

Product User Guide

Product Actions

Add Product

To start this action, click the  **Add Product** button above the Product listing.

Creates a new Product.

When this action starts a form is displayed to enter the details of the Product.

Each field customises or controls some aspect of the Product display or behaviour.



Some fields are required and must be entered before the Product can be added, the required fields are Reference Code, Name, Short Product, Add to Search Engine Site Map file.

Although some fields are not required, it is best practice to populate these, including Title, Description, Add to Search Engine Site Map file.

Most fields are optional, and are often prefilled with a good default so these may not need to be changed. These optional fields allow further customisation.

Alongside most fields is a small ? icon with further help for each field. This information is included at the end of this document.

View


To start this action, select the Product you need to work on, and click the  **View** button in the  More Menu on that row.

Display the selected Product.

This action displays the Product similarly as for an Edit Action, except none of the fields are editable.

Useful for reviewing records without making any changes.

Edit

To start this action, select the Product you need to work on, and click the  button on that row.

Edits an existing Product.



When this action starts a form is displayed with the existing Product and any previous information entered.

Each field customises or controls some aspect of the Product display or behaviour.

When editing it is advisable to only change what is needed and most fields may not need to be changed. These other fields allow further customisation.

Alongside most fields is a small ? icon with further help for each field. This information is included at the end of this document.



Copy

To start this action, select the Product you need to work on, and click the  **Copy** button in the  More Menu on that row.

Copies an existing Product.

The selected Product is copied and the word (Copy) will be added to the name of the new Copy

Delete


To start this action, either select the Product to work on and click the  button on that row. Or CTRL+click to select multiple Products and click the  button above the Product listing.

Deletes an existing Product.

When this action starts a screen is displayed to check for Confirmation before the Action continues.

On this screen a list of warnings may be provided to show the impact of deleting this Product.

Search

To start this action, click the  button above the Product listing.

Allows a Search of Products.

This allows a simple text search across all Products.

To search a specific field select the field from the drop down list

Adv. Search

To start this action, click the  **Adv. Search** button above the Product listing in the  More Menu.

Allows an Advanced Search of Products.

The Advanced Search opens a new section at the bottom of the Products and allows several distinct features:

- Multiple Search Lines : allows Product matches to be identified where more than one search criteria is required
- Nested Searches : allows a combination of AND and OR logic to find results
- Saved Filters : allows a search to be saved as a Filter
- Export : allows the results of the search to be exported and worked on separately

Refresh



To start this action, click the  **Refresh** button above the Product listing in the  More Menu.

Refresh the list of Products.

Allows the list of records to be refreshed.

Although the records in the system will automatically update if a another Admin is using the system at the same time, the Refresh button allows the list to be manually updated.

Export to List

To start this action, click the  **Export to List** button above the Product listing in the  More Menu.

Export the Product results shown to a List.

An Export List can be downloaded as a CSV file, or through any number of customised Export Templates.

Export to List will begin the process of Exporting the Products shown.

Once the data is exported it is available to download as a CSV file with all columns.

A list of Export Templates for Products will be shown, select the Export Template to Print, Export to Document, Export to CSV or Email.

Before using a template an opportunity to amend the template is provided.

See Export Templates for more information on Managing Export Templates.



Export All

To start this action, click the  **Export All** button above the Product listing in the  More Menu.

Export all the Products to a List.

Exactly as for "Export to List" except rather than just Exporting the Product results shown, all Products will be exported.



Export Item

To start this action, select the Product you need to work on, and click the  **Export Item** button in the  More Menu on that row.

Export only the selected Product to a List.

Exactly as for "Export to List" except rather than just Exporting the Product results shown, only the selected Product is exported.

Choose Columns

To start this action, click the  **Choose Columns** button above the Product listing in the  More Menu.

Changes the Columns shown in the Product Listing.



The Choose Columns screen shows the Selected Columns on the left, and the Product Columns available on the right.

Drag and Drop column names between the two columns.

Alternatively double click on a column name to move it from one list to the other.

On the left the Selected Columns can be dragged up and down to change the ordering in the Product Listing.

Manage Filters

To start this action, click the  **Manage Filters** button above the Product listing in the  More Menu.

Creates custom Filters for Products.

A Filter is a saved Advanced Search. Multiple Filters can be created for Products.

These Filters appear at the top of the Product listing.

When the Filter is selected the results are restricted to only include those which match the Filter.

The Manage Filters action shows a list of existing Filters for Products where these can be managed.

Product Field Reference

Reference Code

This field is mandatory.

A unique code for each product

Name

This field is mandatory.

Displayed in product description and shopping basket

Summary Description

Short description of the product, shown in the summary (list) view

Full Description

The full description shown in the detailed view of the product

Short Product

This field is mandatory.

Set if no Summary Description is given and so the Full Description is to be displayed in a product listing

Annotations

Select the annotations to display for this product

Recurring price

Leave blank for an ordinary product.

When a price is set, this product is enabled for recurring orders.

Recurring Orders are orders that the customer can set to automatically recur at a later date

Weight

Enter weight in kg for use in weight-based shipping cost calculations. Leave blank for default weight or if not using weight-based shipping cost calculations

Price Adjustment

Select a price adjustment to use for this product. Select '(Default)' to use the default adjustment set for the theme or all products

Product Variation

Select a Product Variation to define fields used when ordering this this product. Select '(None)' for no variation

Stock Type

Select a Stock Type to determine the stock level messages that are output for this item

Order Quantity Minimum

The minimum number of the product that may be ordered. Leave blank for default

Order Quantity Multiple

The minimum extra quantity that must be ordered once the minimum quantity has been reached. Leave blank for default

Order Quantity Maximum

The maximum number of the product that may be ordered. Leave blank for default

Requires Direct Debit

If set, the customer will be required to enter details to setup a Direct Debit payment, 'Default' will refer to the 'Requires Direct Debit' setting for this product's category.

Requires Billing Address

Determines whether or not to show the 'Billing Address' section in the checkout.

If any one of the items in a user's basket require the billing address, then that section will be shown.

If this item has a price or requires delivery, or the checkout is set to silent login, then this value is ignored and assumed to be 'Yes'.

Yes - This item requires the 'Billing Address' section in the checkout

No - This item does not require the 'Billing Address' section in the checkout

Tax Rate

Select the tax rate type to use for this product

Nominal Code

The nominal code if different to the default defined in the category settings

Department

The department if different to the default defined in the category settings

Cost Centre

The cost centre code if different to the default defined in the category settings

Sale Unit

The unit of sale

Tags

Select the tags that allow this item to be found as a related item when another item is displayed

Find Others Mandatory Tags

When this item is displayed, another item will be found as a related item if it has ALL of these tags set

Find Others Option Tags

When this item is displayed, another item will be found as a related item if it has ANY OF these tags set. These tags operate in addition to any 'Find Others Mandatory Tags' set

Link names

Name(s) for direct hyperlinks to this item. Separate multiple link names with ';'. e.g. if 'fred;fred.html' is entered, entering a URL of \$BASEURL\$/fred or \$BASEURL\$/fred.html into a browser will show this item directly.

Additional Header Content

Advanced Use Only.

This content will be copied directly into the <head> section of the page's HTML.

A '\$USE\$' macro can be used to copy the Additional Header Content from another item.

The format of the \$USE\$ macro is \$USE;Page:English/Who We Are/About Us\$.

Where:

Page - the type of item (e.g. Page, Product, Article)

English/Who We Are/ - the names of the parent Pages (for Pages), or the category path (for Products, Articles etc.)

About Us - the name of the item, e.g. the Page's 'Name' field or Article's 'Heading' field.

Where the Additional Header Content from the other item is wrapped in <nouse>....</nouse> tags then the section inside the <nouse> tags will be ignored.

Title

It is recommended to provide this field for Best Practice to improve each Product

Title displayed in title bar of browser. Defaults to Name if blank

As a guide a title of 55 characters with reasonably few capital letters is 95% likely to be viewable in Google results without being cut short

Description

It is recommended to provide this field for Best Practice to improve each Product

Search Engine Meta tag Description

Recommended maximum length 240 characters

Note: In 2017 and before the recommended limit was 150.

Add to Search Engine Site Map file

This field is mandatory.

It is recommended to provide this field for Best Practice to improve each Product

Set to add an entry to the file used by search engines to locate pages on the Web Site when published

Include in Search Database

This setting determines if the page appears in the search database and therefore can be found via a Site Search Item. If left as 'Default', the page will be included if 'Show on Site Menus' is set

Additional Search Text

Enter additional words, such as plurals or common misspellings, that are not part of the content to enable this item to be found using the site search facility

Engagement Score

Engagement score associated with viewing this item. Leave blank for default score

Post Types

Select the post types that can be used for this content item.

Link Template

An optional special template to govern the format of the product when displayed in a list of products.

Detail Template

An optional special template to govern the format of the item when displayed in detail

Detail Page

Select a page containing detailed information, downloads, etc. for the product if any

Add on Product

A product which will be added to the basket when this product is added to the basket.

Attribute Set

The attributes in the selected attribute set will be made available to this item