ShopCart for Basic Users
Confidential Business Information

This documentation is proprietary information of New Mexico State University (NMSU) and is not to be copied, reproduced, lent or disposed of, nor used for any purpose other than that for which it is specifically provided without the written permission of NMSU.

All rights reserved. The unauthorized possession, use, reproduction, distribution, display, or disclosure of this material or the information contained herein is prohibited.

Use of this material is solely for the support of New Mexico State University.
# Table of Contents

ShopCart Overview .......................................................................................................................... 1

    Types of Users .............................................................................................................................. 1

Planning Your Store ........................................................................................................................ 2

System Requirements ....................................................................................................................... 3

Logging In to ShopCart ..................................................................................................................... 3

Shop Settings ................................................................................................................................... 5

Photo Manager .................................................................................................................................. 9

    Uploading Images ............................................................................................................................ 9

    Deleting Images ............................................................................................................................. 11

    Resizing Images ............................................................................................................................. 13

        Resizing Images (easy) ................................................................................................................ 13

        Resizing Images (Advanced) ....................................................................................................... 15

Adding Products .............................................................................................................................. 16

Editing Products ............................................................................................................................... 20

    Making Products Unavailable for Sale ....................................................................................... 20

Previewing and Testing Your Store ................................................................................................. 22

Order Fulfillment .............................................................................................................................. 31

    Printing Receipts .......................................................................................................................... 33

    Fulfilling Orders in ShopCart ........................................................................................................ 35

    Downloading Orders ...................................................................................................................... 37

Deleting Orders .................................................................................................................................. 40

Incomplete Orders ............................................................................................................................. 43

**Help** ............................................................................................................................................ 45

**Notes:** .......................................................................................................................................... 46
This Page Intentionally Left Blank
ShopCart Overview

ShopCart was created by NMSU to provide a centralized service for NMSU departmental web sites to accept credit card payments or donations in a secure manner. Departments holding symposiums, conferences, or wanting to sell informational products such as books, CD’s, or videos can utilize the Departmental Web Credit Card System by creating an online store. This system includes products, a shopping cart, and checkout services. For those wanting a more customized and integrated solution, departments can use their own store-front website and connect to the system’s checkout services.

Types of Users

As noted above, departments have the option of using the ShopCart system to create their store or developing their own store-front website. Users utilizing ShopCart for all aspects of their store are considered “Basic” users. Those departments utilizing a store-front website are considered “API” or “Advanced” users. The following is a summary of features available to each set of users.

Basic Users:

Basic users have the following functionality available in ShopCart.

- Shop Settings
- Customer View
- Add/Delete/Modify Products
- Photo Management
- Order Fulfillment

API Users:

API users create a separate website that connects to ShopCart on the back-end therefore, not all ShopCart features are required for API users. API users utilize the following areas of ShopCart.

- Shop Settings (limited)
- Add/Delete/Modify Products
- Order Fulfillment

This manual is designed for the Basic User with differences noted for API users.
Planning Your Store
Before setting up your shop you’ll want to plan how you will offer your products for sale. There are several aspects of your products and fulfillment procedures that you’ll want to address. Listed below are a few of the key areas you’ll want to consider:

- **Product Name**
  Each product you offer online should have a unique name that identifies the product to your customers.

- **Product Image**
  As an option, you may want to include an image of the product; particularly if the product’s physical appearance is relevant to the customer.

- **Brief Product Description**
  The brief product description will show up in search results for the product and gives a small amount of the most relevant information to the customer. The brief product description should be no longer than one or two sentences.

- **Product Description**
  The product description provides detailed information about the product. Detailed information may include the physical dimensions of the product, shipping and handling information, and an extended product description, including a description of any product options that may be available.

- **Product Options**
  Product options are typically attributes of the product that customers can choose. For example, when selling shirts online you may have both crimson and white colors as available options. Note that options do not include additional costs, therefore if product options incur additional charges they should already be calculated into the price of the product. In addition, customers will only be able to choose one of the product options for each product ordered.

- **Product Categories**
  Product categories are used to help customers locate products using the Browse feature in ShopCart. Products can belong to multiple categories or you can choose not to categorize a product.

