

# Speartek Admin Guide

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## How to login to the admin

1. Go to [www.yoursite.com/admin](http://www.yoursite.com/admin)
2. Login with your credentials.

## Support

If you have any difficulties doing anything on this guide please don't hesitate to contact us at:

**Email:** [support@speartek.com](mailto:support@speartek.com)

**Phone:** 770-674-3900

## Custom Form Manager

### Creating/Editing Custom Forms

1. Go to Custom Form Manager
2. Go to Manage Custom Forms
3. Click on the "Add New" button at the top.
4. The following information is required to create a custom form
  - a. Name – this is what the custom form will be called
  - b. Column One Width – this is how wide the left column of the form will be (**Note:** This is a percentage value)
  - c. Column Two Width – this is how wide the right column of the form will be (**Note:** This is a percentage value).
  - d. Contact Email – this is the email address that will be notified when users submit information to the custom form. (**Note:** An email will only be sent out if the "Send Notification of Response" radio button is set to Yes.)
  - e. Display Page on Submittal – this is the page the user will see after they have successfully submitted data to the custom form.
  - f. Send Notification of Response – choose whether or not the contact email provided above should be notified every time a user submits data to the custom form.
  - g. Record Responses in Database – leave this option set to Yes.
  - h. Justification – choose whether you would like the form to be left, right or center justified (the left option is usually the best option)
5. Click the "Next" button at the bottom of the page.
6. The following screen allows you to add form fields and labels to the custom form. To add form fields to the form, mouse over the "Add Data Fields" link at the top of the page. The following options will be available to you:
  - a. Add Short Memo – this is a regular text field input field.
  - b. Add File Upload – this will allow the user to upload a file to the form at the time of submission (**Note:** accepted file types are configurable)
  - c. Add Long Memo – this is a regular text area input field
  - d. Add Check Box – this is a regular check box
  - e. Add Radio Buttons – this is a regular radio button
  - f. Add Drop Downs – this will allow the user to make a selection based on a set of predefined values.
7. To edit form fields, please follow the steps below
  1. Click the pencil icon next to the input field you would like to edit

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2. The following information will be required for you to fill in:
  - a. Input Label – this is the label that will appear to either the left or right hand side of the text input box.
  - b. Input Label Font Style – used to set the style of how you want the label to appear next to the input field
  - c. Input Label Alignment – choose whether or not you want the label to appear to the left, right or center.
  - d. Width – how wide should the input box be.
    - If your site is responsive, these are the values you should use for this field:
      1. 401 - This will create a 3 column layout for the field
      2. 601 - This will create a 2 column layout for the field
      3. 801 - This will create a 1 column layout for the field
  - e. Data Field Identifier – this normally can be set to the same name as the label. This is how you will be able to identify that data once it is submitted by the user.
  - f. Required – whether or not this should field is required when filling out the form
  - g. Date Field – choose whether or not this field allows for a date to be entered (**Note:** If this option is set to yes, then a date picker will appear to the right hand side of the text input box)
8. To add labels or breaks to the custom form, mouse over the “Add Labels & Formatting” link in at the top of the page. The following options will be available to you.
  - a. Add Text Label – this is a regular label (This is similar to the one that appears next to the Short Memo field but it does not have the input textbox to the right of the label)
  - b. Add Break – this adds a space before and after where the break is inserted
  - c. Add Horizontal Line – adds a horizontal line to separate content.

## Add Custom Form to Page

Before you can add a form to a page you first need to create the form. The steps to do this are found above. Once you have the form, follow the steps below to add that form to the desired page.

1. Go to Content Manager sample
2. Click on Edit Site Content
3. Find the page you want to add the custom form to by using the “Select Page” drop down. sample
4. Go into the section of the page that you want to add the form by clicking the Edit button on the top left corner of the section.
5. Hover over the Add Web Block menu and click Custom.
6. From the list find the custom form you created. The name will be yourformname.asp. Once you find it, click the icon to the left of it to add it to the page.
7. When you have it on the page you can drag and drop it if you want it to be above or below existing content blocks on the page. Be sure to click the Save Sort Order link on the toolbar if you make any updates to the sort.

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8. If your site uses different Groups, click on the icon above the form block to display the Viewing Group settings. On this screen, select all the groups that are to see the form. Click Save when done.

If your site is responsive, you will also need to go into Content Manager > Site Settings. In the Global Settings tab for your site you will find a section for "Pages with Custom Forms." While holding the shift key on your keyboard, find the page that you just added your new custom form to and select it. Make sure that none of the selections already there are cleared and click the Save button at the bottom.

## Custom Form Reports

1. Go to Custom Form Manager
2. Go to Reports
3. The following screen will show you a list of available custom forms that have already been created that you can view a report for. Find the form that you would like to see a report for and click the checkmark icon to the left of the form name
4. A report will be generated that shows you all submissions that have been received for the form you selected
5. To export the form to your local machine, click on the Export Report button.
6. On the next screen you will see a link to a .csv file. (ex. Download ContactUs\_4152011.csv). Click on the link to download the file to your local machine.

## Commerce Manager

The commerce manager is the primary location for updating all product and category related items.

