

Zen Cart Guide

Quick Reference

Write your Admin Username here: _____

Write your Admin Password here: _____

Print this document and keep safe

This guide has been produced to help assist you with minor amendments that may need to be changed by yourself.

Information not covered in this guide may be available at <http://tutorials.zen-cart.com/> or <http://www.blogadr.com/tutorials/free-zen-cart-tutorial/>

Contents

Configuration

My Store _____ Page 4

Amending the name of the online store _____ Page 4

Amending the name of the store owner _____ Page 4

Amending the store address and phone number _____ Page 4

Shipping/Packaging _____ Page 4

Setting maximum package weight _____ Page 4

Stock _____ Page 4

Setting low stock notifications _____ Page 4

Regulations _____ Page 4

Turn on/off Terms & Conditions notifications on checkout _____ Page 4

Turn on/off Privacy Policy notification on account creation _____ Page 5

Taxes

Tax Rates _____ Page 6

Setting Tax Rates _____ Page 6

Catalog

Categories/Products _____ Page 7

Adding a new category _____ Page 7

Editing a category _____ Page 7

Removing a category _____ Page 7

Adding a new product _____ Page 7

Editing a product _____ Page 8

Removing a product _____ Page 8

Move a product to a different category _____ Page 9

Manufacturers _____ Page 9

Adding Manufacturers _____ Page 9

Reviews _____ Page 9

Viewing/Approving reviews_____	Page 9
Specials _____	Page 10
Adding/Removing 'special offer' prices to existing products_____	Page 10
Featuring Products _____	Page 10
Adding/Removing 'featured products' to existing products_____	Page 10
Sales _____	Page 10
Applying global discounts to items for a sale_____	Page 10
Customers	
Customers _____	Page 12
Viewing customers_____	Page 12
Emailing individual customers_____	Page 12
Viewing individual orders for a specific customer_____	Page 12
Orders _____	Page 13
Viewing orders_____	Page 13
Cancelling orders_____	Page 13
Printing invoices for items_____	Page 13
Printing packing slips for items_____	Page 13
Editing an order status_____	Page 13
Tools	
Tools _____	Page 15
Send an Email to individuals/group categories_____	Page 15
Send a newsletter_____	Page 15
View who's is online_____	Page 15

Configuration

My Store

Amending the name of the online store

Highlight 'Configuration' with the mouse and click 'My Store'.

Click 'Store Name'. On the right hand side you can amend the details.

Click the 'Update' button.

Amending the name of the store owner

Highlight 'Configuration' with the mouse and click 'My Store'.

Click 'Store Owner'. On the right hand side you can amend the details.

Click the 'Update' button.

Amending the store address and phone number

Highlight 'Configuration' with the mouse and click 'My Store'.

Click 'Store Address and Phone'. On the right hand side you can amend the details.

Click the 'Update' button.

Shipping/Packaging

Setting maximum package weight

Highlight 'Configuration' with the mouse and click 'Shipping/Packaging'.

Click on 'Enter the Maximum Package...'.

Enter the weight in lbs.

Click the 'update' button.

Stock

Setting low stock notifications

Highlight 'Configuration' with the mouse and click 'Stock'.

Click 'Stock re-order level'.

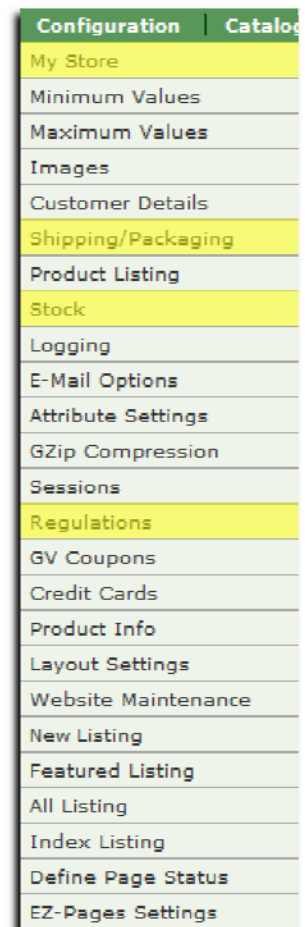
Amend when you wish to be notified of low stock.

Click the 'update' button.

Regulations

Turn on/off Terms & Conditions notifications on checkout

Highlight 'Configuration' with the mouse and click 'Regulations'.



Click 'Confirm Terms...'.

Choose either True or False.

Click the 'update' button.

Turn on/off Privacy Policy notification on account creation
Highlight 'Configuration' with the mouse and click 'Regulations'.

Click 'Confirm Privacy...'.

Choose either True or False.

Click the 'update' button.

Tax Rates

Setting Tax Rates

You may need to amend the Tax Rates of your store based on the economy.

Highlight 'Locations/Taxes' and click 'Tax Rates'.

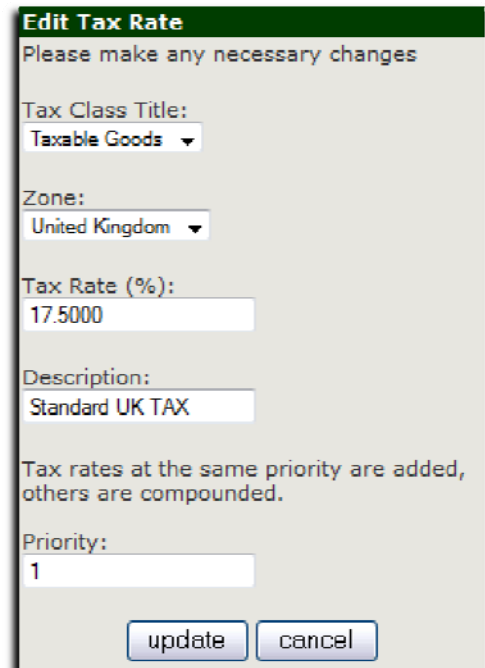
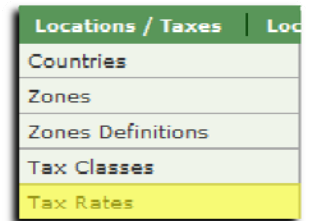
Click 'Edit'.

You will be presented with a box as shown here.

In the 'Tax Rate (%)' box, enter the new Tax Rate.

Click the 'update' button to apply the changes.

This will amend all of the prices automatically in your store.

A screenshot of a dialog box titled 'Edit Tax Rate'. The dialog box has a green header with the text 'Edit Tax Rate' and a subtitle 'Please make any necessary changes'. The dialog box contains the following fields and controls:

- 'Tax Class Title:' with a dropdown menu showing 'Taxable Goods'.
- 'Zone:' with a dropdown menu showing 'United Kingdom'.
- 'Tax Rate (%):' with a text input field containing '17.5000'.
- 'Description:' with a text input field containing 'Standard UK TAX'.
- A note: 'Tax rates at the same priority are added, others are compounded.'
- 'Priority:' with a text input field containing '1'.
- Two buttons at the bottom: 'update' and 'cancel'.

Catalog

Categories/Products

Adding a new category

Highlight 'Catalog' with the mouse and click 'Categories/Products'.

Click the 'New Category' Button.

The next Screen allows you to enter the details of the new products. These details include Category Name, Categories Description, Category Image and Sort Order.

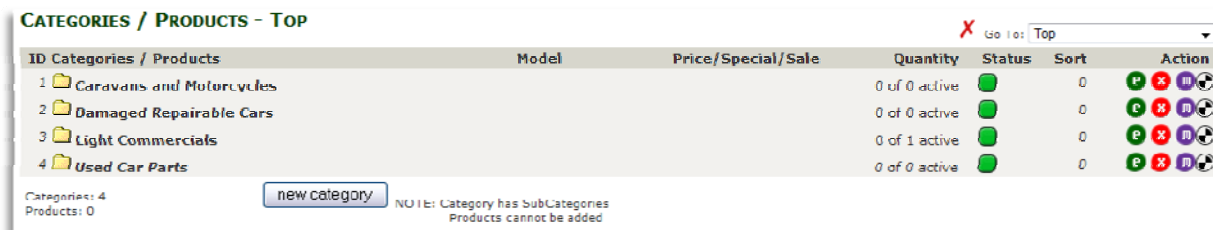
Category Image allows you to upload a new photo that is relevant to the category. However, you also have the option to refer to an image that is already uploaded onto the server by typing in the file name.

Sort Order is blank by default. When it is blank, it will put the new category into alphabetical order. By entering a number you can list it in your own order.

Editing a category

Highlight 'Catalog' with the mouse and click 'Categories/Products'.

You should see a page similar to this:



ID	Categories / Products	Model	Price/Special/Sale	Quantity	Status	Sort	Action
1	Caravans and Motorcycles			0 of 0 active	●	0	e x i r
2	Damaged Repairable Cars			0 of 0 active	●	0	e x i r
3	Light Commercial			0 of 1 active	●	0	e x i r
4	Used Car Parts			0 of 0 active	●	0	e x i r

Categories: 4
Products: 0

NOTE: Category has subCategories
Products cannot be added

Click on the e that is relevant to the category you wish to amend.

This will bring up a page similar to what you see when you create a new category.

Removing a category

Highlight 'Catalog' with the mouse and click 'Categories/Products'.

You should see a page similar to the image above:

Click on the x that is relevant to the category you wish to remove

Adding a new product

Highlight 'Catalog' with the mouse and click 'Categories/Products'.

Click on the category that you wish to add the new product to.

Click 'New Product' and you will be taken to a new page, which will take all of the details of the new product.



Information	Key
Products Status	Specify whether product is in or out of stock
Date Available*	When is the product available from? Leave blank if it is currently available
Products Manufacturer*	Choose from a list of Manufacturers. Not that you will have to add a Manufacturer if one is missing by seeing the 'Manufacturers Section' of this User Guide
Products Name	Enter the name of the product
Product is Free*	Mark whether this item is free to purchase
Product is Call for Price*	Enter whether customer has to call for the price
Product Priced by Attributes*	Leave as No
Tax Class	Specify whether item is taxable or not
Products Price (Net)	Enter the Net Price
Products Price (Gross)	This box will auto fill based on VAT
Product is Virtual*	Unless you are selling a service, leave this as No
Always Free Shipping*	State whether shipping is free or not
Products Quantity Box Shows*	Specify whether to show quantities available
Product Qty Minimum*	Specify minimum quantities to be sold
Product Qty Maximum*	Specify maximum quantities to be sold
Product Qty Units*	Specify quantity units. Only applicable if you sell ½ items
Product Qty Min/Unit Mix	Specify whether products
Products Description	Enter the description of the product
Products Quantity	Enter how many of these items you have in stock
Products Model*	Enter the model number of the product
Products Image	Click browse to locate the image to be uploaded or select the filename of an existing images
Products URL	Enter an external URL of the product
Products Shipping Weight	Enter the weight of the item in lbs
Sort Order	Enter the order you wish this item to be displayed in. Leave blank to keep it in alphabetical order.
*Highlighted items in Yellow can be left as their default settings	


Click the 'Preview' button to continue.

Click the 'Insert' button to accept changes and add the item to the store.

Editing a product

Highlight 'Catalog' with the mouse and click 'Categories/Products'.


Click on the category that the product resides in.

Click on the  that is relevant to the product you wish to amend.

Removing a product

Highlight 'Catalog' with the mouse and click 'Categories/Products'.


Click on the category that the product resides in.

Click on the  that is relevant to the product you wish to remove.

Move a product to a different category

Highlight 'Catalog' with the mouse and click 'Categories/Products'.

Click on the category that the product resides in.

Click on the  that is relevant to the product you wish to move.

The next screen will provide you with a drop-down-box where you wish to move the product to.

Click the 'Move' button to accept the changes.

Manufacturers

Adding Manufacturers

You can add a list of manufacturers/images in this section so that you may use it on the drop-down-box when adding a new product.

Highlight 'Catalog' with the mouse and click 'Manufacturers'.

Click the 'Insert' button.

Enter the Manufacturers Name.

If you wish, you can also upload the logo of the manufacturer.

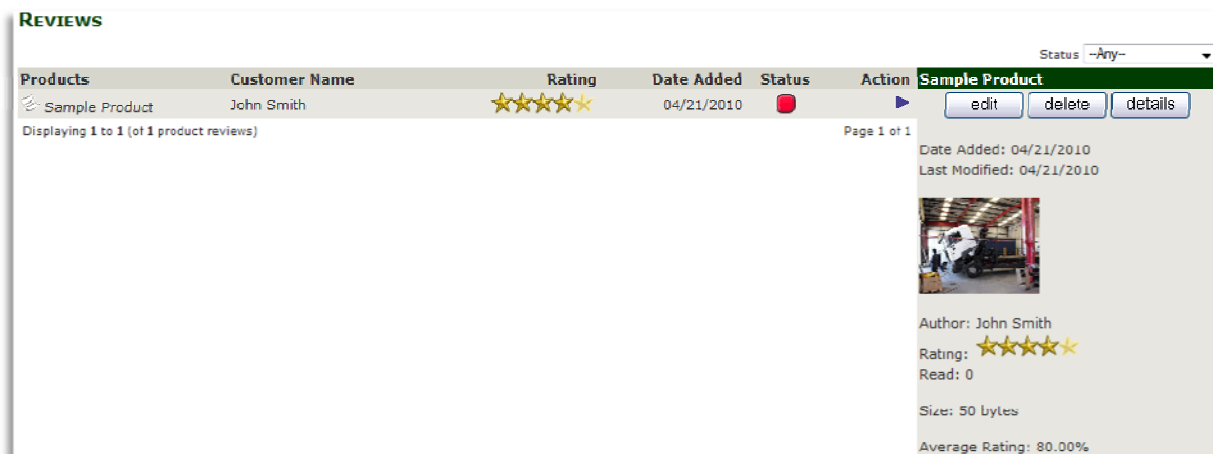
Reviews




Viewing/Approving reviews

When a customer purchases an item, they are given the opportunity to leave feedback on an item.

Before the review goes live, it will need approval.

Highlight 'Catalog' with the mouse and click 'Reviews'.



Products	Customer Name	Rating	Date Added	Status	Action
 Sample Product	John Smith	★★★★★	04/21/2010		


Displaying 1 to 1 (of 1 product reviews)

Page 1 of 1

Status:

Sample Product

Date Added: 04/21/2010
Last Modified: 04/21/2010



Author: John Smith
Rating: ★★★★★
Read: 0
Size: 50 bytes
Average Rating: 80.00%

You will see a page like the above image.

To amend the comment, click the 'Edit' button.



To approve the review, click  so that it turns green.

Specials

Adding/Removing 'special offer' prices to existing products

You may wish to add a Special Offer item to an existing product on your online store.

Highlight 'Catalog' with the mouse and click 'Specials'.


Click the 'New Product' button.

Highlight the item you wish to apply the special offer to.

Enter the Special Offer Net Price.

Enter the dates of when the item goes on offer as well as the expiry date.

Click the 'Insert' button to apply the changes.

To remove the item from special offer simply click .

Featuring Products

Adding/Removing 'featured products' to existing products

You may wish to feature a new product or a good selling product

Highlight 'Catalog' with the mouse and click 'Featured Products'.

Highlight the item you wish to apply the featured product to.

Enter the dates of when the item goes on offer as well as the expiry date.

Click the 'Insert' button to apply the changes.

To remove the item from featured product simply click .

Sales

Applying global discounts to items for a sale

You may wish to start a sale, whether it is January, Easter etc.

Highlight 'Catalog' with the mouse and click 'SaleMaker'.

Click the 'New Sale' button.

Here, you can enter the name of the sale (E.g. January Sale).


Enter the deduction amount, and whether that should be a percentage of amount.

Enter the price range of the products that it should apply to.

Enter the dates of which the sale should start and end.

Then click which categories the sale should apply to.

Click insert to apply changes.

To end the sale, simply click .

Customers

Viewing customers

If you wish to view all of your customers that are registered with your online shop, then Highlight 'Customers' with the mouse and click 'Customers'.



From here you can edit personal information about that customer, delete the customer, view their order history or simply Email them.

Simply do this by clicking on the relevant customer and clicking on either 'Edit', 'Delete', 'Orders' or 'Email'.

Emailing individual customers

See 'Viewing customers'

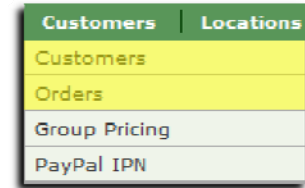
Viewing individual orders for a specific customer

See 'Viewing customers'

Orders

Viewing orders

Highlight 'Customers' with the mouse and click 'Orders'.



From here you can view Pending and Completed Orders

ORDERS							
LEGEND: ● Billing and Shipping does not match							
ID	Payment Shipping	Customers	Order Total	Date Purchased	Status	Customer Comments	Action
1	moneyorder storepickup	John Smith	£117.50	04/21/2010 01:57:51	Delivered		

Displaying 1 to 1 (of 1 orders) Page 1 of 1

Cancelling orders

If you wish to cancel an order for any reason, you can simply use this feature.

Click on the order you wish to cancel.

Simply click the 'delete' button.

You are then provided with another screen, which gives you the option to put that item back into stock or to leave that item out of stock.

Click the 'delete' button to apply changes.

Printing invoices for items

Use this feature if you wish to print an invoice for a customer who may or may not be collecting.

Click on the order you wish to print.

Simply click 'Invoice'.

Printing packing slips for items

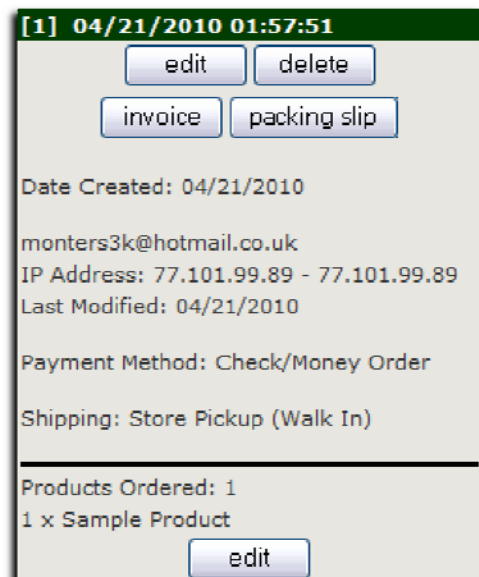
This feature is to print a packing slip for any items that you wish to post to a customer.

Click on the order you wish to print.

Simply click 'Packing Slip'

Editing an order status

When a customer places an order online, the customer and the seller are both provided with a status of the order process. This can either be **Pending**, **Processing**, **Delivered**, **Collected**, **Dispatched**, **Update** or **Reserved**. You may wish to manually edit this information depending on what stage the sale is at.





For example, if the customer has bought the item online, and wishes to come into the store to collect, then the item is automatically marked as **Reserved**. Once the customer has come into the store and picked up their item and paid, then you may wish to mark this down as **Collected** for future reference, which will also update the customers' online shopping cart.

Another example is if the customer pays for the goods online to be posted, then the order will automatically be marked up as **Processing**, until you have processed the customers' card details. If the card is declined, or there are any stocking issues, you may wish to update the customer by marking the status as **Update**, then leaving a comment that will be emailed to the customer. Once everything has gone through and you send out the package, you may want to inform the customer that the item is **Dispatched**. And once confirmation has been received that the customer has this item you can then mark it down as **Delivered** for your records.

To do this, simply click on the relevant order and click  or 'Edit'.

At the bottom of the new page, you will find a history of the order status. You will also find a comment box and a drop-down-box to update your records and your customer of any updates. Anything you edit on this screen can be viewed by your customer in their shopping cart and will Email notification of changes unless you choose not to by using the Notify Customer box at the very bottom of the page.

Date Added	Customer Notified	Status	Comments
04/21/2010 14:46:17		Reserved	
04/21/2010 14:59:09		Update	Decline

Comments

Status: Update [4] update

Notify Customer: [-Email -No Email -Hide] Append Comments:

Tools

Send an Email to individuals/group categories

Highlight 'Tools' with the mouse and click 'Send Email'.

From this screen you can choose to Email an Individual customer or a group of customers (e.g. Active customers, Customers who have never made a purchase).

Send a newsletter

Highlight 'Tools' with the mouse and click 'Newsletter and Product Notifications Manager'.

Click 'New Newsletter' located on the right.

From here you can Email all customers that are subscribed to receive Newsletters. You will be able to use HTML options to insert images and format text.

View who's is online

Highlight 'Tools' with the mouse and click 'Who's Online'.

This screen will be able to give you technical information about any customer who is currently logged on to your site. The most useful of which is the information telling you what pages that they are currently looking at