- **Additional Charges**
  Charges for shipping & handling and sales tax cannot be charged separately using ShopCart; therefore you should include these additional charges in the price of your products. In addition, you’ll want to consider how to make shipping information available to your customers via product descriptions and confirmation emails. The shipping information may include the name of the carrier, expected ship dates and costs.

- **Fulfillment Procedures**
  Once the customer has purchased the product online, you will need to decide how the order will be processed by your staff. Important aspects to consider are returned merchandise, refunds, shipping processes, and customer communications after the sale (e.g. phone calls/email to the customer).
System Requirements
The use of ShopCart requires one of the following Internet browsers.

- Internet Explorer 7.0 or greater
- Mozilla Firefox
- Safari

Note: Internet Explorer 6.0 is not supported.

Logging In to ShopCart
ShopCart supports authenticated user access, meaning that the system verifies your credentials and you are given access to the system based on your assigned security. To use ShopCart as an authenticated user, you must successfully log on by providing your credentials: NMSU Username and Password.

1. Type \texttt{http://shopcart.nmsu.edu/} in the address bar of your web browser and press Enter.

The ShopCart home page is displayed.

\texttt{http://shopcart.nmsu.edu/}

2. Click \textbf{Log In} from the Navigation Pane.
3. Enter your NMSU **Username** and **Password**.
4. Click **Login**.

The **Your Shops** page displays a list of shops that you have access to edit.

5. To select a shop to edit, click the name of the shop from the list.
Shop Settings
The shop settings determine how your shop will function and the options that are available in your shop.

1. Select **Shop Settings** from the Navigation Pane.
2. **Site Name**: This is the name that will display to your customers. Also called a SHOP NAME, this is the name you indicated when you completed the Request for Departmental Web Credit Card System Use form.

3. **Introductory Message**: enter a brief description of your site. This will be displayed to your customers on the home page of your shop. The information in the introductory message may include a brief description of the types of products found in your shop, contact information and policies.

4. **Categories**: If you want your products to be sorted into categories to enhance searches by customers, enter the category titles you want. Enter each category on a separate line. Categories may contain multiple words such as “training materials” or “multimedia content”.
5. **Checkout Message**: type a message that will appear when the customer begins the checkout process. Information in this field may include contact information or shipping details.

6. **Confirmation Message**: Click the checkbox for **Send an extra confirmation email to the customer**, if desired. This email will be in addition to the generic email from CashNet. In the **Confirmation Message** text box, type the additional information that you would like to send to the customer in the confirmation email message. The confirmation message may include a thank you note, shipping details or information about other products and services.

7. **Return URL**: type the web address (including http://) where the customer will be redirected after purchasing the product. This may be back to your shop for additional purchases, the NMSU home page, your departmental home page, or any other page that may be appropriate to your situation.
8. **Notification Emails**: enter the email addresses (separated by commas) of the people you would like to receive notifications of purchases through your store.

9. **Storefront Availability**: If you want to close your store, check this box. Closing your store makes it unavailable to customers to purchase your products.

10. Click the **Save Changes** button.
Photo Manager

Uploading Images
Within your shop you can upload images associated with products in your store. In order to make the images available on your site you must first upload the files into ShopCart and then you will be able to add the images to products.

ShopCart supports the following file formats.

- JPEG/JPG
- GIF Note: GIF files cannot be edited in ShopCart
- PNG

1. Select Photo Manager from the navigation pane.
2. Click the **Browse** button to select the image to upload. Your operating system will open a file browser.

3. Select the file you would like to upload.

4. Click the **Upload** button.

5. The message **Document Uploaded** will appear at the top of the screen and your image will appear in the list of files at the bottom of the screen.
Deleting Images
If you delete a photo that is being used by your product listing, you will be left with a broken link on your site. Be sure to remove all references to your image before deleting it.

1. Select **Photo Manager** from the navigation pane.
2. Scroll down to the bottom of the page to view the images that have been uploaded.
3. Click the **Delete** button next to the image you would like to delete.

