm* checkbox is displayed in order to avoid accidental deletions. To delete a downloadable, this box needs to be checked before the delete button becomes effective.

Operational Tip: Deleting multiple downloads from a folder is not possible in one action. For large download catalogues this will become very time consuming therefore deleting of the folder is preferred. We therefore recommend the use of additional folders to allow you greater control of your library.

Operational Tip: As the menu displays all the downloadable goods in the folder, the menu list has been split into pages making it easy to navigate and find the download that you want. At the bottom of each page you're see navigational tools that allow you to jump to the next or previous pages and also to a specific page.

Deleting a folder

In the folder options menu select the folder name from the drop down list that you wish to delete, once selected click on the *Delete* button. When deleting, a *confirm* checkbox is displayed in order to avoid accidental deletions. This box needs to be checked before the delete button becomes effective.

Adding a download to a folder

In the Folder Options menu, select the folder to take the new file from the drop down list then click the *Add Goods* button, this will take you to the Add Downloadable Goods Menu. Click the *Browse* button to search for the file to be added. When you have selected the image click the *Open* button to upload your file to the folder.

You can use the Description field to add a description to the file to make Reporting more descriptive. If you don't enter a description, the file name is used as the description by default

When the details are complete click either the *Add and return to Add Goods* button or the *Add and return to menu* button to add the image to the folder.

In addition to single files, Click and Build will upload Zip files containing many files. This can speed up the set up process enormously. To upload a Zip file, click the *Browse* button to search for the appropriate Zip file on your computer or network, click the *Open* button, check the *Zip Archive* checkbox and click either the *Add and return to Add Goods* button or the *Add and return to menu* button. Once the file has been uploaded it is automatically unzipped, and the folder is populated with the files. Dependent on the number of files within the Zip, a response to clicking *Add* could take some time. **Note:** If you enter a description, it will be used for all the files from the zip file, however, for each download the description label changes by allocating a number suffix. Should you wish

to find out more about Zip archiving software, contact your Click and Build supplier, or visit <http://www.winzip.com/>.

IMPORTANT: While you are developing your store it will normally be set to test mode. This will enable you to test all of it's functionality including connection to the payment gateway, but the gateway will not debit any cards used in transactions. If you load "live" downloadable goods onto your site, anyone that knows or finds the URL of your site can order and download goods without making any payment. So if you intend to sell downloadable goods make them invisible (See the Catalogue section for details) and use downloadable material of no value for testing.

Goods Options

Downloadable goods can be viewed, modified (detail only), overwritten or deleted from this menu. You can select a download file by finding the download name in the drop down lists or typing in the files ID number (if known).

View/Overwrite download file

Selected the required download file and click the *View/Overwrite* button. Within the View/Overwrite screen, you can change the description of the downloadable file or even replace the file with another while keeping the ID the same. The downloadable file can also be tested to see that it downloads correctly. To do this, click the *Test Download* hyperlink. To confirm any changes, click either the *Update and Return to View/Overwrite* button or the *Update and Return to Menu* button. **Note:** The ID number will stay the same.

Change download details

This enables you to change the reference name of the file and the description for the downloadable goods report. To confirm any changes click the *Store* button.

Deleting a download

When deleting, a *confirm* checkbox is displayed in order to avoid accidental deletions. This box needs to be checked before the delete button becomes effective.

Operational Tip: Unused downloadable goods should be regularly removed from the Click and Build folders, as they will increase the server space that your store uses, and may increase the hosting charges as a result.

Download Library Report

To view the report of the downloadable goods folders click *Go* in the Report Menu. This report displays by folder, the downloadable goods name, description, ID number, last uploaded date and file size.

Site Page Administration

This section enables you to generate the content for the standard text pages with in your store; in addition it enables you to administrate your [User Pages](#), [News Articles](#) and [Guest book](#).

Standard Text Pages

There are eight standard text pages:

- Welcome Page
- Further Information Page
- Terms and Conditions Page
- Contact Details Page
- Category Selection Page.
- View Basket Page
- Order Authorisation Page
- Order Cancelled Page

All use the same method for data entry, which is described below. However, if you are linking your Click and Build store to a 'parent' site, you should not enter any text into the first four pages in the list (welcome through to contact), as non-entry removes the hyperlinks from all store menus (in conjunction with entry of a parent site URL as described in [Personal Details](#)).

Design Tip: The Terms and Conditions page will be accessible from the order confirmation form displayed to the shopper after they have finished shopping, (and before they transfer to WorldPay), so that these can be reviewed immediately prior to payment.

Adding Page Text

Select the page that you wish to change from the drop down list then depress the *Add/Edit* button. For each page, input boxes are displayed one at a time (for individual paragraphs or single words), into which either plain text or HTML can be entered.

Page formatting using plain text

For plain text, enter the text, and then select a text style (which can be defined in the [Look and Feel, Fine Tuning](#) section), leaving the 'HTML' box unchecked.

- To format as a list, enter the list items one on top of another in the input box.
- To include an image in your text either type in the image ID number (if known) or search for the name of the image in a folder, which was defined in the [Image Library](#).
- To allow text to wrap around the image you can select an image format (either left (text to right)/right (text to left)/text at top/text at bottom/text in centre), which will place the text to the image.

Click the *Store Text* button to accept your text entry and add a new empty text input box. In this way, paragraph after paragraph of text can be entered without having to learn HTML to achieve the effect. To reset the form, click on the *Reset Form* button.

To delete the image and all of the text check the *Remove Text* or *Remove Image* boxes and click the *Store Text* button. To replace the page's text with a default content check the *Replace text below with system default* box at the top of the menu.

Page formatting using HTML

Although standard page formatting exists as outlined above, you can also use HTML (the language used by designers to create web pages) in these input areas if you wish, by entering HTML formatted text, then checking the *HTML* checkbox prior to submission. Even if you don't know any HTML and are daunted by the thought of using a programming language, this is no more difficult than text formatting in a word processor. All you have to do is bracket the text to be formatted with HTML tags to achieve the desired effect(s). For example `<h1>` starts displaying text in a large size and `</h1>` turns the effect off again. The basic HTML tags, which should serve most users well, are as follows:

HTML Code	The word 'Example' appears....
<code><p>EXAMPLE</p></code>	in a single paragraph
<code><p align=right>EXAMPLE</p></code>	in a single paragraph aligned to the right
<code><p align=left>EXAMPLE</p></code>	in a single paragraph aligned to the left
<code><p align=center>EXAMPLE</p></code>	in a single paragraph aligned to the centre
<code><h1>EXAMPLE</h1></code>	as a large size header (with a line break after)
<code><h2> EXAMPLE</h2></code>	as a medium size header (with a line break)
<code><h3> EXAMPLE</h3></code>	as a small size header (with a line break)
<code>EXAMPLE</code>	appears emboldened
<code><i> EXAMPLE</i></code>	appears italicised
<code><center>EXAMPLE</center></code>	in the centre of the page
<code><p>EXAMPLE</p>
</code>	in a single paragraph but now has a break (or carriage return) after your text
<code><p>EXAMPLE</p><hr></code>	in a single paragraph but now has a horizontal rule across the page below the text.

Click and Build VHTML tags

Click and Build has an exclusive tag called *display*. This tag can be modified and has many different uses, for example:

`<display img=n>` (where n = an image identifier)

This tag enables you to display any image from one of your libraries.

To use the above 'tags' simply enter your text between them (in place of EXAMPLE as shown above) in all cases but the horizontal rule, the line break and the image display

(which do not need closing or / tags). You can also nest tags, as in the following example:

```
<center><p><b><i>EXAMPLE</i></b></p><br><display img=643></center>
```

This example would make the word EXAMPLE and the example image with the identifier of, say 643, appear in their own paragraph, text above image, emboldened, italicised, and centred.

If you are interested in learning more about HTML, contact your Click and Build provider, who should be able to recommend further reading material or courses. Alternatively, you can visit one of the numerous guides to HTML on the Web. Rest assured that if you do not know HTML, your Click and Build store will still look good and operate efficiently, as it is designed to accommodate both beginners as well as those who have HTML skills.

Click the *Store Text* button to accept your text entry and display anew input box. In this way, paragraph after paragraph of text can be entered without having to learn HTML to achieve the effect. To reset the form, click on the *Reset Form* button.

To delete the image and all of the text check the *Remove Text* or *Remove Image* boxes and click the *Store Text* button. To replace the pages text with a default content check the 'Replace text below with system default' box at the top of the menu.

Editing Page text

Select the required text section from the drop down list and then click the *View/Edit* button to go to the page's text page.

Deleting page text

In the choose text option menu select the page text that you wish to delete from the drop down list, once selected click on the *Delete* button. When deleting, a *confirm* checkbox is displayed in order to avoid accidental deletions. This box needs to be checked before the delete button becomes effective.

User Page Administration

You can add additional user pages to your store other than the included eight, outlined above.

Adding a user page

To add a new user page click the *Add* a user page button, you will then need to enter a title for your new page, a link text name and then the content of that new user page.

User Page Title

The title of the user page is only used for administration purposes.

Link Text

To display the link text in your store:

- Go to the [Look and Feel](#) chapter of Click and Build.
- Click on the Logo and Menu Images selection *Go* button

- Ensure that there is a tick in the *Item Visible* check box next to your user page's title.

At the Look and Feel section of Click and Build, you can also add a navigational image to your user page text link.

User page text content

To add the user page content follow the instructions given in the *Add Page Text* section of this guide. When you have added the content for your user page click either the *Add User Page and Return to Add* or the *Add user Page and Return to Admin* buttons to submit the new user page.

Editing a user Page

To edit a user page, select the pages name for the drop down list and then click the *View/Edit* button. Within the edit screen you can change the title, the link text and any of the user pages content. In addition, you can delete all of the text and images from the pages content by checking either the *Remove Text* or *Remove Image* boxes. To confirm any changes click the *Update* button or to clear all the information, click the *Reset Form* button.

Deleting a user page

Select the user page from the drop down list that you wish to delete, once selected click on the *Delete* button. When deleting, a *confirm* checkbox is displayed in order to avoid accidental deletions. This box needs to be checked before the delete button becomes effective.

News Administration

You can use news article pages to pass on special information to your shopper (for example, press releases, upcoming offer(s) and so on). To create a news article, click on the *Add* button in the News Administration menu.

Adding an article

To add an article, click the *Add* an article button. At the News page, enter a reference title, an activity period for that article, a name of a product that the article applies to and the article text itself.

Reference Title

The title of the article is only used for administration purposes.

Activity period (Start/End Dates)

This enables you to give the article an access period. For example, an article states that a product was that month's bestseller, which means that next month the article will be out of date. By giving the article an activity period, you can guarantee that your shoppers have the up to date information about your products and services. You can also force the article to remain visible even when the activity period is at an end by checking the *Force Visible (ignore dates)* check box.

Relating an article to a Product

By entering a product's name, you can create a link between a product and a article that relates to that product. For example, if there is a recent press release upon one of the products that you are selling, you can attach that release, enabling shoppers access to additional information upon a product. When linked, there will be both a link to the article from the product catalogue and a link to the related product from the news article list.

Article text

Follow the instruction given in the *Add Page Text* section of this guide (above). When you have added the article text click either the *Add Article and Return to Add* or the *Add Article and Return to Admin* buttons to submit the new article.

Editing a News Article

To edit an article, select the article name for the drop down list and then click the *View/Edit* button. Within the edit screen you can change any of the parameters stated above. In addition, you can delete the link to a product by clicking the *Delete?* button next to the product's name and delete all of the text and images by checking either the *Remove Text* or *Remove Image* boxes. To confirm any changes click the *Update* button or to clear all the information, click the *Reset Form* button.

