

JadaSite User Guide 1.03

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Preface

Welcome to JadaSite. JadaSite is an easy to use and feature-rich content management and e-commerce system. More importantly, JadaSite is an open sourced project and the code is freely available for download. We believe open source is a better model since users can obtain the code, see the code and change it. They can also distribute the code that they have modified. If customers do not like the vendor that is serving them, they can freely switch to another vendor that they prefer or decide to support the product themselves.

Our philosophy is to ensure that JadaSite is feature-rich, easy to use and maintain, and does not require an I.T. Team for support and to make constant changes to the system. We believe in simplicity, and we use simple tools and frameworks to ensure that future changes by other parties outside of our core development team can be done easily. We constantly monitor the market to understand the trend and bring new features and ideas into JadaSite as long as they help our users to promote their sites and products.

Many sites are simply information only or mainly targeted on collaboration. However, a lot of commercial sites are for more than just information. Some sites need to sell, and selling is their business. JadaSite invests a lot of effort to help companies to promote their products and generate sales.

About this Guide

The JadaSite User Guide is intended for people who are new to JadaSite or any content management and e-commerce system. This guide introduce you to some basic content management and e-commerce concept and help you get familiar with JadaSite. It describes how to setup and maintain sites and performs administrative functions.

Readers are not required to have any programming or software development knowledge, but should be generally familiar with the user of a personal computer and a Web browser such as Microsoft Internet Explorer, Mozilla Firefox or Apple Safari.

Chapter 1 - Getting Started

Technical Requirements

To access the site, you are required to have a browser installed on your computer that has Internet access to the JadaSite download page.

Browsers and Versions

JadaSite is tested and compatible with the following browser versions:

- Internet Explorer 6 or above (it can be download at <http://www.microsoft.com/windows/downloads/ie/getitnow.msp>)
- Firefox version 2 or above (it can be downloaded at <http://www.mozilla.com/en-US/firefox/>)
- Safari version 3 or above (it can be downloaded at <http://www.apple.com/safari/download/>)

This does not mean that JadaSite does not function with other browser versions. It just means that they are not tested and they are only supported by our best effort.

Our list of supported browsers is based on the publicity that the browser gains. We constantly review our list and make sure we are able to cover the most popular browsers.

Cookies and Javascript Support

In order for us to provide a secure login environment, cookies are being used and must be enabled on the browser. Usually, they are enabled on the browsers by default.

In order for us to provide a rich UI experience, we use Javascript extensively. Again, Javascript support on the browser is required and is enabled on the browsers by default.

If cookies and Javascript settings need to be reviewed, it can be done by selecting the following browser setting:

Internet Explorer

Tools → Internet Options → Security

Tools → Internet Options → Privacy

Firefox

Tools → Options → Content

Tools → Options → Privacy

Safari

Edit → Preference

Different sites in JadaSite

Based on functionalities and access, JadaSite is comprised of 3 main components.

Admin site. This is the administrative component of JadaSite. Via the admin site, administrator can create new site, add item and content for the item, define shipping cost by country and states, and many more. This component is password protected and only administrator who has granted access can access this component.

Public site. The public component of JadaSite. This is the component for external visitors. Visitors use this component to view item and content created for the site as well as purchase item from the site. As the name suggests, this component is public and can be accessed by anyone.

Secure site. This component is for external visitor and is password protected. Visitors use this component when going through the check-out process as well as managing their account.

Accessing admin site

To access admin site, enter the following URL into the browser. The URL depends on how JadaSite is installed. If JadaSite is installed without customization, you can use the following URL to access administration console.

<https://www.yourdomainname.com/jada/admin/login.do>

The above URL will take you to the following login screen, where you will enter your User Id and Password.



The image shows the JadaSite login interface. On the left is the JadaSite logo, which consists of a purple square with the text "jada site" in white, and below it, the text "content management ecommerce system" in purple. On the right is a "Sign In" form with a purple header. The form contains two input fields: "User Id" and "Password", and a blue "Log in" button.

Once the user enters a correct User Id and Password, he/she will be taken to the home page.

If JadaSite is configured, you can use the following URL to access the home page of the public site.

<http://www.yourdomainnam.com/jada/web/fe/home>

Security Timeout

For security reasons, users should sign-out from JadaSite once he/she has finished their task. In order to enforce this security practice, JadaSite will automatically sign-out the user if his/her session has been left idling for a set period of time. The length of the idling is, by default, 30 minutes. We believe this value is reasonable for most installation. If required, the length of timeout can be changed in one of the bundled configuration file (web.xml).

Managing Your Profile and Password

When you are first granted access to the system, your administrator provides you with a User Id and Password. It is highly recommended that you change the password right away. From that time on, it is recommended that you change your password periodically.

To change your password, click **Password** located on the body of the home page after you sign-in. Enter your new password, followed by a verification password, and then click **Change Password**.

Passwords must be 8 to 12 characters long with both alpha and numeric characters.

Welcome Superuser [Password](#) [Profile](#)

Last login at Sun, 10 Aug 2008 02:59 PM

Password

Verify Password

To change your profile, click **Profile**. Enter the information and press **Update**.

Welcome Superuser [Password](#) [Profile](#)

Last login at Sun, 10 Aug 2008 02:59 PM

Name

Email

Phone

Address

City

State

Country

Zip/Postal Code

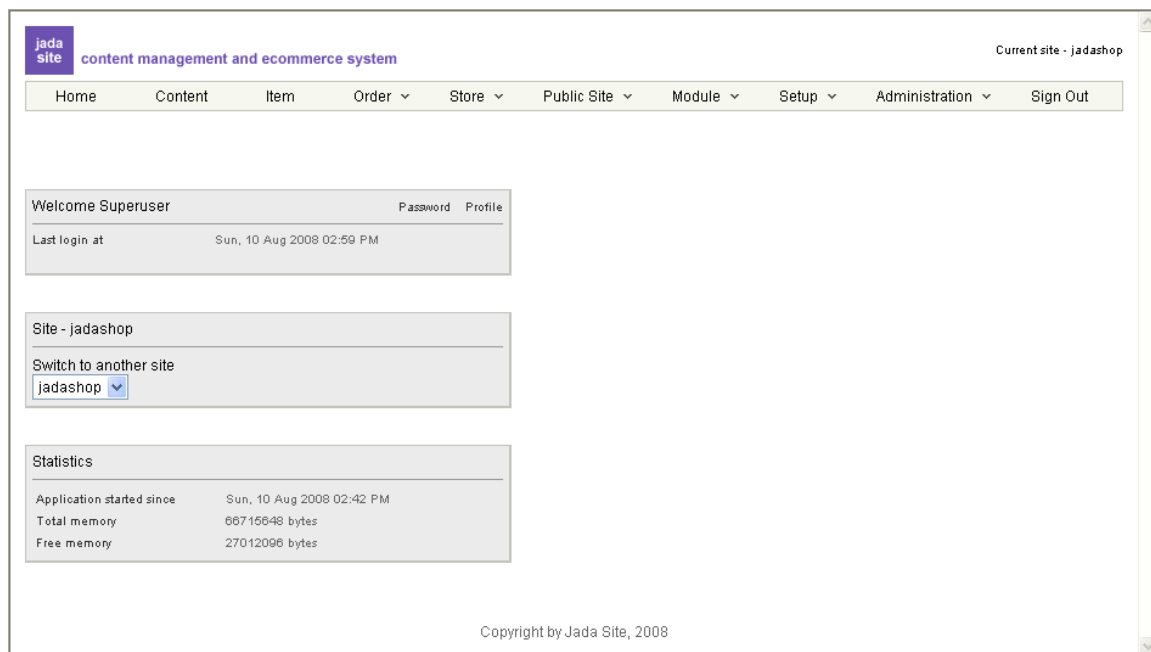
Chapter 2 – How to Navigate the User Interface

Warning - Browser Back Button and Refresh Button

When navigating within JadaSite, please make sure you DO NOT use the browser **Back** button or **Refresh** button located at the top of your browser. The use of these buttons may lead to unexpected side effects. All navigation must be done via JadaSite's links and buttons.

Home Page

Once users sign-in to JadaSite, he/she will be taken to the home page.



The home page has a drop-down menu located at the top.

There are 3 task boxes:

- User – Once signed-in, a user can change his/her Profile and Password from here.
- Site – If multiple sites are defined and the user has been assigned to more than one site, he/she can switch from one site to another from this task box.
- Statistics – System statistics can be viewed from here.

In addition, on the top right corner, user can see the site that they are working on.

Menu



Drop-down menu

A drop-down menu, similar to the one above, is always located at the top of every page. Different users may have different options based on the security setting that he/she may have.

Sub-menu

In addition to the drop-down menu, there may also be a sub-menu to provide a short-cut to the previous page. However, not all pages have a sub-menu so it will only be displayed when applicable.

In our example above, the user has performed an item search (Item Listing) and selected (clicked) an item from the listing. This will bring them to the item modification page (Item Maintenance). The user can then select **Item Listing** to go back to the search page without performing another search.

Chapter 3 – System Administration

During installation of JadaSite, a default site and a default user is created for initial access. This will allow the system administrator to create other users and sites for testing and production use.

Default User

The following user is created automatically during installation. This user is created with Superuser access, which has access to every function of JadaSite. Please make sure you change the password of this id and keep it in a safe place once the installation is complete.

User Id	root
Password	admin

Default Site

A default site is automatically created during installation. This default site is used as a template when creating other sites. Information created in the default site will be cloned to the new site once it is created.

Unless the intention is to modify default information when other sites are created, it is highly recommended not to modify any information on the default site.

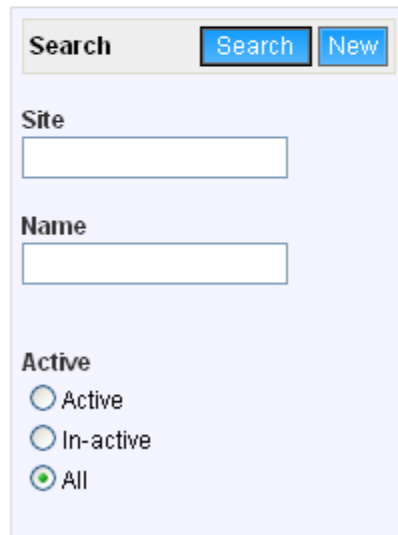
Site Management

Create a site

1. On the drop-down menu, select **Administration** → **Sites**.



Administration - Site Listing



The screenshot shows a search form titled "Administration - Site Listing". At the top, there is a "Search" label and two buttons: "Search" and "New". Below this, there are two input fields: "Site" and "Name". At the bottom, there is a section labeled "Active" with three radio button options: "Active", "In-active", and "All". The "All" option is selected.

2. On the search screen, click **New**.
3. Enter the required information and click **Save** when finished.

Save Cancel

Site Id

Site Name
The name of the site and is feed to the template.

Site Public Domain Name
Domain name for the public site and is important for determining if the incoming request is for this site. It should be in the format of www.jadasite.com.

Site Public Port Number (default to 80)
If not specified, port number will be defaulted to standard port 80.

Enable SSL secure connection
Select this option when SSL is required when performing secure transactions in the public site. Once selected, SSL will be used when user perform checkout transaction and viewing their account information.

Site Secure Port Number (default to 443)
If not specified, port number will be defaulted to standard port 443.

Active

Site Id. A unique site id must be entered for a newly created site.

Site Name. Description of the site. This value is fed to the template and whether or not it will be used is dependent on the template.

Site Public Domain Name. Domain name of the site. Since JadaSite supports multiple sites in one single installation, the combination of site public domain name and site public port number (below) is used to determine which site the incoming request belongs to. The site public domain name has to be in a format similar to www.jadasite.com. If the port number is not entered, it will be defaulted to 80. Although it is not common practice, it is possible to configure more than one site to have the same domain name distinguished by port number. This means that you can have www.jadasite.com as one site and www.jadasite.com:81 as another site, as long as it is configured properly on JadaSite, as well as your hosting environment.

Site Public Port Number. Port number of the site. If not entered, it will be defaulted to 80.

Enable SSL secure connection. If SSL is required when processing a transaction, enable SSL secure connection.

Site secure Port Number. Port number for secure connection. If not specified, it will be defaulted to 443.

Active. This indicates whether the site is setup and ready to be used by the public.

4. During save, a new site is created along with the following default information that is picked up from the default site.

- Country
- State/Province
- Currency
- Menu
- Section
- Tax
- Template
- Shipping Region

Once the site is saved, a detail screen will be displayed as follows. This screen allows for easy maintenance of information as it is categorized under appropriate headings and presented in a tab panel.

The screenshot shows the 'Administration - Site Listing - Site Maintenance' screen. The left sidebar contains the following fields:

- Site Id:** jadashop
- Site Name:** The name of the site and is feed to the template. Input: Jada Demo Shop
- Site Public Domain Name:** Domain name for the public site and is important for determining if the incoming request is for this site. It should be in the format of www.jadasite.com. Input: demo.jadasite.com
- Site Public Port Number (default to 80):** If not specified, port number will be defaulted to standard port 80. Input: [empty]
- Enable SSL secure connection:** Select this option when SSL is required when performing secure transactions in the public site. Once selected, SSL will be used when user perform checkout transaction and viewing their account information.
- Site Secure Port Number (default to 443):** If not specified, port number will be defaulted to standard port 443. Input: [empty]
- Active:**

The main configuration area has tabs for: General, Site logo, Mail, Template, Business, Shipping, Checkout, Paypal, Payment Gateway. The 'General' tab is active and contains:

- Listing page size:** Number of entries to be shown per page during search. Input: 20
- Default Currency Code:** Currency code to be used when performing transaction. Input: USD
- Section page size:** Number of entries to be shown per section page. Input: 4
- Public site footer:** Footer to be used on public site. Preview: Jada Demo Shop @ 2008 All rights reserved.

General

Listing page size. Number of records to be shown per page when showing listing result in admin site.

Default Currency Code. Currency Code to be used when performing sales transactions. For example, when making a payment with a transaction gateway

company, it is required to submit the sales amount and the currency code.

Section page size Number of items/contents to be shown when browsing sections (often named as categories) information in the public site.

Public site footer. Use this option to create footer information on the public site. It is up to the template how it is displayed and whether it is displayed. Therefore, it can vary by template. However, most templates do make use of the footer information entered here.

Site logo

If the template requires a logo for the site, it will use the one created in here. Again, the template will decide how and where to use it.

Site logo. To upload a new logo, click **Upload**, select a file and click **Confirm**. To remove the logo, click **Remove**.

Mail

Configures mail service for sending outgoing email.

Mail outgoing (SMTP) host. This will be the SMTP server address and can be obtained from your system administrator.

Mail outgoing (SMTP) port. This will be the port number of the SMTP server address and can be obtained from your system administrator. If not specified, it will be defaulted to the standard port number, 25.

Mail outgoing (SMTP) account. Most SMTP mail servers require authentication during connection. If authentication is required, enter the account number here. Otherwise, leave it empty.

Mail outgoing (SMTP) password. If authentication is required, enter the password here. Otherwise, leave it empty.

This field contains sensitive information and is not displayed. Enter a value if change is required. Enter a space if this field is to be cleared. Otherwise, leave this field as blank and existing value will not be altered.

Password Reset email from. Mail-from email address to be used when sending password reset emails out to users. It should be a valid email address in case users respond to the email with comments.

Password Reset email subject line. Subject line to be used when sending password reset emails out to users.

Customer sales confirmation email from. Mail-from email address to be used when sending sales confirmation emails out to customers.

Customer sales confirmation subject line. Subject line to be used when sending sales confirmation emails out to customers.

Sales notification email. Email address of notification email to be sent when a sale is made. This email is usually for internal use only. If empty, no notification

email will be sent.

Sales notification internal email from. Mail-from email address to be used when sending sales notification emails.

Customer sales notification internal email subject line. Subject line to be used when sending sales notification emails.

Template

Select the template to be used for this site.

Current template. A drop down menu with a list of all available templates for this site. Different templates can be selected for the site here. Once a template is selected, a sample will be displayed on the screen (if it is setup by the template).

Business

Business contact information when performing monetary transactions. You should make sure the information entered here matches your other business identity (registration, bank account, etc) to avoid any confusion in the future.

Contact Name. Self explanatory.

Company. Self explanatory.

Address Line 1. Self explanatory.

Address Line 2. Self explanatory.

City. Self explanatory.

State. Self explanatory.

Country. Self explanatory.

Postal / Zip Code. Self explanatory.

Phone. Self explanatory.

Fax. Self explanatory.

Email. Self explanatory.

Shipping

For defining shipping related information for on-line store.

Default Shipping Type. Default shipping types for item if not overridden at the item level. The list of available shipping types is created in the Drop down menu under Store → Shipping Type. If it is not already created, no selection will be shown.

Checkout

Configure activity during checkout process.

Activate. Check this option to activate checkout process. This option will display the shopping cart on the public site, depending on the template. In addition, it will enable display of an **Add to cart** button, to allow customers to shop by adding items to the shopping cart.

Shopping Cart Message. This message is shown on every page during the checkout process and in the sales confirmation email. Usually, this message is the disclaimer, terms or a generic message for customers.

PayPal

Contains configuration information for PayPal processing.

Activate. Check this option to activate PayPal processing by showing PayPal button during checkout.

Api Username. PayPal authentication information to be provided by PayPal.

Api Password. PayPal authentication information to be provided by PayPal. This field contains sensitive information and is not displayed. Enter a value if change is required. Enter a space if this field is to be cleared. Otherwise, leave this field as blank and existing value will not be altered.

Signature. PayPal authentication information to be provided by PayPal. This field contains sensitive information and is not displayed. Enter a value if change is required. Enter a space if this field is to be cleared. Otherwise, leave this field as blank and existing value will not be altered.

Environment. Select sandbox when operating in sandbox (test) mode. Otherwise, select live for live mode.

Authorize Extra Amount. Specify the extra amount to pre-authorize. This is usually done to accommodate for extra shipping and tax charges.

Authorize Extra Percentage. Specify the extra percentage (based on total item amount) to pre-authorize.

Note: If both **Authorize Extra Amount** and **Authorize Extra Percentage** are entered, the bigger amount will be used.

Payment Gateway

Contains configuration information for PsiGate (Payment Gateway) processing.

Activate. Check this option to activate PsiGate processing by showing **Credit Card** button during checkout.

Store Id. PsiGate authentication information to be provided by PsiGate.

PassPhase. PsiGate authentication information to be provided by PsiGate. This field contains sensitive information and is not displayed. Enter a value if change is required. Enter a space if this field is to be cleared. Otherwise, leave this field as blank and existing value will not be altered.

Search for a site

1. On the drop-down menu, select **Administration** → **Sites**.
2. On the search panel, enter search criteria and click **Search**. If search information is entered, it will be used to match up sites that contain the search criteria.



Administration - Site Listing

The image shows a search panel titled 'Administration - Site Listing'. It has a search bar with a 'Search' button and a 'New' button. Below the search bar are two input fields: 'Site' and 'Name'. At the bottom, there are radio buttons for 'Active', 'In-active', and 'All', with 'All' selected.

3. Locate the site from the listing and click the site name to select.

Modify a site

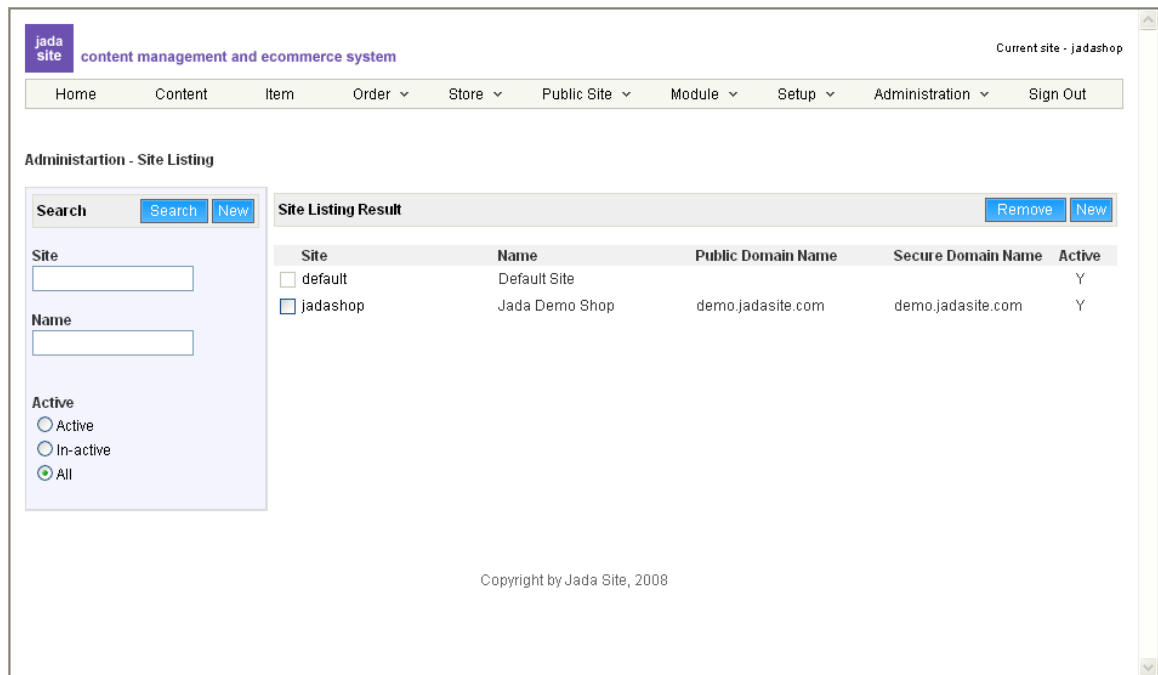
1. Locate and select the site by following the steps as described in the previous section (**To search for a site**).
2. Modify the information and press **Save**.

Remove a site

There are 2 ways to remove a site.

First, a site or multiple sites can be remove from the search and listing page.

1. Locate the site or multiple sites by following the steps as described in the previous section (To search for a site).
2. Select the site or multiple sites by checking on the check boxes.



3. Click **Remove**.

Second, a site can be removed from the modification page.

1. Locate and select the site by following the steps as described in the previous section (**Search for a site**).
2. Click **Remove**.

When removing a site, the following information for the site will be removed as well.

- Country
- State/Province
- Currency
- Menu
- Section
- Tax
- Template
- Shipping Region

Once a site has accumulated activities, it cannot be removed. Activities include (and are not limited to) sales, item creation, content creation, etc. If one attempts to remove a site with activities, the following error message will be displayed.

“Unable to remove site. This site is currently in use.”

User Management

All access to JadaSite administration modules require a valid user id, and this id is maintained and created here.

Users are categorized into three user types.

1. SuperUser

- The most powerful user in the JadaSite, which has access to every function in JadaSite.
- Has access to all users and is able to modify all users.
- Has access to all sites defined.

2. Administrator

- He/She is the administrator and is able to access all sites.
- Administrator has no access to perform Site management.
- Has access to all users who are not granted as SuperUser.
- Administrator can only grant access to other users as Administrator or Regular user. He/She cannot grant access to other users as SuperUser.

3. Regular

- Regular users can handle day to day operations, including most of the configuration, content creation and item creation.
- He/She has no access to Site management or User management functions.

Note: User management is only for users who access administration modules. Customer access id management is done via option **Store** → **Customer**.

Create a user

1. On the drop-down menu, select **Administration** → **Users**.

Administration - User Listing

Search

User Id

User Name

User Type

SuperUser
 Administrator
 Regular
 All

Active

Active
 In-active
 All

2. On the search screen, click **New**.
3. Enter the required information and click **Save** when done.

jada site content management and ecommerce system Current site - jadashop

Home Content Item Order Store Public Site Module Setup Administration Sign Out

Administration - User Listing - User Maintenance

User Id

Name

Password

Verify password

User Type

SuperUser
 Administrator
 Regular

Active

User has access to the following sites

default
 jadashop

User Id. The id that the user will use to sign-in.

Name. Name of the user.

Password. Passwords must be 8 to 12 characters long with both alpha and numeric characters.

Verify password. Must be the same as **Password**.

User Type. User type can be SuperUser, Administrator or Regular. Users cannot assign access to other users that will provide them with more access to the system than he/she currently has.

Active. Activate this user. User must be activated to be able to sign-in to the site.

Email. Self explanatory.

User phone. Self explanatory.

Address. Self explanatory.

City. Self explanatory.

State. Self explanatory.

Country. Self explanatory.

Zip/Postal code. Self explanatory.

User has access to the following site. List of sites that user can access. Select the checkbox beside a site to provide the user with access to that site. Otherwise, deselect the checkbox beside the site. SuperUser and Administrator automatically has access to all sites. Selecting and deselecting checkboxes does not change access for SuperUsers and Administrators.

Search for a user

1. On the drop-down menu, select **Administration** → **Users**.
2. On the search panel, enter search criteria and click **Search**. If search information is entered, it will be used to match up users that contain the search criteria.

Administration - User Listing

Search

User Id

User Name

User Type
 SuperUser
 Administrator
 Regular
 All

Active
 Active
 In-active
 All

3. Locate the user from the listing and click the **User id** to select.

jada site content management and ecommerce system Current site - jdashop

Home Content Item Order Store Public Site Module Setup Administration Sign Out

Administration - User Listing

Search

User Id

User Name

User Type
 SuperUser
 Administrator
 Regular
 All

Active
 Active
 In-active
 All

User Listing Result

User Id	User Name	User Type	Active
<input type="checkbox"/> admin	Administrator	Administrator	Y
<input type="checkbox"/> jsmith	John Smith	Regular	Y
<input type="checkbox"/> root	Superuser	SuperUser	Y

Modify a user

1. Locate and select the user by following the steps as described in the previous section (**To search for a user**).
2. Modify the information and press **Save**.

Note: **Password** and **Verify password** is not displayed during modification. Leave it blank if you do not intend to reset the password.

Remove a user

There are 2 ways to remove a user.

First, a user or multiple users can be remove from the search and listing page.

1. Locate the user(s) by following the steps as described in the previous section (**To search for a user**).
2. Select the user(s) by clicking the check boxes.
3. Click **Remove**.

Second, a user can be removed from the modify page.

1. Locate and select the user by following the steps as described in the previous section (**To search for a user**).
2. Click **Remove**.

Change user password

If the user is already signed-in to JadaSite, he/she can change their password on the home page. On the drop-down menu, select **Administration** → **Home** and click **Password**.

If a user has lost his/her password, other users who have Administrator or SuperUser access can reset his/her password. Locate and select the user by following the steps as described in the previous section (**Search for a user**). Enter **Password** and **Verify password** and click **Save**.

If a user has access to the User Maintenance screen, he/she can reset the his/her password via this screen. Locate and select the user by following the steps as described in the previous section (**Search for a user**). Enter **Password** and **Verify password** and click **Save**.

Chapter 4 - Site setup

Menu management

JadaSite supports a user configurable menu system. Menu items are grouped as menu sets. In a typical web site, there may be a top horizontal navigation menu and a left vertical navigation menu. Usually, they have 2 distinct sets of menu items. Each set of menu items is called a menu set.

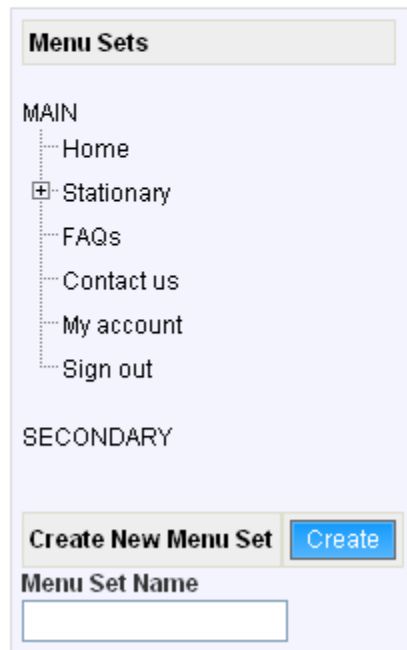
JadaSite has 2 predefined menu sets and they are called MAIN and SECONDARY. These are standard menu sets and are widely used by templates. The menu sets are placed strategically by the templates according to the look and feel defined by the template.

Sometimes, templates may require or support additional menu sets, and additional menu sets can be created in the administration module. In this case, templates will provide simple instructions to create the new menu sets.

Administrative users can add menu items, remove menu items and configure where to take the user to once the menu item is pressed. Menus are structured in a hierarchical manner and you can have more than 1 level of menu items in the same menu set.



Administration - Menu



Navigation is done by moving the mouse over to the menu items displayed on the left navigation panel. Right click and a pop-up context menu will be displayed with available options. If you are on the menu set name (ex. MAIN, SECONDARY, etc), you will see the following options.

- Append Child Menu
- Resequence Children

If the mouse is over the menu items, you will see more options.

- Append Child Menu
- Create Menu Before
- Create Menu After
- Resequence Children

If the mouse is on the menu set name other than MAIN and SECONDARY, you will see one additional option..

- Remove Menu Set

Append Child Menu

Allows you to create a menu item as a children of the menu item that was right clicked. If one or more menu items already exist, the new menu item will be created at the end of the list and will be labeled as **New menu**.

Resequence/remove Children

Allows you to sort the list of menu items in a different order. In addition, this option allows removal of one of more menu items on the same level.

Create Menu Before

Allows you to create a menu item and place it just before the menu item that was right clicked.

Create Menu After

Allows you to create a menu item and place it just after the menu item that was right clicked.

Remove Menu Set

Remove menu set and its menu items. This option is only active for menu sets other than the MAIN and SECONDARY.

Create a new menu item

1. New menu items can be created by selecting the following options.
 - Append Child Menu
 - Create Menu Before
 - Create Menu After

2. Once selected, a new menu item will be automatically created and placed at the location according to the option selected.

The screenshot shows the 'Administration - Menu' page. On the left, there is a 'Menu Sets' sidebar with a tree view under 'MAIN' (Home, Stationary, FAQs, Contact us, My account, Sign out, New Menu) and 'SECONDARY' (Create New Menu Set, Menu Set Name). The main form area contains: 'Menu Name' (New Menu), 'Menu Location' (radio buttons: Section, Content, Item, Static URL, Home (selected), Contact Us, Sign in, Sign Out), and 'Window Mode' (input field). 'Save' and 'Remove' buttons are at the top right.

3. Enter the required information and press **Save** when done.

Menu Name. The name of the menu item that will be shown on the site.

Menu Location. There are 8 options to choose from.

Section. Select this option to show all information (contents or items) for the selected section when this menu item is clicked on the web site.

1. Select **Section** option.
2. Click **Pick Section**.
3. Select the desired section from the list.

Content. Select this option to show a specific piece of of content when this menu item is clicked on the web site.

1. Select **Content** option.
2. Click **Pick Content**.
3. Optionally, enter title of the content to search.
4. Click **Search** to extract a list of content.
5. Click on the desired content from the list.

Item. Select this option to show a specific piece of an item when this menu item is clicked on the web site.

1. Select **Item** option.
2. Click **Pick Item**.
3. Optionally, enter **Item number, Item UPC code** or **Item**

description to search.

4. Click **Search** to extract a list of item.
5. Click on the desired item from the list.

Static URL. Select this option to show a specific URL for this menu item.

1. Select **Static URL**, the area below this option will open up.
2. Enter URL. Here are some examples.
<http://www.jadasite.com>
<http://www.jadasite.com/jada/web/fe/content/Welcome+to+Jada+Site>

Use /jada/web/fe/content/Welcome+to+Jada+Site (without domain) only when the page is hosted in the same domain.

Home. Select this option to show the home page when this menu item is clicked on the web site.

Contact Us. Select this option to show the contact us page when this menu item is clicked on the web site.

Sign in. Select this option to show the sign in page when this menu item is clicked on the web site and only when the user has not signed-in yet. If the user has already signed-in, clicking this option will take the user to the **My account** home page.

Sign out. Select this option to sign out the user when this menu item is clicked on the web site. If the user has not signed-in, this menu item will not be shown.

Window Mode. Optional. Window mode is a set of Javascript parameters that configure the behavior of the new window. This field is a string that contains a list of items separated by commas. Each item consists of an option and a value, separated by an equal sign. For example, 'height=300,width=300,resizable=false'.

These options are rather technical, therefore it is highly recommended that you consult with other Javascript references. References are available from various sources on the Internet. In technical terms, Javascript uses window.open([url] [, name] [, mode] [, replace]) to open browser windows. The value entered in here will go into the 'mode' parameter.

Window Target. Specify where the content of this menu item will be displayed.

- **_self** - This menu item will be loaded in the current window.
- **_blank** - This menu item will be loaded in a new, unnamed browser window.
- **_parent** - This menu item will be loaded in the current frame parent. If there is no parent, it will be treated the same as **_self**.
- **_top** - This menu item will replace any frameset that may be loaded. If there is no frameset, it will be treated the same as **_self**.

Published. - Publish or activate this menu item.

Modify a menu item

1. Select the menu item on the left navigation panel.
2. Modify the information and press Save.

Remove a menu item

1. Select the menu item on the left navigation panel.
2. Click Remove.

Create a new menu set

1. Enter a name for the new menu set.
2. Click Create.

Remove a menu set

1. Right click on the menu set name that is to be removed. The menu set name cannot be the default menu set, **MAIN** and **SECONDARY**.
2. Select Remove Menu Set.

Resequence/remove children

1. Right click on the parent of the list of menu items to be re-sequenced or removed.
2. To re-sequence menu items, enter the sequence number for each menu item and click **Resequence**.
3. To remove menu items, check the menu items that are to be removed and click **Remove**.

Sections management

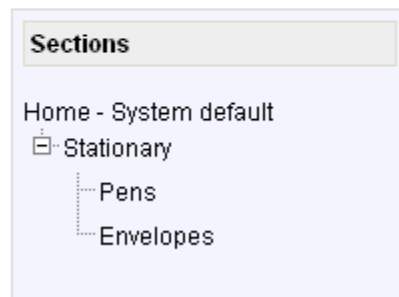
JadaSite has a concept of section. In some inventory systems, they are often referred to as categories. Section is a way to group contents or items together. You can create a section called Sports that contains sporting news or sporting goods items. You can also have a mixture of sports news content and sporting goods items in the same section.

Administrative users can add section items, remove section items and modify section items. Sections are structured in a hierarchical manner and you can have more than one level of section items.

Navigate the user interface



Administration - Section



Navigation is done by moving the mouse over to the section items displayed on the left navigation panel. Right click and a pop-up context menu will be displayed with available options. If you are on the root level (labeled as Home), you will see the following options.

- Append Child Section
- Resequence Children.

If the mouse is over the section items, you will see these options.

- Append Child Section
- Create Section Before
- Create Section After
- Resequence Children

Append Child Section

Allows you to create a section item as a children of another section item that you have right clicked on. If one or more section item already exists, the new section item will be created at the end of the list and will be labeled as **New section**.

Resequence/remove Children

Allows you to sort the list of section items in a different order. In addition, this option allows removal of one of more section items on the same level.

Create Section Before

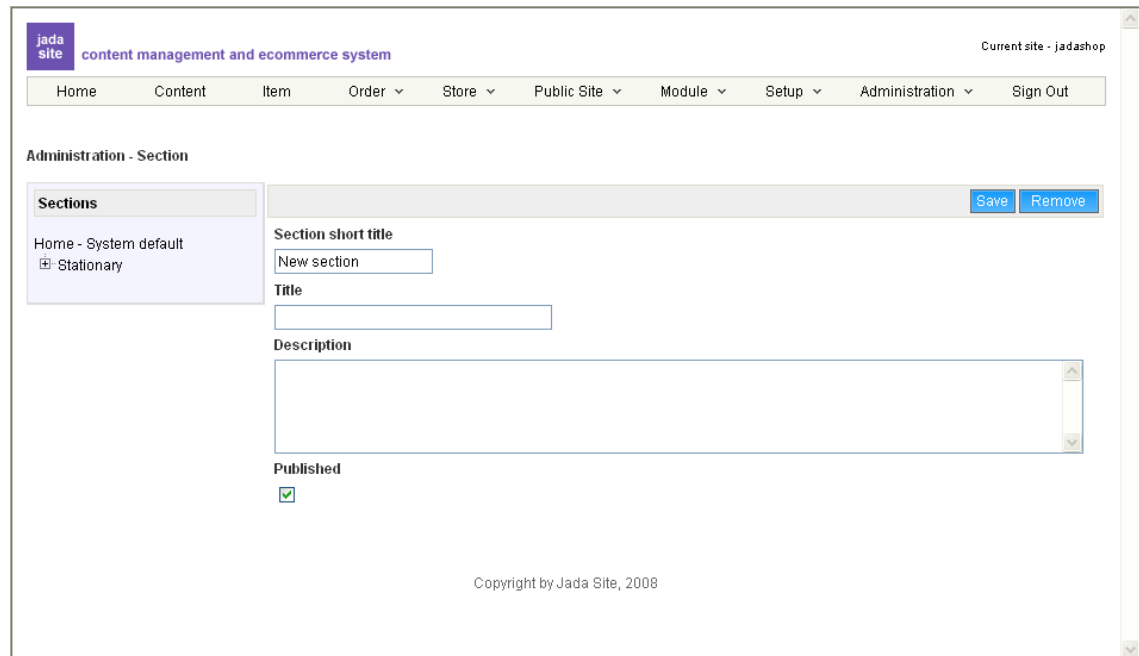
Allows you to create a section item and place it just before the section item that you right clicked on.

Create Section After

Allows you to create a section item and place it just after the section item that you right clicked on.

Create a new section item

1. New section items can be created by selecting the following options.
 - Append Child Section
 - Create Section Before
 - Create Section After
2. Once selected, a new section item will be automatically created and placed in the location according to the option selected.



The screenshot shows the Jada Site administration interface. At the top, there is a navigation menu with options: Home, Content, Item, Order, Store, Public Site, Module, Setup, Administration, and Sign Out. The current page is titled 'Administration - Section'. On the left, there is a 'Sections' sidebar with a tree view showing 'Home - System default' and 'Stationary'. The main content area contains a form for creating a new section. The form has the following fields: 'Section short title' (text input with 'New section'), 'Title' (text input), 'Description' (text area), and 'Published' (checkbox, checked). There are 'Save' and 'Remove' buttons at the top right of the form. The footer of the page reads 'Copyright by Jada Site, 2008'.

3. Enter the required information and press **Save** when done.
 - Section Short Title.** Short title of the section.
 - Title.** Title (longer title) of the section.
 - Description.** Description (or full description) of the section.
 - Published.** Publish or activate this section item.

Modify a section item

1. Select the section item on the left navigation panel.
2. Modify the information and click **Save**.

Remove a section item

1. Select the section item on the left navigation panel.
2. Click **Remove**.

Resequence/remove children

1. Right click on the parent of the list of section items to be resequenced or removed.
2. To resequence section items, enter the sequence number for each section item and click **Resequence**.
3. To remove section items, check the section items that are to be removed and click **Remove**.

Country/State management

JadaSite maintains a list of country and state codes. This information is required when e-commerce is used, as it is needed when setting up shipping charges and sales taxes.

Since country code and state code are very static information that does not often change, JadaSite has included a list of the country code and state code in its standard installation. In some extremely rare circumstances that you may need to modify the setup of country and state code, you can use the following procedure.

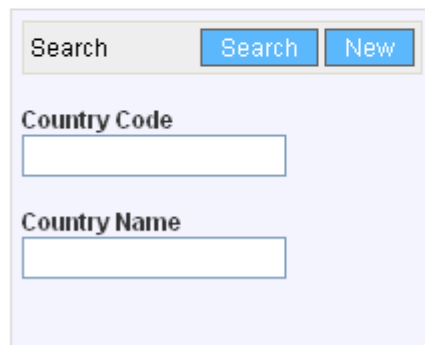
Note: There is no specific menu item used to create and modify state codes. State codes are maintained together with Country code.

Create a country

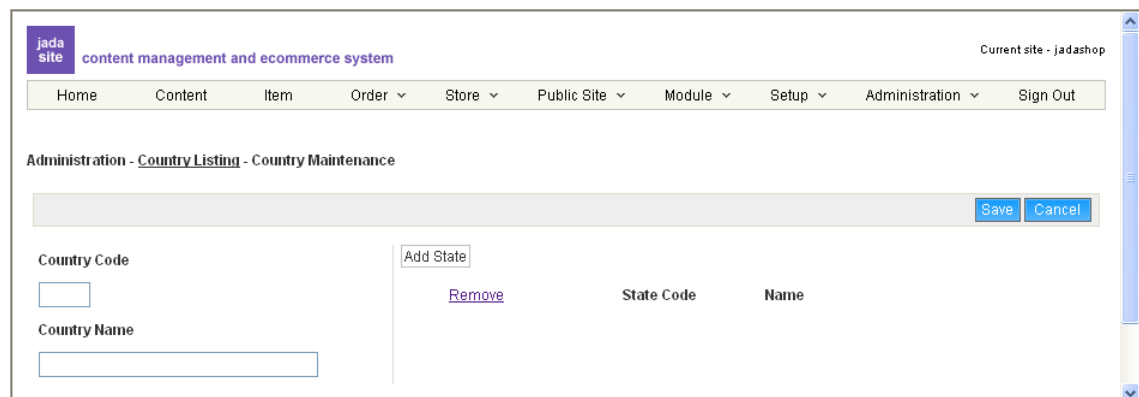
1. On the drop down menu, select **Setup** → **Country**.



Administration - Country Listing

This screenshot shows a search interface for country listings. At the top, there is a search box with the text 'Search' inside. To the right of the search box are two buttons: 'Search' and 'New'. Below the search box, there are two input fields. The first is labeled 'Country Code' and the second is labeled 'Country Name'. Both fields are currently empty.

2. On the search screen, click **New**.
3. Enter the required information and click **Save** when done.

This screenshot shows the 'Country Maintenance' screen. At the top, there is a navigation bar with the 'jada site' logo and 'content management and ecommerce system' text. To the right, it says 'Current site - jdashop'. Below the navigation bar is a menu with items: 'Home', 'Content', 'Item', 'Order', 'Store', 'Public Site', 'Module', 'Setup', 'Administration', and 'Sign Out'. The 'Administration' item has a dropdown arrow. Below the menu, the page title is 'Administration - Country Listing - Country Maintenance'. There are two input fields for 'Country Code' and 'Country Name'. To the right of these fields is an 'Add State' button. Below the 'Add State' button is a 'Remove' link. At the bottom right, there are 'Save' and 'Cancel' buttons. The page also features a table with columns for 'State Code' and 'Name'.

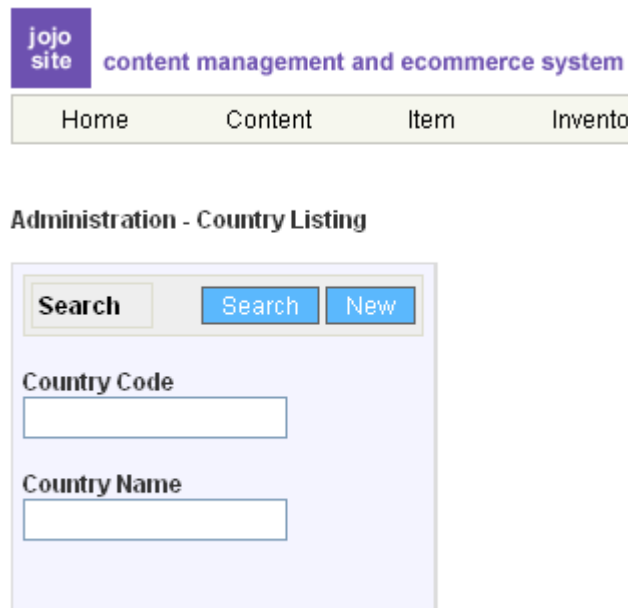
Country Code. The 2 character ISO-3166 Country code for the country. This value is often used when communicating with PayPal or other payment gateways.

Country Name. The name of the country.

4. Click **Add State** to add a state to the country.
5. Enter **State Code** and **State Name** in the pop-up window and click **save**. U.S. and Canadian state/province codes should be one of the ISO 3166-2 codes.

Search for a country

1. On the drop-down menu, select **Administration** → **Country**.
2. On the search panel, enter search criteria and click **Search**.



The screenshot shows the Jojo Site Administration interface. At the top, there is a logo for 'jojo site' and the text 'content management and ecommerce system'. Below this is a navigation menu with links for 'Home', 'Content', 'Item', and 'Invento'. The main content area is titled 'Administration - Country Listing'. It features a search panel with a 'Search' button, a 'Search' button, and a 'New' button. Below the buttons are two input fields: 'Country Code' and 'Country Name'.

3. Locate the country from the listing and click the Country Code to select.

Modify a country

1. Locate and select the site by following the steps as described in the previous section (**To search for a country**).
2. Modify the information and press **Save**.

Remove a country

There are 2 ways to remove a country.

First, a country or multiple countries can be remove from the search and listing page.

1. Locate the country or multiple countries by following the steps as described in

the previous section (To search for a country).

2. Select the country or multiple countries by checking the check boxes.
3. Click **Remove**.

Second, a country can be removed from the modify page.

1. Locate and select the country by following the steps as described in the previous section (**To search for a country**).
2. Click **Remove**.

Chapter 5 – Content and Item Authoring

One important feature of JadaSite is authoring and publishing content and items. In this chapter, we will explore the key concept of creating content and items.

Key concepts

Rich text editor

A rich text editor is an editor on the browser that provides rich formatting of text content. It includes a list of different text styles, uses text formatting such as bold, italic and underline, and can uploading images in the text.

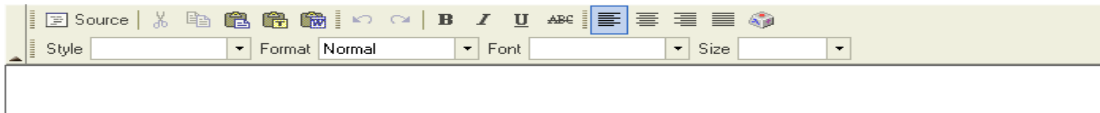
The rich text editor that JadaSite incorporates is another open source project, FCKeditor, that is widely used with many features.

FCKeditor is used in JadaSite in 2 forms, simple and extended. They look very similar and they only differ in the number of formatting options offered.

For detailed documentation of FCKeditor and its features, please visit the official FCKeditor web site.

<http://www.fckeditor.net>

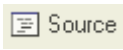


Simple form





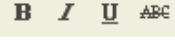

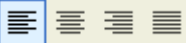










Extended form



Options

	Toggle HTML text view.
	Cut selected area.
	Copy selected area.

	Paste buffer.
	Paste as plain text. By using this option, a new window will appear and you will paste your content into the window using Ctrl-V followed by OK .
	Paste from MS Word document. By using this option, you can paste content from MS Word document, ignoring all formatting definitions.
	Undo and redo previous operation.
	Make selection bold, italic, underline and strike through.
	Toggle order list.
	Align paragraph left justify, center justify, right justify or block justify.
	<p>Insert/Edit and Remove link.</p> <p>FCKeditor supports 3 types of links: URL, link to anchor in the text or email. URL link can be configured to link to a resource on the server. If the resource is not already on the server, it can be uploaded.</p> <p>There are many more options to configure the link, please refer to the FCKeditor documentation for information.</p>
	Creates anchor.
Style <input type="text" value=""/>	Use predefined style for selected area.
Format <input type="text" value="Normal"/>	Use predefined format for selected area.
Font <input type="text" value=""/>	Use predefined font for selected area.
Size <input type="text" value=""/>	Use predefined size for selected area.
	Insert or edit table.
	<p>Insert or edit image.</p> <p>FCKeditor allows image attachment to the text, and the image properties can be configured. If the image does not already exist on the server, it can be uploaded.</p> <p>For detailed information of all the options, please refer to the FCKeditor documentation.</p>
	Insert or update flash component. Flash components can be

	uploaded if they do not already exist.
	Inserts horizontal rule.
	Inserts special characters.
	Maximizes the editor size.

Search engine optimization – SEO

Search engine optimization is a complicated topic and is also a moving target. It is the process of making the site rank high when performing the search based on anticipated keywords. In general, from a marketing point of view, you should try to understand how your potential visitors search and how search engines work to come up with a strategy. The site is only useful if visitors are able to find it.

JadaSite provides tools to make your site search engine friendly. At the end of the day, it is all the work of the content author to ensure the page is ranked high during a search.

Here is the design of JadaSite and the tools that JadaSite offers.

SOE friendly URLs – JadaSite uses search engine friendly URLs. For content pages, the URL contains the title of the content page. For item pages, the URL contains the item number of the item. In the example below, you can see the URL of the content page contains the title of the page.

<http://www.jadasite.com/jada/web/fe/content/Welcome+to+Jada+Site>

Keywords in page title – JadaSite place keywords after the name of the site in the HTML page title. For content pages, keywords is the title of the page. For item pages, keyword is the 2 lines of short description for the item. In the technical term, the keywords are placed in the <title> tag of the HTML page. Please see an example below.

<title>JadaSite - Welcome to JadaSite</title>

Alternate keywords (HTML Title Tag) – Sometimes, the default keywords may not make the most sense as the page title. In this case, JadaSite allows the content author to define alternate keywords (or HTML Title Tag). If this is defined, JadaSite will use these value as the keywords.

There are also techniques that content authors should be aware of.

Pick the right keywords – There are keywords that are more popular in searches. Make sure the keywords are those that visitors are going to use. Once the right keywords are identified, make them as part of the content title or one of the 2 items short description. Or, enter them as HTML Title Tags. There are tools that can suggest keywords. One of them is Google Keyword Tools.

Keywords in the content – Content authors should make sure keywords are also in the content page and should be placed closer to the top of the page. Search engines like to see that the content has keywords in it. Density of

keywords are also important. It is good to have the keywords in every paragraph or every other paragraph. However, having a page full of keywords may be considered as spam by search engines and should be avoided.

Linking should not be too deep – Search engines typically crawl and index the sites for searching. For performance and other reasons, search engines do not crawl indefinitely. Therefore, it is important to make sure there are not excessive levels created in the link hierarchy. For example, a page that requires 30 clicks to get there is neither search engine or user friendly.

Do not get blacklisted by search engines – Although it is important to get the site ranked as close to the top as possible by search engines, do not use search engine techniques excessively. If SEO creates deceptive or misleading content on a site, the site can be removed completely from the search engine database. These undesirable techniques can be doorway pages, throwaway domains, invisible text, tiny text, etc.

Myth

Meta keywords and Meta description tags – Most people or even web developers think in order to achieve high search engine ranking, meta keywords and meta description tags should be used. In the past, search engines did look at the 2 tags, but nowadays, since many sites abuse the 2 tags and put bogus information that is completely unrelated to the content into the tags in order to bring ranking higher, search engines have become smarter and look elsewhere for keywords. For this reason, meta keyword tags have little use anymore. Meta description may still be used by Yahoo in some rare situations. For simplicity reason, JadaSite chooses not to provide tools to support these 2 tags since it can be quite time consuming (as well as confusing) to maintain the fields while they produce little to no return. However, if desirable, custom templates can still populate value in the <title> tag into meta keywords and meta description.

Hit Counter

For statistics purposes, JadaSite maintains a page hit counter for every content and item. Every time the front-end content page or item page is accessed, the counter is incremented. Hit counters can be reset when required and it can be done on the content or item maintenance page.

Images

There are 2 ways to have images in the front-end content or item page.

1. Include images in the content or item description via rich text editor interface. This approach allows content authors to have some control over how the images are presented, including location, border, size, etc. Images are uploaded via rich text editor interface and the same uploaded images can be shared across multiple contents and items.
2. Images can also be uploaded via the interface on the content and item maintenance screen. It allows uploading multiple images for the same item or

content. The images uploaded are exclusive for that content or item and cannot be shared. It is extremely useful as product pictures and templates typically line up all images as a picture gallery, and is very useful when presenting products. Images uploaded via this interface are stored in the database and the dimension of the images are scaled to within 600x600 pixels (if original size exceeds this dimension) and the proportions of the images are preserved. Although there may be more than one image assigned to a content or item, there is always a default image. This default image is usually shown as the first (or default) picture in the gallery.

Menus

Contents or items can be assigned to a menu item and the same content or item can be assigned to more than 1 menu item when desired. If the menu item has already been assigned, it will be overridden. This approach makes it convenient for content authors when creating content for the site. Alternately, you can assign content or item to the menus from the menu maintenance screen.

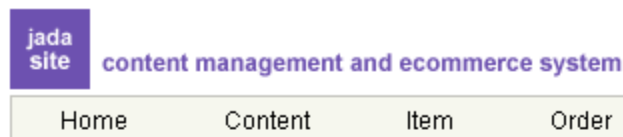
Section

Section can be perceived as category. Optionally, contents and items can be assigned to a section and it is highly recommended to do so. It provides a logical way to group the items and contents. More importantly, JadaSite has a section page on the public site to show all items and contents grouped in the same section.

Content management

Create a content

1. On the drop down menu, select **Content**.



Administration - Content Listing

The image shows a screenshot of the 'Administration - Content Listing' form. At the top left is a 'Search' label. To its right are two buttons: 'Search' and 'New'. Below this is a text input field labeled 'Title'. At the bottom of the form are three radio button options: 'Published', 'Not-Published', and 'All'. The 'All' option is selected, indicated by a small green dot inside the radio button.

2. On the search screen, click **New**.
3. Enter the required information and click **Save** when finished.

The screenshot shows the 'Content Maintenance' page in the Jada Site system. The page has a navigation bar at the top with links for Home, Content, Item, Order, Store, Public Site, Module, Setup, Administration, and Sign Out. Below the navigation bar, the page title is 'Administration - Content Listing - Content Maintenance'. The main content area is divided into three sections: 'Title' with a text input field, 'Description' with a rich text editor, and 'Content' with another rich text editor. On the right side, there is a 'General' section with fields for 'Publish On' (10-08-2008), 'Expire On' (31-12-2999), 'Show in Home Page' (checkbox), and 'Published' (checkbox). Buttons for 'Save' and 'Cancel' are located at the top of the form area.

Title. Title of the content (no more than one content can have the same title). This value is used as the title of the content, to create the URL for the content display page as well as the value in the HTML <title> tag (if not overridden by HTML Title Tag below). Since the title is used to create the URL for the content page, previous bookmarks of the content page need to be changed if the title of the content is changed.

Description. Short description of the content and is often considered a preview of the content. This value is important in the section page where links to multiple pieces of content is presented. It provides enough information for visitors to pick the right content to view. Value is maintained via the rich text editor.

Content. The full content and is shown in the content view page. Value is maintained via the rich text editor.

HTML Title Tag. If the title of the content does not have the keywords that are preferred for search engine, the keyword phase can be entered in here. This value will go into the HTML <title> tag.

Publish On. The date when this content will be published.

Expire On. The date when this content will expire.

Show in Home Page. To include this content in the home page.

Published. To publish or not publish this content.


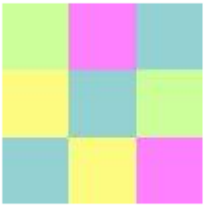
4. During save, a new content is created and the page will be refreshed. More options are displayed on the page.

Reset hit counter

General	
Hit Counter	1 <input type="button" value="Reset Counter"/>
Publish On	<input type="text" value="16-07-2008"/> +
Expire On	<input type="text" value="31-12-2999"/> +
Show in Home Page	<input checked="" type="checkbox"/>
Published	<input checked="" type="checkbox"/>

1. While on the content maintenance screen, click **Reset Counter**. This will reset the counter to 0.
2. Clicks OK when finished.

Upload Image, Remove Selected Images or Set Default Image

Images	
<input type="button" value="Upload image"/> <input type="button" value="Remove selected images"/>	
	
<input type="checkbox"/>	<input type="checkbox"/>
pen.jpg Default Image	pen2.jpg <input type="button" value="Set Default"/>

Upload Image

1. To upload an image, click **Upload Image** on the content maintenance screen.
2. Select an image from your local machine.
3. Click **Confirm** to upload image.
4. The first image uploaded is treated as the default image.

Remove selected images

1. Select the images to be removed.
2. Click **Remove selected images**.

3. Click **OK** when finished.

Set Default Image

1. Select the image to be set as the default image.
2. Click **Set Default**.
3. Click **OK** when finished.

Assign to Menu or Remove Selected Menu

Menu	Window Mode	Window Target
<input type="checkbox"/> MAIN - FAQs		_self

Assign to Menu

1. To assign this content to menus, click **Pick Menu**.
2. Select the menu where this content should be assigned.
3. Enter the optional information **Window Mode** and **Window Target**.
4. Click **Confirm**.

Remove Selected Menu

1. Select menus to be removed (unassigned).
2. Click **Remove Selected Menu**.
3. Click **OK** when finished.

Assign to Section or Remove from Section

Section
Stationary - Pens

Assign to Section

1. To assign this content to a section, click **Pick Section**.
2. Select the section where this content should be assigned.

Remove from section

1. Click **Remove from section**.
2. Click **OK** when finished.

Search for a content

1. On the drop-down menu, select **Administration** → **Content**.
2. On the search panel, enter search criteria and click **Search**.
 - Title.** Search for all contents that have this value anywhere in the content title.
 - Published.** Content that are currently published.
 - Not-Published.** Content that are currently not published.
 - All.** Content that are either published or not published.
 - Published between.** Content that are published between these dates.
 - Expired between.** Content that expire between these dates.
 - Updated by.** Search for content that are updated by the selected user.
 - Created by.** Search for content that are created by the selected user.
 - Select sections to show.** If any one of the sections are selected, search for content that belong to the section selected. Otherwise, search for any sections.
3. Locate content from the listing and click the title to select.

The screenshot shows the 'Administration - Content Listing' page. The search panel on the left includes a 'Search' field, a 'Search' button, and a 'New' button. Below the search field are radio buttons for 'Published', 'Not-Published', and 'All' (selected). There are also date pickers for 'Published between' and 'Expired between', dropdown menus for 'Updated by' and 'Created by' (both set to 'All'), and a checkbox for 'Stationary' under 'Select sections to show'. The 'Content Listing Result' panel on the right shows a table with columns: Title, Section, Publish, Publish On, and Expire On. The table contains two rows of content.

Title	Section	Publish	Publish On	Expire On
<input type="checkbox"/> Welcome to Jada Demo Shop		Y	Mon, 4 Aug 2008	Tue, 31 Dec 2999
<input type="checkbox"/> Frequently Asked Questions		Y	Sun, 10 Aug 2008	Tue, 31 Dec 2999

Modify a content

1. Locate and select the content by following the steps as described in the previous section (**Search for a content**).
2. Modify the information and press **Save**.

Remove a content

There are 2 ways to remove a content.

First, one or more content can be removed from the search and listing page.

1. Locate one or more content by following the steps as described in the previous section (To search for a content).
2. Select one or more contents by checking the check boxes.
3. Click **Remove**.

Second, content can be removed from the modify page.

1. Locate and select the content by following the steps as described in the previous section (**Search for a content**).
2. Click **Remove**.

Item management

Pricing

JadaSite supports two different methods of pricing as well as date sensitive special pricing.

Pricing method

Single pricing – Single price for the item. Customer will be charged with this price no matter how many units he/she purchases.

Multiple pricing – Used in conjunction with single pricing. The customer gets a different price when he/she buys up to the limit defined by multiple pricing, as shown in the example below. The customer pays \$3.99 if he purchases 1 unit. If the customer purchases 2 units, he will be charged $\$3.99 \times 2 = \7.98 . If the customer buys up to 3 units, he will be charged \$9.99.

Pricing	
Cost	<input type="text" value="2.00"/>
Price	<input type="text" value="3.99"/>
Multiple Pricing	<input type="text" value="3"/> for <input type="text" value="9.99"/>

Date sensitive special pricing

Item can be put on-special by simply entering **Special Price** for single pricing. If multiple pricing is desirable, it can be entered in **Multiple Pricing** below **Special Price**.

If the item should be on-special for only a specific period of dates, the date

range can be entered in **Special Publish On** and **Special Expire on**. Once the 2 date fields are entered, the item will be on-special on or after **Special Publish On** and on or before **Special Expire On**.

This will allow the administrator to setup a set of items that will be on-special on a given date before hand, and these items will automatically be on-special on the defined dates.

Pricing	
Cost	<input type="text" value="2.00"/>
Price	<input type="text" value="3.99"/>
Multiple Pricing	<input type="text" value="3"/> for <input type="text" value="9.99"/>
Special Price	<input type="text" value="2.99"/>
Multiple Pricing	<input type="text"/> for <input type="text"/>
Special Publish On	<input type="text" value="01-12-2008"/> +
Special Expire On	<input type="text" value="31-12-2008"/> +

In the above example, the regular price for the item is \$3.99. If the customer buys 3 units of the same item, he will be charged \$9.99. If the customer buys the item on or after Dec 01, 2008 and on or before Dec 31, 2008, he will be charged \$2.99 per unit (regardless how many units he buys).

Inventory

Currently, JadaSite keeps track of inventory simply by maintaining 2 inventory counts by item.

Inventory – Physical inventory of an item.

Booked Quantity – Inventory of an item that is already ordered and is not shipped. This is to ensure JadaSite does not oversell items and that there are enough items in stock for shipping.

Inventory and Booked Quantity is updated during the following scenario.

	Inventory	Booked Quantity
Customer check-out the items. (order creation)		+
Order marked as shipped.	-	-
Adjustment	-/+	-/+
Credit transaction created with an order that	+	

is marked as shipped.		
Void order with an order that is marked as shipped.	+	
Void order with an order that is not marked as shipped.		+
Void credit order with an order that is marked as shipped.	-	
Void credit order with an order that is not marked as shipped.		-

Rating

JadaSite maintains rating of items by external customers. Depending on the template used, rating for any particular items can be entered by external customers. JadaSite keeps track of this information by recording the number of times external customers have rated the item as well as the average score external customers have given to the item. Again, depending on the template, rating for the item can be displayed together with other information to the customers.

Create an item

1. On the drop down menu, select **Item**.



Administration - Item Listing

2. On the search screen, click **New**.
3. Enter the required information and click **Save** when finished.

Item Number. User assigned item number for the item. Item numbers need to be unique within the site.

Item UPC Code. UPC code of the item.

Short Description. Short description of the item.

Additional Description. Additional description of the item. Depending on the preference, this can be the color or the size of the item.

Description. Full description of the item.

Publish On. The date when this content will be published.

Expire On. The date in which this content will expire.

Show in Home Page. To include this content in the home page.

Published. To publish or not publish this content.

Price. Single price of the item.

Multiple pricing. Multiple pricing contains 2 fields. The first field is the number of units. The second is the price to be paid when the number of units is bought.

Special Price. Single price of the item when it is on special.

Multiple pricing – special. Multiple price of the item when it is on special. The first field is the number of units. The second field is the price to be paid when the number of units is bought.

Special Publish On. Start date of special pricing.

Special Expire On. End date of special pricing.

4. During the saving process, a new item is created and the page will be refreshed. More options are displayed on the page.

Adjust Inventory or Booked Inventory

Inventory	0	Adjust
Booked Quantity	0	Adjust


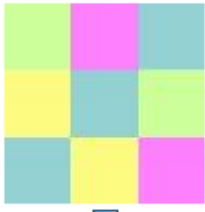
1. Depending on whether inventory or booked quantity is to be adjusted, click the **Adjust** button on the right side of the fields.
2. Enter the quantity to be adjusted. A positive value will bring the value up while a negative value will bring the quantity down.
3. Click **Confirm**.

Reset hit counter

General	
Hit Counter	16 <input type="button" value="Reset Counter"/>
Publish On	<input type="text" value="27-05-2008"/> +
Expire On	<input type="text" value="31-12-2999"/> +
Show in Home Page	<input type="checkbox"/>
Published	<input checked="" type="checkbox"/>

1. While on the item maintenance screen, click **Reset Counter**. This will reset the counter to 0.
2. Click **OK** when finished.

Upload Image, Remove Selected Images or Set Default Image

Images	
<input type="button" value="Upload image"/> <input type="button" value="Remove selected images"/>	
	
<input type="checkbox"/>	<input type="checkbox"/>
pen.jpg	pen2.jpg
Default Image	<input type="button" value="Set Default"/>

Upload Image

1. To upload an image, click **Upload Image** on the item maintenance screen.
2. Select an image from your local machine.
3. Click **Confirm** to upload image.
4. The first image uploaded is treated as the default image.

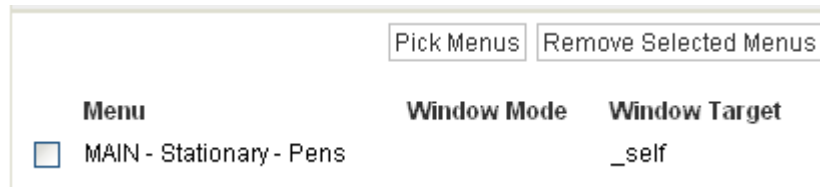
Remove selected images

1. Select the images to be removed.
2. Click **Remove selected images**.
3. Click **OK** when finished.

Set Default Image

1. Select the image to be set as default image.
2. Click **Set Default**.
3. Click **OK** when finished.

Assign to Menu or Remove Selected Menu



The screenshot shows a dialog box with two buttons at the top: "Pick Menu" and "Remove Selected Menu". Below the buttons, there are three columns: "Menu", "Window Mode", and "Window Target". Under the "Menu" column, there is a checkbox and the text "MAIN - Stationary - Pens". Under the "Window Target" column, there is the text "_self".

Menu	Window Mode	Window Target
<input type="checkbox"/> MAIN - Stationary - Pens		_self

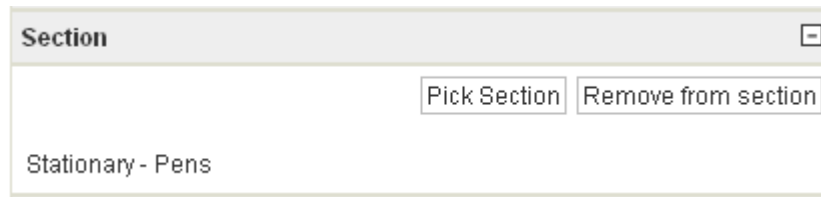
Assign to Menu

1. To assign this item to menus, click **Pick Menu**.
2. Select the menus that this item should be assign to.
3. Enter the optional information Window Mode and Window Target.
4. Click Confirm.

Remove Selected Menu

1. Select menus to be removed (unassigned).
2. Click **Remove Selected Menu**.
3. Click **OK** when finished.

Assign to Section or Remove from Section



Assign to Section

1. To assign this item to a section, click **Pick Section**.
2. Select the section that this item should be assign to.

Remove from section

1. Click **Remove from section**.
2. Click **OK** when finished.

Search for a item

1. On the drop-down menu, select **Administration** → **Item**.
2. On the search panel, enter the search criteria and click **Search**.

Item Number. Search for all items that have an item number that starts with this value.

Item UPC Code. Search for all items that have an item UPC code that starts with this value.

Item Short Description. There are 2 lines of item short descriptions. The first line is the item's short description and the next line is additional description information available for the item. Values entered are used to locate items that have these values in the item short description and additional description.

Published. Items that are currently published.

Not-Published. Items that are currently not published.

All. Items that are either published or not published.

Published between. Items that are published between these dates.

Expired between. Items that expire between these dates.

Updated by. Search for Items that are updated by the selected user.

Created by. Search for Items that are created by the selected user.

Select sections to show. If any one of the sections are selected, search for content that belong to the section selected. Otherwise, search for any sections.

3. Locate item from the listing and click the title to select.

jada site content management and ecommerce system Current site - jdashop

Home Content Item Order Store Public Site Module Setup Administration Sign Out

Administration - Item Listing

Search Search New

Item Number

Item UPC Code

Item Short Description

Published
 Not-Published
 All

Published between

Expired between

Updated by

Item Listing Result Remove New

1

Description	Item Number	Section	Publish	Publish On	Expire On
<input type="checkbox"/> Precision laser engraved twist ball point pen Blue	100001	Stationary - Pens	Y	Mon, 4 Aug 2008	Tue, 31 Dec 2999
<input type="checkbox"/> Large Jumbo imprinted pens with translucent trim With color matching grip	100002	Stationary - Pens	Y	Mon, 4 Aug 2008	Tue, 31 Dec 2999
<input type="checkbox"/> Low priced translucent stick pen Assorted colors	100003	Stationary - Pens	Y	Mon, 4 Aug 2008	Tue, 31 Dec 2999
<input type="checkbox"/> Superb plastic matte finish classic twist action pen Assorted color	100004	Stationary - Pens	Y	Mon, 4 Aug 2008	Tue, 31 Dec 2999
<input type="checkbox"/> Padded Mailer 12 pack	200001	Stationary - Envelopes	Y	Thu, 7 Aug 2008	Tue, 31 Dec 2999
<input type="checkbox"/> Bubble mailer 24 pack	200002	Stationary - Envelopes	Y	Thu, 7 Aug 2008	Tue, 31 Dec 2999

Modify an item

1. Locate and select the item by following the steps as described in the previous section (**To search for a item**).
2. Modify the information and press **Save**.

Remove an item

There are 2 ways to remove an item.

First, one or more items can be removed from the search and listing page.

1. Locate one or more items by following the steps as described in the previous section (Search for a item).
2. Select the one or more items by clicking on the checkboxes.
 1. Click **Remove**.

Second, an item can be removed from the modify page.

1. Locate and select the item by following the steps as described in the previous section (**To search for a item**).
2. Click **Remove**.

Chapter 6 - Public Site Management

Template management

In addition to the default template shipped by JadaSite, JadaSite supports plug and play templates, and encourages creation of new templates and modification to already created templates.

As a site administrator, the easiest method is to use the default template shipped by JadaSite. Alternatively, free templates can be downloaded from other sites. Once a template with a more appropriate theme is obtained, the template can simply be uploaded via the administration module and configured for the site to use.

Sometimes, no existing templates with the right theme can be found (cause the requirement is so unique) and a new template should be created. In this case, JadaSite has a framework for template creators to use. With JadaSite, there is always one page that carries the layout, and the look and feel of the whole site. If a user is generally satisfied with the default template and simply wishes to change the layout (placement of some major components) and the color scheme, it can be done by simply changing the one page, `template.vm`. JadaSite always refers back to the default template if the other templates do not have all the files required. This mechanism is to ensure that the templates creator is able to leverage the default template and only has to create files that are absolutely required.

Lastly, users can uploaded predefined templates and JadaSite provides users with a user interface to change and fine-tune the uploaded templates..

In this section, we will concentrate on how a predefined template can be uploaded, as well as the tools that are provided to create new template and to modify existing templates. Template authoring is a more involved and more technical process and will be described in another document, **JadaSite template authoring tutorial**.

Upload a predefined template

This is an easy process and should be used whenever possible.


Predefined templates are templates that are created specifically for JadaSite. These templates may also be open sourced and are offered as free downloads. There are also other places that offer JadaSite templates for a small fee.

Once the desirable template is located, please follow the download instructions from the source site and download the template to your local machine. The downloaded template file should have an extension of 'jar'. For example, `template.jar`.

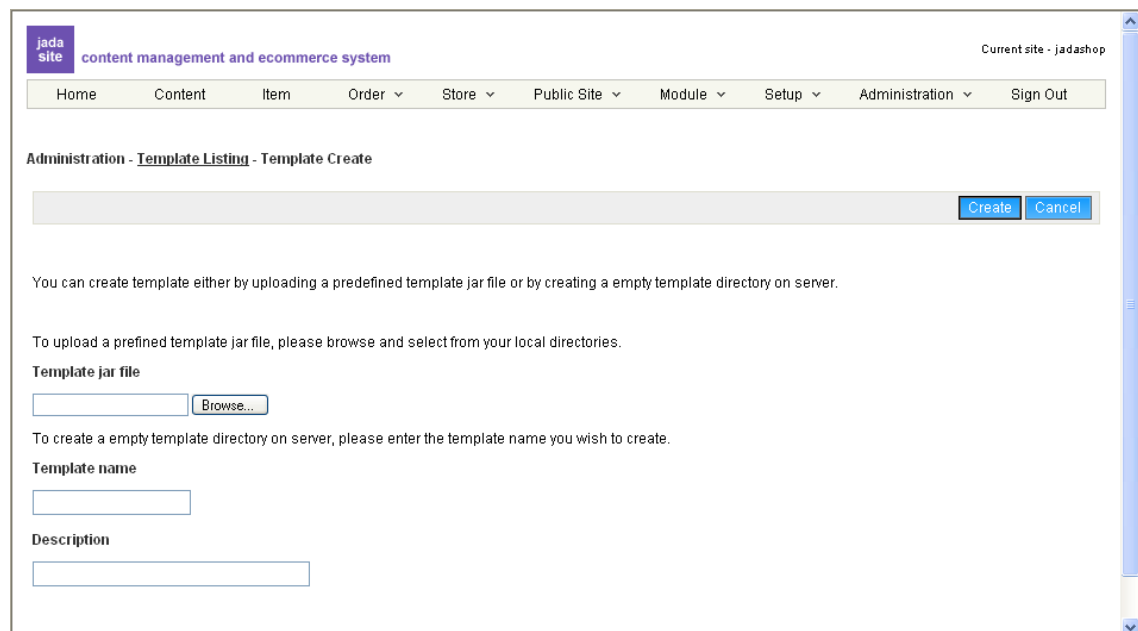
To upload a template.

1. On the drop down menu, select **Public Site** → **Template**.
2. On the search screen, click **New**.

Administration - Template Listing



3. Enter the required information and click **Create** when done.



Template jar file. Browse for the template jar file on your local machine. The template jar file should have an extension of '.jar'. Note: The text box for template jar is disabled. Please use the browse button to locate the template jar file.

Template name. Do not use. This is only used when a new template is to be created manually.

Description. Description of the template

4. Once created, the uploaded jar file will be expanded and files will be created on the server location according to the location defined during installation.
5. To assign the template to a site, you can navigate to **Administration** → **Sites** ,

locate the site that this template should be used. Click tab template and select the recently upload template.

Create a new template

A new template is usually created when no predefined templates are suitable. Another reason is that the default template is fine for the most part, but you would like to override a small number of pages to twist the look and feel. For details on authoring template, please refer to **JadaSite Template Authoring**.

To create a new template.

1. On the drop down menu, select **Public Site** → **Template**.



Administration - Template Listing

The image shows a web form titled "Administration - Template Listing". At the top left is a "Search" label, followed by two buttons: "Search" and "New". Below this are two input fields: "Template Name" and "Description".

2. On the search screen, click **New**.
3. Enter the required information and click **Create** when finished.

jada site content management and ecommerce system Current site - jadashop

Home Content Item Order ▾ Store ▾ Public Site ▾ Module ▾ Setup ▾ Administration ▾ Sign Out

Administration - Template Listing - Template Create

You can create template either by uploading a predefined template jar file or by creating a empty template directory on server.

To upload a prefined template jar file, please browse and select from your local directories.

Template jar file

To create a empty template directory on server, please enter the template name you wish to create.

Template name

Description

Template jar file. Do not use. Only use it to upload already created template files.

Template name. Enter the name of the new template. Please do not use any special characters for the name since this name will become the directory name on the server.

Description. Description of the template

4. Once created, an empty directory is created on the server and a template navigation screen is displayed on the browser.

Remove selected. Remove the selected files and directories from the server. If directories are selected, all files in the directories are removed.

Upload new file. Upload a new file onto the server. Once clicked, you can browse for a new file on your local machine. Click **Confirm** and the local file will be uploaded.

Create directory. Creates a new directory in the current location. Click **Create directory**, enter new directory and click **Confirm**.

5. To edit a file, click on the file name. Edit the content of the file and click **Save**. Only text file can be edited. Images and files that are not text can not be edited.
6. To navigate to sub-directories, click on the name of the directory.

Home page management

Home page is the most important page for a site since it is the site's (company's) face to the world and is the page that is usually visited the most. The layout and the theme of the home page is defined by templates. However, templates do not know which content to show. In order to achieve this, JadaSite provides a tool for site administrator to define the content to be shown. JadaSite then takes the content configured by site administrator and merge it with the templates to produce the home page.

In a typical home page, there is usually a block of content that should be emphasized. This content can be the overall description of the site or company. It can also be important upcoming events such as boxing day sale. In addition, there are usually other contents on the home page.

It is important to optimize the home page for search engine. Since HTML title text is one of the most crucial factor for search engine, JadaSite provides a tool to create the ideal HTML title text.

To accommodate this, JadaSite provides tools to allow the site administrator to assign contents or items to the home page, as well as flag one of the items or contents to be the emphasis on the home page. Information on the home page can also be sequenced and allows more important information to be shown closer to top.

Assign content to the home page

1. Locate and edit content via **Content Maintenance**.
2. On the **General** tab, select and check **Show in Home Page**.

General	
Hit Counter	19 <input type="button" value="Reset Counter"/>
Publish On	<input type="text" value="27-05-2008"/> +
Expire On	<input type="text" value="31-12-2999"/> +
Show in Home Page	<input checked="" type="checkbox"/>
Published	<input checked="" type="checkbox"/>

3. Click **Save** and this content will be included in the home page.

Assign an item to the home page

1. Locate and edit item via **Item Maintenance**.
2. On the **General** tab, select and check **Show in Home Page**.

General	
Publish On	16-07-2008 +
Expire On	31-12-2999 +
Show in Home Page	<input checked="" type="checkbox"/>
Shipping Type	Small ▾
Inventory	100 <input type="text"/> <input type="button" value="Adjust"/>
Booked Quantity	9 <input type="text"/> <input type="button" value="Adjust"/>
Hit Counter	0 <input type="text"/> <input type="button" value="Reset Counter"/>
Rating	0.00
Number of Rating	0
Published	<input checked="" type="checkbox"/>

3. Click **Save** and this item will be included in the home page.

Create HTML title text for home page

1. Select **Public Site** → **Home Page**.

Administration - Home Page Maintenance

HTML title text for home page
Our national home office supplies store

Type	Resequence	Description	Section	Set Feature	Publish	Publish On	Expire On
Content	<input type="text" value="0"/>	Welcome to Jada Demo Shop		<input checked="" type="radio"/>	Y	Mon, 4 Aug 2008	Tue, 31 Dec 2999
Item	<input type="text" value="0"/>	Precision laser engraved twist ball point pen Blue	Stationary - Pens	<input type="radio"/>	Y	Mon, 4 Aug 2008	Tue, 31 Dec 2999
Item	<input type="text" value="0"/>	Large Jumbo imprinted pens with translucent trim With color matching grip	Stationary - Pens	<input type="radio"/>	Y	Mon, 4 Aug 2008	Tue, 31 Dec 2999

2. Enter **HTML title text for home page** and press **Save**. If this field is left blank, the title text for home page will be simply set as 'Name of the site - Home'.

Re-sequence item/content on home page

1. Select **Public Site** → **Home Page**.

Type	Resequence	Description
Content	<input type="text" value="0"/>	Welcome to Jada Demo Shop
Item	<input type="text" value="0"/>	Precision laser engraved twist ball point pen Blue
Item	<input type="text" value="0"/>	Large Jumbo imprinted pens with translucent trim With color matching grip

2. Enter a sequence number and click **Resequence**.

Flag a content or item to be the emphasis on the home page

1. Select **Public Site** → **Home Page**.

Set Feature	Publish	Publish On	Expire On
<input checked="" type="radio"/>	Y	Mon, 4 Aug 2008	Tue, 31 Dec 2999
<input type="radio"/>	Y	Mon, 4 Aug 2008	Tue, 31 Dec 2999
<input type="radio"/>	Y	Mon, 4 Aug 2008	Tue, 31 Dec 2999

2. Select the content or item and click **Set Feature**.

Site index and Searches

Index the site to allow visitors to perform full featured, high performance, text searches for contents and items.

When the size of the site grows, it can contain a lot of content and items, which makes searching for content and items in the site very time consuming and CPU intensive. In order to provide a good user experience, all content and items are indexed by incorporating search engine technology that is implemented by another open source project, Apache Lucene.

The following information is indexed.

1. **Content.** Title and Description.
2. **Item.** Item number, Item UPC Code, Short Description and Additional Description.

Once a content or item is created, it is automatically indexed and the index is created on a directory on the server. There is normally no reason for performing indexing on the site again except in the following situations:

- Suspect the index is corrupted.
- Contents or items are created via a non-conventional method. For example, custom bulk load process.

Index a site

1. Select **Public Site** → **Site index**.
2. System will start creating index in the background.

Query syntax

Lucene comes with a very powerful query parser. The following is an extract from Lucene documentation that describes common searches. For the full capability of Lucene documentation, please refer to Lucene official documentation.

Terms

A query is broken up into terms and operators. There are 2 types of terms: Single Terms and Phrases.

A Single Term is a single word such as “test” or “hello”.

A Phrase is a group of words surrounded by double quotes such as “hello dolly”.

Multiple terms can be combined together with Boolean operators to form a more complex query.

Wildcard Searches

Lucene supports single and multiple character wildcard searches within single terms.

To perform a single character wildcard search use the “?” symbol.

To perform a multiple character wildcard search use the “*” symbol.

The single character wildcard search looks for terms that match with the single character replaced. For example, to search for "text" or "test" you can use the search:

```
te?t
```

Multiple character wildcard searches looks for 0 or more characters. For example, to search for test, tests or tester, you can use the search:

```
test*
```

You can also use the wildcard searches in the middle of a term.

```
te*t
```

Note: You cannot use a * or ? symbol as the first character of a search.

Boolean Operators

Boolean operators allow terms to be combined through logic operators. Lucene supports AND, "+", OR, NOT and "-" as Boolean operators (Note: Boolean operators must be ALL CAPS).

The OR operator is the default conjunction operator. This means that if there is no Boolean operator between two terms, the OR operator is used. The OR operator links two terms and finds a matching document if either of the terms exist in a document. This is equivalent to a union using sets. The symbol || can be used in place of the word OR.

To search for documents that contain either "jakarta apache" or just "jakarta" use the query:

```
"jakarta apache" jakarta
```

```
or
```

```
"jakarta apache" OR jakarta
```

AND

The AND operator matches documents where both terms exist anywhere in the text of a single document. This is equivalent to an intersection using sets. The symbol && can be used in place of the word AND.

To search for documents that contain "jakarta apache" and "Apache Lucene" use the query:

```
"jakarta apache" AND "Apache Lucene"
```

+

The "+" or required operator requires that the term after the "+" symbol exist somewhere in a the field of a single document.

To search for documents that must contain "jakarta" and may contain "lucene" use the query:

```
+jakarta lucene
```

NOT

The NOT operator excludes documents that contain the term after NOT. This is equivalent to a difference using sets. The symbol ! can be used in place of the word

NOT.

To search for documents that contain "jakarta apache" but not "Apache Lucene" use the query:

"jakarta apache" NOT "Apache Lucene"

Note: The NOT operator cannot be used with just one term. For example, the following search will return no results:

NOT "jakarta apache"

-

The "-" or prohibit operator excludes documents that contain the term after the "-" symbol.

To search for documents that contain "jakarta apache" but not "Apache Lucene" use the query:

"jakarta apache" -"Apache Lucene"

Grouping

Lucene supports using parentheses to group clauses to form sub queries. This can be very useful if you want to control the boolean logic for a query.

To search for either "jakarta" or "apache" and "website" use the query:

(jakarta OR apache) AND website

This eliminates any confusion and ensures that the website must exist and either term jakarta or apache may exist.

Syndication

JadaSite syndication can be used to centralize different RSS feeds from other sites and the result can be used by templates. Templates will decide if information is to be displayed and how it should be displayed.

JadaSite allows 5 feeds to be defined per site. Each feed can be activated or deactivated via the administration interface.

Note: JadaSite currently only supports RSS syndication.

Define Syndication

1. On the drop-down menu, select **Administration** → **Syndication Maintenance**.
2. Enter the **URL** and click **Active** to activate the URL. URLs should be in the format similar to the following:

<http://www.jadasite.com/rss/topstories.rss>



The screenshot shows the 'Administration - Syndication Maintenance' page. At the top, there is a navigation menu with options: Home, Content, Item, Order, Store, Public Site, Module, Setup, Administration, and Sign Out. Below the menu, the page title is 'Administration - Syndication Maintenance'. There is a section titled 'Syndication Information' with an 'Update' button. Below this is a table with 5 rows. The first row has a checked checkbox in the 'Active' column, and the others have unchecked checkboxes. The URL in the first row is 'http://news.cnet.com/2038-12_3-7853-1.xml'. At the bottom of the page, it says 'Copyright by Jada Site, 2008'.

	URL	Active
0	<input type="text" value="http://news.cnet.com/2038-12_3-7853-1.xml"/>	<input checked="" type="checkbox"/>
1	<input type="text"/>	<input type="checkbox"/>
2	<input type="text"/>	<input type="checkbox"/>
3	<input type="text"/>	<input type="checkbox"/>
4	<input type="text"/>	<input type="checkbox"/>

3. Clicks **Update** when finished.

Poll

JadaSite has a build-in web poll functionality. Again JadaSite provides an administration interface to define and update polls, and to activate and deactivate polls. A poll is comprised of a poll topic and one or more responses.

Create a poll

1. On the drop down menu, select **Module** → **Poll**.



Administration - Poll Listing

This is a search panel for the 'Administration - Poll Listing' page. It features a 'Search' label and two buttons: 'Search' and 'New'. Below the buttons is a 'Topic' text input field. There are three radio button options: 'Published', 'Not-Published', and 'All', with 'All' selected. Below these are two date input fields for 'Published between', each with a '+' icon to its right. At the bottom, there is a label for 'Expired between'.

2. On the search panel, click **New**.
3. Enter the required information and click **Save** when finished.

This is a screenshot of the 'Administration - Poll Listing - Poll Maintenance' form. At the top left is the 'jada site' logo and 'content management and ecommerce system' text. At the top right is 'Current site - jadashop'. Below is a navigation menu with 'Home', 'Content', 'Item', 'Order', 'Store', 'Public Site', 'Module', 'Setup', and 'Administration'. A 'Sign Out' link is also present. The main form area has a title bar with 'Save' and 'Cancel' buttons. The form fields include: 'Poll Topic' (text input), 'Publish On' (date input with '+' icon), 'Expire On' (date input with '+' icon), and 'Published' (checkbox, which is checked).

Poll Topic. Topic of the poll.

Publish On. The date when this poll should be published.

Expire On. The date when this poll should expire.

Published. To publish or not publish this poll.

4. During the saving process, a new poll is created and the page is refreshed. More options are displayed on screen.

The screenshot shows the 'Administration - Poll Listing - Poll Maintenance' page. At the top, there is a navigation menu with items: Home, Content, Item, Order, Store, Public Site, Module, Setup, Administration, and Sign Out. The current page title is 'Administration - Poll Listing - Poll Maintenance'. Below the title, there are three buttons: Save, Remove, and Cancel. The main form contains the following fields:

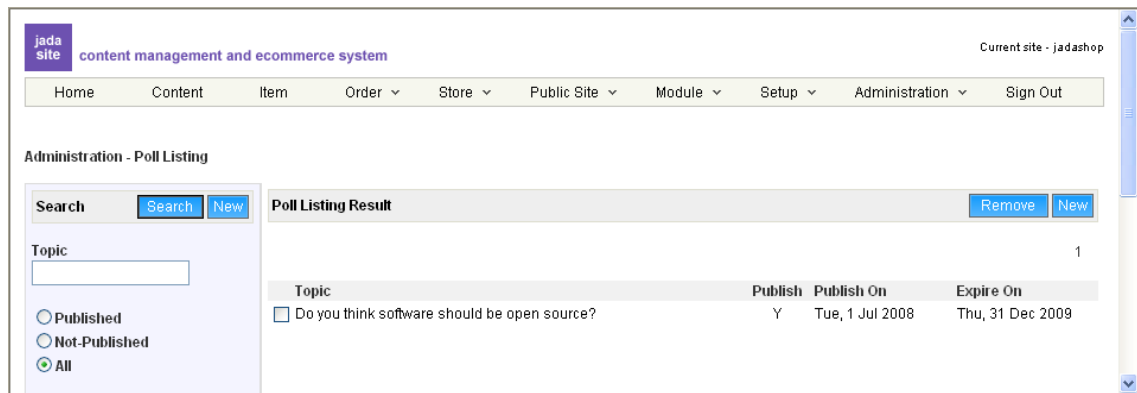
- Poll Topic:** Do you think software should be open source?
- Publish On:** 01-08-2008
- Expire On:** 31-08-2008
- Published:**

Below the form, there is an 'Options' section with a table header: 'Remove Resequence Response', 'Vote Count', and 'Percentage'. There is also a text input field for 'Enter new response - Add'.

5. To create a new response, enter the new response and click **Add**.
6. To remove existing responses, select responses from the list and click **Remove**. Please be aware that vote counts for the responses will be removed at the same time.
7. To re-sequence existing responses, enter a sequence number and click **Resequence**.

Search for a poll

1. On the drop down menu, select **Module** → **Poll**.
2. On the search panel, enter the search criteria and click **Search**.
 - Topic.** All polls that have topics begin with the value entered here.
 - Published.** Polls that are currently published.
 - Not-Published.** Polls that are currently not published.
 - All.** Polls that are either published or not-published.
 - Published between.** Polls that are published between these dates.
 - Expired between.** Polls that expire between these dates.
3. Locate poll from the listing and click topic to select.



Modify a poll

1. Locate and select the poll by following the steps as described in the previous section (To search for a poll).
2. Modify the information and press **Save**.

Remove a poll

There are 2 ways to remove a poll.

First, one or more polls can be removed from the search and listing page.

1. Locate one or more polls by following the steps as described in the previous section (**To search for a poll**).
2. Select one or more polls by clicking on the checkboxes.
3. Click **Remove**.

Second, polls can be removed from the modify page.

1. Locate and select the poll by following the steps as described in the previous section (**To search for a poll**).
2. Click **Remove**.

Contact Us

The Contact Us module provides a means for site administrators to define a list of contact information to be shown on the public site.

Create a contact

1. On the drop down menu, select **Module** → **Contact Us**.

Administration - Contact Us Listing

Search

Contact Us Name

Active
 Active
 In-active
 All

2. On the search screen, click **New**.
3. Enter the required information and click **Save** when finished.

jada site content management and ecommerce system Current site - jadashop

Home Content Item Order ▾ Store ▾ Public Site ▾ Module ▾ Setup ▾ Administration ▾ Sign Out

Administration - Contact Us Listing - Contact Us Maintenance

<p>Contact Us Name <input type="text"/></p> <p>Active <input checked="" type="checkbox"/></p> <hr/> <p>Email <input type="text"/></p> <p>Contact Us phone <input type="text"/></p> <p>Address <input type="text"/> <input type="text"/></p> <p>City <input type="text"/></p> <p>State:Province Alberta ▾</p> <p>Country</p>	<p>Contact us Description <input type="text"/></p>
---	--

Contact Us Name. Name of the contact.

Active. Activate or deactivate this contact.

Email. Email address.

Contact Us phone. Phone number.

Address. Two lines of postal address.

City. City name.

State/Province. State or Province name.

Country. Country name.

Zip/Postal code. Zip or Postal code.

Contact us Description. Description of this contact. Usually, this field describes why this contact should be contacted.

Search for a contact

1. On the drop-down menu, select **Module** → **Contact Us**.
2. On the search panel, enter the search criteria and click **Search**.

Contact Us Name. Search for contacts that have this value anywhere in the contact us name.

Active. Contacts that are currently active.

In-active. Contacts that are currently in-active.

All. Contacts that are either active or in-active.

3. Locate the contacts from the list and click the Contact us name to select.

The screenshot displays the 'Administration - Contact Us Listing' interface. On the left, there is a search panel with a 'Search' button, a 'New' button, a text input field for 'Contact Us Name', and radio buttons for 'Active', 'In-active', and 'All'. On the right, the 'Contact Us Listing Result' table shows two entries:

Resequene	Contact Us Name	Active
<input type="checkbox"/>	0 Site administrator	Y
<input type="checkbox"/>	0 Sales	Y

Modify a contact

1. Locate and select the contact by following the steps as described in the previous section (**Search for a contact**).
2. Modify the information and press **Save**.

Remove a contact

There are 2 ways to remove a contact.

First, one or more contacts can be removed from the search and listing page.

1. Locate one or more contacts by following the steps as described in the previous section (To search for a contact).
2. Select the one or more contacts by clicking on the check boxes.
3. Click **Remove**.

Second, content can be removed from the modify page.

1. Locate and select the contact by following the steps as described in the previous section (**Search for a contact**).
2. Click **Remove**.

Re-sequence contacts

The sequence of the contacts will determine how they are shown on the public site.

1. Obtain a listing of the contacts by following the steps as described in the previous section (**Search for a contact**).
2. Enter a sequence number and click **Resequence**.

Chapter 7 - Store management

Tax Management

When selling on the Internet, it is very tricky to decide who should be paying the sales tax and how much. If you are charging taxes when you do not need to, you are pricing your product too high. If you do not charge tax when you should, you are setting yourself up for an expensive assessment when you are audited.

Important: The following information is a simplified version and is strictly for reference only. You should obtain professional advice about your business to ensure you are handling it correctly.

Canada

Generally speaking, an on-line retailer is required to register to collect PST only if they have a physical presence in the province that they are shipping to. If they do not have a physical presence, it is the customer's responsibility to remit the PST. If you are shipping goods (with exception) to a province, you must charge GST or HST depending on the type of goods that you are shipping.

United States

If an on-line retailer has a physical presence in the state, it must collect sales taxes for customers in that state.

JadaSite supports flexible configuration of one or more sales taxes by state/province. During the customer check-out process, sales tax can be calculated automatically based on the customer provided shipping address.

Create a new sales tax

1. On the drop down menu, select **Store** → **Taxes**.
2. On the search screen, click **New**.

Administration - Tax Listing


Search

Tax Code

Published

Published
 Not-Published
 All

3. Enter the required information and click **Save** when finished.


content management and ecommerce system
Current site - jdashop

[Home](#) [Content](#) [Item](#) [Order](#) ▾ [Store](#) ▾ [Public Site](#) ▾ [Module](#) ▾ [Setup](#) ▾ [Administration](#) ▾ [Sign Out](#)

Administration - Tax Listing - Tax Maintenance

Tax Code
Tax Name
Tax Rate (Percentage)
Published

Tax Code. Tax code for internal use only.

Tax Name. Name of the tax and is displayed during check-out process.

Tax Rate (Percentage). Rate of the tax in percentage. Up to 4 digits decimal point is supported.

Published. To publish or not publish this tax.

5. During the saving process, a new tax is created and the page is refreshed. More options are displayed on the page.
6. Tax can be applied to the whole country or to a set of states/provinces of the country.
7. On the bottom right of the page, there is a country and states/provinces selection panel. Countries are displayed in alphabetical order. If the country has states or provinces, they will be displayed as children of the country.

8. Select the country and states/provinces and click **Add**.
9. To remove the states or provinces for the tax, select the states or the provinces to be removed, and click **Remove Regions**.

Search for a sales tax

1. On the drop-down menu, select **Store** → **Tax**.
2. On the search panel, enter search criteria and click **Search**.

Tax Code. Tax code.

Published. Tax that are currently published.

Not -Published. Tax that are currently not published.

All. Tax that are either published or not published.

3. Locate tax from the listing and click tax code to select.

The screenshot shows the 'Administration - Tax Listing' page. On the left is a search panel with a 'Tax Code' input field and radio buttons for 'Published', 'Not-Published', and 'All'. On the right is a 'Tax Listing Result' table with columns for 'Tax Code', 'Tax Name', 'Tax Rate', and 'Published'. The table lists six taxes: GST, HST, PST1, PST2, PST3, PST4, and PST5, each with a checkbox for selection.

Tax Code	Tax Name	Tax Rate	Published
<input type="checkbox"/> GST	GST	5.0000	Y
<input type="checkbox"/> HST	HST	13.0000	Y
<input type="checkbox"/> PST1	PST	7.0000	Y
<input type="checkbox"/> PST2	PST	8.0000	Y
<input type="checkbox"/> PST3	PST	10.5000	Y
<input type="checkbox"/> PST4	PST	7.8750	Y
<input type="checkbox"/> PST5	PST	5.0000	Y

Modify a sales tax

1. Locate and select a sales tax by following the steps as described in the previous section (**Search for a sales tax**).
2. Modify the information and click **Save**.

Remove a sales tax

There are 2 ways to remove a sales tax.

First, one or more sales taxes can be removed from the search and listing page.

1. Locate one or more sales taxes by following the steps as described in the previous section (To search for a sales tax).
2. Select the one or more sales taxes by clicking on the check boxes.
3. Click **Remove**.

Second, a sales tax can be removed from the modify page.

1. Locate and select the sales tax by following the steps as described in the previous section (**Search for a sales tax**).
2. Click **Remove**.

Shipping Management

Shipping calculation is influenced by three major factors: size of the package, location of the shipping destination, and the method that is used to ship the product out. For example, shipping a letter-sized package to California via Fedex Next Day Air may have a different rate than shipping the same package to the same location via USPS Ground. Shipping a 10 in x 10 in x 10 in package to California via Fedex Next Day Air can be different than shipping the same package using the same method of shipping to New York. Therefore, it is important to be able to define this three way combination in a way that can be easily maintained.

In order to accomplish this task, JadaSite provides a set of administration tools to define this three way relationship. During the check-out process, JadaSite makes use of the defined information together with the customer information (address and his/her selected shipping method) to calculate the shipping cost.

In terms of shipping, JadaSite has the following concepts.

Shipping Types

Different products are usually packaged in different sizes and they usually have different shipping costs. JadaSite allows administrators to define different shipping types for items and each item can be assigned with a shipping type. For example, in a stationary store, shipping types can be defined as small, medium and large. Pens that are sold as a single unit can be setup as a small package. Binders can be setup as a medium package, and back-packs, which are the largest in size, can be setup as a large package. Usually, each item should be assigned with a shipping type. Sometimes, if a store is selling a lot of items that are roughly of the same size, it can be rather time consuming to setup shipping types for all items. In this case, JadaSite provides a convenient feature to allow setup of a default shipping package for the site and is applied to all items in the site if the item is not already setup with a shipping type. During the check-out process, if the shipping package for the item is not defined, the default shipping package for the site is used.

Shipping Region

Shipping to different countries or even to different states or provinces of the country can have different rates. Defining shipping rates for all countries and states or provinces are cumbersome and not necessary, reason being rates in the same region are typically very much the same. Also, companies typically have exposure in only certain area or countries. Shipping to other countries may be possible, but is usually very low in volume. Because of this, it is more beneficial to simply charge a higher default rate that can cover the cost in most cases instead of spending a lot of efforts to setup shipping rates for all possible case.

JadaSite handles this situation by allowing system administrator to define shipping regions that are made up of a group of one or more countries, states or provinces. For example, if a company is primarily in the United States and would like to ship only to major countries, shipping regions can be defined as follows.

- Australia/Oceania
- Europe/Asia

- Canada
- United States Alaska/Hawaii
- United States (Lower 48/APO/FPO)

In addition, JadaSite automatically creates default shipping regions, **Others (default)**, to handle all other locations not covered above. All shipping regions can be published or not published. If a shipping region is defined and is not published, shipping to any location defined in the shipping region is not allowed and the sale will not be completed.

Shipping Method

Shipping method defines the method that is to be used to ship the product to the destination. One or more shipping methods can be defined and they can be published or not published. If the shipping method is defined and is published, it will be made selectable by the customer during the check-out process. For example, shipping methods can be defined as follows.

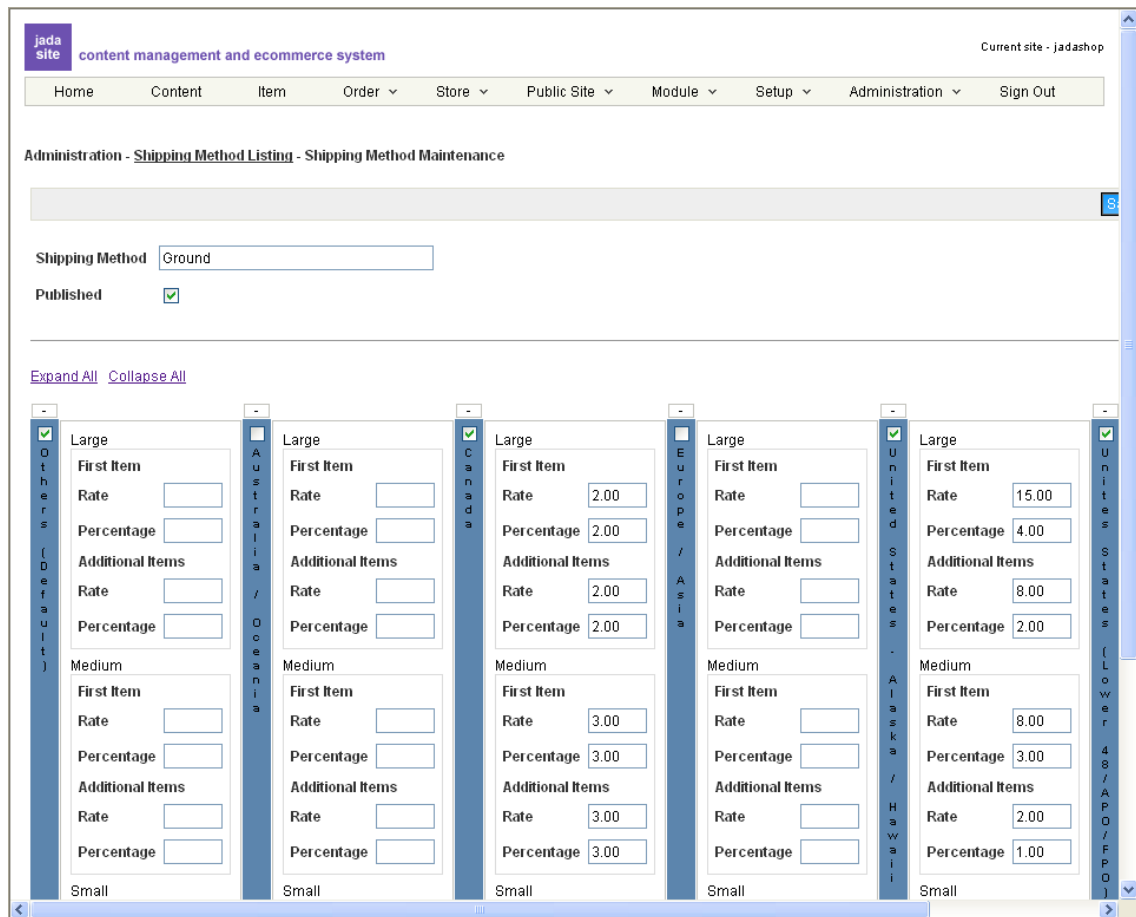
- USPS Ground
- 2nd Day
- Next Day
- Express

Once the shipping method is defined, shipping types, shipping regions and shipping methods can be tied together. JadaSite provides a table (conceptually similar to a spreadsheet) to define, in one shipping method, how much shipping cost will be charged for each type of product shipped to each defined shipping region.

Shipping cost can be defined as a simple rate (fixed amount) or percentage of the regular item price for the first item. Special price is not used in the calculation of shipping cost. All calculations are done based on the regular price of an item. If rate and percentage are both defined, whichever is the greater value will be used.

Usually, when customers buy one item, a shipping cost will be applied. If the customer buys the same or another item in the same order, a lesser shipping cost is applied. JadaSite accomplished this scenario by defining 2 sets of shipping costs, one for the first item and the other for each additional item.

The following is a snapshot when defining the shipping method as Express and how everything (shipping types, shipping regions) are tied together in the form of a spreadsheet.



- Shipping regions are defined horizontally and are labeled as Others (Default), Australia / Oceania, etc, on the blue bar. Exact wording for the label depends on how shipping regions are defined.
- Shipping types are defined vertically and are labeled as Large, Medium, etc. Again, exact wording depends on how shipping types are defined.
- Shipping regions can be published or not published by clicking on and off on the check boxes at the top of the blue bar.
- In the example above, the shipping method, Ground, is available to the customer who is shipping to an address in Canada or the two regions in United States.
- Shipping method, Ground, is not available to a customer who is shipping to addresses in Australia or Europe.
- If the customer address is not in the United States, Europe, Canada or Australia, the shipping cost defined in Others (Default) will be used.

Shipping Calculator

Shipping calculation is done in a way to ensure the company charges the right shipping cost to cover the expense in shipping based on the defined rate.

1. Shipping cost for an item is done by, first, locating the Rate and Percentage for

the item on the table based on the item's shipping type and shipping region. Then, the Percentage is applied to the regular price of the item and will be used to compare with the Rate. Whichever is larger will be the shipping cost for the item.

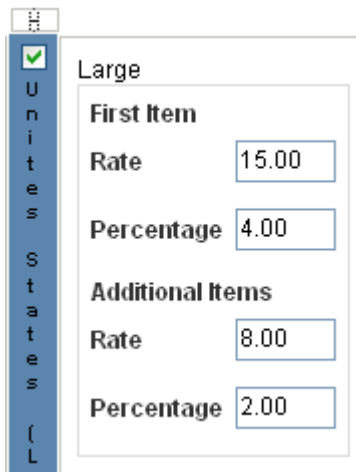
2. If the customer purchases multiple items, the calculator has to look at all the items in the order to determine the first item's shipping cost. Although all items are being shipped to the same location, they may be of different shipping types (Large, Medium, etc) and the cost can be different. Shipping cost for the first unit is calculated for all items in the order based on their shipping types. Whichever is the largest is the shipping cost for the first item.
3. Shipping cost for any subsequent items are determined individually based on values defined for Additional Items.

Shipping a Large item with a value of \$100 to the United States Lower 48 States

If the customer is shipping a Large item with a value of \$100 to the United States Lower 48 States (on the right-most column of the diagram), the following values will be used in the calculation. Since 4% of \$100 is \$4.00 and is less than \$15 defined in the rate field, he will be charged \$15. If he buys another unit of the same item, the calculator compares 2% of \$100 = \$2.00 with \$8.00. Since \$8.00 is larger than \$2.00, he will be charged \$8.00 for the additional item.

Cost for first item = Maximum of \$15 or $100 \times 4\% = \$15$

Cost for second item = Maximum of \$8 or $100 \times 2\% = \$8$



United States (L)	Large
	First Item
	Rate <input type="text" value="15.00"/>
	Percentage <input type="text" value="4.00"/>
	Additional Items
	Rate <input type="text" value="8.00"/>
	Percentage <input type="text" value="2.00"/>

Shipping a Large item with a value of \$100 and a Medium item with a value of \$80 to the United States Lower 48 States

Now, the customer is still shipping to United States, but he is buying 2 products. One is configured with shipping type Large and the other is configured with shipping type Medium.

-	
<input checked="" type="checkbox"/>	Large
U n i t e s S t a t e s (L o w e r 4 8 / A P O / F P O)	First Item
	Rate <input type="text" value="15.00"/>
	Percentage <input type="text" value="4.00"/>
	Additional Items
	Rate <input type="text" value="8.00"/>
	Percentage <input type="text" value="2.00"/>
	Medium
	First Item
	Rate <input type="text" value="8.00"/>
	Percentage <input type="text" value="3.00"/>
	Additional Items
	Rate <input type="text" value="2.00"/>
	Percentage <input type="text" value="1.00"/>

The first item shipping cost for shipping a Large item is
Maximum of \$15 or ($\$100 \times 4\% = \4), therefore it is \$15

The first item shipping cost for shipping a Medium item is
Maximum of \$8 or ($\$80 \times 3\% = \2.40), therefore it is \$8

Since Large items cost \$15 to ship and Medium items cost \$8 to ship, the shipping cost for the first item is \$15.

Now, the Large item is shipped. The only item that is left to be shipped is the Medium item.

Shipping cost for shipping a Medium item is

Maximum of \$2 or ($\$80 \times 1\% = \0.8), therefore it is \$2

Total shipping cost is $\$15 + \$2 = \$17$

Create a shipping type

1. On the drop down menu, select **Store** → **Shipping** → **Shipping Type**.

Administration - Shipping Type Listing

The screenshot shows a search panel for Shipping Type. It includes a search input field, a 'Search' button, and a 'New' button. Below the search field is a 'Shipping Type' label and an empty text input box. Underneath, there is a 'Published' section with three radio button options: 'Published', 'Not-Published', and 'All'. The 'All' option is selected.

2. On the search screen, click **New**.
3. Enter the required information and click **Save**.

The screenshot shows the 'Shipping Type Maintenance' form. It features a header with the 'jada site' logo and navigation links: Home, Content, Item, Order ▾, Store ▾, Public Site ▾, Module ▾, Setup ▾, Administration ▾, and Sign Out. The main content area has a title 'Administration - Shipping Type Listing - Shipping Type Maintenance' and a 'Save' button. Below this, there is a 'Shipping Type' label and an empty text input field. The 'Published' checkbox is checked.

Shipping Type. The type of the products to be shipped. Usually, it means the size of the packages.

Published. To publish or not publish the shipping type.

Search for a shipping type.

1. On the drop down menu, selects **Store** → **Shipping** → **Shipping Type**.
2. On the search panel, enter search criteria and click **Search**.

Administration - Shipping Type Listing

Search

Shipping Type

Published
 Published
 Not-Published
 All


Shipping Type. Search for records that have this value anywhere in the shipping type field.

Published. Shipping type that are currently published.

Not -Published. Shipping type that are currently not published.

All. Shipping type that are either published or not published.

- Locate shipping type from the listing and click shipping types to select.


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[Home](#)
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[Order](#) ▾
 [Store](#) ▾
 [Public Site](#) ▾
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 [Sign Out](#)

Administration - Shipping Type Listing

Search

Shipping Type

Published
 Published
 Not-Published
 All

Shipping Type Listing Result

	Shipping Type	Published
<input type="checkbox"/>	Large	Y
<input type="checkbox"/>	Medium	Y
<input type="checkbox"/>	Small	Y

Modify a shipping type

- Locate and select the shipping type by following the steps as described in the previous section (**To search for a shipping type**).

2. Modify the information and press **Save**.

Remove a shipping type

There are 2 ways to remove a shipping type.

First, one or more shipping types can be removed from the search and listing page.

1. Locate one or more shipping types by following the steps as described in the previous section (**To search for a shipping type**).
2. Select the one or more shipping types by checking the check boxes.
3. Click **Remove**.

Second, a shipping type can be removed from the modify page.

1. Locate and select the shipping type by following the steps as described in the previous section (**To search for a shipping type**).
2. Click **Remove**.

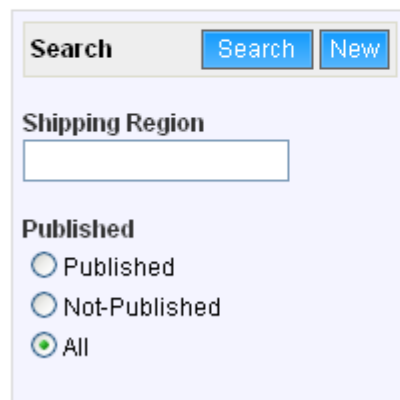
Note: If a shipping type is already in use (assigned to an item), it cannot be removed.

Create a shipping region

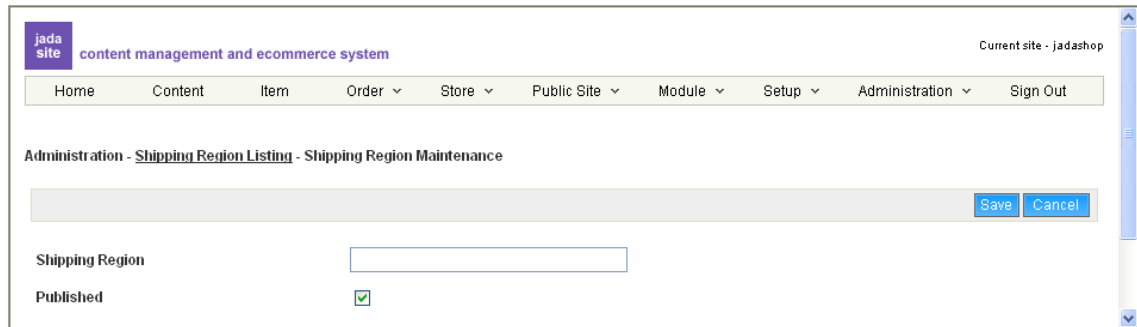
1. On the drop down menu, select **Store** → **Shipping** → **Shipping Region**.



Administration - Shipping Region Listing

The image shows a screenshot of the "Shipping Region Listing" administration page. At the top, there is a "Search" section with a text input field, a "Search" button, and a "New" button. Below this is a "Shipping Region" section with a text input field. At the bottom, there is a "Published" section with three radio button options: "Published", "Not-Published", and "All". The "All" option is selected.

2. On the search screen, click **New**.
3. Enter the required information and click **Save**.



Shipping Region. Name of the shipping region.

Published. To publish or not publish the shipping region.

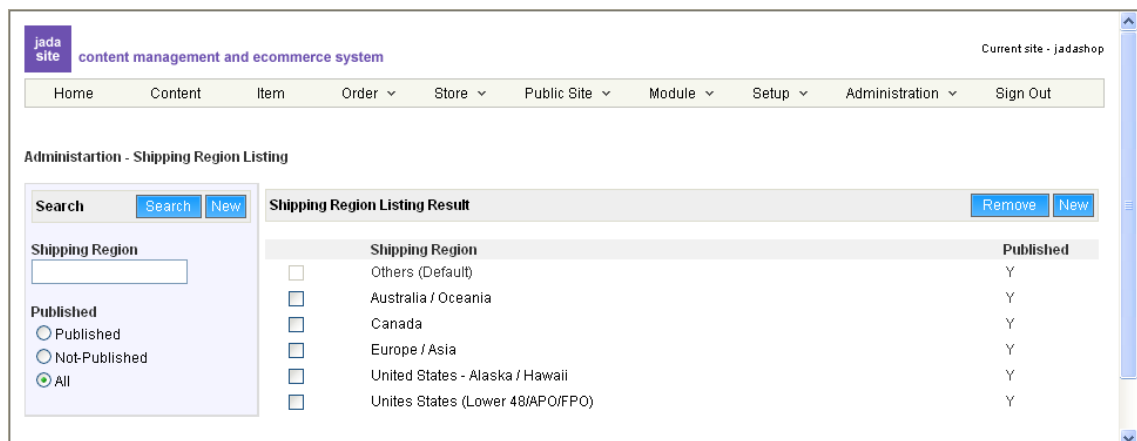
4. After saving, a new shipping region is created and the page is refreshed. More options are display on the screen for adding and removing countries, states and provinces.
5. On the bottom right of the page, there is a country and states/provinces selection panel. Countries are displayed in alphabetical order. If the country has states or provinces, they will be displayed as children of the country.
6. Select the desired country and states/provinces, and then click **Add**.
7. To remove the states or provinces for the tax, select the states or the provinces, and click **Remove Regions**.

Search for a shipping region.

1. On the drop down menu, select Store → Shipping → Shipping Region.
2. On the search panel, enter search criteria and click Search.

Shipping Region. Search for records that have this value anywhere in the shipping region field.

3. Locate shipping region from the listing and click on it to select.



Modify a shipping region

1. Locate and select the shipping region by following the steps as described in the previous section (**Search for a shipping region**).
2. Modify the information and press **Save**.

Remove a shipping region

There are 2 ways to remove a shipping region.

First, one or more shipping regions can be removed from the search and listing page.

1. Locate one or more shipping regions by following the steps as described in the previous section (To search for a shipping region).
2. Select the one or more shipping regions by checking the check boxes.
3. Click **Remove**.

Second, a shipping region can be removed from the modify page.

1. Locate and select the shipping region by following the steps as described in the previous section (**Search for a shipping region**).
2. Click **Remove**.

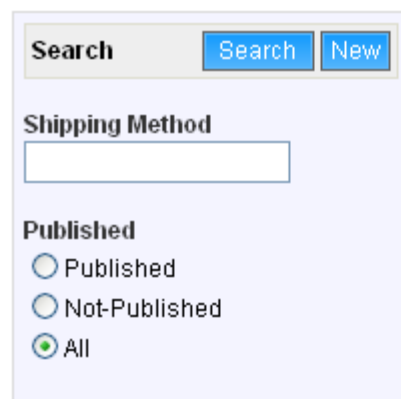
Note: If a shipping region is already in use (assigned to an item), it cannot be removed.

Create a shipping method

1. On the drop down menu, select **Store** → **Shipping** → **Shipping Method**.

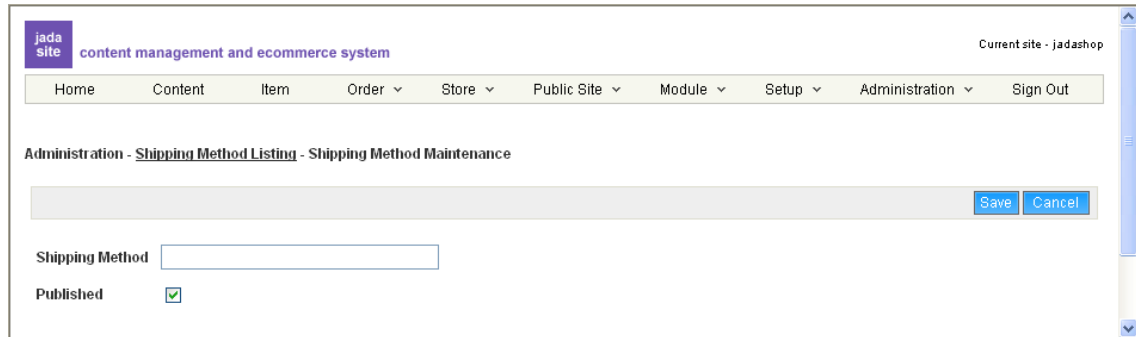


Administration - Shipping Method Listing

The image shows a search interface for shipping methods. At the top, there is a search bar with the text "Search" and two buttons: "Search" and "New". Below the search bar is a section titled "Shipping Method" with an empty text input field. Underneath, there is a section titled "Published" with three radio button options: "Published", "Not-Published", and "All". The "All" option is selected, indicated by a green dot.

2. On the search screen, click **New**.

3. Enter the required information and click **Save**.



The screenshot shows the 'jada site content management and ecommerce system' interface. The current site is 'jadashop'. The navigation menu includes Home, Content, Item, Order, Store, Public Site, Module, Setup, Administration, and Sign Out. The page title is 'Administration - Shipping Method Listing - Shipping Method Maintenance'. There are 'Save' and 'Cancel' buttons. The form includes a 'Shipping Method' text input field and a 'Published' checkbox which is checked.

Shipping Method. The name of the shipping method. Usually, it means the way the product is delivered to the customer. This value will be shown to the customer during the check-out process. If there are more than one shipping method defined and are eligible for the order, they will all be available for the customer to select.

Published. To publish or not publish the shipping type.

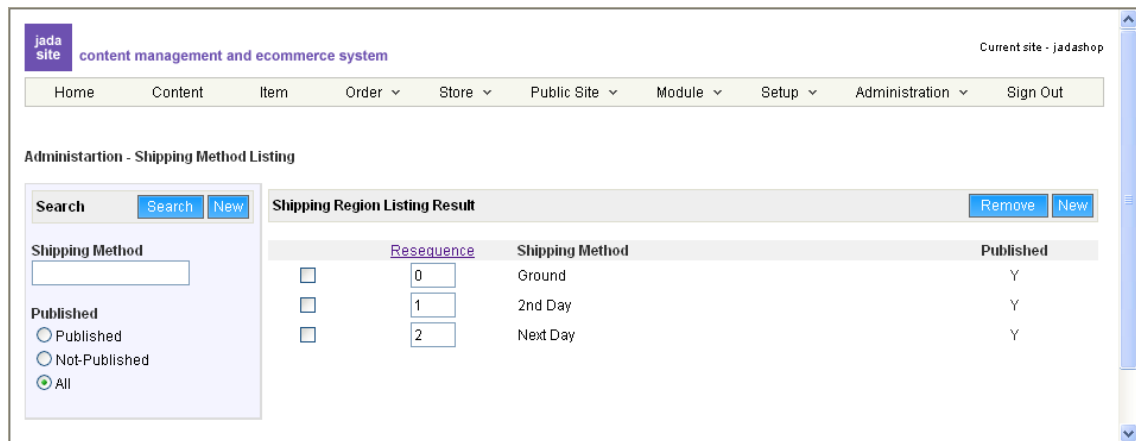
4. Once the newly created shipping method is saved, a table (layout like a spreadsheet) is created by shipping regions and shipping types for entering the shipping cost for this shipping method by shipping regions and shipping types.
5. By default, all columns except shipping region **Others (Default)** are collapsed. Expand or collapse other regions by clicking on the shipping region name or (+/-) sign on the top of the shipping region. Alternatively, click **Expand All** to expand all shipping regions, and **Collapse All** to collapse all shipping regions.
6. Enter shipping costs.
 - First Item – Rate. Shipping cost in dollar amount for shipping the first item.
 - First Item – Percentage. Shipping cost in percentage for shipping the first item.
 - Additional Items – Rate. Shipping cost in dollar amount for shipping subsequent items.
 - Additional Items – Percentage. Shipping cost in percentage for shipping subsequent items.

Search for a shipping method.

1. On the drop down menu, select **Store** → **Shipping** → **Shipping Region**.
2. On the search panel, enter search criteria and click Search.

Shipping Method. Search for records that have this value anywhere in the shipping region field.

3. Locate shipping method from the listing and click on the shipping method to select.



Modify a shipping method

1. Locate and select the shipping method by following the steps described in the previous section (**To search for a shipping method**).
2. Modify the information and press **Save**.

Remove a shipping method

There are 2 ways to remove a shipping method.

First, one or more shipping methods can be removed from the search and listing page.

1. Locate one or more shipping methods by following the steps as described in the previous section (**To search for a shipping method**).
2. Select the one or more shipping methods by clicking the check boxes.
3. Click **Remove**.

Second, a shipping method can be removed from the modify page.

1. Locate and select the shipping method by following the steps as described in the previous section (**To search for a shipping method**).
2. Click **Remove**.

Order Management

JadaSite not only helps businesses to create sales and orders, but it also streamlines the process of fulfilling orders and managing orders.

There are 2 types of orders.

Sales orders

Sales orders are created when customers successfully order products by completing the check-out process from JadaSite.

Credit orders

Credit orders are created only when issuing credits back to the customer. In JadaSite, credit order has to be issued based on the existence of a sales order. The amount credited goes back to the account from the sales order and the total amount of credit has to be smaller or equal to the amount of the original sales order.

Note: PayPal orders have to be created via PayPal web site.

Each order created in JadaSite has a status to identify the state of the order.

Life cycle of a sales order

Open. When a sales order is newly created, the status of the order is set to **Open**. Booked quantity of the item is increased (item is booked).

Shipped. Once the sales order is shipped, the status of the order is set to **Shipped** and booked quantity and inventory of an item are both reduced.

Void. Sales order can be voided and the status of the order will be set to **Void**. If the order is still open (with a status of **Open**), the booked quantity of an item is reduced in order to release the quantity back for other customers to order. If the order is shipped (with a status of **Shipped**), inventory of the item is increased.

Life cycle of a credit order

Closed. Credit order is set to a closed state (with a status of Close) automatically once it is created. During this process, inventory is taken out from booked quantity if the order is not shipped. This is to release the item back for other customers to order. If the order is shipped, inventory will be taken out from the quantity of the item. The administrator can decide if inventory should be reversed.

Void. Credit order can also be voided and the order will be set to **Void**.

Search for an existing order

Any successful e-commerce site can have a lot of orders generated daily. JadaSite provides a search screen to effectively locate newly created orders and past orders.

1. On the drop down menu, select Order → Order Listing

Administartion - Order Listing

The screenshot shows a search panel with the following fields and controls:

- A "Search" label and a blue "Search" button.
- An "Order Num" text input field.
- An "Order Created Between" section with two stacked text input fields, each followed by a blue "+" icon.
- A "First Name" text input field.

2. On the search panel, enter search criteria and click Search.

Order Num. The order number of the order.

Order Created Between. To look for orders that are created between these dates. If the start date is entered, it will search for all orders that were created on or after the entered start date. Similarly, if the end date is entered, it will search for orders that were created on or before the end date.

First Name. Customer first name that starts with this value.

Last Name. Customer last name that starts with this value.

Email. Customer email address.

City Name. The city name of the order's shipping address.

State. The state name of the order's shipping address.

Country. The country name of the order's shipping address.

Authorization Code. The authorization code of the order from the payment processor.

Order Status. The status of the order. Select **All** to include all statuses.

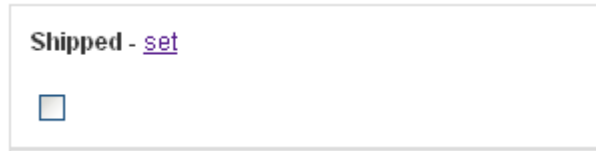
3. Locate the order from the listing and click order number to select.
4. This will take you to the order maintenance screen where all order information will be shown. Order information includes.
 - Detailed order information.
 - Customer information.
 - Shipping information.
 - Payment information.
 - Order summary.

- Tracking information.
- Void order information if the sales order is voided.
- List of credit orders for this sales order, if it exists.

Ship order

Newly created orders have a status code of **Open**. All quantity that are ordered are allocated into booked quantity. To physically take it out from the inventory, the status of the order has to be set to **Shipped**.

1. On the order maintenance screen, select the Shipped checkbox and click **Set**.



A screenshot of a web form titled "Shipped - [set](#)". Below the title is a single checkbox that is currently unchecked.

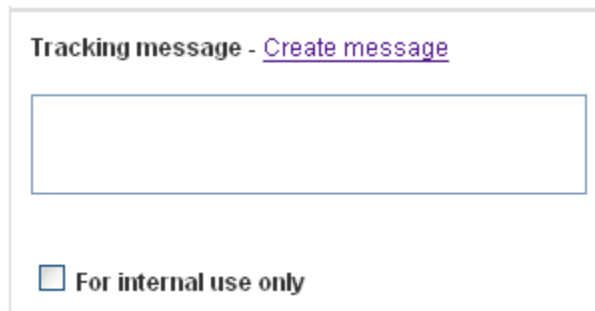
2. Orders can be set so as they are not to be shipped. This is done by not selecting the Shipped checkbox and then clicking **Set**.

Create tracking messages

Multiple tracking messages can be created for orders. Usually tracking messages are used to inform customers of the status of their order. Once customers sign-in to their account on the public site, they will be able to review their order as well as tracking messages (if created).

Tracking messages can also be created for internal use only and these messages can only be viewed from the order maintenance screen and is not displayed on the public site.

1. On the order maintenance screen, enter Tracking message.



A screenshot of a web form titled "Tracking message - [Create message](#)". Below the title is a large empty text input field. At the bottom of the form is a checkbox labeled "For internal use only", which is currently unchecked.

2. Check **For internal use only** if the messages should not be shown on the public site.
3. Click **Create message** when finished.

Messages created can toggle between internal and external.

1. On the order maintenance screen, locate the tracking message you wish to change.

Tracking	Messages	Internal - Set	Date/Time
Message	Item has been delivered via Fedex with tracking number 123456.	No <input type="button" value="v"/>	Sun, 22 Jun 2008 07:06 AM

2. Select the Yes/No option.
3. Click **Set**.

Creates a credit order

One or more credit orders can be created to issue credit back to the customer when required, and monetary credit is then issued back to the customer via its original payment method. JadaSite ensures the amount credited is less than or equal to the original order amount to protect the merchant from over crediting.

Note: Credits for orders made by PayPal transaction need to be done through the PayPal web site.

1. On the order maintenance screen, click **Credit Order**.
2. Click **Confirm** to proceed and a credit order is generated for the sales order.

The screenshot shows the JadaSite administration interface. At the top, there is a navigation menu with options: Home, Content, Item, Order, Store, Public Site, Module, Setup, Administration, and Sign Out. Below the menu, the breadcrumb trail reads 'Administration - Order Listing - Order Maintenance'. On the right side, there are three buttons: 'Credit Order', 'Void Order', and 'Cancel'. The main content area is divided into three panels:

- Customer:**
 - Order Number: 20080824213218737
 - First Name: John
 - Last Name: Doe
 - Email: jdoe@jadasite.com
 - Address line 1: 1 Toronto Street
 - Address line 2:
 - City: Toronto
 - State: ON Ontario
 - Country: CA Canada
 - Phone: 416-123-4567
 - Fax: 416-123-4567
- Shipping:**
 - Shipping Method: Ground
- Order Summary:**
 - Order Date: Sun, 24 Aug 2008
 - Price Total: 0.99
 - Shipping Total: 4.00
 - Tax - PST: 0.08
 - Order/Grand Total: 5.07
 - Order Status: Open

Below the 'Payment Information' section, there is a 'Reference' field with the value '508713110' and a '1' below it.

3. Enter required information and click **Save**.

Reverse Inventory. If checked, inventory will be reversed. If the order is not already set to shipped, quantity will be reduced in the booked quantity for the item. If the order is already set to shipped, credited item will be added to the inventory (quantity field of the item).

Sometimes, if the item is damaged, reversal of inventory of the credited item is

not preferred and should not be checked in here.

4. If the original sales order information is needed for reference, click **Show Purchase Order**. Close window when you are finished reviewing the information.

The Sales Order window is divided into four main sections:

- Customer:** First Name: John, Middle Name: (blank), Last Name: Doe, Email: jdoe@jadasite.com, Address line 1: 1 Toronto Street, Address line 2: (blank), City: Toronto, State: ON Ontario, Country: CA Canada, Phone: 416-123-4567, Fax: 416-123-4567.
- Shipping:** Shipping Method: Ground.
- Payment Information:** Payment Type: CC, Credit Card Type: Visa, Credit Card Num: 4111*****1111, Authorization Code: Purz95, Reference: 508713110, 1.
- Order Summary:** Order Date: Sun, 24 Aug 2008, Price Total: 0.99, Shipping Total: 4.00, Tax Total: 0.08, Order/Grand Total: 5.07, Order Status: Open.

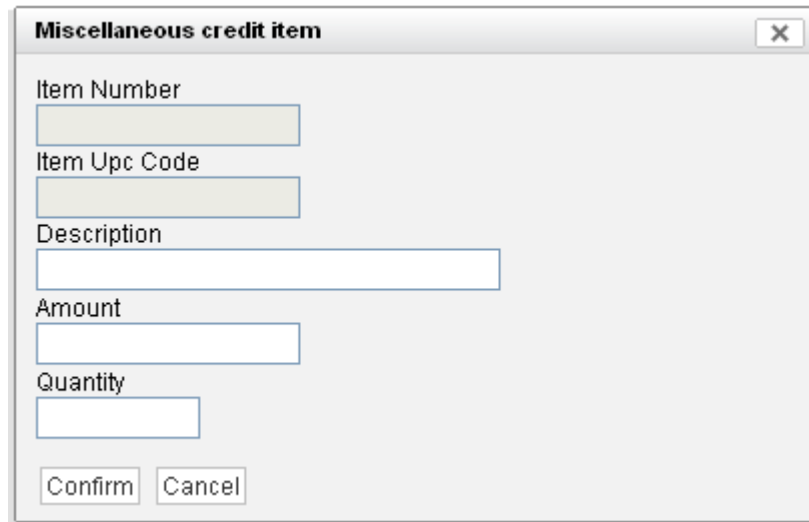
5. Click **Pick from Sales Order** to create credit details on an item by item basis from the original sales order. This is typically used when a customer is returning items.