4. Click the **OK** button to confirm the delete action.
Resizing Images
It is recommended that you resize images before you associate the image with a product in your store. Image sizes may vary, however, it is recommended that you use a large thumbnail sized (75 pixels wide) or screenshot sized (200 pixels wide) image for your product photos. In addition, it is also recommended that you use the same size for each of the product images in your store to ensure consistency of the design of your shop.

While JPEG/JPG, PNG, and GIF files are supported, you can only use the ShopCart resize feature with JPEG/JPG file types.

Resizing Images (easy)

1. Select **Photo Manager** from the navigation pane.
2. Scroll down to the bottom of the page to view the images that have been uploaded.
3. Click the Edit button next to the image you would like to resize.
4. Click the radio button next to the image size that you prefer (i.e. small, medium, or large thumbnail or screenshot).
5. Click the **Resize** button.

**Resizing Images (Advanced)**

Follow steps 1-3 for easy image resizing.

4. Type the pixel width, pixel height or percentage size of the image in the **Resize Image to be** field.
5. From the dropdown menu, select the appropriate resize method (pixel wide, pixel tall, or percent of its current size).
6. Click the **Resize** button.
Adding Products
In order to make your products available for sale online you will need to add new products to your ShopCart store.

1. Select Product Listing from the navigation pane.

2. The Product Listing page is displayed.
3. Click Add a New Product.
The product settings page is displayed.

1. **Product Name**: type the name of the product
2. **Product Price**: type the price of the product (including decimal points). Do not use commas.
3. **Brief Description**: type a brief description of the product. The description will show up in search results and should provide a brief description of the most important information about the product.
4. **Description**: type a longer/detailed description of the product. The description field will display when the user chooses to click on the product.
5. **Product Availability**: Click the **Offer product for sale** checkbox if you would like to make the product visible to customers. You may decide to make a product unavailable if you have sold out of the product or the product is otherwise unavailable.
6. **Product Options**: type the options available for this product, one per line. Examples of product options include size, color and style. Note that if product options are entered, the user will only be able to choose one of the options. Using an example of a shirt, one option might be “Large Crimson Polo” which combines the size, style and the color of the shirt.

7. **Product Categories**: if you entered product categories in your shop settings, they will be displayed here. Check the appropriate category for your product. Product categories help customers to browse for products in ShopCart.

8. **Promotion Level**: Select the option that works best for your needs. Typically, you’ll want to limit the number of Heavy and Medium level promotions because these products will occupy much of the space at the top of your ShopCart main page and search listings.
   a. **Heavy**: appears on main page and at top of searches
   b. **Medium**: appears at top of searches
   c. **Light**: no special treatment

9. **Product Photo**: Choose the photo that you would like to use to represent the product. Product photos will need to be uploaded into ShopCart before they will be available in the product photo list. For information about how to upload product photos, refer to the Photo Manager section of this manual.
10. Click the **Save** button. The product listing page displays and you should see the product you just created in the list.
Editing Products
Once your product has been created you may need to edit product information. The most common reasons to edit a product are to correct an error made when creating the product, to change the price of an item, or to make the item unavailable for sale.

When editing products it is important to consider if the product has been previously purchased. If the product has been purchased, any changes to the price of the product will also be reflected in the ShopCart order history. In order to maintain accurate order history, it is recommended that you create a new product if the price of a previously purchased product needs to be changed.

In addition, if you delete a product that has been previously purchased, all transaction history in ShopCart will be lost for that product. Deleting previously purchased ShopCart items is not recommended. In order to maintain the transaction history for a product, it is recommended that you change the product settings so that the product is not for sale.

Making Products Unavailable for Sale

1. Select Product Listing from the navigation pane.
1. The **Product Listing** page is displayed.
2. Click the name of the product to edit.

3. Uncheck the **Offer product for sale** checkbox.
4. Click the **Save Product** button.
Previewing and Testing Your Store

In order to ensure that your product information will display correctly to your customers, it is recommended that you preview and test your store using the following steps. API users should test their shop from the custom website – not ShopCart since ShopCart will not be used as the customer view.