### Product Section

#### Adding a New Product

1. Go to Commerce Manger
2. Click Categories and Products
3. On the right pane click on the "Create New Product" link
4. Product Type should be "Product"  
Enter Product Name, PartNo, and Price and click next
5. Fill out any information you need on the Core Tab and scroll to the bottom and hit save
6. Click on the Group Config tab and configure the groups the item is supposed to display on the front end of the site for by clicking on the pencil icon next to each group and filling out the corresponding information.
7. Click on the Pricing tab and click on the "Create New" button. This step should only be completed if the item is to have price breaks assigned to it.
8. Click on the Media tab and upload images. Main, Thumb, Cart and Large are required.
9. Click the Product Connections tab and assign item to its corresponding categories.
10. If you have related items, click on the Related Items section on the Product Connection tab and assign the related items to the product.
11. If the item is to have attributes, click on the Attributes tab and click the "Add Attributes" link. From the list that comes up select all the corresponding attributes that should be assigned to this item as well as inputting mark up if the modifier has any. All modifiers

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default to By Item mark-ups. If it should be by Part No, please make the updates on the specific modifier.

Note: If you have color specific images for the color attribute, you can click on the media tab and then attribute images to assign those images to the item.

12. Click on the Properties tab and fill out corresponding properties if needed.
13. Last, you will need to enter inventory for the item. This is found in the inventory tab.

## Copying a Product

1. Go to Commerce Manager.
2. Go to Manage Product and Categories.
3. Go to the Edit Product screen by using the search field or by expanding the categories on the left hand side of the screen by clicking the plus icon located to the left of the category name.
4. Once you find the product you would like to edit, click the pencil icon next to the product name to edit it.
5. Scroll down to the bottom of the Edit Product screen and press the Copy button. This will take you to the Copy Product Data screen.
6. Below the Select Elements to Copy: section, press the "Check All" button to choose all the settings from the original product. (Note: Since this is for a new product, you can un-check Image to not copy the existing product image.)
7. Type in the Product Name and Part #.
8. Once done, press the "Copy This Product" button.

## Add/Editing Group Config

The group config tab allows you to specify which public groups can view a product. If no public groups are configured for a product, it will not be visible on the website.

1. Go to Commerce Manager
2. Go to Manage Categories and Products
3. Go to the Edit Product screen by using the search field or by expanding the categories on the left hand side of the screen by clicking the plus icon located to the left of the category name.
4. Once you find the product you would like to edit, click on the item name or click the pencil icon next to the product name to edit it if you used the search feature.
5. Under the Edit Products screen, go to the General Info > Group Config tab.
6. To **add/modify** the configuration, click on the pencil icon next the public group name
7. On the Group Configuration screen, choose the options you'd like for the group then press the Save button.
8. Repeat Steps 4-7 for any other groups that need to be configured.

## Assigning Product Images

The Media > Main Images tab allows you specify cart, thumbnail, main, large and alt product images. You will need to select unique images for each by clicking the individual "Select Image File" buttons if you have alt views.

- The cart image is what displays in the shopping cart
- The thumbnail image displays on the category page
- The main image displays on the product page
- If available, the large image displays on the "view larger" pop-up

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Steps for assigning product images:

1. Under the Edit Products screen, go to Media > Main Images tab.
2. Press on the “Select image” button under the image definition.
3. Browse for your image on the Media Object pop up window.
4. Once done, scroll down to the bottom of the page, then press the Save button.

## Adding Attributes to a Product

1. Go to Commerce Manager
2. Go to Manage Categories and Products
3. Go to the Edit Product screen by using the search field or by expanding the categories on the left hand side of the screen by clicking the plus icon located to the left of the category name. Once you find the product you would like to edit, click the pencil icon next to the product name to edit it.
4. Under the Edit Products Screen, go to the Attributes tab.  
Click on the “Add Attributes” button. This will open a pop up window.
5. In the pop up window, choose the Attribute type you’d like (such as size) then use the checkbox to select attributes you’d like. (**Note:** if you want a markup for the attribute, simply type in the amount (such as 2.00) to the right of the attribute item.)
6. Once done, press the “Add Modifiers to product” button at the bottom of the screen.

## Editing Attributes for a Product

1. Go to Commerce Manager
2. Go to Manage Categories and Products
3. Go to the Edit Product screen by using the search field or by expanding the categories on the left hand side of the screen by clicking the plus icon located to the left of the category name. Once you find the product you would like to edit, click the pencil icon next to the product name to edit it.
4. Under the Edit Products Screen, go to the Attributes tab.
5. You will see a list of all of the attributes that are currently tied to a product. Click directly on the attribute name to expand the list of modifiers that are a part of that attribute
6. From the list provided, make sure that all modifiers that you want attached to the product have a checkmark in the checkbox next to it. All modifiers that don’t have the checkbox checked will not be attached to the product.
7. Once done, click the “Save” button to save your changes.

## Assigning Inventory to a Product

1. Go to Commerce Manager
2. Go to Manage Categories and Products
3. Go to the Edit Product screen by using the search field or by expanding the categories on the left hand side of the screen by clicking the plus icon located to the left of the category name. Once you find the product you would like to edit, click the pencil icon next to the product name to edit it.
4. Under the Edit Products screen, go to Inventory
5. The following information must be filled in per product
  - Track Inventory – checkbox must be checked
  - SKU – The product SKU you will be updating stock for.
  - Quantity On Hand – the number of items in stock for this SKU

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- Allow Backorder – checkbox must be checked

## How to Sort Products in Commerce Manager

1. Login to the admin
2. Go to Commerce Manager
3. Go To Categories and Products
4. Expand the shop you want to work with to view tis categories.
5. Find the Category you want to sort the products of and click on it.
6. Go to the Sort Products tab and sort products in the desired order.

## Category Section

### Adding / Modifying a Category

Commerce Manager > Categories and Products

To view your categories, you must first expand the categories menu. To expand the menu, click on the plus [+] next to the shop name on left side of the screen. Click on the plus [+] next to any category name to expand and view existing sub-categories. Click on a category name to view the category details.

The category details on the right provide buttons for creating a sub-category, renaming, or deleting selected category. You can also specify search engine optimization (SEO Configuration), associate products, sort sub-categories, and specify a category image (Set Image Definitions).

### How to Create a New Main Category

1. Login to the admin.
2. Go to Commerce Manager.
3. Go to Manage Shops.
4. Click the pencil icon next to the shop.
5. Click on the categories tab.
6. Enter in a Category Name for the new category.
7. In the Public Groups section select the Public Groups that should be allowed to view this category.
8. If the category should be active, make sure that the Active checkbox is checked.
9. Click the “Add Category” button to save your changes.

### How to Add New Categories under Existing Categories

1. Login to the admin.
2. Go to Commerce Manager.
3. Go to Categories and Products
4. To view your categories, you must first expand the categories menu. To expand the menu, click on the plus [+] next to the shop name on left side of the screen. Click on the plus [+] next to any category name to expand and view existing sub-categories. Click on a category name to view the category details.
5. On the right hand side, click on the “New Subcategory” button.

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6. At the top of the page you may see a prompt that says “This website is using a scripted window to ask you for information. If you try this website, click here to allowed scripted windows...” Click on this message and select “Temporarily allow scripted windows”.
7. Click the “New Subcategory” button again.
8. A prompt window will now appear. Enter the name of your new category and click “Ok”.

## Associating Products to a Category

There are two ways to associate products: using the associate products section or the edit product screen.

### Associate Products Screen:

1. Go to Commerce Manager.
2. Go to Manage Categories and Products.
3. Expand the categories using the left side of the screen to edit the category you’d like.
4. Once you click on the category name, the Details for Category screen will show on the right. Click on Assign Products Button.
5. In the left column (Products Available for this category), choose the products you’d like to add by using the search filter.
6. Once you have found the products you would like to associate to this category, click on the right arrow button located between the Available Products and Assigned Products tables. This will populate the products to the right column (Products in this category).
7. Once done, click on the Save Products button.

### Edit Products Screen:

1. Go to Commerce Manager.
2. Go to Manage Categories and Products.
3. Search the product by clicking on the Search Products button that is near the right of the screen.
4. Click on the checkmark that is at the left of the product name to edit.
5. Click on the Product Connections tab.
6. Select the products on the left column and click on the right arrow button. This will move them to the Products assigned to this Associated Categories section.
7. Click on the Save Connections button.

## Manage Attributes

Attributes allow to you specify available modifiers—such as size, color, etc—for products. To create a brand new attribute, please follow the instructions below:

1. From Admin Home, go to Commerce Manager.
2. Click on the Manage Attributes link.
3. At the top left hand corner of the Manage Attributes table, click the “Add” button.
4. On the Add/Edit Attributes screen you will need to fill in the following information
  - a. **Attribute Name:** this is the name of what you would like to call the new attribute you are creating.
  - b. **Display attribute name in drop-down:** If this option is set to yes then on the front end of the website the drop down menu for this attribute will not default to one of the available attribute modifiers. (ex: If your new attribute is named “Color” with the

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available modifiers of Red, Blue & Black then the drop-down menu on the front end will default to the value “Select Color” instead of defaulting to the “Red” attribute modifier).

- c. **Does this attribute require inventory to be tracked:** Set this option to yes if you have SKU’s for the modifiers for this specific attribute.
  - d. **Does this attribute have unique product images:** Set this option to yes if alternate product images will be used depending on which attribute modifier is selected by the user on the product page.
5. Under the “How many items do you want to add to the Attribute?” label enter in how many modifiers you would like to create for this attribute and then click the “Generate” button.
  6. Below the “Generate” button you will now see empty modifier fields below that will allow you to enter in the Modifier name.
  7. Once done, click the “Save” button to save your changes.

## Add additional modifiers to an existing attribute

1. From Admin Home, go to Commerce Manager
2. Click on the Manage Attributes link.
3. Click on the pencil that is to the left of the attribute you’d like to edit.
4. Click on the “Add New” button for any of the existing attributes. It will load a new Item section underneath.
5. Type in the Item Name.
6. If you’d like to change the order of the attributes, you can click on the arrows to the right of the attribute.
7. Once done, scroll down to the bottom of the screen and press the “Save” button.

## Price Breaks for Items

### Creating a Price Break

The price breaks section will allow you to create specific discounts for selected products. Please follow instructions below:

1. Go to Commerce Manager
2. Mouse over the Commerce link in the top navigation and then select Manage Price Breaks.

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- Click on the “Add New” button.