Deleting Articles

Select the article from the drop down list that you wish to delete, once selected click on the *Delete* button. When deleting, a *confirm* checkbox is displayed in order to avoid accidental deletions. This box needs to be checked before the delete button becomes effective.

Guest Book Administration

The guest book is automatically generated for you and enables your shoppers to add their personal details and any comments that they have about the store and its content. The shoppers can enter the guest book from the navigation menu in the store (provided the link is activated in the [Look and Feel](#) section of Click and Build). When a shopper has entered an article in your quest book it can be modified or deleted within the Guest Book Administration menu. **Note:** The menu does not have any functions until the first Guest Book entry is created.

Editing a Guest Book comment

To edit a comment select the comment name for the drop down list and then click the *View/Edit* button. Within this edit screen you can change any of the parameters below.

Shopper name

When your shopper has completed and submitted a comment using the quest book form. The initial field that they entered is their name, which you may need to change to make a more relevant title.

Make visible

Each quest book entry that your shoppers have entered is by default **not** initially displayed in your store, this enables you to review each of the comments content before releasing it back into your store. To make a comment visible in the store's quest book

tick the *Make Visible* checkbox.

Edit page text

This is the same procedure as the changing of site page text. When you have edited the comment text click the *Update* button to confirm the changes.

Deleting a Guest Book comment

Select the comment from the drop down list that you wish to delete, once selected click on the *Delete* button. When deleting, a *confirm* checkbox is displayed in order to avoid accidental deletions. This box needs to be checked before the delete button becomes effective.

Catalogue Options

Now that you have set up the generic and look and feel parameters for your store, this section enables you to define how the heart of your store operates. This administration area enables you to set up product categories and then add individual products in these categories; it also enables you to upload the whole of your inventory as a CSV file and report on the structure of your store's catalogue.

Category Setup

Adding a Category

Click the *Add* product category button to start inputting the different categories and sub-categories required for the structure of your product inventory. **Note:** The categories will only be displayed to your shoppers if they contain at least one product.

Category Image

If you have decided to include an image as a link to a category, then it is displayed to your shoppers alongside the category's name and laid out depending upon the selection of the category layout in the [Look and Feel](#) chapter. To enter an image, either type in the image ID number (if known) or search for the name of the image in the folder that was defined in the [Image Library](#).

Category Name

The category name is displayed to the shopper alongside the category image above. The category name is also a hyperlink, which enables your shoppers' access to the brief product pages of the products contained in that category. Enter a descriptive name for the category to prevent confusion for your shoppers.

Sort Priority

The sort priority enables a category to have an importance level. By associating a category with a priority number you can apply an order in which the categories are displayed in your store. You can choose your own numbering system however lower numbers will appear first.

Product Displayed per Page

By entering a number in the *Product displayed per page* field you can specify the number of products that are displayed on the brief product page for that category.

Visible

When checked, it makes the category visible to shoppers. **Note:** The default setting is 'Invisible' so that shoppers will not see categories under development. To temporarily make a category and all the products in that category invisible in your store, simply un-check the *Visible* checkbox.

Description

The description will be displayed at the top of the category's brief product pages, and is there to provide the shopper with a more detailed summary of what products are contained within that category. Entry of the description either as a standard format or as

HTML is carried out in the same way as in the [Site Pages Administration](#).

Parent Category

Using this drop down list you can state that your new category is a sub-category (child) to a parent category, thus obtaining a structured method of breaking down your product inventory into smaller categories. The parent for your new category can also be a child to another category, therefore some pre-planning of your product inventory structure would prove beneficial to avoid confusion.

When each of the parameters above have been filled out click either the *Add and Return to Add* or the *Add and return to Menu* buttons to confirm the new category. To clear the menu, click the *Reset Form* button.

View / Edit a Category

Select a category from the drop down list and then click the *View/Edit* button to change the content of that category. You can change any of the category's parameters as above; in addition, you can now include a new category as a sub-category or 'child' to your chosen category. Click the *Add Child Category* button, and fill out the new category details menu to include this new category as a child to your now parent category.

Deleting a Category

Select the category's name from the drop down list that you wish to delete, once selected click on the *Delete* button. When deleting, a *confirm* checkbox is displayed in order to avoid accidental deletions. This box needs to be checked before the delete button becomes effective.

Quick Edit

Select a category name from the drop down list and click the *Quick Edit* button. This displays a screen that shows all of the products that are included in that category, and enables you to quickly edit some of the product's details. You can view any of the product or variant details in full by clicking on the relevant hyper linked name. However, the main purpose of *Quick Edit* is to quickly:

- i) enable you to make your products visible to your shoppers by ticking the *Visible* checkbox.
- ii) to edit the price of each of the products.
- iii) to change the stock levels of the products.

After changing any the product's details click the *Update* button to confirm the changes.

Adding a new product

Once you have entered the product categories, you need to complete your inventory by adding your products into their categories. From the drop down list, select the category that you wish to add a product to and click the *Add Product* button. At the next screen, enter the new product's parameters, including the product's name, description and product image and details on the product's tax and shipping, discount applied and the product's variant(s).

Product Parameters

Product Code

An optional parameter. Use this if you wish to implement product part numbering. Not displayed to the shopper.

Product Name

The product name is displayed to the shopper and is hyper linked (as is the associated thumbnail image), to an area displaying the long description and a larger size image of the product.

Sort Priority

The sort priority enables a product to have an importance level, by associating a product with a priority number you can apply an order in which the products are displayed on the brief detail product pages. You can choose your own numbering system however lower numbers will appear first.

Visible

When checked, it makes the product visible to customers. To temporarily make products invisible in your store, simply un-check the *Visible* checkbox.

In (Category)

Using the drop down list you can select a different initial category, that the product will be stored in, also the amount of time that it is visible in this catalogue. By default it will display the category that was chosen before entering the *Add Product* screen. Products may reside in multiple categories; add the product to additional categories by clicking *Add and Add a Category Entry* button at the bottom of the menu or by entering the edit product screen (see [Product Options](#)).

Descriptive Keywords

A shopper will be able to search your catalogue either by category, or by using keywords. You should enter any descriptive words for your product that will help accommodate this search method. **Design Tip:** Always include the full product name, manufacturer, model number and so on.

Brief Description

You may set up two textual descriptions of your products; brief and short descriptions. The brief description is displayed in the brief product pages, which is the initial product page that is displayed to your shoppers. Several brief product details can be displayed at once, dependent on the number chosen in [Look and Feel](#). The thumbnail image, described below, will also be displayed alongside the brief description. Entry of brief description text is carried out in the same way as in [Site Pages Administration](#).

Design Tip: The use of any of the list formats that are included could help present a product feature list to your shoppers in both the brief and full product pages.

Long Description

The long description is displayed when the shopper is viewing the brief product page and clicks the Product Name hyperlink or thumbnail image. The purpose of the two description areas (Brief & Long) can be best illustrated with this example, a CD's artist and CD title can be entered in the short description, and further details like the track

listing is entered in the long description. Alternatively, a book and author title can be entered in the short description and a chapter extract in the long. Be cautious about the amount of data entered here, as it will take longer to display large amounts of text to your shoppers, and will increase the amount of server space used. A different graphic of the product can displayed alongside this text.

Design Tip: If you enter track listings or similar lists in this area, use one of the list formats to display it properly. A mix of images and different text styles can give your product descriptions a very professional output.

Design Tip: The Brief description area is the page that the shopper will use to identify the product so it needs to load quickly. Use a small image of the product and minimal descriptive text. Use a larger image and fuller description in the Long Description area to give the shopper more information about the product.

Image

This image is displayed with the long description. To enter an image either type in the image ID number (if known) or search for the name of the image in a folder which was defined in the [Image library](#). Here is where you feel the benefit of keeping your images in libraries that mirror your categories as previously suggested.

Thumbnail Image

This image will be displayed in the brief product pages, alongside the brief description. To enter a thumbnail image either type in the image ID number (if known) or search for the name of the image in the image library folder using the drop down lists.

Design Tip: This image will be hyper linked, so you may want to consider a more descriptive image, rather than a thumbnail of the larger image (as outlined above).

Tax Rate Group

This parameter is used to choose a previously defined tax rate group for the product. A description of tax rate group setup and use is given in the [Tax and Shipping Options](#) chapter.

Shipping Rate Group

This parameter is used to choose a previously defined shipping rate group for the product. It is either used in conjunction with the shipping parameters below, or standalone (which will render it applicable only to the unit, percentage value or fixed cost). A description of shipping rate group setup and use is given in the [Tax and Shipping Options](#) chapter.

Discount Scheme

This parameter is used to apply a previously defined discount scheme to a product. A description of the discount setup and use is given in the [Discount Options](#) chapter.

Instruction

Select an instruction's name, or select multiple instructions by holding down CTRL and highlighting them for the list, until all the relevant instructions have been associated with the product. A description of the instructions setup and use is given in the [Instruction Options](#) chapter.

Shipping Parameters

These parameters are used with the figures entered in Shipping Rates Group for shipping rate calculations based on weight or size. The weight unit (grams, kilograms, etc.) and the dimension units (mm's, cm's or inch's) are irrelevant providing the same unit is used in both areas. If the product is being shipped on a unit, percentage value or fixed price basis, these parameters can be ignored. The dimension shipping parameters are not used in the Click and Build Standard Shipping Model (see [Tax and Shipping Options](#) for more details).

Initial Variant

Variants are used to sub-classify variations of a single product. For example, size or colour variations. This can also be used for variations of any products that have similar descriptive characteristics (i.e. for films the classifications are either Video or DVD, and for music they could be Vinyl/CD/Cassette/Minidisc etc). Variants have their own stock amounts and pricing so if you do not wish to use stock control but do wish to sub-classify, you should use [Instructions](#) instead. If you are not using any variants, an initial variant name need not be entered, although the other details in this section (price, stock details, and goods type) are required.

Design Tip: For associated products, such as batteries for electrical equipment, or accessories for audio/video equipment, a variant can be set up so that they are alongside the parent item.

Operational Tip: If a product has more than one variant then you can add the additional variants by clicking the *Add and Add a Variant* button at the bottom of the page or enter the product options edit screen (see below).

To add a product variant you will need to fill in the following parameters:

Variant Name

This parameter needs only to be entered if you are planning to apply more than one variant to the product. Enter a descriptive name, as this will be displayed to your shoppers.

Price

Enter the price in the *base Currency* (the currency that your store was set up with) for the product, this will then be re-calculated automatically for the shopper dependant upon the shoppers currency choice when they enter your store. As the exchange rate variations are handled via the real-time link to WorldPay the prices displayed to your shopper could vary from day to day.

Operational Tip: If you have not subscribed to WorldPay's multi-currency system, we recommend that you consider taking the option. Additional currencies make your products much more accessible to your shoppers from countries outside your own by allowing shoppers to make an easy 'value for money judgement' in their own currency.

Make visible to Shoppers

When checked, it makes the product's variant visible to your shoppers. To temporarily remove the variant from shoppers view simply un-check the *Visible* checkbox.

Use Stock Checking

Tick this checkbox if you want Click and Build to maintain a stock level on this product/variant, display the stock level to shoppers and provide you with low stock or stock depletion emails.

Operational Tip: If you did not include stock checking in your initial variant, but wish to include this functionality to the product, then you will need to delete the product's variant and recreate it using the product option variant edit menu.

Sort Priority

The sort priority enables a variant to have an importance level, by associating a variant with a priority number you can apply an order in which the variants are displayed on the product pages. You can choose your own numbering system however lower numbers will appear first.

Initial Stock

Enter the initial amount of stock, this value will then be displayed in your store provided you have checked the *Use Stock Checking* box above.

Re-order Level

When a shopper adds a product to their basket the available stock level will be depleted.