1. Select **Main Page** from the navigation pane. The main page of your store will display as it will be seen by your customers. Check to make sure your introductory message displays correctly and featured products are displayed.
2. Select **Browse by Category** from the navigation pane. All the product categories that you created in your Shop Settings will display. To test the categories, click one of the categories from the list.

---

**Category Search**

Click a product category to see products in that category.

- Blackboard
- iTunes U
- Podcasting
- WebCT
- Web Development
- Conference registration
3. Select **Search Products** from the navigation pane. The search feature will look for text in the product name and description that matches your search query. Note that you can also limit your search to certain categories.

4. Use either the **Search Products** or **Browse by Category** feature to select a product to buy.
5. Click the product name or product picture. The product detail page displays. You will see the full product description, related products and product option (if available).

6. Click Add to Cart.

7. Update Quantity, if desired.

8. Click Update Quantities or Continue Shopping, as applicable.

9. Click Proceed to Checkout.
10. Enter your **first name**, **last name**, **email address**, and **shipping address** in the fields provided.

11. Click **Proceed to Checkout**. You will be transferred to CashNet, a third party vendor to complete the transaction.
12. Enter credit card number 4111111111111111 (fifteen 1’s).
13. Select Current Month for the expiration month and 2013 for the expiration year.
14. Type your name in the cardholder name field.
15. Enter 000 in the security code field.
16. Click Continue Checkout.
17. Review the information for accuracy and click **Submit Payment**.
18. The confirmation screen appears. Click the Sign Out button. You should be redirected to the Web site that you set in your shop settings (Return URL field).
After you have tested your site, you will receive a few e-mail messages regarding this purchase. The exact number of e-mail messages received is determined by ShopCart settings.

1. E-mail message from **UAR** which details the transaction. This message is sent to customers.

![E-mail message example](example.png)

2. Optional: E-mail message from you to your customer with additional order information. This e-mail is only sent if you set up the **Confirmation Message** area of your ShopCart Settings.

![E-mail message example](example2.png)
3. E-mail message to shop owners detailing the transaction. This message is sent to those whose e-mail addresses were listed in the **Notifications E-Mail** field of the ShopCart Settings.

![E-mail example](image)

**Order Fulfillment**

The procedure that you will use to fulfill orders will largely be determined by internal department procedures. For most shop owners, the process of fulfillment will begin by printing receipts of orders followed by the physical processing of the orders (e.g. shipping) and finally completion of order fulfillment in ShopCart. After the order has been fulfilled, you may need to reconcile your transaction with Banner to ensure that the financial records have been properly audited. In order to do so, ShopCart provides tools that allow you to download the order data to CSV format, which can be opened in common spreadsheet applications such as Microsoft Excel. The following information details a typical process for fulfilling orders; however each department may have their own department-specific fulfillment procedures.
1. Select **Orders** from the Navigation Pane. After a customer purchases products from your Shop, shop owners will see a list of pending orders in the orders area of ShopCart.
2. There are two areas in which processed orders are initially placed.
   a. **Confirmed Purchases**: Confirmed purchases are orders that have been processed and need to be fulfilled by your staff.
   b. **Mismatched Purchases**: Mismatched purchases are purchases where the amount paid and product price do not match. The most common reason for a price mismatch is that the product price had changed while the customer was purchasing the product. Special attention should be given to mismatched purchases to ensure that the order details are accurate.

**Printing Receipts**
Printable receipts can be used to help process and fulfill orders. For example, you can use a printable receipt as a packaging slip or as a printable record to keep in your files. You will only see printable receipts for orders that are Confirmed, Mismatched, or Fulfilled. Once the order is deleted, the printable receipts will not be available.
1. Click on the checkbox for each order you would like to print.
2. If you want to print all orders, click the Select All link.
3. From the With Selected drop-down list, select Print Receipts.
4. Click the Go button.

5. A printable view will display. Use your browser’s Print function to print the receipts to a printer.
   a. Using Firefox or Safari: From the menu bar, select File; Print
   b. Using Internet Explorer 7: From the command bar, click the Print button.