The screenshot shows the 'Manage Price Breaks' form. At the top, there is a 'Name' field with the value 'test-pricebreak' and a 'Help' button. Below this is the 'Price Break Type' dropdown menu, currently set to 'By Group and Quantity'. A 'Description' text area is positioned below the dropdown. An 'Add Group' button is located to the left of the main form area. The main form area contains a 'Group' dropdown menu set to 'Any Group', an 'Add Quantity' button, a 'Copy Set of Conditions' button, and a 'Delete Set of Conditions' button. Below these buttons is a table with two columns: 'Quantity' and 'Price Break Amount'. The 'Quantity' column has a text input field with the value '0'. The 'Price Break Amount' column has a text input field with the value '0', a 'Dollar' dropdown menu, and a 'Delete' button. At the bottom of the form, there is a message: 'After you save this price break, you may come back to this screen to assign it to a product.' and two buttons: 'Cancel' and 'Save Definition'.

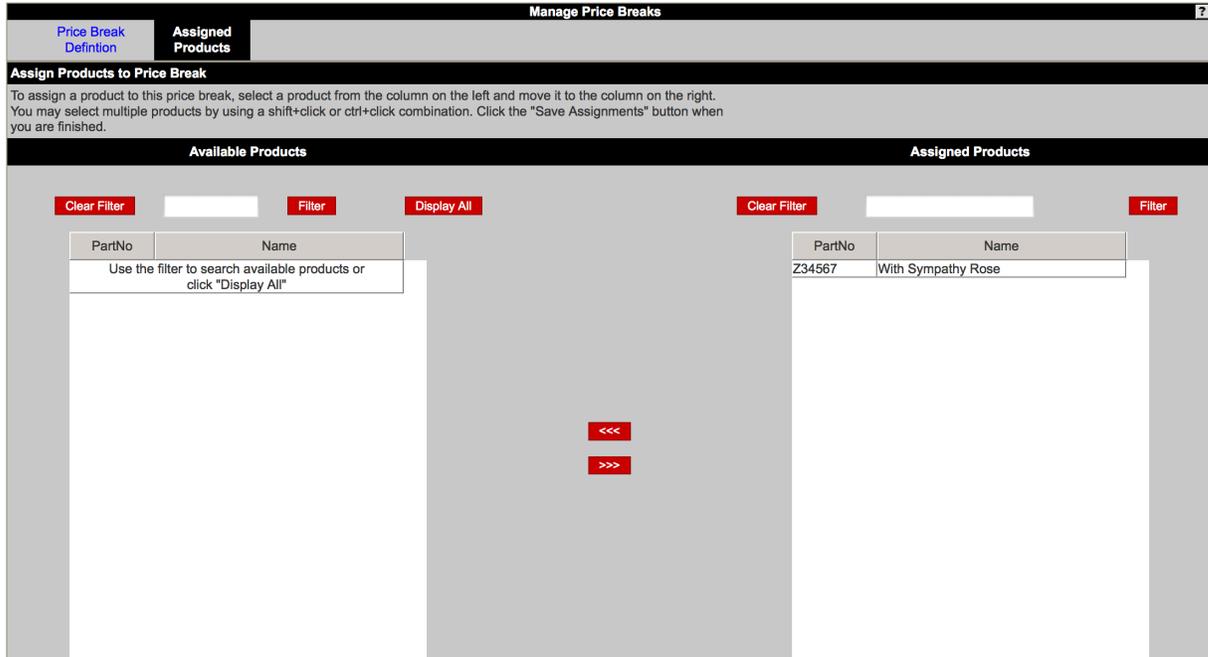
- On the Manage Price Breaks screen, fill in the fields below:
  - Name: Enter the price break name you’d like.
    - Example: 10% Off.
  - Type of Price Break:** Choose “By Group and Quantity”. This will allow you to apply a price break to people that are associated with a given group when they buy a certain quantity of the product.
  - Description:** Enter a brief description of the price break.
  - Under the “Add Price Break” button, this is where you will create the price break definitions:
    - Group:** You can specify which group will receive this price break. The users that are connected to the group selected will be the only users associated with this price break.
    - Quantity:** Enter the number of minimum number of units to get this price break.
    - Price Break Amount:** Enter the discount dollar amount or percentage of price for the minimum quantity specified under quantity.
    - Percent or Dollar:** From the drop down menu, select Dollar(s) if you want a discount of fixed amount or select Percent if you want the discount to be a percentage of the original price.
  - To create more definitions for a particular group, you can click on the “Add Quantity” button. To add a new group to this price break, you can click on the “Add Price Break” button.
- Once done, click on the “Save” Button.

## Assigning Price Break to a Product

- Go to Commerce Manager.
- Mouse over the Commerce link in the top navigation and then select Manage Price Breaks.
- Click the pencil to the left of the price break name.

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4. Near the top of the screen, click on the Assigned Products tab.
5. To assign a product to the price break, use the search box to find the product, then select a product from the column on the left and move it to the column on the right. You may select multiple products by using a shift+click or ctrl+click combination.



6. Click the "Save Assignments" button when you are finished.

## Manage Gift Certificates

1. Login to the admin
2. Go to Commerce Manager > Manage Certificates
3. Click the Add New button
4. On the Manage Certificates for screen
5. Select Gift from the Certificate Type drop-down menu
6. Enter a unique Certificate Number (this can be the next certificate number in sequence, or an alpha-numeric value specific to this certificate)
7. Enter a unique Certificate Code (this is the value the user will enter in the Certificate Password field at step 1 of checkout)
8. Click the Send Email checkbox
9. Complete the remaining fields
10. Change the Expires values to the desired expiration date
11. Click the Add button

Once you click the Add button, an email will be sent to the email address you indicated in the "To E-Mail" field.

## Import Product Data

This section of the admin allows you to import items into your site. To import items to your site do the following:

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1. Run an Export so that you have a fresh file of the data from your site. If you are making edits on your site use this file to make the edits. If you are adding brand new data, you can use this file as a template.
2. Once you have your file ready go to Commerce Manager > Import Product Data
3. Select your file using the instructions on screen. **Make sure this file is an XML Spreadsheet 2003/2004 spreadsheet. The import will not work if it is not.**
4. If you have product images, use the product images button to upload them.
5. Enter the email address the confirmation email should go to.
6. Check the box next to the statement "I have removed all unnecessary worksheets from the XML file prior to upload."
7. Click Import

Remember these guidelines:

- Go to <http://www.speartek.com/VLInclude/Product-Import-Guide.pdf> to view printable instructions on how to format and populate the product import XML file. All worksheet names, column headers, and values are case-sensitive.
  - The product import is based on PartNo, with the exception of the Inventory and Stock worksheets, which are based on both PartNo and SKU.
  - Once you click the Import button, a backup of your website's current product data is generated. If you find that your import causes a problem, you can import the backup file, which can be downloaded from the Export Product Data > Previous Exports screen.
  - If space is needed, you can make your way to the \Commerce\AdminImport\ subdirectories within Site Manager > File Manager to delete files that are no longer required.

## Export Product Data

This section of the admin allows you to export all of the current data for all of your items on the site. To export the data to your computer do the following:

1. Go to Commerce Manger > Export Product Data
2. Once there you will see the below screen. You can either download the file for a previous export or just click the Export button to export the current data on your site.
  - a. **Display Previous Exports:**

This section will give you a list of exports you have done in the past 30 days and let you download them.
  - b. **Export:**

This will get a file ready for you from the data currently on the site. Note: Depending on the amount of data depends on the amount of time it takes for the export to complete. Please give it a few minutes for it to finish.

Once done follow instructions on the screen to save to computer.

It is advised that you do an export prior to an import and make your edits on that file and use that as your import file to minimize possible errors.

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## Content Manager

### Editing Content

1. Go to Content Manager
2. Go to Edit Site Content.
3. At the top of the screen, choose the page you'd like to edit from the drop down menu.
4. Click on the EDIT button that is to the top of the block you'd like to edit.
5. Click on the blue WebEdit button that is to the left of the block you'd like to edit.
6. You are now in the Inline HTML editor. Make the edits you'd like.
  - a. Note: To learn more on the editing options, click the question [?] mark that's near the top right of the Inline HTML screen.
7. Once done, press the Save button.

### Copying Pages/Creating a New Page

1. Go to Content Manager
2. Go to Edit Site Content.
3. Search for the page you'd like to copy by using the drop down menus or search by page ID near the top of the screen.
4. Once found, click on the "Copy Page" link near the top of the screen. This will take you to the Page Copy screen.
5. On this screen, fill in the fields described below:
  - a. **Page Name:** Type in the name of the page in the format – Page Title. This will only be seen in the admin.
    - i. Example: About Us.
  - b. **Page Title:** Type in the name of the page that you'd like.
    - i. Example: About Us | Company Name.
  - c. **Meta Tag:** Enter Meta tags used to provide search engines with information about your website.
  - d. **Page Type:** Select the page type that best classifies the content of this page.
  - e. **Copy All HTML In Unshared Content Blocks:** Select if you want to copy the content that is not shared.
  - f. **Secure Page:** Select either yes or no if the new page will be security encrypted. Normally, this is kept as no.
  - g. **Searchable Page:** Select either yes or no if you'd like this page searchable. Normally, this is kept as yes.
6. Once done, click on the "Save" button.

### Updating Group Viewing Permissions on Content Pages

1. Go to Content Manager
2. Go to Edit Site Content
3. Choose a page you'd like to edit
4. Click on the Properties link that's near the top of the screen.
5. At the bottom of the Properties screen, click on the Next>> button.
6. Click on the checkbox near the left of the group name.
7. Press Save.

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## Updating Group Viewing Permissions on Content Blocks

1. Go to Content Manager
2. Go to Edit Content
3. Choose a page you'd like to edit
4. Click on the EDIT button that is right above the block you'd like to edit.
5. Click on the Content Properties link.
6. At the bottom of the Content Properties screen, click on the Next>> button.
7. Click on the checkbox near the left of the group name.
8. Press Save.

## JavaScript Files Running on Pages

All JavaScript files included in each page are included in the open and close include files on each page. If you ever need to add new JavaScript files to the site you do so by uploading them into the following folder:

1. Go to Site Manager
2. Click on File Manager
3. Click on Content then JavaScript's

To view what JavaScript files are in each page you can see them by going here:

1. Go to Site Manager
2. Click on File Manager
3. Click on Content then Includes
4. In this section you will see the Open and Close page includes. We have two open page includes and one close page include. The JavaScript files are listed on the open page files. The two open page files contain the same java scripts they are just laid out a bit differently.
5. If you ever need to add new JavaScript files, make sure they are on both open includes.

## Security Manager

### Changing Passwords

1. Go to Security Manager
2. Go to Change Password.
3. Click on the pencil that is to the left of the login.
4. Type in the password in the New Password and Re-type New Passwords fields.
5. Once done, press the Save button.

### Authorizing a New User

1. Go to Security Manager.
2. Click on the Authorize Prospects link or using the top navigation menu links, mouse over the Manage User Security link then click on the Authorize Prospects link.
3. Click on the pencil that is to the left of the prospect's information.
4. On the Authorize Prospects edit screen:

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- a. Enter any comments if desired. These comments will show up on the users' profile in Manage Users once the user has been approved.
  - b. Change the Security Level from "Prospect" to "Member".
  - c. Under the Group Types, it automatically defaults to the main public group on your site.
    1. If you'd like to change the user to a different group, just choose the Public group type by clicking the appropriate radio button.
  - d. Select the checkbox to the right of Active to make the user active.
5. Once Done, press the Authorize button.

## Configure Prospect Approved Email

1. Go to Security Manager.
2. Using the top navigation menu links, mouse over the Manage Email Content link then click on the "Prospect Approved Email" link.
3. The following information is needed to configure the Prospect Approved Email.
  - a. Subject - – this is the email address that will receive an email when a new user registers on your site.
  - b. From Address - this is the email address that will be sending the email out to the user that is being approved for access to the website.
  - c. Text - this contains the information that will be seen in the body of the email that is sent out.
4. Once you finish making your changes, click the "Submit" button to save your changes.

## Site Manager

### Creating an Admin Account

1. Go to Site Manager
2. Go to Add Users.
3. On the Add User screen, fill in the required fields which are shown below:
  - a. Person Type
  - b. First and Last Name
  - c. Group Types:
    - i. Select the Admin checkbox for each group type based on what the user will have access. On the Transaction section, you will also need to select the checkbox with your shop name as well.
  - d. Type in the Email Address.
  - e. Username
  - f. Password
    - i. Please fill in both password fields.
  - g. Company Name
  - h. Security Level
    - i. Choose the SiteAdmin from the drop down menu.
4. Once done, press the Submit button.

### Creating a Regular User Account

1. Go to Site Manager

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2. Go to Add Users.
3. On the Add User screen, fill in the required fields which are shown below:
  - a. Person Type – Check the checkbox next to wholesale.
  - b. First and Last Name
  - c. Group Types:
    - i. Select the public group the user should belong to
  - d. Type in the Email Address.
  - e. Username
  - f. Password
    - i. Please fill in both password fields.
  - g. Company Name
  - h. Security Level
    - i. Choose Member from the drop down menu.
4. Once done, press the Submit button.

## Editing a User

1. Go to Site Manager
2. Go to Manage Users.
3. Search for the user using the fields at the top of the Manage Users screen.
4. Click on the pencil that is to the left of the user's info. This will take you to the Edit User screen.
5. At the bottom you can find the users address, phone number and properties. Properties will display extra information that the user had to fill out in order to create an account.
6. Make the necessary changes. Once done, scroll down to the bottom of the page and press the "Submit Changes" button.

## Delete an existing user

1. Go to Site Manager
2. Go to Manage Users
3. Search for the user you wish to modify
  - a. Note: You can filter your search with the available drop-downs
4. Click the "X" icon next to the user you wish to delete
  - a. To delete multiple users, check the checkboxes next to the corresponding names and press the delete button.

## Configure Password Reminder Email

1. Go to Site Manager.
2. Using the top navigation menu links, mouse over the "Manage Email Content" link then click on "Password Reminder Email".
3. The following information is needed to configure the Password Reminder Email
  - a. Subject – this is the subject line that will appear in the email's subject line.
  - b. From Address – this is the email address that will be sending out the password reminder email to the user.
  - c. Text – this contains the information that will be seen in the body of the email that is sent out. (**Note:** The user's username and password will be automatically added to the body of the message when the email is sent out.)

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4. Once you finish making your changes, click the “Submit” button to save your changes.

## Configure New User Registration Email

1. Go to Site Manager.
2. Using the top navigation menu links, mouse over the “Manage Email Content” link then click the “New Registration Form Email”.
3. The following information is needed to configure the Password Reminder Email
  - a. Subject – this is the subject line that will appear in the email’s subject line.
  - b. From Address – this is the email address that will be sending out the password reminder email to the user.
  - c. Text – this contains the information that will be seen in the body of the email that is sent out. (**Note:** The user’s username and password will be automatically added to the body of the message when the email is sent out.)
4. Once you finish making your changes, click the “Submit” button to save your changes.

## Accessing the File Directory

To access the file directory, go to Site Manager > File Manager. This will take you to the main screen with all or your folders. The main folders you will be using are below:

- **Content Folder:** This is where your content images, backgrounds, pdfs, include files and java scripts are housed.
- **Style:** All site style sheets are in this folder.

## Trans Manager

### Viewing Web Orders

1. Go to Transaction Manager
2. Go to Manage Web Orders. This will take you the Web Order screen.
3. To view orders, fill in the filters on the screen and then press the "Display" button.
  - a. Note: If you would like to display all orders, simply click the "Display All" button.
4. To view orders details, click on the pencil to the left of the Order # you’d like.
5. You should now see all the order information.
  - a. Note: You can update the order status on this screen by choosing the options on the Order Status drop down menu that’s near the bottom of the screen.

### Export Reports

1. Go to Transaction Manager
2. Go to View/Export Sales Reports.
3. It will default to the Customer Reports within 30 days. You can update the fields under “Select Report Criteria” for more customized reports.

### Configure Payment Options Accepted At Checkout

1. Go to Transaction Manager
2. Go to Checkout Configuration
3. Click the pencil icon next to the Shop Name.

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4. Click on the “Payment Options” link to the left of the label “Collecting User Data”.
5. From here you can configure checkout on your site to accept the following forms of payment
  - a. Credit Card
  - b. Purchase Order
  - c. Ledger Balance
  - d. Rialto Pay
  - e. PayPal
6. To enable one of the forms of payment mentioned above, select the radio button that says “Only ONE...” (i.e. if you want to accept credit cards at checkout, you would select the radio button that says “Only ONE credit card”).

## Configure Order Confirmation Email

1. Go To Transaction Manager.
2. Click on Order Confirmation Email
3. Click the pencil icon next to the Shop Name
4. You can configure different confirmation emails for the public groups that are setup on the site. Choose which group you would like to configure the order confirmation email for and then click the pencil icon next to that group name.
5. The following information will need to be filled in (**Note:** the details of the order are automatically filled in when the email is sent out):
  - a. **Subject:** this is the subject line of the email.
  - b. **From Address:** this is the email address that the email received by the user will be sent from.
  - c. **Header:** this is the information that will appear above the details of the order.
  - d. **Footer:** this is the information that will appear below the details of the order.
6. Click the “Submit” button to save your changes.
7. Repeat these steps for each group you would like to configure the order confirmation email for.

## Configure Order Shipped Email

1. Go To Trans Manager.
2. Click on Order Shipped Email
3. Click the pencil icon next to the Shop Name
4. You can configure different confirmation emails for the public groups that are setup on the site. Choose which group you would like to configure the order shipped email for and then click the pencil icon next to that group name.
5. The following information will need to be filled in (**Note:** the details of the order are automatically filled in when the email is sent out):
  - a. **Subject:** this is the subject line of the email.
  - b. **From Address:** this is the email address that the email received by the user will be sent from.
  - c. **Header:** this is the information that will appear above the details of the order.
  - d. **Footer:** this is the information that will appear below the details of the order.
6. Click the “Submit” button to save your changes.
7. Repeat these steps for each group you would like to configure the order shipped email for.

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## Resend Order Confirmation Email

1. Go to Trans Manager
2. Click Manage Web Orders
3. Search for the desired order
4. Click the pencil icon to edit the order
5. On the order details screen, click the Send Customer Email button on the lower right
6. On the next screen, select Order Confirmation from the drop-down
  - a. To send to the customer, just click the SEND EMAIL button
  - b. To send to YOURSELF, change the TO address to the desired address then click the SEND EMAIL button
7. Repeat these steps for any other order

## Manage Discounts/Promotions (Promo Codes)

1. Login to the admin
2. Go to Trans Manager > Manage Discounts / Promotions
3. Click the “Add New” button
4. At “Step 1 – Setting up your Discount or Promotion”:

**Note:** All the fields on this screen are required.

1. Select a discount type from the **Select Discount Type** drop-down menu.  
Cart Based Discount – Cart based discounts apply discounts based on the subtotal of the shopping cart at checkout
2. Enter the **Description** for your discount/promotion

**Note:** It is best to use a unique description for your discount

3. Enter the **Start Date** and **End Date** to specify the date range a discount will be active

**Note:** Dates can be typed in using the MM/DD/YYYY format or selected from the calendar by clicking on the calendar icon  next to the date field.

4. From the **Shop** drop-down menu, select the shop that the discount will be applied to
5. Click on the **Add Conditions** button to configure the discount code and group

After discounts have been configured, click **Next** to proceed to the next step.

You can click on the question mark ( ? ) in the top right corner for instructions on how to complete the fields on this screen if you have questions.

5. Click the “Add Conditions” button:

**Note:** At least one discount code and group must be configured

1. Check the checkboxes for the groups that the discount will be applied to
2. In the **Code** field, enter the desired discount code that customers will use to apply the discount at checkout

**Note:** Codes must be unique and cannot be duplicated. Codes are case-sensitive and may contain spaces.

**Example:**

*FREESHIP* is not the same as *freeship*

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- c. In the **Max Uses** field, enter the maximum number of times a discount can be used by all users while the discount is active

**Note:** 0 = unlimited

Click the **Save** button to apply the configuration.

In the popup window, click the question mark ( ? ) in the top right corner for instructions on how to complete the fields in the popup screen if you have questions.

6. When done, click the “Save” button
7. When back at the step 1 screen, click the “Next” button
8. At “Step 2 – Define Discount Amount”:

The “Define Discount Amount” screen allows you to define the discount amount as well as how that discount will be applied.

1. Under **Discount Amount**, enter the amount of the discount.
2. Under **Where will this discount be applied**, indicate if the discount should apply to the Cart Subtotal or Shipping Fees.
3. Under **Qualifying Amount**, enter the Minimum and Maximum dollar amounts of the cart subtotal eligible for the discount.

**Note:** Cart subtotals that fall outside the Qualifying Amount will be ineligible for the discount.

Examples:

- **Cart Subtotal:** Minimum \$0, Maximum \$200.  
If the cart subtotal is between \$0 and \$200, the discount will be applied to the cart subtotal.
- **Shipping Fees:** Minimum \$100, Maximum (blank).  
If the cart subtotal is more than \$100, the discount will be applied to the shipping fees.

Click the **Next** button

Click the question mark ( ? ) in the top right corner of for instructions on how to complete the fields on this screen if you have questions.

9. When done, click the “Next” button.
10. If you selected cart subtotal as the discount please continue to step 11.  
If you selected shipping fees:

This step allows you to select which shipping methods and rates will be eligible for the discount. To select a shipping rate:

1. Click on the plus symbol [+] to expand locations in the Geographic Locations tree.
2. Click on the location name to view the shipping methods and rates already configured for that region.
3. From the **Select Group** drop-down menu, select the desired group.
4. Select the checkboxes for the shipping methods and rates that will be eligible for the discount.

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5. If more than one group is available, repeat the 3rd and 4th step for each group you would like to configure.

Click the Finish button to complete your discount configuration.

Click the question mark ( ? ) in the top right corner of for instructions on how to complete the fields on this screen if you have questions.

11. On the “Select Cart values for Discount Action” screen, click the “Finish” button

## SEO within the Admin

### Purpose of SEO

SEO has two key purposes:

1. To refine and streamline certain aspects of the site content to reduce the time spent searching for your site – thereby increasing the likelihood they will click on your site.
2. Once the user finds your site – to give them the necessary information up front so they will click and stay on your site.

### Three Tags that make up SEO

#### Title, Keywords, and Description Tags

**Title Tag** – this is the text that shows up in the top bar of your browser. It is used to describe or sum up the topic of the content that is included on the rest of the page. It should include the name of your site as well (**Example: About Us | My Site Name – About Us is the name of the page while My Site Name is the name of your site**) It is also the text that will appear in the SERP’s (search engine results pages) as the linked title on which users will click on to access your page. The title should be clear and concise as this is what search engines look at to determine the focus, content, and relevance of your site. Due to the fact that different search engines have different character limits on this tag, we recommend that you try to keep your title to 50 characters or fewer (**\*50 characters include spaces**).

\*This tag is considered the most important tag to most major search engines.

**Keywords Tag** – this should contains words or phrases that identify what the page is about. It should include words or phrases that you feel users will put into a search engine when trying to find specific information on a topic. We recommend that you limit the amount of keywords used to about 20.

**Description Tag** - this is used to provide a brief description of what the page is about. It should contain some of the keywords and phrases that were used in the Keywords tag as well. Some search engines will display this information on the SERP’s (search engine results pages) so you want to make sure that the description makes sense and also reads well to those that may be reading your description on the search results page. Due to the fact that search engines differ on the character limits for this tag, we recommend that you try to keep your description to about 160 characters (**\*160 characters include spaces**).

\*This tag is considered the 2<sup>nd</sup> most important to most major search engines.

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## Formats that can be used to enter in SEO data

There are two different formats that SEO data can be entered in using our platform:

1. Commerce SEO (SEO data for your Categories and Products using the Commerce Manager)
2. Content SEO (SEO data for your content pages using the Content Manager)

## Adding Category SEO

1. Go to Commerce Manager > Categories and Products
2. On the left hand side, you will see the name of your shop with a Plus sign to the left of it. Click on the plus sign to expand the shop so that you can view all of the categories/sub-categories that are setup for your shop.
3. Locate the category/sub-category that you would like to add SEO information for and click on the category name to bring up its information on the right hand side of the browser window.
4. Click on the “Category SEO” button to expand it.
5. Enter in the appropriate information for the Category Title, Keywords and Description.
6. Click the “Save SEO” button to save your changes.

**\*Note: If this is the first time that you are adding Category SEO information to your site you will need to publish this information before it will show up on the front end of your site. To Publish SEO you can go to Commerce Manager > Publish SEO. From here you will select which type of SEO you want to publish, whether it is Category or Product SEO and click the “Publish” button at the bottom of the screen to publish the information.**

## Adding Product SEO

1. Go to Commerce Manager > Categories and Products
2. In the top right hand corner of the screen you will see a search bar that you can use to search for a product (you can search by product name or part number).
3. Click on the pencil icon next to the product you searched for to edit its information.
4. On the General Info > Core Data tab towards the middle of the page there is a section titled “Product SEO”. This is where you will enter in the Product Title and Keywords.

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5. Once you have finished making your changes, click the “Save” button at the bottom of the page.

**\*Note: If this is the first time that you are adding Product SEO information to your site you will need to publish this information before it will show up on the front end of your site. To Publish SEO you can go to Commerce Manager > Publish SEO. From here you will select which type of SEO you want to publish, whether it is Category or Product SEO and click the “Publish” button at the bottom of the screen to publish the information.**

## Adding SEO to a General Content Page

1. Go to Content Manager > Edit Content
2. At the top of the page, use the second and third-drop down menus to locate the page that you would like to add SEO information to. (you can also use the “page id” textbox to the right of the two drop-down menus if you know the page ID of the page you are looking for)
3. Once you are on the page, click the “Properties” link at the top of the page. (This link can be found below the second and third drop-down menus.
4. On the next screen you will see a page that allows you to enter in the Keywords and Description information for the page. Enter in the necessary information.
5. Click the “Next” button at the bottom of the page.
6. Click the “Save” button at the bottom of the page.