Note: If the shopper subsequently leaves the store without ordering or their payment is unsuccessful the stock level will be restored after a timeout period. When the stock level reaches the re-order level, an (optional) email will be sent to you by Click and Build advising you that your stock is low and should be replenished.

When stock is completely depleted, no quantity input box for ordering that product will be displayed to shoppers until the stock level has been replenished. The replenishing of stock is achieved in the product option edit menu. Complete depletion of stock also triggers an (optional) email to you. See the [Personal Details](#) chapter for more details.

Goods Type

Choose either hard goods, (a product that has to be physically shipped to your shopper) or downloadable goods (a piece of software or information that can be downloaded from a virtual page) from the drop down list provided.

Downloadable Goods Settings

Important Note: *While you are developing your store it will normally be set to test mode. This will enable you to test all of its functionality including connection to the payment gateway, but the gateway will not debit any cards used in transactions. If you load "live" downloadable goods onto your site, anyone that knows or finds the URL of your site can order and download goods without making any payment. So if you intend to upload downloadable goods before your site is live, make them invisible (See the [Catalogue Options](#) chapter for details) and use downloadable material of no value for testing.*

If your product is downloadable, then you will need to select the downloadable file by finding the relevant file (that you previously uploaded) from the drop down lists or by typing in the file ID number (if known). This file will be available to the shopper upon successful completion of a card transaction, from a time expired, 'virtual' page (that

cannot be book-marked).

Allow Access To Purchasers is where you enter the amount of days/hours that your shopper can access the virtual page to download their purchased file. **Note:** The time entered should reflect how long it might take a shopper accessing your store via a slow modem link to download the product. Refer to the table in [Download Options](#).

Requires Delivery checkbox enables your downloadable goods to be both downloaded and physically shipped to your shopper as normal hard goods. For example you may need to send a hardcopy manual to accompany the software.

Discount Scheme

This parameter is used to apply a discount scheme to a particular variant of a product for example, a 3 for 2 offer or a 20% discount after spending £100. A description of the discount setup and use is given in the [Discount Options](#) chapter.

Instruction

Different instructions can be related to variants of a product. These instructions allow the your shoppers to select different versions of a particular variant of a product, i.e. the choice of colour for a size of the product. Simply select the instruction's name, (or select multiple instructions by holding down the 'CTRL' key) from the list provided. A description of the instructions setup and use is given in the [Instruction Options](#) chapter.

Product Options

The product details can be viewed, edited or deleted from this menu by simply selecting the products name from the drop down list and then by clicking any of the following option buttons.

View/Edit

When you have selected a product from the drop down it can be viewed in more detail by clicking the *View/Edit* button. You can change any of the products parameters set out above and the choice of which categories the product appears in. You may also add a new variant to the product. To confirm any changes click either the *Add and Return to Add* button or the *Add and Return to Menu* button.

Editing Variants to the Product

Within the edit product screen is the Variant Option menu that enables you to edit the initial variant of the product and add new variants. See the sections above for explanations of the individual fields.

The Variant Edit menu also enables you to change the stock level of that product or variant. A positive figure entered in the *Increase Or Deplete Stock By* field will increment the stock by that amount, and a negative will decrement it. The reorder level can also be adjusted here.

Adding the Product to Additional Categories

A product can belong to several categories to provide shoppers with multiple routes to finding a single product, though the product's stock level will be maintained regardless of how many categories it resides in.

Click the *Add* button to enter the add category entry menu where you can simply select the additional category from the drop down list. You can also choose to time expire the products appearance within the chosen category by first stating the *from date* and then the number of days after the start date that the product will remain in that category. By including a time frame for a product's duration in a category, you can highlight new stock, or sell 'hard to move' stock by reducing its price and putting it in a 'Special Offer' area for a limited amount of time. When you have set the parameters for the additional category click either the *Add and Return to Add* or the *Add and Return to Menu* buttons to confirm your choice. By adding a product to more than one category you can also provide your store with a more structured and searchable format as many products could fall in the realms of multiple categories.

Quick Edit

This will display all the products in all categories, and enables you to quickly view and edit prices, stock levels and visibility to the shopper. You can view any of the product or variant details in full by clicking on the relevant hyper linked name. After changing any of the products details click the *Update* button to confirm the changes.

Delete

Select the product that you wish to delete from the drop down list, once selected click on the *Delete* button. When deleting, a *confirm* checkbox is displayed in order to avoid accidental deletions. This box needs to be checked before the *Delete* button becomes effective.

Product Inventory Uploading

If you have a large, pre-existing inventory, a quick upload facility is available via a CSV (Comma Separated Values file - which is a common output format used by the market leading spreadsheets and databases).

Click the *Admin* button to enter the inventory upload file selection menu. Click the *Browse* button to search for the CSV file that you intended to upload and when located, click the *Open* button. The format for the CSV file is as laided out in [Appendix A](#).

Populate your image libraries, downloadable goods, discounts and instructions before compiling your CSV file. The catalogue structure must also be completed so that ID numbers are available.

If you are an existing Click and Build customer you may have previously compiled a CSV in an earlier version of Click and Build, in which case your file will be either version 2.3 or 2.4 (see your Click and Build provider for your version details)

Note: The early versions of the CSV file will still work in version 3 of Click and Build however, some of the product details will be excluded. If you are a new user to Click and Build and have generated your CSV file from the format given to you in [Appendix A](#) then your CSV file is version 3. To submit the product inventory CSV file to your store click the *Commit Upload* button. If you wish to see if you file will upload correctly before overwriting any of you pre-exist information tick the 'Test Mode' check box before

committing the file.

After a successful upload of data, you will see several pieces of information in a blue-bordered box when the screen refreshes:

- The name of the file that has been uploaded, e.g. c:\inventory.csv
- Notification of whether products exist and have been edited
- Notification of whether variants exist and have been edited
- Summaries of products that have been added

Warnings may immediately precede the information for individual products. These signify data lines, which the system cannot interpret fully, but that are not critical enough to force a rejection. Slight changes may have to be made to these items using the on-line Click and Build interface.

For those items that are rejected completely, a rejection message, followed by an input box enabling you to edit the product data, will be presented at the foot of the refreshed page. Each rejection will include a row number that relates to the lines in the text input box, and a file row number that relates to the original CSV file. It will also have a product, variant and category number (if on that line). Following amendment, these items can be resubmitted. This cycle can be followed until the process is complete. The possible rejection messages are as laid out in [Appendix A](#).

Operational Tip: If you have not got a pre-existing inventory set out in a database or spreadsheet but you have a large inventory to add to your store, Click and Build now has an Off-line Inventory Builder. For more information upon building your store off-line go to the [Off-line Inventory Builder](#) chapter.

Catalogue Reporting

Catalogue reporting has 3 reports, which are run by clicking the Go button adjacent to the report title.

Category Reporting displays each of your category folders and lists the products that are included in them.

Inventory Reporting enables you to download any of the following reports as useful CSV files; Entire Inventory Report; Inventory Hard-Goods Report; Inventory Downloadable Goods Report; Inventory Product Shipping Group Report; Inventory Product Tax Group Report; Inventory Product Discount Report; Inventory Product Instructions Report. These CSV reports can be imported into programs like Microsoft's Excel or Access, which enables you to create an offline inventory.

Orphaned Product Report An orphaned product is a product that is not assigned to any category, therefore a shopper has no way to navigate to it.

The report will display each orphaned product's ID number (which is hyper linked to its product page) and the products name. You can then select the orphaned product by clicking the radio button next to the ID number. To move it to a category, select a category from the *Move to* drop down list and then click the Go button. To delete the

orphaned products, check the *Delete Product* box for each of the redundant products and then click the *Delete Orphaned Product (s)* button. To delete all orphaned products simply check the *Delete All* box and click the *Delete Orphaned Product(s)* button to confirm the deletion.

Off-line Inventory Builder

The Click and Build Off-line Inventory Builder enables you to set up your catalogue of products off-line. The Off-line Inventory Builder uses a predefined database, to allow your product entries to be directly compatible with your on-line store and is therefore; intended to complement, not replace the on-line equivalent.

Installation

To install the off-line inventory builder insert the Click and Build CD, select the option, Off-line Inventory Builder from the menu screen and follow the instructions on screen. (If autorun is not active on your PC you will need to browse the CD and double click on the file menu.exe).

If you are planning to download the off-line builder program from the download page at <http://www.clickandbuild.com/> you will need to save the file to a temp directory then run the setup.exe file from that location. This will install the program onto your hard drive. The installation will guide you through the set up procedures and will install the software into a Click and Build directory.

Starting the program

Once this program has been installed onto your PC, you can access the program by clicking *Start|Programs|Click and Build|Click and Build*. **Note:** This start up procedure is only for operating systems Windows 95/98/2000/NT.

Login

The Off-line Inventory Builder will prompt you for a password before enabling you to enter the main program. It is 'admin' by default but it can be changed in the program settings. When the password is keyed in, click the *OK* button to enter the program. The first time that you login you will be presented with an Introduction screen, which will give you a brief overview of the off-line builder program. All Subsequent logins will take you directly into the software.

Settings

Before compiling your inventory you are required to give the program specific settings to enable the software to be used in conjunction with the on-line Click and Build software. To do this go to the menu bar and select *Settings* and then *Settings* again, this will open a form in which you are required to fill in the following local and Internet parameters.

Your local settings are:

- Database file location (this is the path to where the information is stored in a MDB file).
- Local password (where you can change the initial password to the program).

Your Internet settings are:

- Your on-line Click and Build store building user name.

- The URL of the store (<http://xxxxxxxxx/>, where xxxxxxxxx equates to the store's address).
- Upload Timeout (an allocated time for uploading the inventory. If there is no response from the online store server then the upload with time out and fail. Extend the value of the timeout if uploading errors occur regularly).

Adding Products and Variants

Before putting any product details into the off-line builder you must have first completed the following on-line areas (if relevant), [Image Library](#), [Tax and Shipping Options](#), [Discount Options](#), [Instructions Options](#), and [Downloadable Goods](#). This is necessary, as each product will call upon the values entered into sections.

Adding a product

There are two methods of adding a product to the inventory,

- i) using the *Product and Variants* table view to enter the specific product details into the highlighted row (*) by filling out each of the product parameters into the labeled columns.
- ii) click the *Add Product* button to call up a form that aids in the inputting of the product parameters.

Details upon the different product parameters are given in the [Catalogue Options](#) chapter of this Help.

To save the product details when completed click either the *OK* button in the input form or highlight another row in the table view.

Editing a product

To edit a product simply highlight the product's row in the table view and then change the parameters in the columns, or enter the edit form by clicking the *Edit Product* button.

Removing a product

Highlight the product's row from the table view and click the *Remove product* button to completely remove the product from the off-line builder. To remove the product from only the on-line store, enter a 'D' in front of the products ID number.

Duplicating a product

Highlight the product's row from the table view and click the *Duplicate Product* to copy the data into a new row within the table.

Allocating product ID numbers

When you have completed your product inventory you will need to upload the information into your store by clicking *File|Upload Inventory*, this will then assign each of your product details with a ID number. You will then need to download your inventory (*File|Download Inventory*) back into the off-line builder. Your product will now have an ID number, which is used in the off-line builder to associate your products to their categories.

Variants

Each product that you have entered can also have a number of variants. Further details upon variants and their parameters can be found in the [Catalogue Options](#) chapter of

this Help. To add, edit, remove and duplicate a variant follow the same procedures as outlined for the product construction above.

Adding Product and Variants to Categories

To start to allocate your products to their categories you will need to first construct all of the categories on-line and then download them into your off-line builder by selecting *File|Download Inventory*. Details upon the how to construct the different categories is given in the [Catalogue Options](#) chapter of this Help. Next click the *Categories* tab to enter the category assignment form. Select a product from the list provided, and then click the *Add Category* button to assign a category to that product. This will display a *Add Product Category* form where you can select from a drop down list the category and enter how many days that the product will remain in that category. Once you have allocated a category or categories to the product, it can be edited by clicking the *Edit Category* button, or deleted by clicking the *Remove Category* button.

Uploading the Inventory

Once the inventory is complete and you wish to upload the information to the specified store, simply go to the menu bar and select *File* then click *Upload Inventory*, this convert all of your database into a CSV file and uploads it to your on-line store's automatically.

To reset the inventory data select *File* then click *Import Last Inventory*, this will reset the data back to your last download.

Order Administration

It is important that when you have received your shoppers orders that you subsequently maintain your order records. Your stock level are maintained automatically by Click and Build, but you must inform the system using the Order Administration functions when you have shipped your goods to your shoppers, as this is a physical process (unless you are using Click and Build's downloadable goods facility). By doing this, your shoppers are kept informed of their order status by means of product shipment emails, or by making enquiries themselves via the 'order enquiry' menu option in your store.

Query Order Database

This area can be used for quick order enquiries, should your shoppers contact you with a query ahead of shipping. To query an order, simply enter the order number, WorldPay authorisation code or the Shopper's own reference. When using the shopper's own reference, the date range facility can also be used, as the reference could be identical across a number orders. To use the date facility check the *Use Date* box and select the date you want to start and finish the search from the drop down lists. The screen displayed after the *Submit* button is clicked, will then only display those order details.

Multiple Order Query

To view multiple orders, select the appropriate range from the following choices:

- (Optional) **date range** (today's date the default, so it is easy to produce 'last x days' listings) in combination with any of the following.
- **All authorised orders**, those awaiting shipment confirmation.
- **All completed orders**, those whose shipment has been confirmed, but are not yet archived.
- **All orders**, which lists all orders, regardless of status.
- **Disputed orders**, those marked by you as 'Disputed'.
- **Refunded orders**, those marked as refunded following a dispute, as an alternative to shipped.
- **Archived orders**, those marked by you for dropping off the system.

The screen displayed after the *Submit* button is clicked, lists all orders falling into the range selected.

Multiple Order Query Results Page

This page displays the list of orders that have fallen into your search query. The list contains the general order details for each of the orders and enables you to change the status of each of them.

Order Details Page

This page is viewed by clicking the link shown next to an order listed by the Database Query Results. The page displays information about your shopper's details and their orders, the information includes:

- General order details, which is the WorldPay Authorisation number, the shopper reference and the order status.
- Shopper details, containing their name, address and email address. **Operational Tip:** The shopper's email address is hyper linked, and is provided for your convenience should the shoppers other contact details not be available.
- Delivery address and recipient name, if different from the shopper details.
- Item order details, which displays the item descriptions, quantity, the number of items shipped, unit cost, tax and shipping costs, total cost and shipping completion date.

Order Detail Status

On both query results page and the order details page you have the option, via check boxes, to complete any of the orders (i.e. mark as shipped). The query result page also gives you the additional option of confirming all the orders that are contained in the query at once.

On the order detail page, you can also mark orders as disputed, mark them as refunded or archive them (an archived order cannot be un-archived or changed and only archived orders can be deleted). **Note:** To refund an order you will need to enter your Customer Management System (CMS), find the order and specify that you wish to refund all or part of it (see CMS Guide). Only when an order has been refunded in your CMS should it then be marked as such within Click and Build.

The order detail page also contains two input areas designed to retain comments against any of the orders, one is for internal comments and the other *Shopper Visible Comments* is displayed to your shopper when they are using the enquiry facility in the store.

Orders can be part completed (if multiples of the items have been ordered) by entering the number of items shipped in the *shipped* input box on the order details page. If all items have been shipped, either click the *Complete* checkbox on the query results page, or click the *Complete Order* and click the *Update Order* button on the order detail page.

When you have shipped (completed) your goods, Click and Build can also send an email message confirming the shipment of the goods to the shoppers in question, while at the same time changing the status of the order(s) within your database.

Note: that the generation of the shopper notification of the shipping email is under your control by ticking the checkbox at the foot of the order detail page or by checking the *Shipping Email* box on the query results page.

The final option in this area concerns downloadable goods. You will notice a *Download* hyperlink will exist on its order details page, and will enable you to transfer to another screen in order to modify the time a 'virtual' download page can exist before it expires. This will commonly be used when a shopper contacts you to say that they have not been able to complete the download in the time set in Product Entry. Access by shoppers to the virtual page can also be withdrawn here by checking the *Block Access* box, if you suspect that unpaid access to this page is being made.

Operational Tip: You may wish to increase the download virtual page access time if

calls from your shopper to request an increase the download time are frequent.

Archive Deletion

Finally, to keep the order database within reasonable size limits, the option to drop off archived orders (within a date range) is provided on the main order administration screen. When deleting, a *confirm deletion* checkbox is displayed in order to avoid accidental deletions. To delete the archive (within a date range), the box needs to be checked before the delete button becomes effective.

Report Administration

The Click and Build Report Administration enables you to build your own reports from the system databases, access your WorldPay's CMS, a user feedback facility and resource usage report.

The report writing facility works by prompting you for the data fields you require (from the order and catalogue areas of the underlying databases), then for layout specifications, sorting and totalling parameters. The final report can then be saved, printed or deleted after the initial use.

The user feedback facility enables you to contact Click and Build's support with any suggestions for enhancements to the next version, or notification of unexpected events and bugs that have occurred when administrating your store.

The resource report give details upon how much space you have used on your host server, also the number of visitors to your store and some order status details.

To enter the report facilities or to view any of the reports click the *Go* buttons next to their titles.

Order Reporting

Adding an Order Report

To show how to create a report, we will use the example of a report that prints all the ordered items for a shopper, sorted in ascending order, then variant order, showing totals, key dates and order status. Start to create a report by clicking the *Add* button in the report writer menu, and then you will be able to enter any of the following parameters to produce a user-defined report.

Report Title

When you first enter either the order or catalogue report writing area, you will need to give the report a descriptive title. **Note:** The title entered will be printed at the head of the report.

Default Output Format

This will determine whether the report is displayed on your screen, which can be printed from your browser or as a CSV file (commonly used by applications such as Microsoft Excel and Lotus 123) that contains no headers or footers and can be imported directly into a spreadsheet. **Note:** Click and Build recommend that when downloading the CSV file, you save the report to disc, rather than opening the file in its current location (when prompted at runtime), as your browser may not be able to handle the current file format.

Options (Disallow Runtime Changes)

Reports can be created by one user, but run by many (dependant on user access privileges: see [User Options](#)). A creator of a report can determine whether users are presented with the option of specifying the selection criteria and the output format of the report, or whether the report will run without prompting. To disallow changing the parameters of the report in runtime, tick the options checkbox. **Note:** You can also fix each of the selection criteria separately giving the report creator greater control of what

the report output will be.

Display Columns

This menu enables the selection, positioning order, totalling and formatting of the data items that make up your custom report.

Add Column	Choose the data items (from either the order or catalogue database) that you wish to display as a column on your report.
Insert	The insert drop down list determines the positioning of the newly added column in relation to those already inserted.
Column Header	Enables you to overwrite the default column headings (those shown in the <i>Add Column</i> drop down list) with a more descriptive name.
Count	Gives a count of the number of items selected. Only one count is allowed.
Break	Creates a break in the text for counts or totalling. Only one break is allowed.
Subtotal	Prints a total of all numeric items since the last break. Note: Selecting this option for a non-numeric field will produce a count.
Total	Prints a grand total of the numeric items in the report. Note: Selecting this option for a non-numeric field will produce a count.
Suppress Repetition	Will prevent the report from displaying duplicated records in the same column, which is useful in reports with sorted columns. This function for example, can prevent the same product or customer name being printed over and over if this item sorts the report.

Operational Note: When producing an order report, some of the data fields that can be added to your report as columns contain some basic mathematics. The following mathematic describes how the data items are produced.

Item

Item Shipping + Item Shipping Tax = Item Shipping Total

Item Cost - Item Discount + Item Shipping Total + Item Tax = Item Total

Item Unit Cost x Item Quantity = Item Cost (note: that the item unit costs is what it was at the time the order was confirmed by the customer - the variant price is what it is now)

Order

Order Shipping Cost + Order Shipping Tax = Order Shipping Total

Order Cost (including discount) + Order Shipping Total + Order Tax = Order Total

After adding and formatting a column for your report click the *Store Report* button. The new columns will now be featured in the display column menu giving you the ability to rapidly change any of the settings or even delete a column.

Selection Criteria

This menu enables you to state a *Selection Criteria* for the report so that it only extracts items of data from the database.

Add Selection	Choose from the drop down list the data fields that you wish to make part of your selection criteria.
Criteria	From the criteria drop down list select a logical operator to apply to the selection criteria.
Value	Enter a value that will be used in conjunction with the selection and criteria, for example, a shopper's Name Equal To Smith, a Product Name Not Equal to CD, where Smith and CD are the values. Note: A number of selections simulates an 'And' type report, i.e. Selection A and Selection B will be printed, whereas values entered into this field separated by commas simulate an 'Or' type report, i.e. Selection A or Selection B will be printed. If at runtime, no values are entered into Value, no data will be printed.
Insert	The insert drop down list determines the order of the selection criteria and has no effect on the contents of the report. However, it may affect the speed of the reports production as subsequent criteria extracts are made from the previous selection, not on the database as a whole.

After adding a selection criteria click the *Store Report* button to enter the changes and display the criteria in the menu.

Operational Tip: Selecting the Shopper's Name as a selection, and not actually specifying a value for the shopper, in conjunction with enabling runtime changes, enables you to produce a report where you can enter the name of shopper at report runtime.

Sort Options

This enables you to determine how the rows within your report are ordered. For example, by setting the sorting options initially on the product name, and then sorting on a variant, the report will display the rows in alphabetical order, first on the products name and then by the variant. You can however, reverse the order in which they are displayed i.e. from A-Z, to Z-A, by clicking the *Reverse Order* checkbox when adding each of the sort options.

View/Edit an Order Report

When an order report is selected it can be viewed in more detail by clicking the *View/Edit* button. This new screen will display the date of the report creation and the creator, also the date when the report was last run and by whom. You may change or delete any of the report parameters and sort criteria. To confirm any of changes click the *Store Report* button, or click the *Run Report* button to view the report.

Running a Report

To run one of your reports simply select the order report title from the drop down list and click the *Run* button.

Operational Tip: The report can be printed for later reference using your browsers print button when displayed on the screen. If it is outputted as a downloadable CSV file then you can open and print the file using a spreadsheet package like Microsoft's Excel or Lotus 123.

Deleting a Report

Select the report from the drop down list that you wish to delete, once selected click on the *Delete* button. When deleting, a *confirm deletion* checkbox is displayed in order to avoid accidental deletions. This box needs to be checked before the delete button becomes effective.

Catalogue Reporting

Adding a Catalogue Report

This follows the same structure as the [Order Report](#), but instead contains catalogue items in the drop down data fields.

View/Edit a Catalogue Report

When a catalogue report is selected it can be viewed in more detail by clicking the *View/Edit* button. This new screen will display the date of the report creation and the creator, also the date when the report was last run and by whom. You may change or delete any of the report parameters and sort criteria. To confirm any of changes click the *Store Report* button, or click the *Run Report* button to view the report.

Running a Report

To run one of your reports simply select the catalogue report title from the drop down list and click the *Run* button.

Operational Tip: The report can be printed for later reference using your browsers *print* button when displayed on the screen. If it is outputted as a downloadable CSV file then you can open and print the file using a spreadsheet package like Microsoft's Excel or Lotus 123.

Deleting a Report

Select the catalogue report from the drop down list that you wish to delete, once selected click on the *Delete* button. When deleting, a *confirm deletion* checkbox is displayed in order to avoid accidental deletions. This box needs to be checked before the delete button becomes effective.

User Feedback

The feedback area enables you to contact Click and Build's support with any suggestions for enhancements to the next version, or notification of unexpected events or bugs that have occurred when administering a store. You can make a suggestion by simply typing your comments into the form provided and then clicking the *Submit* button to send it. To submit a bug you must first state what type of error has occurred using the radio buttons

provided. The different types of errors are *Internal Server Error*, *Document Contains No Date*, *Blank Page (can view source HTML)* and *Error has Occurred in application*, which are displayed in your browser. If any of these errors have occurred it is useful to copy any error message displayed and paste it into the *Message Given when Error occurred* field for further reference. An error may not fall into any of error types which is why there is space provided for other types of error details. Click and Build Support will also need to know what actions resulted in the error and the time and date that they occurred.

WorldPay CMS

By clicking on the *Go* button for WorldPay CMS you will be redirected to the WorldPay Administration Server where you will need to enter your user name and password for your WorldPay customer account. You can then view your account details including order transactions.

Resource Usage Report

This reporting facility gives a detailed report on what resources you are using on the host server. Set the date parameter to state the start and end date that you wish to view, the end date is by default the current date. The report generated will display the date range that the report was generated from. The report contains the number of visitors to your store and the disk space used. It also provides the number of products, variants, catalogues, images and downloadable goods that have been included in your store. In addition, it shows the order status, such as the number of actual orders, and the number of orders that have been completed, authorised or cancelled. As the report is broken down into individual day usage you can get a precise account of the work being carried out on your store, but for general information there is a report grand total at the foot of the report.

Appendix A

To upload your product inventory in bulk, you will need to create a CSV (comma separated value) file, which is a commonly used output by the market leading spreadsheet programs, such as Microsoft Excel and Lotus 123 or a database like Microsoft Access.

CSV Format (Version 3)

FIELD NAME	TYPE	LENGTH	DESCRIPTION
Product Data			
Product Identifier	Integer		A whole number greater than zero which uniquely identifies an existing product in your inventory. Used only when editing existing products (Optional if not editing)
Product Name	Text	1 to 16 Characters	The name of your product. This will name a new product or rename an existing product if you are editing one. (Optional if editing)
Product Code	Text	1 To 40 Characters	The code for your new or existing (if editing) product (Optional)
Visible to customers	True Or False		If this flag is set to true then the product will be visible to your customers. If set to false then the product will be stored but invisible to your customers. The visibility can be changed at any time by editing a product after it is stored. (Optional if editing)
Descriptive Keywords	Text	1 Character Or More	You may enter one or more descriptive keywords for keyword searches within your catalogue. The keywords should be separated by single spaces. (Optional)
Short Description HTML Flag	True Or False		If a short description (see below) is entered for the product then you may wish to include HTML formatting within it. If so then enter true here otherwise (for plain text) select false.
Short Description	Text	Variable Length	This is a short description of your product (which may include optional HTML formatting - see above), which will be displayed on category pages of your site.
Long Description HTML	True Or False		If a long description (See below) is entered for the product then you may wish to include HTML formatting within it. If so then enter true here

Flag			otherwise (for plain text) select false (Optional)
Long Description	Text	Variable Length	This is a long description of your product (which may include optional HTML formatting - see above), which will be displayed on full product information pages of your site.(Optional)
Image Identifier	Integer		A whole number greater than zero, which uniquely identifies an image currently, stored in your database. This image will appear as part of your full product description. (Optional)
Thumbnail Image Identifier	Integer		A whole number greater than zero, which uniquely identifies an image currently, stored in your database. This image will appear as part of your short product description. (Optional)
Product Weight	Floating Point Number		A number, zero or greater, that denotes the weight of your product - it does not represent a particular unit of weight other than in relation to the other products in your inventory. (Optional if editing)
Product Height	Floating Point Number		A number, zero or greater, that denotes the height dimension of your product - it does not represent a particular unit of height other than in relation to the other products in your inventory. (Optional if editing)
Product Width	Floating Point Number		A number, zero or greater, that denotes the width dimension of your product - it does not represent a particular unit of width other than in relation to the other products in your inventory. (Optional if editing)
Product Depth	Floating Point Number		A number, zero or greater, that denotes the depth dimension of your product - it does not represent a particular unit of depth other than in relation to the other products in your inventory. (Optional if editing)
Tax-Rate Group	Integer		A whole number greater than zero, which uniquely identifies a tax-rate group already, stored in your database. (Optional)
Shipping-Cost Group	Integer		A whole number greater than zero, which uniquely identifies a shipping-cost group already, stored in your database. (Optional)
Product Discount Scheme	Integer		A whole number greater than zero, which uniquely identifies a discount scheme already, stored in your database. (Optional)
Product Instruction	Text	1 Or More	A list of integer values contained in double quotes and separated by commas. Each integer represents

s			a product instruction already stored in your database. (Optional)
Product Priority	Integer	1 Or More	A whole number that represents the sorting priority for this product when it is displayed in a list of products (1 being the highest). If no value is entered then the default of '500' will be used. (Optional)
Variant Data			
Variant Identifier	Integer		A whole number greater than zero which uniquely identifies an existing variant in your inventory. You must also have specified the correct product identifier for the product that contains this variant. Used only when editing existing products and variants. (Optional if not editing)
Variant Price	Floating Point Number		A number, zero or greater that denotes the price of this variant. (Optional if editing)
Variant Description	Text	1 To 40 Characters	This is a description of your variant that will be displayed on the variant information pages of your site. (Optional)
Visible To Customers	True Or False		If true then the variant will be visible to your customers and will appear in your catalogue. If false is entered then the variant will be stored but invisible to your customers. The visibility can be changed at any time by editing a variant after it is stored. (Optional if editing)
Use Stock Checking	True Or False		If true is entered then stock checking will be active, if false is entered then stock checking will be inactive. (Optional if editing)
Variant Reorder Level	Integer		A whole number, zero or greater, that denotes the reorder level for the variant. If the stock level falls below the reorder level then you will be advised by the system. (Optional if editing)
Variant Initial Stock Level	Integer		A whole number, zero or greater, that denotes the initial stock level for this variant. (Optional if editing)
Hard-Goods Or Downloads	Integer		If set to 1 then the variant represents 'hard-goods', if set to 2 then the variant represents 'Download'. Any other value is erroneous (Optional if editing)
Downloads Identifier	Integer		If downloads have been selected by the flag described immediately above then this identifier

			references a previously created downloads in your database. (Optional if hard goods editing)
Downloads Access Days	Integer		If the hard/downloads selection flag is set to downloads (see above) then this whole number represents the number of days that the particular item is available to your customers. (See below) (Optional if hard-goods editing)
Downloads Access Hours	Integer		If the hard/downloads selection flag is set to downloads (see above) then this whole number represents the number of hours that the particular item is available to your customers. (Optional if hard-goods editing)
Delivery Flag	True or False		If true is entered then delivery will be active, if false is entered the delivery will be inactive. Downloadable goods default to false. Hard goods default to true.
Variant Discount Scheme	Integer		A whole number greater than zero which uniquely identifies a discount scheme already stored in your database. (Optional)
Variant Instructions	Text		A list of integer values contained in double quotes and separated by commas. Each integer represents a variant instruction already stored in your database. (Optional)
Variant Priority	Integer	1 Or More	A whole number that represents the sorting priority for this variant when it is displayed in a list of products (1 being the highest). If no value is entered then the default of '500' will be used. (Optional)
Category Data			
Category Identifier	Integer		A whole number greater than zero which uniquely identifies an existing variant in your inventory. You must also have specified the correct product identifier for the product that contains this variant. Used only when editing existing products and variants. (Optional if not editing)
Category Date	Date		A date that represents the start date that this product will appear in the category described above. (Optional)
Category Days	Integer		A whole number greater than zero which uniquely identifies an existing variant in your inventory. You must also have specified the correct product

			identifier for the product that contains this variant. Used only when editing existing products and variants. (Optional if not editing)
--	--	--	---

Note: 'Integer' denotes a whole number, 'floating point number' denotes one that may have a decimal place and 'Date' denotes a date in the format of YYYYMMDD.

Example CSV Format

```
,PNAME1,PCODE,true,KEYWORDS,FALSE,S_DESCRIP,FALSE,L_DESCRIP,1,2,100,1,1,1,,,,,500,d135,1,V_DESCRIP1
,true,true,10,100,1,,,,,500,1,,10
,,,,,,,,,1,V_DESCRIP2,true,true,10,100,1,,,,, (Adding Variant 2)
,,,,,,,,,1,V_DESCRIP3,true,true,10,100,1,,,,, (Adding Variant 3)
,,,,,,,,,500,2,,1 (Putting the product into category 2)
,,,,,,,,,500,3,,1 (Putting the product into category 3)
,PNAME2,PCODE,true,KEYWORDS,FALSE,S_DESCRIP,FALSE,L_DESCRIP,1,2,100,1,1,1,,,,,500,,1,V_DESCRIP1,true,
,true,10,100,1,,,,,500,1,,10
,,,,,,,,,1,V_DESCRIP2,true,true,10,100,1,,,,,500,2,,1 (Adding Variant 2 & putting the product into category 2)
,,,,,,,,,1,V_DESCRIP3,true,true,10,100,1,,,,,500,3,,1 (Adding Variant 3 & putting the product into category 3)
,,,,,,,,,1,V_DESCRIP4,true,true,10,100,1,,,,,500,4,,1 (Adding Variant 4 & putting the product into category 4)
,,,,,,,,,1,V_DESCRIP5,true,true,10,100,1,,,,,500,5,,1 (Adding Variant 5 & putting the product into category 5)
```

The example above clearly indicates that variants can be added to products without the need to repeat any of the initial product details. The additional variants can be added to the product by putting only the variant details into the following line of the CSV file. It also shows that the product can be added to different categories by entering the additional category data into a new CSV file row.

Operational Tip: To delete any of the products from the Click and Build database using a CSV file simply place a 'D' in front of the specific product's ID number. You can also delete any of the variants from a product, again by just placing a 'D' in front of the variants ID number. When uploading this edited CSV file it will delete the marked information from the Click and Build database.

Warning Messages

Row: 2- Unknown image '72' ----- Your inventory file contained a reference to an unknown image, no image will be stored for the product if this occurs but an image can be selected using the product edit menus.

Row: 2- Unknown thumbnail image '49' ----- Your inventory file contained a reference to an unknown thumbnail image, no thumbnail image will be stored for the product if this occurs but an image can be selected using the product edit menus.

Row: 2- No product weight - defaulting to zero ----- Your inventory file did not specify a weight for the given product and system has therefore chosen to store the product with a weight of zero. If this is inappropriate then use the product edit menu to alter the product weight.

Row: 2- no category matching ID: 4 ----- Your inventory file contained a reference to an unknown category. The product will not be stored within a category and may therefore become an 'orphaned' product - a product that is not a member of any category ('orphaned' products can be located using the 'Orphaned Product Report').

Row: 2- bad product-ID ----- Your inventory file contained a product ID that was not an integer value. The system will assume that this was a typing error and will store a new product instead of editing an existing product. If this storage is unsuitable then delete the

product from your database.

Row:2- bad variant-ID ----- Your inventory file contained a variant ID that was not an integer value. The system will assume that this was a typing error and will store a new variant instead of editing an existing variant. If this storage is unsuitable then delete the variant from your database.

Row:2-Product Visibility flag contains unknown value ----- Your inventory file contained a product visibility flag that was neither 'true' nor 'false'. The system will default the product visibility to 'false'.

Row:2- Short-Description HTML flag contains unknown value----- Your inventory file contained a Short-Description HTML flag that was neither 'true' nor 'false'. The system will default the Short-Description HTML flag to 'false'.

Row:2- Long-Description HTML flag contains unknown value----- Your inventory file contained a Long-Description HTML flag that was neither 'true' nor 'false'. The system will default the Long-Description HTML flag to 'false'.

Row:2- bad product tax rate ----- Your inventory file contained a tax-rate identifier that was not a suitable integer - no tax rate will be set.

Row:2- bad product shipping cost ----- Your inventory file contained a shipping cost identifier that was not a suitable integer - no shipping cost will be set.

Row:2- bad product discount ----- Your inventory file contained a product discount identifier that was not a suitable integer - no product discount will be set.

Row:2- bad product instruction ----- Your inventory file contained a product instruction identifier that was not a suitable integer - no product instruction will be set.

Row:2- Un-referenced product instruction: 'BAD-INSTRUCTION' ----- Your inventory file contained a list of product instructions, one of which could not be referenced as an existing instruction. Check the uploaded file and edit the product accordingly.

Row:2- Variant Visibility flag contains unknown value 'BAD' ----- Your inventory file contained a variant visibility flag that was neither 'true' nor 'false'. The system will default the flag to 'false' and you may wish to edit the variant and adjust this value.

Row:2- Stock Checking flag contains unknown value 'BAD' ----- Your inventory file contained a stock checking flag that was neither 'true' nor 'false'. The system will default the flag to 'false' and you may wish to edit the variant and adjust this value.

Row:2- bad variant reorder level - defaulting to zero 'BAD' ----- Your inventory file contained a variant reorder value that was not a valid integer. The system will default the variant reorder level to zero and you may wish to edit the variant and adjust this value.

Row:2- bad variant initial stock - defaulting to zero 'BAD' ----- Your inventory file contained a variant initial stock value that was not a valid integer. The system will default the variant initial stock level to zero and you may wish to edit the variant and adjust this value.

Row:2- bad variant soft-goods days 'BAD' ----- Your inventory file contained a soft-goods day duration that was not an integer value - no day duration will be stored. You may wish to edit the variant and adjust this value.

Row:2- bad variant soft-goods hours 'BAD' ----- Your inventory file contained a soft-goods day duration that was not an integer value - no day duration will be stored. You may wish to edit the variant and adjust this value.

Row:2- bad variant discount ----- Your inventory file contained a variant discount identifier that was not a suitable integer - no variant discount will be set.

Row:2- bad variant instruction ----- Your inventory file contained a variant instruction identifier that was not a suitable integer - no variant instruction will be set.

Row:2- Un-referenced variant instruction: 'BAD-INSTRUCTION' ----- Your inventory file contained a list of variant instructions, one of which could not be referenced as an existing instruction. Check the uploaded file and edit the variant accordingly.

Row:2- no category matching ID: 32 ----- Your inventory file contained a category identifier that does not match any currently stored in the database. The product will not be stored in any category at this point. You may wish to edit the product and adjust this value.

Row:2- bad category duration 'BAD' ----- Your inventory file contained a category duration that is not a valid integer number. No duration will be stored so you may wish to edit the product and adjust this value.

Appendix B

International Clothes Sizes

These tables are to assist you when entering your products into the Click and Build catalogue.

Men's Shoes

British	6	7	8	9	10	11
American	7	8	9	10	11	12
European	39.5	40.5	41.5	42.5	43.5	44.5

Women's Shoes

British	3	4	5	6	7	8
American	4.5	5.5	6.5	7.5	8.5	9.5
European	35	36	37	38	39	40

Women's Dresses, Coats and Blouses

British	10	12	14	16	18	20
American	8	10	12	14	16	18
French	40	42	44	46	48	50
Italian	44	46	48	50	52	54
German	36	38	40	42	44	46

Men's Suits

British	34	36	38	40	42	44
American	same					
European	44	46	48	50	52	54

Men's Shirts

British	14	14.5	15	15.5	16	16.5	17
American	same						
European	36	37	38	39	40	41	42

Socks

British	9.5	10	10.5	11	11.5	12	12.5
American	same						
European	38-39	39-40	40-41	41-42	42-43	43-44	44-45

Appendix C

International Dialing Codes

These Dialling codes and time zones are to assist you when entering your telephone number into Personal Details.

To find out the time difference between yourself and another country subtract one time from the other.

Country	Int Dial Code	Hours difference from GMT / Universal Standard Time
Afghanistan	93	+4 1/2
Albania	355	+1
Algeria	213	+1
Andorra	376	+1
Angola	244	+1
Anguilla	1 809	-4
Antarctic Australian Territory	672	+4 1/2 +10
Antigua and Barbuda	1 809	-4
Antilles	599	-4
Argentina	54	-3
Armenia	374	+4
Aruba	297	-4
Ascension Island	247	0
Australia	61	+8 +10
Austria	43	+1
Azerbaijan	994	+1
Azores	351	-1
Bahamas	1809	-5
Bahrain	973	+3
Bangladesh	890	+6
Barbados	809	-4
Belarus	375	+2
Belgium	32	+1
Belize	501	-6
Belize	229	+1
Bermuda	1 809	-4

Bhutan	975	+6
Bolivia	591	-4
Bosnia Herzegovina	387	+1
Botswana	267	+2
Brazil	55	-3
Brunei Darussalam	673	+8
Bulgaria	359	+2
Burkina Faso	226	0
Burundi	257	+2
Cambodia	855	+7
Cameroon	237	+1
Canada	1	-3 1/2 - 8
Cape Verde Islands	238	-1
Cayman Islands	1 809	-5
Central African Republic	236	+1
Chad	235	1
Chile	56	-4
China	86	+8
Christmas Island	672	+7
Cocos Island	672	+6 1/2
Columbia	57	-5
Comoros	269	+3
Congo	242	+1
Cook Islands	682	+10 1/2
Costa Rica	506	-6
Cote d'Ivoire	225	0
Croatia	385	+1
Cuba	53	-5
Cyprus	357	+2
Czech Republic	42	+1
Denmark	45	+1
Djibouti	253	+3
Dominica	1 809	-4
Dominican Republic	1 809	-4
Ecuador	593	-5

Egypt	20	+2
El Salvador	503	-6
Equatorial Guinea	240	+1
Eritrea	291	+3
Estonia	372	+2
Ethiopia	251	+3
Falkland Islands	500	-4
Faro Islands	298	0
Fiji	679	+12
Finland	358	+2
France	33	+1
French Guiana	594	-3
French Polynesia	689	+10
Gabon	241	+1
Gambia	220	0
Georgia	7 & 995	+4
Germany	49	+1
Ghana	233	0
Gibraltar	350	+1
Greece	30	+2
Greenland	299	-3
Grenada	1 809	-4
Guadeloupe	590	-4
Guam	671	-10
Guatemala	502	-6
Guinea	224	0
Guinea - Bissau	245	0
Guyana	592	-3
Haiti	509	-5
Honduras	504	-6
Hong Kong	852	+8
Hungary	36	+1
Iceland	354	0
India	91	+5 1/2
Indonesia	62	+7 +8

Iran	98	+3 1/2
Iraq	964	+3
Ireland Republic of	353	0
Israel	972	+2
Italy	39	+1
Ivory Coast see Cote d'Ivoire	225	0
Jamaica	1 809	-5
Japan	81	+9
Jordan	962	+2
Kazakhstan	7	+5 +6
Kenya	254	+3
Kirghizstan	7	+3
Kiribati	686	+12
Korea (North)	850	+9
Korea (South)	82	+9
Kuwait	965	+3
Laos	856	+7
Latvia	371	+2
Lebanon	961	+2
Lesotho	266	+2
Liberia	231	0
Lybia	218	+1
Liechtenstein	41 75	+1
Lithuania	370	+2
Luxembourg	352	+1
Macao	853	+8
Macedonia	389	+1
Madagascar	261	+3
Malawi	265	+2
Malaysia	60	+8
Maldives	960	+5
Mali	223	0
Malta	356	+1
Marshall Islands	692	+12
Martinique	596	-4

Mauritania	222	0
Mauritius	230	+4
Mayotte	269	+3
Mexico	52	-6 - 8
Micronesia	691	+11
Moldavia	373	+2
Monaco	33 93	+1
Mongolia	976	+8
Montserrat	1 809	-4
Morocco	212	0
Mozambique	258	+2
Myanmar (Burma)	95	+6 1/2
Namibia	264	+2
Nauru	674	-12
Nepal	977	+5 3/4
Netherlands (Holland)	31	+1
Netherlands Antilles	599	-4
New Caledonia	687	+11
Nicaragua	505	6
Niger	227	+1
Nigeria	234	+1
Norway	47	+1
Oman	968	+4
Pakistan	92	+5
Panama	507	-5
Papua New Guinea	675	+10
Paraguay	595	-4
Peru	51	-5
Philippines	63	+8
Pitcairn Island	649	-8 1/2
Poland	48	+1
Portugal	361	+1
Puerto Rico	1 809	-4
Qatar	974	+3
Romania	40	+2

Russia	7	+2 1/2 +10
Rwanda	250	+2
St Helena	290	0
St Kitts and Nevis	1 809	-4
Samoa (USA)	685	-11
Samoa Western	685	-11
San Marino	378	+1
Saudi Arabia	966	+3
Senegal	221	0
Seychelles	248	+4
Sierra Leone	232	0
Singapore	65	+8
Slovakia	42	+1
Slovenia	386	+1
Solomon Islands	677	-11
Somalia	252	+3
South Africa	27	+2
Spain	34	+1
Sri Lanka	94	+5 1/2
Sudan	249	+2
Surinam	597	+3
Swaziland	268	+2
Sweden	46	+1
Switzerland	41	+1
Syria	963	+2
Taiwan	886	+8
Tajikistan	7	+5
Tanzania	255	+3
Thailand	66	+7
Togo	228	0
Tonga	676	-13
Trinidad & Tobago	1 809	-4
Tunisia	216	+1
Turkey	90	+2
Turkmenistan	7	+5

Turks & Calicos	1 809	-5
Tuvalu	688	-12
Uganda	256	+3
Ukraine	380	+2
United Arab Emirates	971	+4
United Kingdom	44	0
Uruguay	598	-3
USA	1	-5 -11
Uzbekistan	7	+5 +6
Vanuatu	678	-11
Venezuela	58	-4
Vietnam	84	+7
Virgin Islands (UK)	1 809 49	-4
Virgin Islands (US)	1 809	-4
Yemen	967	+3
Yugoslavia	381	+1
Zaire	243	+1
Zambia	260	+2
Zimbabwe	263	+2

Appendix D

Useful Web Sites

Listed below are some web sites providing software mentioned in the guide that you may find useful when building your store:

1. <http://www.exploit.net/>

Where downloadable copies of the software used for submitting details of your store to over 450 search engines worldwide can be purchased.

2. <http://www.netscape.com/>

Where the latest Netscape browsers can be downloaded.

3. <http://www.microsoft.com/>

Where the latest Internet Explorer browsers can be downloaded.

4. <http://www.digitalworkshop.co.uk/>

Where the best value for money graphics creation/manipulation tools can be purchased and downloaded.

5. <http://www.winzip.com/>

Where the Zip file compression and archiving software can be purchased and downloaded.

6. http://www.vertexinc.com/taxcybrary20/CyberTax_Channel/taxchannel_70.html

Information for American users of Click and Build on the latest taxation rules for Internet trading, state by state.

7. <http://www.netnames.com/>

Where domain names (Web Addresses) can be purchased.

Appendix E

Text and Background Colours

Alice Blue	Antique White	Aqua	Aquamarine	Azure	Beige	Bisque	Black	Blanched Almond	Blue
Blue Violet	Brown	Burlywood	Cadet Blue	Chartreuse	Chocolate	Coral	Cornflower Blue	Corn Silk	Crimson
Cyan	Dark Blue	Dark Cyan	Dark Golden Rod	Dark Grey	Dark Green	Dark Khaki	Dark Magenta	Dark Olive Green	Dark Orange
Dark Orchid	Dark Red	Dark Salmon	Dark Sea Green	Dark Slate Blue	Dark Slate Grey	Dark Turquoise	Dark Violet	Deep Pink	Deep Sky Blue
Dim Grey	Dodger Blue	Fire Brick	Floral White	Forest Green	Fuchsia	Gainsboro	Ghost White	Gold	Golden Rod
Grey	Green	Green Yellow	Honeydew	Hot Pink	Indian Red	Indigo	Ivory	Khaki	Lavender
Lavender Blush	Lawn Green	Lemon Chiffon	Light Blue	Light Coral	Light Cyan	Light Golden Rod Yellow	Light Green	Light Grey	Light Pink
Light Salmon	Light Sea Green	Light Sky Blue	Light Slate Grey	Light Steel Blue	Light Yellow	Lime	Lime Green	Linen	Magenta
Maroon	Medium Aquamarine	Medium Blue	Medium Orchid	Medium Purple	Medium Sea Green	Medium Slate Blue	Medium Spring Green	Medium Turquoise	Medium Violet Red
Midnight Blue	Mint Cream	Misty Rose	Moccasin	Navajo White	Navy	Old Lace	Olive	Olive Drab	Orange
Orange Red	Orchid	Pale Golden Rod	Pale Green	Pale Turquoise	Pale Violet Red	Papaya Whip	Peach Puff	Peru	Pink
Plum	Powder Blue	Purple	Red	Rosy Brown	Royal Blue	Saddle Brown	Salmon	Sandy Brown	Sea Green
Seashell	Sienna	Silver	Sky Blue	Slate Blue	Slate Grey	Snow	Spring Green	Steel Blue	Tan
Teal	Thistle	Tomato	Turquoise	Violet	Wheat	White	White Smoke	Yellow	Yellow Green

Appendix F

CSV Rates Upload

CSV Rates Upload enables you to set up an infinitely flexible table of shipping charges. There are two types of CSV format, *Range* and *Each*. If your shipping charge rate is by *Range* you are effectively setting prices for ranges of quantities. For example, 1-5 units will add £10 to the total of the shipping charge and 6-10 units will add £18 to the total and so on. If your shipping charge is by *Each*, you are effectively setting prices per unit for ranges of quantities. For example, 1-5 units will add £10 each to the total of the shipping charge and 6-10 units will add £18 each to the total and so on. The format of the CSV file is simply two columns as shown in the examples below. It is also possible to type the rate variations directly into the Rate box as: 5=10; 10=18; 20=30; *=35.

UNIT

CSV Data Format		Resulting Shipping Charge for Unit Rate Type - Range
5	10	1-5 units will add £10 (total) to the shipping charge
10	18	6-10 units will add £18 (total) to the shipping charge
20	30	11-20 units will add £30 (total) to the shipping charge
*	35	21 and more units will add £35 (total) to the shipping charge

Direct Input format: 5=10;10=18; 20=30;*=35

CSV Data Format		Resulting Shipping Charge for Unit Rate Type - Each
each		Each modifier changes the calculation
10	18	1-10 units will add £18 (per unit) to the shipping charge
20	30	11-20 units will add £30 (per unit) to the shipping charge
*	35	21 and more units will add £35 (per unit) to the shipping charge

Direct Input format: each= ;10=18; 20=30;*=35

WEIGHT

CSV Data Format		Resulting Shipping Charge for Weight Rate Type - Range
5	10	1-5 measures of weight will add £10 (total) to the shipping charge
10	18	>5-10 measures of weight will add £18 (total) to the shipping charge
20	30	>10-20 measures of weight will add £30 (total) to the shipping charge
*	35	>20 and more measures of weight will add £35 (total) to the shipping charge

Direct Input format: 5=10;10=18; 20=30;*=35

CSV Data Format		Resulting Shipping Charge for Weight Rate Type - Each
each		Each modifier changes the calculation
10	18	0-10 measures of weight will add £18 (per measurement) to the shipping charge
20	30	>10-20 measures of weight will add £30 (per measurement) to the shipping charge
*	35	>20 measures of weight will add £35 (per measurement) to the shipping charge

Direct Input format: each= ;10=18; 20=30;*=35

Value %age

CSV Data Format		Resulting Shipping Charge for Value %age Rate Type - Range
5	10	%10 (total) will be added for goods up to £5
10	18	%18 (total) will be added for goods between £5 and £10
20	30	%30 (total) will be added for goods between £10 and £20
*	35	%35 (total) will be added for goods over £30

Direct Input format: 5=10;10=18; 20=30;*=35

CSV Data Format		Resulting Shipping Charge for Value %age Rate Type - Each
each		Each modifier changes the calculation
10	18	%18 (each) will be added for goods up to £10
20	30	%30 (each) will be added for goods between £10 and £20
*	35	%35 (each) will be added for goods over £30

Direct Input format: each= ;10=18; 20=30;*=35

Glossary of WorldPay terms

A

Account ID

The unique reference for each of a customer's accounts on the *Select Database*.

Activation Request Form (ARF)

URL: <https://secure.worldpay.com/app/arf.pl>

Form that the customer submits to the *Technical Support* Team when he is ready to go live.

Agent Number

Assigned by the bank. WorldPay's reference number with the bank.

AMEXC

American Express Customer

ARF

See *Activation Request Form (ARF)*.

Authorization

A process where the transaction is approved.

B

Bank Compliance form

The customer must complete this document and get it stamped by his bank to confirm his business details. It is a requirement of the customer acceptance process.

Bureau

The former name for *WorldDirect*.

C

Callback password

The password relating to a *callback URL*.

Callback URL

The customer can set up a callback URL on the *Customer Management System (CMS)*. This URL can be used for payment responses that are displayed to his shoppers. The customer can set up the callback URL and password by clicking on the 'Configuration Options' button for the required installation at the Home page on the CMS.

Card issuer

See *issuer*.

Card scheme

Mastercard, Visa or Switch.

Card scheme rules and regulations

Operating rules set by the card schemes to which all member banks must comply.

Cardholder

See *shopper*.

'Cardholder not present' transactions

Transactions which are processed via telephone or the Internet. The merchant does not have sight of the card or of the cardholder's signature.

Chargeback

A transaction dispute procedure, initiated by a cardholder/shopper, which may result in a debit being applied to the customer's account.

Chargeback Guide

A document describing what happens when a chargeback is raised on a WorldPay Direct customer. It provides support to the customer in deciding whether to process the transaction in question or make inquiries as to the identity of the cardholder.

Click and Build

WorldPay's multi-currency and multilingual online shopping system and catalogue builder.

Code 10 call

An authorization check made by an *issuer*, where a customer is suspicious about a transaction.

Collection assistance

A 'Please can you help' type of letter sent by one card scheme member to another.

Company ID

A unique reference for a customer on the *Select Database*. Also known as *WorldPay Company ID (WCID)*.

Company number

Assigned by the acquiring bank. A way in which the bank identifies a merchant on their system.

NatWest: 6 digit unique number

Midland: 6 or 7 digit unique number

Barclays: same as *Terminal ID (TID)*. 8 or 16 digit number

Completion

See *deferred processing*. Once a supplier is satisfied that a 'pre-authorized' transaction should go ahead, he 'completes' the transaction.

Continuous authority transaction (Mastercard and Visa only)

A transaction for which a cardholder grants written permission to a customer to periodically charge their account number for recurring goods or services (for example, club membership or magazine subscription).

Customer

A business that is using WorldPay to facilitate the selling of its products/services: For example, ISPs who host Click and Build or internet *store-owner*s.

Customer Acceptance

Email: autorisk@worldpay.com (All Customer Acceptance)

emea.applications@worldpay.com (UK CA Team)

rowapps@worldpay.com (International CA Team)

Previously known as *Risk*. The Customer Acceptance Team receives the customer's initial application form. They assess his application and decide whether he can become a WorldPay customer. The ROW Customer Acceptance Team deal with companies incorporated in the USA and the Asia-Pacific regions and the EMEA Customer Acceptance Team deal with companies registered in Europe, the Middle East and Africa.

Once the customer's web site is live, they also check any changes he wishes to make, ensuring he adheres to any agreements he has signed with us. Occasionally, they run random checks on his web site to ensure it conforms to all agreements.

Customer Management System (CMS)

URL: <https://select.worldpay.com/wcc/admin>

A tool for WorldPay customers to manage their WorldPay accounts. Previously known as MAMS or WAS.

Customer Procedures Guide

Aimed at customer/customer's integrator who is integrating with the WorldPay payment service.

The document explains how the customer's WorldPay account is set up and how to carry out various administrative procedures.

Customer Service

Email: customerservice@worldpay.com

Telephone: +44 (0) 870 742 7002

Available: 0700 to 2300 GMT, every day

Provide (non-technical) support to customers. The Customer Service Team can offer help with any issue to do with WorldPay's services. You should direct technical queries to the Technical Support Team.

See also *Customer Support* and *Technical Support*.

Customer Services Director (CSD)

Email: csd@worldpay.com

The Customer Services Director oversees all components of WorldPay's service to the customer and ensures that the customer is receiving a good level of service.

The customer can contact the Customer Services Director for advice on who to speak to at WorldPay with his question or problem. The customer can also register any comments or complaints that he may have.

Customer Support

Customer Support is divided into two; *Customer Service* and *Technical Support*.

D

Deferred processing

A facility available through WorldPay which allows the supplier to:

- check a shopper's credentials/creditworthiness before providing the goods or services.
- identify duplicate transactions before they are sent through to the banks for

processing.

Once the supplier is satisfied that the transaction should go ahead, he 'completes' the transaction.

Direct Debit Authority form

UK customers must fill out a direct debit authority, so that WorldPay can debit any fees that are due (for example the annual set-up fee).

E

Expired card

A card on which the embossed, encoded, or printed expiry date has passed.

F

Fulfilment

A document image that NatWest supplies in response to a Request for Information.

FuturePay

A WorldPay product, which enables both fixed amount (standing-order-like) contracts and variable amount (direct-debit-like) contracts with infinitely flexible permutations on possible constraints. It need not involve any initial payment, and the amount and timing of payments may vary.

G

GoldMine

Customer relationship management software.

Gold ID

A unique reference on the GoldMine system. For customers, this will usually be the same as their *Company ID*.

Good Faith

A 'Please can you help' type of letter sent by one card scheme member to another.

I

In real time

Instantaneously, immediately

Installation ID

The unique reference number assigned by WorldPay for a particular Select installation. The customer includes this is the number in his payment form. The customer will probably have two installation IDs; one for live and one for testing.

Integration Guide

The technical guide that helps a customer to set up his Shopping System to use the WorldPay Internet payment mechanism. He can view or download this document when he has paid for WorldPay.

Internet-trader

Individual or company who owns an internet site from which products/goods can be

purchased.

Intershop

A method of integrating with WorldPay.

Issuer

Also known as *issuing bank*, *card issuer* . A member bank that issues cards and whose name appears on the card.

Issuing bank

See *issuer*.

L

Live Server

The secure server onto which *Technical Support* transfers your payment page files to make them live.

Login password

The password used by a customer or a shopper to access the *Customer Management System (CMS)* or the *Shopper Management System (SMS)*.

M

MAMS

Old name for the *Customer Management System (CMS)*.

Member

An organisation (usually a bank) which is a signed up to operate within the terms of the card scheme.

Merchant (1)

An individual or company approved to accept a credit or bank card.

Merchant (2)

Obsolete way to describe an individual or company who is using WorldPay to facilitate the selling of its products/services on its internet site. These individuals or companies are now known as *customer s*.

Merchant Number

See *Outlet ID/Number*.

Merchant Service Charge (MSC)

The charge levied on a transaction by the acquiring bank.

See also *Transaction Service Charge (TSC)*.

Multi-currency transaction

Transaction where the currency in which the shopper makes payment may differ to the currency in which the customer receives payment. Enables shoppers to purchase goods and services in a currency that they recognise and understand. The customer can offer goods in over 160 currencies and receive payment in any of 22 currencies.

N

NDC

National Data Corporation

NDCC

NDC Acquired Customer

NWAC

NatWest Acquired Customer

O

OBAC

Other Bank Acquired Customer

Outlet ID/Number

Also referred to as *Merchant Number*. Assigned by the acquiring bank. A way in which the bank identifies a merchant on their system. There is one outlet number for each of the merchant's remittance currencies.

NatWest: 8 digits. Also known as *Streamline ID/Number*.

Midland: 15 digits

Barclays: 7 digits

P

Password

Could be *login password*, or *call-back password*.

Partner

See *WorldPay Partner*

Partner ID

The *Company ID* for a partner.

PC-EFT

Shortly to be replaced by *WP-EFT (WorldPay Electronic Funds Transfer)*.

A software package that enables the authorization and processing of *'cardholder not present' transactions* to the relevant acquiring bank. In order for merchants to process transactions via WorldPay, they have to be entered onto the PC-EFT system.

Post-authorization

See *pre-authorization*.

Pre-authorization

A transaction that verifies if there are sufficient funds on the card. The amount of the transaction is held for a period not longer than 30 but as short as 7 days. The post authorization transaction actually charges the account and pays the merchant.

R

Real time

See *in real time*.

Refund

When funds for a transaction are returned to a shopper by the customer.

Remittance

The funds that WorldPay pays to the customer.

For customers offering WorldAccount: Transactions are remitted to the customer's bank account each Wednesday, 4 weeks in arrears. Bank Transfer Charges, Refunds and WorldPay's TSC are calculated and deducted before remittance occurs.

For WorldDirect customers: Transactions are remitted to the customer's bank account each Wednesday, 4 weeks in arrears (1 week in arrears for customers domiciled in the USA or Canada). Bank Transfer Charges, Refunds and WorldPay's TSC are calculated and deducted before remittance occurs.

For NatWest Acquired customers: Transactions are remitted to the customer's bank account 3 to 5 working days after the transaction was made. If the customer is set up to process sterling transactions only, NatWest debits the agreed MSC from the customer's bank account each month. If the customer is set up for multi-currency processing, NatWest collects the MSC before remittance.

For Other Bank Acquired customers: Transactions are remitted to the customer's bank account 3 to 5 working days after the transaction was made. The acquiring bank debits the agreed MSC from the customer's bank account each month.

Remittance currencies

The currencies in which the customer can accept payment from WorldPay and into which foreign currency payments are converted. The customer must have an account for each remittance currency before applying. There are 22 remittance currencies.

Request for Information (RFI)

A request from the cardholder's issuing bank for copies of a signed sales receipt or other suitable documentation to prove the validity of a transaction.

Risk

The former name for *Customer Acceptance*.

S

Select Checkout

Plain text (via HTTP) integration method. Used by the majority of customers for simple integration with the Select Gateway.

Select Checkout lets the customer have multilingual and configurable payment pages, but does not offer WorldAccount. Checkout allows the customer to have repeat billing, a delivery address and callbacks. To integrate with Select Checkout the customer needs knowledge of HTML forms. No scripts need to run on the customer's server.

Select Database

The main transaction and reporting database underlying the Select Gateway.

Select Gateway

The web-facing service for capturing payment information.

Select Invisible

Batch processing interface to the Select gateway. Using either Select Junior or Select Pro, the customer can use Select Invisible to communicate directly with WorldPay on behalf of the shopper, submitting batches of transactions or transactions that require only

simple feedback. The use of Select Invisible is not normally permitted for purchases, although all customers can use it for refunds and post-authorizations.

Select Junior

A Java Servlet implementation of a simple text (via HTTP) integration method. Select Junior enables brandable and configurable payment pages, repeat billing and call-backs. It is already integrated into WorldAccount. To integrate with Select Junior the customer requires knowledge of HTML forms. No scripts need to run on the customer's server.

Select Pro

Encrypted (via HTTP) Java integration method. Used by customers requiring encrypted call-backs from the Select Gateway.

Select Pro lets the customer have brandable and configurable payment pages, repeat billing, call-backs, and is already integrated into WorldAccount. It also features additional security measures and automatic exchange rate updates. To integrate with Select Pro the customer needs basic Java programming and web server administration skills, and preferably a server supporting Java servlets.

Settlement

See *remittance*.

Shop@ssistant

A method of integrating with WorldPay.

Shopper

A cardholder who is buying a customer's products/services. See also *customer*.

Shopper Management System (SMS)

URL: <https://select.worldpay.com/wcc/admin>

A tool for WorldPay shoppers to manage their WorldPay accounts.

Single currency transaction

Transaction where the payment currency is the same for both the shopper and the customer. Developed to satisfy the demands of companies wishing to transact electronic commerce solely in their own country. WorldPay support 22 single currency options.

SMS

See *Shopper Management System (SMS)*.

Split sale

Where a customer has processed two or more transactions that in total exceed his floor limit, to avoid having to obtain a single authorization for the combined total.

Staging Server

Accessible to customers using *Select Checkout*, *Intershop* or *Shop@ssistant*. The server to which the customer must move his payment page files (from his local machine) so that *Technical Support* can transfer them to the *Live Server*.

His area on the Staging Server is username.staging.worldpay.com.

Store-builder

An individual or company who builds internet sites from which products/goods can be purchased.

Store-owner

An individual or company who owns an internet site from which products/goods can be purchased.

Streamline ID/Number

See also *Outlet ID/Number* and *Merchant Number*. An 8-digit number assigned by NatWest that identifies a merchant on their system. There is one Streamline number for each of the merchant's remittance currencies.

Supplier

Another term for *customer*.

Support

Could be *Customer Support* or *Technical Support*.

T**Technical Support**

See also *Support* and *Customer Support*.

The Technical Support Team have four functions:

Integration - they set up the WorldPay computers to accept the customer's payment pages, once he has been accepted by *Customer Acceptance*.

Testing - they check the customer's site at the testing stage to ensure there are no technical or operational errors before it goes live. They will inform the customer of any errors and may be able to advise as to how to correct them.

Activation - they are responsible for making the customer's web site live. Upon receipt of the customer's *Activation Request Form (ARF)* and after approval from *Customer Acceptance*, they will activate the customer's site.

General Support - The Technical Support Team deal with technical queries the customer may have during the integration of his site with WorldPay.

Asia Pacific Technical Support

Email:support@aisapac.worldpay.com

UK Technical Support

Email:support@uk.worldpay.com

Fax:+44 (0) 870 742 7009

Available:0700 to 2100 GMT, Monday to Friday

0900 to 1500 GMT, Saturday and Sunday

US Technical Support

Email:support@usa.worldpay.com

Terminal ID (TID)

This number is assigned by a bank and is the virtual equivalent of a PDQ machine. A TID is assigned for each of a customer's remittance currencies.

Transaction currencies

The currencies in which a shopper pays for goods/services on your web site. There are over 160 transaction currencies.

Transaction Service Charge (TSC)

The charge levied on a transaction by WorldPay. See also *Merchant Service Charge (MSC)*.

U**User ID**

A unique numeric reference for a user of the *Customer Management System (CMS)* or of the *Shopper Management System (SMS)*. The user probably never needs to know his user ID.

Username

The name used by a customer to access the *Customer Management System (CMS)* or by a shopper to access the *Shopper Management System (SMS)*.

V**Virtual terminal**

An integration with WorldPay from the customer's back office, where the customer can type in payments directly, instead of using a credit card terminal.

W**WAC**

WorldAccount Customer

WAS

See *WorldPay Administration Server (WAS)* .

WorldAccount

An additional option for WorldPay customers who are using Select Pro or Select Junior. A WorldAccount allows the shopper to make low value purchases in the lowest denomination of up to 22 currencies. The shopper sets up a virtual account with WorldPay, a WorldAccount, in the currency of his choice and "loads" his account using a credit or debit card. With his WorldAccount username and password, he can then buy goods and services from participating customers in his preferred currency.

WorldDirect

A fully approved customer acquisition solution for processing credit and debit cards which operates in over 125 countries.

WorldPay Administration Server (WAS)

The server on which the *Customer Management System (CMS)* and the *Shopper Management System (SMS)* reside.

WorldPay Company ID (WCID)

The unique number that is given to the customer when he first applies to use WorldPay. This number identifies the customer on WorldPay's database. It stays with the customer for as long as he is a WorldPay customer.

WorldPay Customer Agreement

The agreement that the customer signs when accepted as a WorldPay customer. Both

the customer and WorldPay hold a copy of this agreement.

WorldPay Customer Reference (WCR)

Old term for *WorldPay Company ID (WCID)*.

WorldPay Internal Admin Server

URL: <http://wcc.select.worldpay.com/wcc/wpadmin>

The internal customer administration system for creating new companies, accounts, installations, etc.

WorldPay Partner*WorldPay Accredited Partner*

Can offer their shoppers the full range of WorldPay products, enhance their team skills through training and support and earn attractive rewards for recruitment and ongoing business. They also benefit from aggressive marketing programmes, comprehensive marketing support material and campaign funding.

WorldPay Affiliate Partner

Can offer their shoppers the full range of WorldPay products, enhance their skills through training and support, and earn attractive rewards for recruiting new shoppers.

WorldPay Select

Transaction Management Service. Select is the middleware between the customers' web sites and the bank gateway. It is used to capture, store and report on data submitted to WorldPay. The "products" we offer to customers are really just the methods by which they can integrate with the Select service.

WPDC

WorldDirect Customer

WP-EFT (WorldPay Electronic Funds Transfer)

A software package, which enables the authorization and processing of '*cardholder not present*' transactions to the relevant acquiring bank.

In order for merchants to process transactions via WorldPay, they have to be entered onto the WP-EFT system.

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Document Information

Title: Store Builder's Guide issue 1.0 for version 3 of Click and Build.

Who should use this guide

You should use this document if you are a store owner wishing to build an on-line store using Click and Build.

Store Owner and Shoppers

In this document the term store owner refers to a business that is using Click and Build to facilitate the selling of its products/services whereas the term shopper refers to an individual who is buying the store owner's products/services.

What this guide covers

This document provides a guide to all the facilities available to a Store Builder to construct their store. It also provides both design and operational tips to guide you through the program's basic functionality and tips to produce a good looking store. It does not include instructions on using any related software such as Microsoft Windows or Internet Browsers.

What you need to know

To use this guide, you need to know how to use Microsoft Windows and Internet browsers (such as Netscape Navigator or Internet Explorer).

Record of issues

Click and Build Store Builders Guide (for Version 3)	
Issue	Changes made to this issue
1.0	New document

Associated documents

The following documents are also available:

- Getting Started
- Hosting Guide (which contains details on installation, account administration, templating and example sites).
- Customer Procedures Guide
- Charge back Guide
- Customer Management System Guide

Documentation inputs

We strive to produce the highest quality of documentation and welcome your feedback. Please send your comments to <mailto:editor@uk.worldpay.com>. This email address is however, only for feedback. If you have a technical question, address it to

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