Note: each order will print on an individual sheet of paper.
Fulfilling Orders in ShopCart

Once you have printed, processed, and shipped an order to your customer, you should fulfill the order in ShopCart. This process will move orders from the Confirmed or Mismatched view to the Fulfilled view to ensure you do not process orders more than once.

1. Select **Orders** from the Navigation Pane. After a customer purchases products from your Shop, shop owners will see a list of pending orders in the orders area of ShopCart.
2. Click on the checkbox for each order you would like to fulfill.
3. If you want to fulfill all orders, click the Select All link.
4. From the With Selected drop-down list, select Mark Order as Fulfilled.
5. Click the Go button.
6. Message received the **Fulfillment Request Complete**.
7. Orders are moved from Confirmed Purchases to **Fulfilled Purchases**.

**Downloading Orders**

In order to maintain an offline and permanent record of your orders that you can also use to reconcile your account in Banner, you can download your order data to CSV format. CSV format can be easily imported into spreadsheet programs such as Microsoft Excel.
1. Select **Orders** from the Navigation Pane. After a customer purchases products from your Shop, shop owners will see a list of pending orders in the orders area of ShopCart.

2. Click on the checkbox for each order you would like to download.
3. If you want to download all orders, click the **Select All** link.
4. From the **With Selected** drop-down list, select **Download as CSV**.
5. Click the **Go** button.
6. Use your browser’s save function to save the information to your computer.
   a. Internet Explorer 7 (shown above): Click the Page icon and select Save As…
   b. Firefox: From the menu bar, select File, Save Page As
   c. Safari: From the menu bar, select File, Save As

7. Select the folder where you want to save the file.
8. Type an appropriate file name; add .CSV to end of file name.
9. Select Text File as save as type.
10. Click Save.
CSV file opened in Excel.

**Deleting Orders**

Once an order has been fulfilled and a permanent record of the transaction has been downloaded to your computer, you may want to delete orders that have been made through your store.

1. Select **Orders** from the Navigation Pane. After a customer purchases products from your Shop, shop owners will see a list of pending orders in the orders area of ShopCart.
2. Click on the checkbox for each order you would like to delete.
3. If you want to delete all orders, click the Select All link.
4. From the With Selected drop-down list, select permanently delete order reference.
5. Click the Go button.

6. Click OK to delete order.
Order Listing

Here is a listing of orders which need fulfillment attention.

Confirmed Purchases
This list of orders are ones which have been completed, and need to be fulfilled.

(There are no orders of type Confirmed currently.)

Mismatched Purchases
Below are orders which paid a different amount than is expected for the cost of the items. This may represent an attempt at fraud, or it may simply be that the price of the product changed while the person was completing the information for his or her order. Either way, you should probably look into it before fulfilling the order.

(There are no orders of type Mismatched currently.)

Fulfilled Purchases
This list of orders are ones which have been fulfilled. When you no longer need to refer to them, you can delete them (we recommend downloading them as a CSV before deleting them as a backup).

(There are no orders of type Fulfilled currently.)

7. Message received **Deletion Request Complete**.
8. Orders are deleted from the **Fulfilled Purchases** area.
Incomplete Orders
Incomplete orders are orders that are currently in progress or orders that were abandoned by the customer before payment. Incomplete orders will be removed automatically approximately 8-9 days after the order was initiated. No action is required on your part to process incomplete orders. You may view incomplete orders following the steps below.

1. Select **Incomplete Orders** from the Navigation Pane.
2. **Sent Orders**: Sent orders are orders which reached the CashNet site but were not completed.

3. **Unsent Orders**: Unsent orders are orders which were cancelled/abandoned by the customer prior to them reaching the Checkout stage.

4. **Failed Orders**: Failed orders are orders that were declined by CashNet.
Help
If you need HELP with ShopCart:

- **Call ICT Product Development Svcs at 646-2026**

- For online help, documentation and interactive training demos, go to:
  
  [http://hr.nmsu.edu/clpd/busprocdocs.html](http://hr.nmsu.edu/clpd/busprocdocs.html)

For questions regarding payments, refunds, or accounts:

- **Call University Accounts Receivable (UAR) at 646-4911**
Notes: