CYS: How to Manual

Step-by-step instructions for Admin Tasks

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How To: Create Custom Attributes

Introduction

Each product, color and size has a set of standard attributes that are set up in the main product repository and are available for display or selection in the catalog. Attributes are dependent on the product's category. Examples include Fiber Content for Carpet or Species for Hardwood.

Custom Attributes are values created and assigned by you to products in your site catalog, and are in addition to the standard attributes.

They can be set up to show in the product's specifications or used to filter the products displayed in the Catalog or Virtual Room Designer.

Setting up a Custom Attribute

1. Log in to your site's admin page.
2. Select *Set up Custom Attributes* from the left menu, in the *Products* section.
3. Select a *Type* (e.g. Carpet) from the drop down box.
4. Any existing Custom Attributes for the selections will be displayed.
5. Press the *New* button.
   Tip: You don't need to press New if no Custom Attributes have been set up.
6. Give your Custom Attribute a *Name* and a display *Sequence* (zero is lowest).
7. Select how the Custom Attribute is to be used from the *Show In Specs* drop-down box:
   Full Only – display only on the full specs page
   Short Only – display in the Color Catalog page only
   Both – display in both the specs and Color Catalog pages
   None – don't display in the specs
8. Select how your Custom Attribute will be used as a filter by checking the *Show In* check boxes. You can select to have the values display as a drop-down box in either the Catalog page or the VRD page, or both.
9. Enter the *Allowed Values* for your Custom Attribute.
   Tip: Each value must be separated by a comma.
   Note: Changing or removing values for a previously saved Custom Attribute may mean they are dropped from any product that have been assigned to; so make changes with caution.
10. Press the *Add* button.
11. Your new Custom Attribute will be displayed in the list on the left.
12. Before any new Custom Attributes are active in the website, you need to assign them to products. See *Assigning Custom Attributes* below.

Changing an Existing Custom Attribute

1. Follow steps 1 to 4 in Setting Up A Custom Attribute
2. Click on the *Select* link next to the Custom Attribute you want to change.
3. Make changes to the Custom Attribute settings or values as needed.
   Note: Changing or removing values for a previously saved Custom Attribute may mean they are dropped from any product that have been assigned to; so make changes with caution.
4. Press the *Update* button.
   Tip: If you make changes that you don't like, you can press the Refresh button to revert all the setting back to their previous saved values.

Deleting an Existing Custom Attribute

1. Follow steps 1 and 2 in Changing an Existing Custom Attribute
2. Press the Delete button.
3. Confirm the deletion by selecting OK in the confirmation message.

Assigning Custom Attributes

1. Log in to your site's admin page.
2. Select *Add Attributes to Products* from the left menu, under the *Products* section.
3. Select a *Brand, Type, Attribute* and *Value* from the drop down boxes at the top.
4. Press the *Show Products* button.
5. Click on the check box for each product that show have the selected *Value* assigned.
   Tip: You can use the Select All button to quickly select all products.
6. Press the *Save Changes* button.
7. You can also select a *Status Image* for the products on this page.
   Note: The status image is NOT associated with the Custom Attribute value you have selected.
8. Repeat steps 3 to 6 to assign a different Custom Attribute *Value*.

How To: Add Product Pricing

Introduction

Once product pricing has been enabled by the CYS System Administrator for your website, prices can be added to:

- Products – the price will apply to all its colors and sizes
- Colors – the price will apply to color and all its sizes
- Size – the price just applies to the size

Prices can be added manually or the system can create an Excel Workbook where you can enter your prices, and then upload the sheet for the system to create all the price details in one step.

How To: Add Product Pricing Manually

Initial Set-up

There are some items that need to be set up before product prices can be entered:

- Units Of Measure – each product/color/size has a pricing and shipping unit of measure
- Ship and Pick-up Addresses – these are addresses that product can be shipped or picked up from.