The Select items to credit window displays a table with the following data:

Item number	Item Upc Code	Description	Price	Quantity	Credit Total	Credit Quantity
100001	099000123456	Precision laser engraved twist ball point pen - Blue	0.99	1	0	<input type="text"/>

Buttons: Confirm, Cancel

6. Enter credit quantity and click **Confirm**, and a credit detail line is created. Price and tax of the item is calculated based on the information in the original sales order. Furthermore, if the item is purchased in a multiple pricing scenario, the correct price to credit will be calculated correctly. For example, if the item is sold at \$2.99 or 2 for \$4.99 and the customer purchased 2 items for \$4.99, the customer will be only credited \$2.00 for returning one item. Note: Shipping cost is not calculated automatically since most real world scenarios do not credit shipping costs.
7. Click **Create miscellaneous credit item** to issue any other credits that are not on an item by item basis. This can be anything from returning shipping costs to crediting an overcharged amount back to the customer.



The image shows a dialog box titled "Miscellaneous credit item" with a close button (X) in the top right corner. It contains several input fields: "Item Number", "Item Upc Code", "Description", "Amount", and "Quantity". At the bottom, there are two buttons: "Confirm" and "Cancel".

8. Enter required information and click **Confirm**.

Description. Description of the credit line.

Amount. Unit amount to be credited.

Quantity. Quantity to be credited.

9. Click **Credit** to submit transaction to a payment processing company and have the inventory reversed (only if **Reverse Inventory** is selected).

10. Click **Confirm** to submit. Once submitted, credit is issued back to the customer. No changes can be made to this credit transaction. The only thing that you can do is void the transaction. Payment processing companies usually only allow a short period of time to void the transaction. If the payment processing company encounters an error, an error message will be provided.

Modify a credit order

1. Locate the purchase order by following the steps as discussed in **Search for an existing order**.

2. If there are credit orders created for this sales order, there will be a summary section detailing all the credit orders and its summary.

All Credit Orders						
remove	Credit Number	Date	Amount	Status	Update By	Update On
<input type="checkbox"/>	20080825142405261	Mon, 25 Aug 2008	1.07	Open	root	Mon, 25 Aug 2008
Summary						
Status	Amount					
Open	1.07					

3. Click the **Credit Number** to modify.

4. Modify the information and click **Save**.

- Credit detail lines can be removed by selecting the checkboxes on the left of the line and clicking **Remove**.
- Individual detail line can be modified by clicking on the description of the detail line. If the line is created through selection from a sales order, only **Quantity** can be modified. Otherwise, **Description, Amount** and **Quantity** can be modified. Click **Confirm** when finished editing.

Remove a credit order

If the credit order is created and has not been sent to a payment processing company, it can be removed.

There are 2 ways to remove credit orders.

First, one or more credit orders can be removed from the order maintenance screen.

- Locate the purchase order by following the steps as discussed in **Search for an existing order**.
- If there are credit orders created for this sales order, there will be a summary section detailing all the credit orders and its summary.

All Credit Orders						
remove	Credit Number	Date	Amount	Status	Update By	Update On
<input type="checkbox"/>	20080825142405261	Mon, 25 Aug 2008	1.07	Open	root	Mon, 25 Aug 2008
Summary						
Status	Amount					
Open	1.07					

- Select the credit order to be removed via the checkbox on the left and click **remove**.

Second, a credit order can be removed from the credit maintenance screen.

- Locate the purchase order by following the steps as discussed in **Search for an existing order**.
- Scroll down to the credit order summary section and click **credit number** to select.
- Click **Remove**.

Chapter 8 – Using JadaSite Public Site module

Once the site is configured, it is time to explore into how contents is delivered to visitors. Contents goes hand in hand with templates since it is the template that drives the color scheme, layout and presentation of the contents. Depending on the template that is used, the look and feel of the public site can varies a lot. In this chapter, all discussion will be based on the use of basic template that is delivered with the standard JadaSite installation.

JadaSite delivers the following pages out of the box.

- Home page
- Section
- Content
- Item
- Contact us
- Search
- Customer self service (My account)

In addition, JadaSite has components that can be viewed as small modules and can be included anywhere in the master template as well as the body of the template.

- Shopping cart summary
- Poll
- Syndication

Although the site is considered to be public, there is still a portion of it that requires visitors to have to sign-in before use and we called these pages as secure site. Note: Although it is highly recommended the secure site to be setup to use SSL, it can be setup to simply use non-SSL HTTP protocol to allow site that does not require high level of security and/or do not have the capability.

Public Site

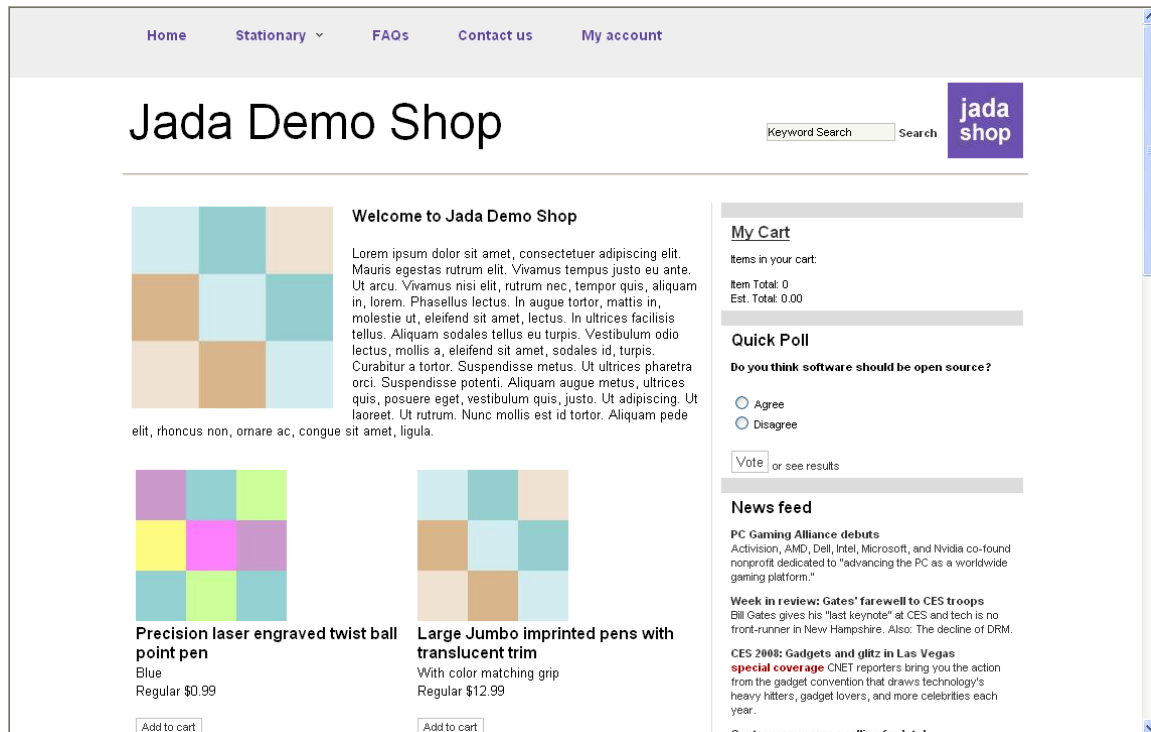
Home

Home page for basic template is make up of content and items defined for the home page as well as other components located on the right of the template. These components are shopping cart summary, poll and syndication in the order from top to bottom.

Content or item that is marked as feature from the admin console appears on the top of the page and span the whole row. Other content and items that are configured to show

on the home page will appear right after the feature content/item in the sequence that is defined in the admin console. A total of two content or items are shown per row. All content or items that appear on the home page are shown in preview mode and only limited information will be shown. Visitors can clicks on the image or description to view detail information of the content or item.

Here is a typical home page.



Content preview

- Maximum of 1 image
- Content title
- Content short description

Item preview

- Maximum of 1 image
- Item short description
- Addition description
- Price
- Special price when the item is on special
- Add to cart button if shopping cart is enabled.

Shopping cart summary

This component provides a summary view of the visitor's shopping cart. Once the visitor has an item added to the shopping cart, the item will be shown in this summary view. This component is only shown if the check-out process is activated in the admin console.

- Link, My Cart, to the detail view of the shopping cart and the check-out process
- Item by item summary of all check-out items.
- Total number of items in the cart.
- Estimated total amount of the order. The amount will be adjusted and finalized once taxes and shipping charge is determined during the check-out process.

Poll - Quick poll

This component shows the current poll and allows visitors to vote. Vote is counted and a result page is displayed to the visitors.

- Visitor selects a option from the list and clicks **vote** to show the summary page.
- Alternatively, visitor can clicks **see results** to view the summary page without voting.
- Summary page shows the percentage of each vote.

Syndication - News feed

This component display result from all syndication information defined in admin console. Visitors clicks on the title to view the full content of the article and this page will be a new window.. Note: It is always important visitors do not have too many ways to leave the site.

Section

In many cases, sections can be view as categories. For example in a business supplies site, it can be setup to have a section named as Office Supplies. Section office supplies contains sub-section Envelopes & Forms, Paper & Pads and Pens.

TV. Section TV contains sub-section LCD TV, Plasma TV, DVD players, HD DVD players, etc. Section TV can then be assigned to a menu item TV. In this case, visitor selects TV on the menu item will take him to a section page that display information for section TV and well as items and content that belongs to section TV. There are links to the sub-section on the section page to take visitors to LCD TV, Plasma TV, DVD players and HD DVD players.

- There is a navigation on the top of the section page to navigate to the previous level.
se<http://demo.jadasite.com/jada/admin/inventory/creditMaint.do?process=create&orderHeaderId=6>
- If the section has sub-sections, there will be links on the right of the page for navigating to the sub-sections.
- If the section has more content or items than one page (configured in admin console) can display, page by page navigation are displayed at the top and bottom of the screen.
- Section title and description is always displayed at the top of the screen and only at the first page of the section.
- Clicking on the image or title of the content takes the visitor to the detail content page. Similarly, clicking on the image or description of the item takes visitors to the detail item page.

Content

This page contains detail view of the selected content.

The screenshot displays the 'Jada Demo Shop' website. At the top, there is a navigation menu with links for 'Home', 'Stationary', 'FAQs', 'Contact us', and 'My account'. The main header features the store name 'Jada Demo Shop' and a search bar with the text 'Keyword Search' and a 'Search' button. The 'jada shop' logo is positioned to the right of the search bar. The main content area is divided into two columns. The left column contains a large grid image of a product, a title 'Welcome to Jada Demo Shop', and two paragraphs of placeholder text. The right column features a 'My Cart' sidebar with the text 'Items in your cart:', 'Item Total: 0', and 'Est. Total: 0.00'. The footer area contains a list of social networking sites for sharing the content.

If the content has image associated with it, the image is show on the top left corner of the page. There is always a navigation just below the image in order for visitor to select and view other images.

If there is no image associated with this content, this space will not be occupied.

Content title, short description and description are display on this page.

Rendering this page cause the hit counter to increment by one.

At the bottom of the page, there is a list of social networking site for visitors to post this content to for sharing.

Share it



[Facebook](#)

[del.icio.us](#)

[del.icio.us](#)

[digg.com](#)

[Newsvine](#)

[Technorati](#)

Item

This page contains detail view of the selected item.

The screenshot shows the 'Jada Demo Shop' website. At the top, there is a navigation bar with links for Home, Stationary, FAQs, Contact us, and My account. The main header features the store name 'Jada Demo Shop' and a search bar with the text 'Keyword Search' and a 'Search' button. The 'jada shop' logo is in the top right corner.

The product details for the 'Precision laser engraved twist ball point pen' are displayed. The item number is 100001 and the color is Blue. The regular price is \$0.99. There is an 'Add to Cart' button. The current rating is 0.00 out of 5, with a 'Rate this item' link. Below the rating is a grid of 10 small images showing different views of the pen. The description includes placeholder text: 'Lorem ipsum dolor sit amet, consectetur adipiscing elit. Sed viverra orci tempus augue. Suspendisse iaculis, sem ut interdum eleifend, tellus elit consectetur dolor, vel gravida orci dui non ligula. Nullam gravida. Mauris convallis ligula tincidunt tellus. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Sed suscipit, augue eu aliquet interdum, orci elit cursus sapien, nec viverra velit tellus ut mauris. Curabitur sapien mi, laoreet eu, semper quis, euismod eu, arcu. Integer vitae dolor sed arcu imperdiet pellentesque. Phasellus et velit id enim fringilla fermentum. Quisque in libero sed urna ullamcorper fermentum. Nulla orci ligula, interdum sed, porta in, facilisis et, justo. Quisque odio. Mauris mauris sem, fermentum congue, sodales nec, rhoncus et, risus.' Below the description is a paragraph of additional placeholder text: 'Donec malesuada. Mauris nibh velit, vestibulum sit amet, fermentum non, viverra a, erat. Vestibulum aliquam aliquet odio. Ut urna urna, vehicula non, lacinia quis, gravida at, diam. In fringilla arcu id orci. Fusce ullamcorper nisi eu leo. Quisque non nibh. Phasellus nunc. Proin quis leo. Donec auctor ipsum eget mauris. Sed auctor tortor eget augue. Maecenas ante turpis, placerat a, imperdiet eu, vehicula eget, nulla. Quisque nec dolor vel sapien sagittis fringilla. Aliquam dapibus, urna non facilisis venenatis, dolor ligula sollicitudin elit, nec consequat massa'.

On the right side, there is a 'My Cart' section showing 'Items in your cart: 0', 'Item Total: 0', and 'Est. Total: 0.00'.

If the item has images associated with it, the image is shown on the top left corner of the page. This is always a navigation just below the image in order for visitor to select and view other images.

If there is no image associated with this item, this space will not be occupied.

Item number, item UPC code, item short description, addition description and description for the item are shown on this page.

Item price and item special page (if this item is on special) are displayed on this page.

If the item has less than 1 unit in quantity, a out of stock message is shown. Otherwise, an Add to Cart button is shown.

A scale of 1 to 5 is shown for visitor to rate the item and visitor clicks **Rate this item** to update the rating. Average rating for the item is updated every time when the item is rated.

At the bottom of the page, there is a list of social networking site for visitors to post this item to for sharing.

Share it



[Facebook](#)

[del.icio.us](#)

[del.icio.us](#)

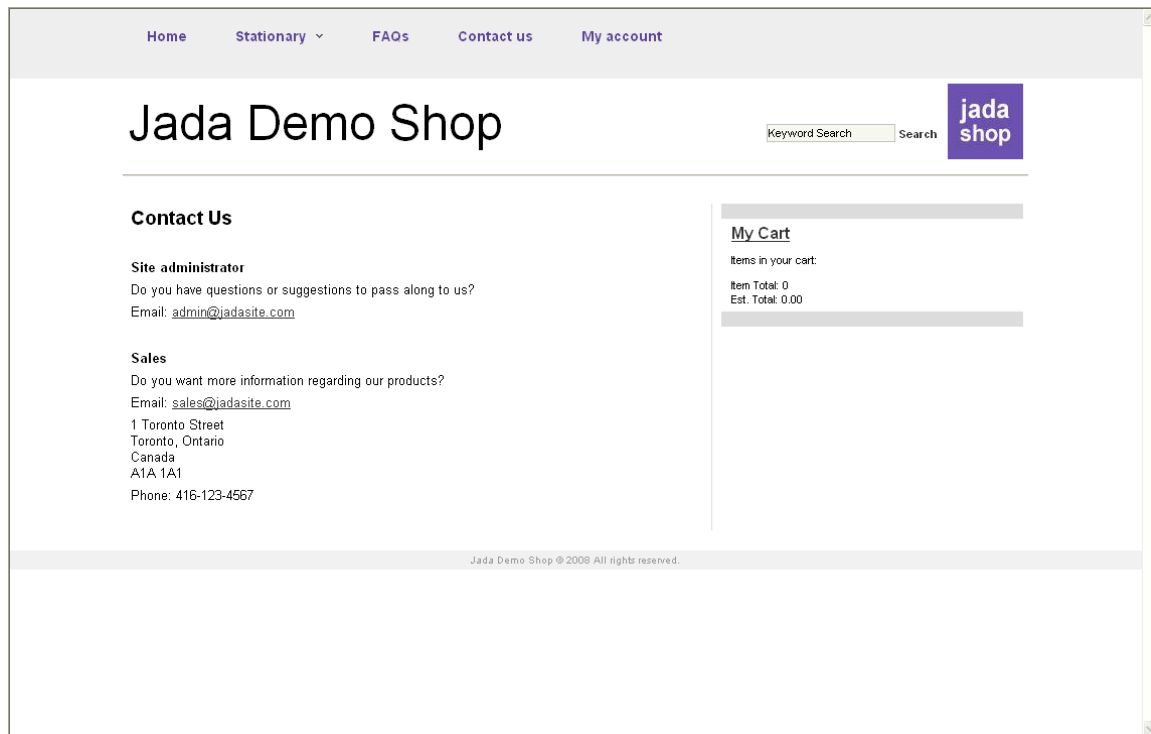
[digg.com](#)

[Newsvine](#)

[Technorati](#)

Contact us

This page contains all the contact us information defined in the admin console.



The screenshot shows the 'Contact us' page of the Jada Demo Shop. The page has a navigation bar at the top with links for Home, Stationary, FAQs, Contact us, and My account. The main header features the 'Jada Demo Shop' logo and a search bar. The 'Contact Us' section is divided into two parts: 'Site administrator' and 'Sales'. The 'Site administrator' section includes a question about questions or suggestions, with an email address admin@jadasite.com. The 'Sales' section includes a question about more information regarding products, with an email address sales@jadasite.com and a physical address: 1 Toronto Street, Toronto, Ontario, Canada, A1A 1A1, and a phone number: 416-123-4567. On the right side, there is a 'My Cart' section showing 'Items in your cart: Item Total: 0, Est. Total: 0.00'. The footer contains the text 'Jada Demo Shop © 2008 All rights reserved.'

Information displayed includes description, name, email, address and phone of the contact us item.

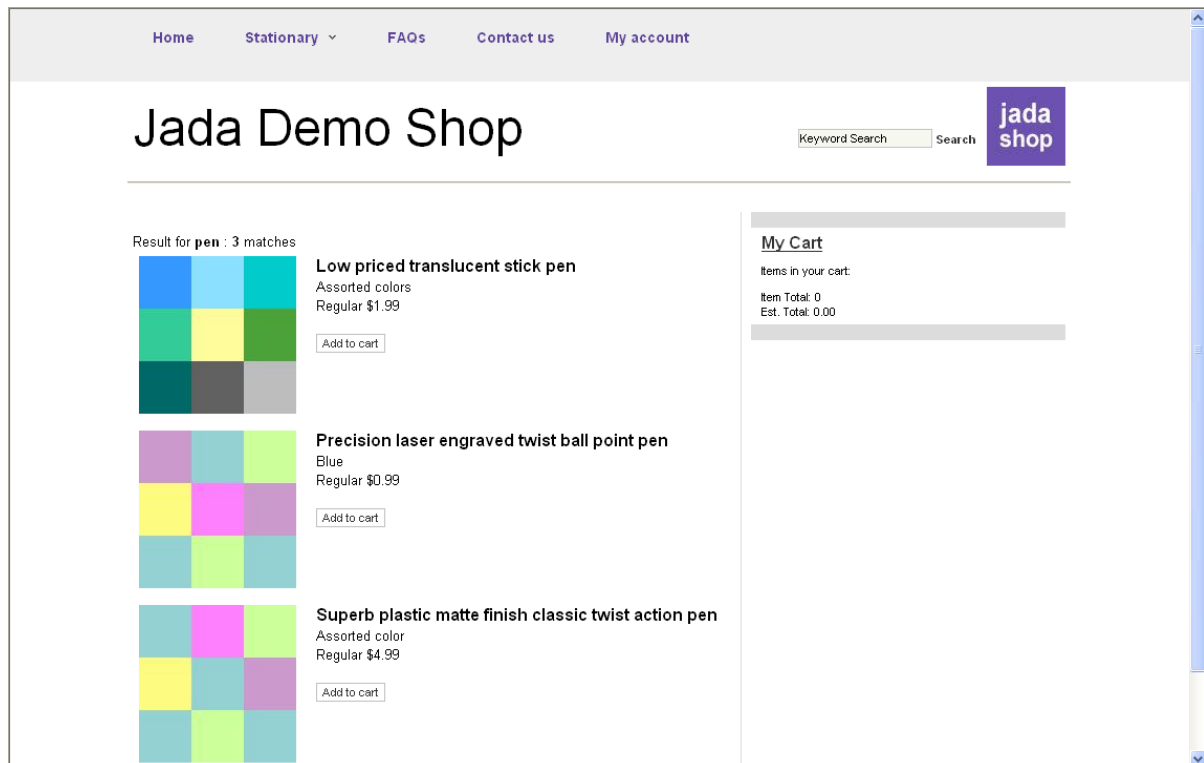
Search

JadaSite provides search functionality via this page. This function consists of a search module and a search result page.

Search module is a text box that is rendered by the template and is located at the top of the page.

Visitors enter keywords that they like to search and click search. The keywords are then used to match with items and contents information.

Result is being delivered to the search result page.



Behind the scene, search is implemented by incorporating another open source software, Apache Lucene. Syntax for searching is very flexible and is best to reference with the official Apache Lucene reference.

Some of the commonly used syntax

Look for terms that match with a single character replaced.

te?t

Look for terms that match with multiple characters replaced.

te*t

To search for document that contains phase1 or phase2

phase1 phase2

phase1 or phase2

To search for document that contains phase1 and phase2
phase1 and phase2

To search for document that contains 'phase1 phase2'
"phase1 phase2"

To search for document that must contains phase1 and may contains phase2
+phase1 phase2

Secure Site

Check-out process


Customer enters the check-out process by

- Clicking on the Add to cart button from item preview or item detail screen.
- Clicking on My Cart link on shopping cart summary component.



The above takes the customer to the shopping cart detail page. This page details out every item that customer has selected to purchase.


Home Stationary ▾ FAQs Contact us My account

Jada Demo Shop

Keyword Search Search 

My Cart

Item Details	Quantity <small>update</small>	Item Price	Item Total
 Precision laser engraved twist ball point pen Blue	<input type="text" value="1"/>	0.99	0.99
 Large Jumbo imprinted pens with translucent trim With color matching grip	<input type="text" value="1"/>	12.99	12.99
Sub-total			13.98
Shipping and Handling			0.00
Total Price			13.98

[Continue Shopping](#)  [Check-out with Credit Card](#)

Shopping cart messages or disclaimer.

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nunc nec metus sed odio vestibulum vehicula. Nullam et lectus. Nulla vel pede ut augue commodo semper. Nunc quis sapien. Suspendisse nec purus. Fusce malesuada nunc eu justo. Nam viverra dolor ullamcorper tellus. Donec posuere tortor et urna vulputate dignissim. Pellentesque habitant morbi tristique senectus et netus et malesuada fames ac turpis egestas. Duis lacus sem, cursus quis, tringilla quis, auctor a, lectus. Maecenas dolor. Integer aliquam mauris vitae pede. Etiam sed justo condimentum pede lobortis mattis. Duis non neque. Aliquam feugiat. Nam quis pede. Donec blandit.

Depending on the configuration, there can be 2 ways how customers can check-out items and go through the payment process.

Credit Card. Credit Card allows customers to perform seamless check-out without leaving the site. During the process, user is required to sign-in (if he/she already has an account) or creates a new account. Customer will be prompted for shipping address and credit card information. All information collected are saved for the customer to allow for faster future check-out. Taxes and shipping charges are calculated based on the customer's shipping address. Transaction is sent to payment gateway company for processing.

PayPal. PayPal is another check-out that is supported by JadaSite. During the PayPal check-out process, customer is redirected to PayPal where they are either required to sign-in or have a new account created. PayPal captures user shipping address, payment information, etc. Shipping address is passed back to JadaSite to allow for accurate processing of taxes and shipping cost. This option is the best when customer is not willing to give out credit card information to web sites other than PayPal.

Clicks **Continue Shopping** button takes customers back to the home page of the site.

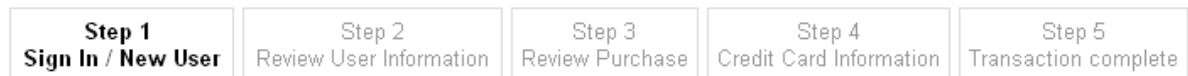
Customer can increase or decrease the number of items purchased by enter the item quantity and clicks update.

If payment gateway is configured, clicks Credit Card to starts seamless credit card check-out.

If PayPal is configured, clicks PayPal to starts PayPal check-out.

Payment gateway option

Payment gateway is a 5 steps process and they are listed on the top of every pages during the check-out process.



Step 1 - Sign In / New user

Home Stationary ▼ FAQs Contact us My account

Jada Demo Shop

Keyword Search Search **jada shop**

Step 1 Sign In / New User Step 2 Review User Information Step 3 Review Purchase Step 4 Credit Card Information Step 5 Transaction complete

Sign in

Email address

Password

Jada Demo Shop © 2008 All rights reserved.

Customer is required to provide information about themselves during check-out.

If he/she is an existing customer, he/she can simply sign-in by providing e-mail address and password and clicks **Sign in**.

If the customer is new and has never check-out any items from the site, he/she is required to create a new account by clicking **New visitors? Click here to create a new account**.

Clicks **Cancel Checkout** to interrupt the check-out process and returns to the home page.

Step 2 - Review User Information

Step 1 Sign In / New User	Step 2 Review User Information	Step 3 Review Purchase	Step 4 Credit Card Information	Step 5 Transaction complete
------------------------------	---	---------------------------	-----------------------------------	--------------------------------



Review User Information

Please complete your information. Please be aware this information will be used to ship the products you purchased from us. You should also ensure all information is consistent with information on file at your financial institution.

First Name	Last Name
<input type="text" value="John"/>	<input type="text" value="Doe"/>
Address	
<input type="text" value="1 Toronto Street"/>	
<input type="text"/>	
City	State/Province
<input type="text" value="Toronto"/>	<input type="text" value="Ontario"/>
Country	
<input type="text" value="Canada"/>	
Zip/Postal Code	
<input type="text" value="A1A 1A1"/>	
Phone Number	
<input type="text" value="416-123-4567"/>	
Fax Number	
<input type="text" value="416-123-4567"/>	

Enters or update information on screen and clicks **Update and Continue** to proceed. Clicks **Cancel Checkout** to interrupt the check-out process and returns to the home page.

Step 3 - Review Purchase

Item Details	Quantity	Item Price	Item Total
 Precision laser engraved twist ball point pen Blue	1	0.99	0.99
 Large Jumbo imprinted pens with translucent trim With color matching grip	1	12.99	12.99
		Sub-total	13.98
		Shipping and Handling	8.00
		PST	1.12
		Total Price	23.10

Cancel Checkout

Confirm Checkout

Shopping cart messages or disclaimer.

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nunc nec metus sed odio vestibulum vehicula. Nullam et lectus. Nulla vel pede ut augue commodo semper. Nunc quis sapien. Suspendisse nec purus. Fusce malesuada nunc eu justo. Nam viverra dolor ullamcorper tellus. Donec posuere tortor et urna vulputate dignissim. Pellentesque habitant morbi tristique senectus et netus et malesuada fames ac turpis egestas. Duis lacus sem, cursus quis, fringilla quis, auctor a, lectus. Maecenas dolor. Integer aliquam mauris vitae pede. Etiam sed justo condimentum pede lobortis mattis. Duis non neque. Aliquam feugiat. Nam quis pede. Donec blandit.

At this point of the process, shipping address is known and the actual amount for the check-out including taxes and shipping cost is displayed.

Customer is presented with a list of shipping methods that is available according to the shipping address and the items that the customer is buying. If a different shipping method is preferred, selects the shipping method on the list and clicks recalculate.

Clicks **Cancel Checkout** to interrupt the check-out process and returns to the home page.

Clicks **Continue** to proceed.

Step 4 - Credit Card Information

Step 1 Sign In / New User	Step 2 Review User Information	Step 3 Review Purchase	Step 4 Credit Card Information	Step 5 Transaction complete
------------------------------	-----------------------------------	---------------------------	---	--------------------------------

Credit Card Information

Name as it appears on the card

Credit card type

▾

Card number (no spaces)

Expiration Date

Month ▾ Year ▾

Card Code Verification Number (CCV)

Customer is required to enter credit card information.

Clicks **Cancel Checkout** to interrupt the check-out process and returns to the home page.

Clicks **Continue** to proceed. At this point, transaction is sent to the payment gateway company for processing. Any errors returned from the payment gateway company will be displayed on this screen.

Step 5 - Transaction Complete

At this point, purchase has successfully completed, order has been created and a confirmation email has been sent to the customer.

Jada Demo Shop

Keyword Search Search



- Step 1
Sign In / New User
- Step 2
Review User Information
- Step 3
Review Purchase
- Step 4
Credit Card Information
- Step 5
Transaction complete**

MY CART [print view](#)

Thank You. Transaction has been successfully completed.

My Account

jdoe@jadasite.com

Order Information

Order Number: 20080827011240218
Date: Wed, 27 Aug 2008
Payment Type: CC
Credit Card Type: Visa
Credit Card: 4111*****1111
Authorization Number: 8ZBGIE

Shipping Address

John Doe
1 Toronto Street
Toronto Ontario
A1A 1A1
Phone: 416-123-4567
Fax: 416-123-4567

Shipping Method

Ground

Item Details	Quantity	Item Price	Item Total
--------------	----------	------------	------------

Customer can clicks print view to print a copy of the summary page.

PayPal option

PayPal is a 3 steps process and they are listed on the top of every pages during the check-out process.

- Step 1
PayPal
- Step 2
Review Purchase
- Step 3
Transaction complete**

Step 1 – PayPal

Customer is redirected to the PayPal where he/she is required to sign-in if he/she already has an account created with PayPal. Otherwise, customer is required to create a new account with PayPal.

PayPal is the safer, easier way to pay



PayPal securely processes payments for Jada Shop. Pay with PayPal in a couple of clicks.

Why use PayPal?

- You can use your credit card without exposing your card number to the seller.
- You can speed through checkout without stopping to enter your card number or address.

Sign up for a PayPal account and [continue checkout](#).

Cancel and return to [Jada Shop](#).

LOG IN TO PAYPAL

Email:

Password:

[Log In](#)

Forgot [email address](#) or [password](#)?

During this step, PayPal prompts customer to enter shipping information and payment information.

Once information is completed, shipping information (including customer's email address) and only shipping information is communicated back to JadaSite for calculating taxes and shipping cost. Payment information including credit card information is never sent back to JadaSite.

Step 2 – Review Purchase

JadaSite received shipping information from PayPal. Taxes and shipping cost is calculated based on the shipping address from PayPal.

The screenshot shows the 'Jada Demo Shop' checkout page. At the top, there is a navigation bar with links: Home, Stationary (with a dropdown arrow), FAQs, Contact us, My account, and Sign out. Below the navigation bar, the page title 'Jada Demo Shop' is displayed on the left, and a search bar with the text 'Keyword Search' and a 'Search' button is on the right. The 'jada shop' logo is also visible. A progress indicator shows three steps: Step 1 (PayPal), Step 2 (Review Purchase, which is the current step and is highlighted in blue), and Step 3 (Transaction complete). Below the progress indicator, the heading 'MY CART' is followed by a section titled 'My Account'. Under 'My Account', the email address 'test900@test.com' is shown. There are two input fields: 'Password' and 'Verification Password'. Below these fields is a link that says 'Activate Account'. The next section is 'Shipping Address', which contains the following text: 'Can Test', 'line 1', 'line 2', 'Toronto Ontario', 'L6C 2E7', 'Phone:', and 'Fax:'.

Shipping information from PayPal is stored in JadaSite and a customer account is automatically created if it is not already exist. If the customer account is already exist, it will be updated with the new information. Customer account sign-in id is the email address of the customer.

If the customer account is newly created, no password is assigned to the account and the customer is required to activate the account in this process by entering **Password** and **Verification Password** and press **Activate Account**.

Customer is presented with a list of shipping methods that is available according to the shipping address and the items that the customer is buying. If a different shipping method is preferred, selects it on the list and clicks **recalculate**.

Clicks **Cancel Checkout** to interrupt the check-out process and returns to the home page.

Clicks **Continue** to proceed. At this point, the final amount including shipping cost and taxes is sent to PayPal for processing.

Step 3 - Transaction Complete

At this point, purchase has successfully completed, order has been created and a confirmation email has been sent to the customer.

Jada Demo Shop

Step 1
PayPal

2
Review Purchase

3
Transaction complete

MY CART

My Account

test900@test.com

Password

Verification Password

[Activate Account](#)

Shipping Address

Can Test
line 1
line 2
Toronto Ontario
L6C 2E7
Phone:
Fax:

Shipping Method

Ground ▾

Item Details	Quantity	Item Price	Item Total
 Precision laser engraved twist ball point pen Blue	2	0.99	1.98

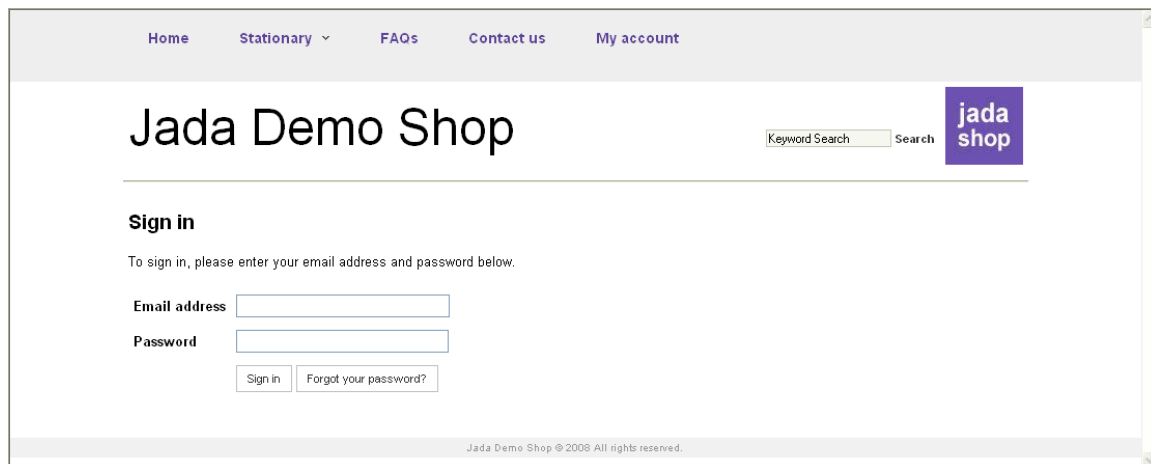
Customer self service

In order to provide good customer service, JadaSite is bundled with a customer self servicing module to allow customer to perform the following functions.

- Forgot your password
- My account
 - Maintain email and password
 - Maintain shipping address
 - Maintain credit card information
 - View order status

Forgot your password

If a customer forget their password, he/she can reset the password at the sign-in screen. Sign-in screen can be setup at the admin module, **Administration – menu**, with **menu location** set to **Sign in**.



- Click **Forgot your password?**
- Enter **Email address** and click **Continue** and an email with the password will be sent to the email address entered.
- Email sent can be configured as follows.
 1. From email can be configured from **Administration** → **Site** → **Mail** → **Password reset email from**.
 2. Subject line can be configured from **Administration** → **Site** → **Mail** → **Password reset email subject line**.
 3. Body of the email is preset to be "You recently requested we mail you your password. Your password is xxxxxxxx."

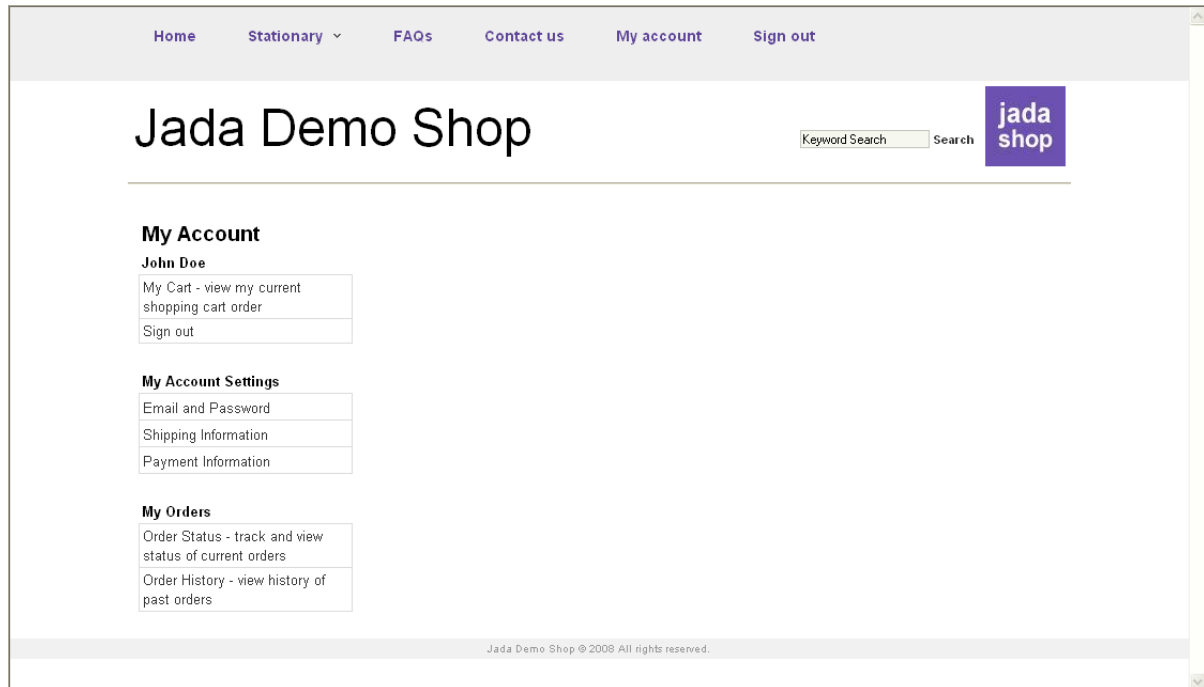
My account

JadaSite provides **My Account** function for customer to manage their own personal and account information.

Due to security reason, customer is required to sign-in to My Account using their **Email address** and **Password** created during check-out.

Sign-in screen can be setup as a menu option on the public site via the admin module, **Administration → menu**, with **menu location** set to **Sign in**.

Once customer enters the correct **Email address** and **Password**, he/she will be taken to the **My Account** home page.



My Cart – view my current shopping cart order

This option takes customer out to the shopping cart where he/she can check-out their order currently in the cart.

Sign out


Customer selects this option to sign-out from **My account**.

Email and password

Customer can change their Email address and Password from this option.

Home Stationary ▾ FAQs Contact us My account Sign out

Jada Demo Shop

Keyword Search Search 

My Account

John Doe

My Cart - view my current shopping cart order

Sign out

My Account Settings

Email and Password

Shipping Information

Payment Information

My Orders

Order Status - track and view status of current orders

Order History - view history of past orders

Email and Password

Email address (login name)
If you wish to change your email address or password, you may do so here.

Password
Password is used to secure your account. Please make sure your new password is between 8 to 12 characters and contains both alpha and numeric characters.

Re-enter Password

Jada Demo Shop © 2008 All rights reserved.

1. Enter **Email address**.
2. Enter **Password** and **Re-enter password**. If password is not to be updated, the 2 password fields should be left blank.
3. Click **Update** to change.


Shipping Information

This option is to allow customer to change their shipping address. This information will be used to calculate taxes and shipping cost when customer check-out their order via credit card.

If PayPal is used for check-out, PayPal will supply a shipping address and PayPal's shipping address will be used to calculate taxes and shipping cost. This shipping address will be updated by PayPal shipping address every time when a PayPal transaction is performed.

Home Stationary ▾ FAQs Contact us My account Sign out

Jada Demo Shop

Keyword Search Search 

My Account

John Doe

My Cart - view my current shopping cart order

Sign out

My Account Settings

Email and Password

Shipping Information

Payment Information

My Orders

Order Status - track and view status of current orders

Order History - view history of past orders

Shipping Information

To speed up your checkout process. Please complete your shipping information. You should also ensure all information is consistent with information on file at your financial institution.

Note: If checking out from PayPal, its shipping address will be used.

First Name Last Name

John Doe

Address

1 Toronto Street

City State/Province

Toronto Ontario

Country

Canada

Zip/Postal Code

A1A 1A1

Phone Number

416-123-4567

Fax Number

416-123-4567

1. Enter shipping information.
2. Click **Update** to save.

Payment information

This option is to allow customer to change their payment information. This payment information is used when customer performing credit card check-out.



My Account

My Cart - view my current shopping cart order

Sign out

My Account Settings

Email and Password

Shipping Information

Payment Information

My Orders

Order Status - track and view status of current orders

Order History - view history of past orders

Payment Information

Enter or update the following fields to speed the checkout process. For billing please ensure all information is consistent with information on file at your financial institution.

Name as it appears on card

Credit card type

Visa

Card number (no spaces)

Expiration date

Month 01 Year 01

Card Code Verification Number (CCV)

Update

1. Enter payment information.
2. Click **Update** to save.

Order Status – track and view status of current orders.

This option is to allow customer to view their latest order (orders that are made within 30 days).

Jada Demo Shop

Keyword Search Search



My Account

John Doe

My Cart - view my current shopping cart order
Sign out

My Account Settings

Email and Password
Shipping Information
Payment Information

My Orders

Order Status - track and view status of current orders
Order History - view history of past orders

Order Status

Track and view status of recent and pending orders.

Order date	Order number	Status	Ship date	Total
11-08-2008	20080811025003936	Open		5.07
11-08-2008	20080811024751953	Open		23.10
11-08-2008	20080811020906545	Open		5.07
11-08-2008	20080811020726140	Open		5.07
11-08-2008	20080811020052664	Open		23.10
10-08-2008	20080810132349367	Open		10.14
09-08-2008	20080809220216896	Open		5.07

Clicks the **order number** to view the order.

Jada Demo Shop

Keyword Search Search



My Account

My Cart - view my current shopping cart order
Sign out

My Account Settings

Email and Password
Shipping Information
Payment Information

My Orders

Order Status - track and view status of current orders
Order History - view history of past orders

Order status

Track and view status of recent and pending orders.

<< [Back to orders listing](#)

Order Information

Order Number: 20080824213218737
Order Status: Open
Date: Sun, 24 Aug 2008
Payment Type: CC
Credit Card Type: Visa
Credit Card: 4111*****1111


Shipping Address

1 Toronto Street
Toronto Ontario
Canada
A1A 1A1

Shipping Information

Method: Ground
Shipped Date:

Tracking

Item Details	Quantity	Item Price	Item Total
 Precision laser engraved twist ball point pen Blue	1	0.99	0.99
		Sub-total	0.99
		Shipping and Handling	4.00
		PST	0.08

Customer will be able to view the following information from the order detail page.

- Order information including order number, status, order date, check-out card type, shipping amount, tax amount and total order amount.
- Shipping address.
- Shipping information including shipping method and shipped date.
- Tracking information if there are tracking information created via the admin console.
- Credit information if there are credits issued for this order.
- Line by line item details.

Order Status – view history of past orders.

- This option has the same information as the previous option. The only different is this option contains orders that are 30 days or older. Reason being customer usually tracks and views current order and the separation of orders in 2 different

groupings make it easier for customer to access the information.