Adding a Unit of Measure

1. Log in to your site's admin page.
2. Select *Manage Units of Measure* from the left menu, in the *Online Purchasing* section.
3. You will see several common *Units of Measure* already set up. These can't be changed.
4. Press *New*.
5. Give your new *Unit of Measure* a *Name* and *Abbreviation*.
6. *Only Whole Numbers* is only used during Ecommerce calculations – you can leave it checked for now.
7. Press *Add*. Your new *Unit of Measure* will appear in the list on the left.

Adding a Pick up or Ship from Address

1. Log in to your site's admin page.
2. Select *Manage Ship and Pickup Addresses* from the left menu, in the *Online Purchasing* section.
3. If there are any existing addresses, press the *New* button.
4. Give you new *Address* a *Name*. This is displayed in drop down boxes in the pricing pages.
5. Select a type; *Ship From* or *Pick Up*
6. Enter details for the *Address*, *City*, *State*, *Zip*, *Phone* and *FAX*.
7. Press *Add*.
8. Your new *Address* will be displayed in the list on the left.

Adding a Price

1. Log in to your site's admin page.
2. Select *Select Products* from the left menu, in the *Products* section.
3. Select a *Brand* and *Type* from the drop down boxes.
4. Select *Selected Products* to *Show*.
5. Press *Show Products*.

6. For the *Product* you want to add prices, click on the *Manage Prices* link.
7. The *Manage Prices* page will be displayed. The contents of this page will depend on if a price has already been created for this product. The rest of the instructions assume that no prices have been created yet.
8. The top half of the page is used to set up common information. The top drop down boxes for *Color* and *Size* determine that level at which the information applies.
   *Discussion: You can set up the common information at the product level (by leaving the drop down boxes set to All), but enter prices at the color or size level. How the product is priced, and how it is shipped, vary a lot between different product categories so you need to pick the right combination for your selected product. For example, Area Rugs are generally sold as individual rugs (excluding runners) but each size of rug has its own price. In this case, you would set up the common data at the Product level, and then select the Color and Size to enter the actual price.*
9. Select the *Selling Unit Of Measure (UOM).* This is the *UOM* that the product is delivered to the consumer as – a Box of Tile, for example. This is required for prices but is only used in Ecommerce.
10. Select a *Pricing Unit of Measure*. This is the *UOM* that is shown beside the price in the Catalog.
11. If the *Selling* and *Pricing UOM's* are different, enter a *Price to Sell Factor* to convert one to the other. For example, if tile is sold by the piece (tile) but shipped in a box of 12, the Factor would be 12. This is required for prices but is only used in Ecommerce.
12. Enter the *Minimum Quantity* of product that can be shipped (in the *Shipping UOM*). This is required for prices but is only used in Ecommerce.
13. If the product can be shipped, select a *Ship From* address. This is required for prices but is only used in Ecommerce.
14. Check the *Item is Tax Exempt* if the product should not attract sales tax. This is required for prices but is only used in Ecommerce.
15. If the product can be picked up, check each *Pick Up* location. This is required for prices but is only used in Ecommerce.
   Note: You must pick a *Ship From* or at least one *Pick Up* address.
16. Select where the product *is Available for Sale*. This is required for prices but is only used in Ecommerce.
17. Press *Update*.
18. The lower part of the page will now allow entry of the actual prices. To enter *Color* or *Size* specific prices, change the top selection drop down boxes.
19. Select a *Promotion Code* if applicable. This is required for prices but is only used in Ecommerce.
20. Enter a *Quantity Break* if applicable. This allows you to have different prices for different quantities of product. This is required for prices but is only used in Ecommerce.
21. Enter the *Effective date* of the price.
   Tip: You can enter future price changes by setting the Effective Date after today.
22. Enter the *Selling Price*. This is in the *Pricing UOM*.
23. Enter a *Compare to Price*, if applicable. This is displayed as a crossed-our price in the catalog. If you leave this a zero, no crossed out price is displayed.
24. Enter a *Cost*, if applicable. This is also in the *Pricing UOM*. It is never displayed to the consumer and is only for profit analysis.
25. Press *Add*.
26. Your new *Price* will be displayed in the list of the left.

How To: Use the Product Pricing Spreadsheet

Creating the Spreadsheet

1. Log in to your site's admin page.
2. Follow the steps in *Adding a Unit of Measure* and *Adding a Pick up or Ship from Address* if necessary. The information entered in these steps is included in the generated spreadsheet.
3. Select *Select Products* from the left menu, in the *Products* section.
4. Select a *Brand* and *Type* from the drop down boxes.
5. Press the *Export to Price Excel* button.
6. You will see a File Download dialog box similar to:
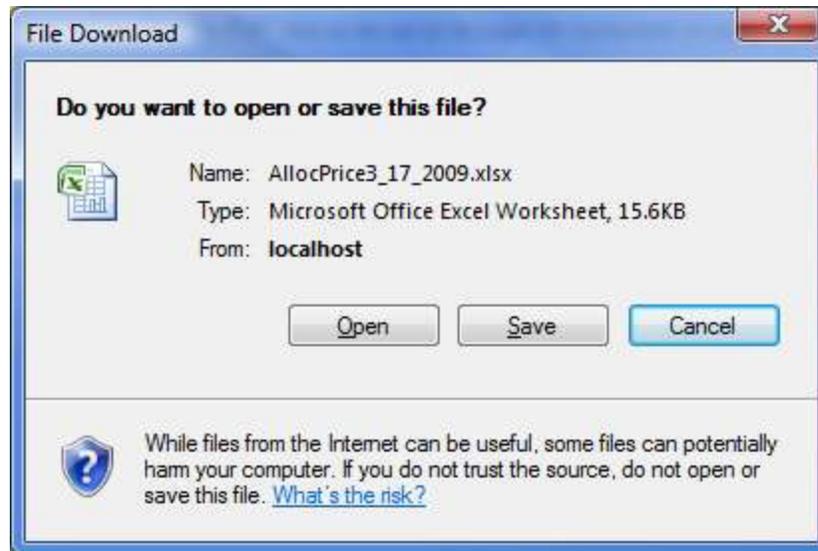
7. Click on the *Save* button and choose a location to save the spreadsheet on your computer.
8. Open the file using Microsoft Excel.
9. The first row of the spreadsheet will contain the *Brand* and *Type* you selected. It also has a link to this document.
10. The second row has the column names of all the fields needed for pricing. Some of these column names include the allowed values for that column.
11. The fields with values are *Sell UOM, Price UOM, Ship From, Pick Up From* and *Available Online*.
12. Columns A to H for row 3 onwards list all the selected *Products*, *Colors* and *Sizes* for the *Brand* and *Type* selected. These values will be used when the spreadsheet is uploaded and so should not be changed. If you don't want to create a price for a line, you can remove it from the spreadsheet. Do not just delete the cell contents, but select the *Delete Row* option (varies by Excel version).
13. There are 3 types of row created: *Product, Color and Size*. *Size* rows will only be created if the associated *Color* has sizes.
    The *Product* row does not have the Color Id, Size Id, Color Name or Size Name filled in.
    The *Color* row does not have the Size Id Size Name filled in.
14. The *Common Data* and *Price* will be set according to the type of line their information is entered on. You can use a combination of entries to set pricing up the way you want.
    For example, you could set all the *Common Data* (Ship From, Units Of Measure, …) at the Product level by entering them on a *Product* line, and then add prices for each *Size*.
    Because any row with a blank *Price* is ignored, you need to set the *Price* to 0.00 for the *Common Data* to be processed.

15. Enter values in columns I through R as appropriate. Explanations for each value can be found in the *Adding a Price* section above.
16. The *Price* column will accept a special value '-1'. This tells the system to make the last price found expire yesterday. This will effectively remove all prices for the *Product*, *Color* or *Size*.
17. Save the file for later upload.
18. Appendix A has some samples to show the different ways of setting Common Data and Prices.

Uploading the Pricing Spreadsheet

1. Log in to your site's admin page.
2. Select *Import Product Prices* from the left menu, in the *Products* section.
3. Press the *Browse* button to select your pricing spreadsheet from your computer. The spreadsheet must have a .xls or .xlsx extension.
4. Press the *Import Prices* button.
5. The spreadsheet will be uploaded to the server which may take a minute or two depending upon its size.
6. After processing, you will get a list of warnings, errors and information about which rows were processed or ignored.
7. If you get any errors, review the row in question and correct any problems. The updated spreadsheet can be uploaded again.
8. If the spreadsheet tries to add a price that is already in effect, it will not be added again. This allows a spreadsheet with rows already processed to be uploaded multiple times without problem.

How To: Market Your Products in the Catalog

Introduction

There are 3 settings that can make certain products more visible in your product catalog:

- Brand Priority
- Product Priority
- Private Labels

Brand Priority puts all the products in the selected Brand ahead of other products when listed in the product catalog.

Product Priority puts the selected products ahead of other products in the catalog, assuming their Brand priority is the same. Brand priority takes precedence.

Private Labels allow you to give Brands and Products alternate names when displayed in your website.

Assigning Brand Priority or Private Label

1. Log in to your site's admin page.
2. Select *Select Brands* from the left menu, in the *Products* section.
3. For each selected *Brand* (the check box next to the name is checked), select a *Preferred Status* option from the drop down list.
   Tip: Level 9 is the highest and this brand's products will appear first.
4. You can change the name of any selected *Brand* by typing a new name in the box provided.
5. Press Apply Changes.

Assigning Product Priority or Private Label

1. Log in to your site's admin page.
2. Select *Select Products* from the left menu, in the *Products* section.
3. Select a *Group*, *Category* and *Brand* from the drop down boxes.
4. Select *Selected Products* to *Show*.
5. Press *Show Products*.
6. For each selected *Product* (the check box next to the name is checked), select a *Preferred Status* option from the drop down list.
   Tip: Level 9 is the highest and this brand's products will appear first.
7. You can change the name of any selected *Product* by typing a new name in the box provided.
8. Press Apply Changes.

How To: Set Up Custom Forms

Introduction

Custom forms allow the website user to give you information about their needs. You can add custom forms to any of your site's Registration, Contact Me, Shop At Home, Ask A Question, content and promotional landing pages.

You set up a form and then the fields that should appear on the form.

Once set up, the form can be attached to the content or promotional landing page.

These steps are explained below.

Create a Custom Form

1. Log in to your site's admin page.
2. Select *Manage Custom Page Forms* from the left menu, in the *Content* section.
3. The page has 5 buttons across the top – *General, Register, Contact Me, Shop At Home* and *Ask A Question*. These allow you to select the type of page the form will appear in.
4. General forms can be used on any Content or Promotional Landing page.
5. Press one of the buttons to select the type of form to set up. *General* is preselected when you first come to the page.

Create a General Form

1. From the *Manage Custom Page Forms page,* click on the General button at the top.
2. Click on the *Add New Form* button.
3. Enter a name for your form.
4. The *Submit Button* Image path and *CSS Class* are optional. *CSS Class* is a style sheet class to be used to format the form.
5. For *Redirect To*, select a page that the form should go to after the consumer has completed the form.
6. Select a *Register User* option. This determines whether the registration fields are automatically displayed in the form. If a registered consumer uses the form, registration fields are never displayed.
7. Press the *Insert* button.

Create a System Page Form

1. From the *Manage Custom Page Forms page,* click on the system page button at the top for the page you want to add a form to. The settings are the same for each system page except Register which has the Register User preset to Must Register.
2. The *Submit Button* Image path and *CSS Class* are optional. *CSS Class* is a style sheet class to be used to format the form.
3. For *Redirect To*, select a page that the form should go to after the consumer has completed the form.
4. Press the *Save Settings* button.

Add fields to a Custom Form

1. Log in to your site's admin page.
2. Select *Manage Custom Page Forms* from the left menu, in the *Content* section.
3. Select the type of form you want to add fields to by clicking on one of the buttons at the top and then clicking on the *Fields* link.
4. Click on the *Add New Form Field* button.

5. Enter a meaningful *Name* for the field. This is used when the field data from the form is display for the consumer or exported to Excel.
6. Enter the *Prompt Text* that will be display next to the field on the form.
7. Enter a *Sequence* number. This controls the order in which the fields are displayed.
8. Enter a *CSS Class*. This is the name of a style sheet class in your CSS file and determines how the field will look in the form.
9. Enter a *Width* for the entry portion of the field. This defaults to 400.
10. Check *Required* if the field must have an entry. This does not apply to the List, Yes/No or Phone data types.
11. Check *New Line After Field* to have this field start on a new line.
12. Select the *Data Type* for the field:
   Character – any characters or numbers allowed
   Numeric – only numbers allowed
   Money – numbers in the form of currency amount (i.e. 3.34) allowed
   Date – only valid dates allowed. The form displays a date picker for the consumer to select a date
   Yes/No – the form displays a check box
   List – the form displays a drop down list box
   Phone – the form displays 4 formatted entry fields; Area Code , Part 2, Part 3 and Extension
   Location – the form displays a drop down with a list of Locations
13. If the *Data Type* is *List*, enter a set of values in *List Values* to be displayed in the drop down, separated by commas.
14. Enter a *Default Value* for the field. This will pre-fill an entry box or pre-select the drop down list box. This does not apply to a *Date* type which always defaults to the current date.
15. *Match To Field* is used store the entered value in one of the fields associated with a consumer. This should only be used if the form does not already include the *Registration* fields (you will see a message at the top of the page if it does).
16. Press *Insert*.

Add a Custom Form to a Content Page
1. Log in to your site's admin page.
2. Select *Edit Other Page Content* from the left menu in the *Content* section.
3. Select the page you want to add the form to from the drop down list at the top of the page.
4. In the page's *HTML markup*, add the special *??Form* token at the position you want the form to appear.
5. Select the form from the *Form to Include* drop down list at the bottom of the page.
6. Press *Save Changes*.

Add a Custom Form to a Promotional Landing Page
1. Log in to your site's admin page.
2. Select *Manage Promotional Landing Pages* from the left menu in the *Content* section.
3. Select the page you want to add the form to from the list.
4. In the page's *Page Content*, add the special *??Form* token at the position you want the form to appear.
5. Select the form from the *Use Form* drop down list.
6. Press *Update*.

Appendix A

Pricing Spreadsheet Example

Brand Name	Product Name	Color Name	Size Name	Sell UOM	Price UOM	Factor	Min Qty	Ship From	Pick Up From	Available Online	Selling Price	Compare Price
Dal-Tile	Alta Vista			1	1	1	1	2	3	0	0.00	
Dal-Tile	Alta Vista	Desert Sand									1.99	2.59
Dal-Tile	Alta Vista	Desert Sand	12"x12" Plain									
Dal-Tile	Alta Vista	Desert Sand	18"x18" Plain									
Dal-Tile	Alta Vista	Drift Wood										
Dal-Tile	Alta Vista	Drift Wood	12"x12" Plain								1.99	2.59
Dal-Tile	Alta Vista	Drift Wood	18"x18" Plain								2.29	3.05
Dal-Tile	Alta Vista	Misty Rain		1	2	1	10	2	3	0	3.99	5.59
Dal-Tile	Alta Vista	Misty Rain	12"x12" Plain									
Dal-Tile	Alta Vista	Misty Rain	18"x18" Plain									
Dal-Tile	Alta Vista	Sunset Gold										
Dal-Tile	Alta Vista	Sunset Gold	12"x12" Plain	1	2	1	2	2	3	0	5.99	8.99
Dal-Tile	Alta Vista	Sunset Gold	18"x18" Plain	1	2	1	1	2	3	2	6.99	10.99

Note: Not all spreadsheet columns are shown.

In this example the first row establishes a default set of Common Data values for all the subsequent Colors and Sizes. Note the zero price to ensure the row gets processed.

Desert Sand is priced at the Color level. In other words, all Desert Sand sizes are the same price.

Drift Wood is priced at the Size level, each size having its own price.

Misty Rain overrides the Common Data at the Color level and has a single price for each of the sizes.

Sunset Gold has all the data entered at the Size level.

All the rows without a price will be ignored when imported and could be deleted from the spreadsheet.