Website and Content Management System Training

GTP iCommerce

www.gtp-icommerce.com

1300 856 533

Contents

How to Use This Document

- Step yourself through each slide at your own pace

- Watch the videos which demonstrate in more depth how to do things.

- Note: You may need to copy and paste the video web links into your browser to view them.

- Please inform dale@gtp.com.au about items that are unclear so that they can be improved.

- Note: The information in this document is accurate mostly for new GTP web sites. Older web sites may have different organisational frameworks to that indicated here. However the bulk of the content in this document is general in nature and the principals are the same.

Definitions

- CMS stands for Content Management System.

- We may use the term CMS from time to time throughout this document.

- Backend: This is another term we use to describe the content management system. It refers to the "backend" of your web site.

- So when we say "login to your backend" over the phone we are not being rude ☺

Overview

- Your web site has a comprehensive content management system that sits behind it.

- This enables you to make changes to your content and images within the design structure of the web site

- This training document is to help you know how to use the content management system

Logging In to Your CMS

- Visit
  www.gtp-icommerce.com
- Click on the login link at the top
- A new window opens
- Select your server
  - Darth or Luke
- Enter your username and password and login.
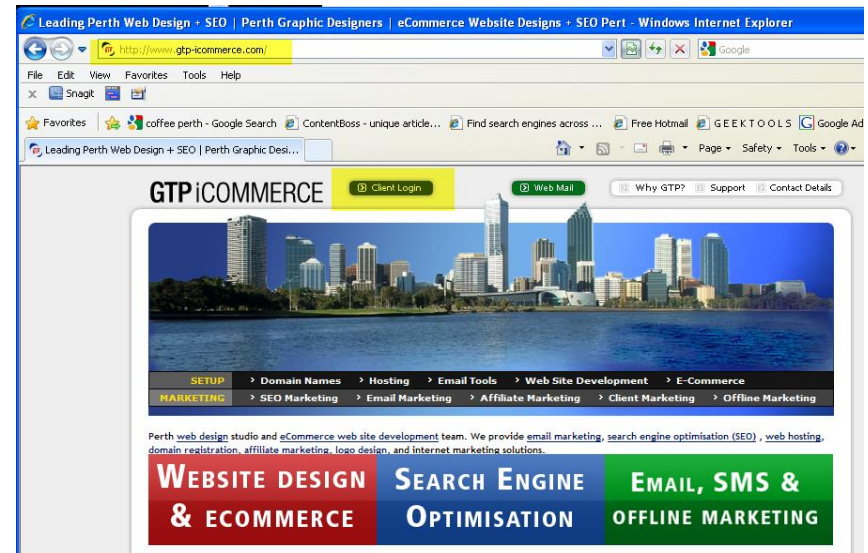
Click to Watch the video on logging in

You will be provided with a username and password to access your CMS

Content Management System Overview

What you can do with your content management system

- Manage products and their images
- Manage images for other sections
- Manage and Process orders
- View Sales Reports
- Create promotional codes and customer discounts
- Manage affiliate functions
- Manage contacts
- Create and send email and SMS marketing
- Manage your web page text and image content
- Adjust your search engine keywords
- Change contact details and passwords.
- Set general configuration options

Lets Get Started

- There are two key areas to know first in order to manage your content

    1. The web pages area
    2. The products area

- Every web site has a **web pages** area and only product based sites will have a **products** area.

Common Language

- The following three screens show several web sites that we have developed

- We have labelled the elements of each site to show you what we will commonly call sections.

- Look carefully at what we call each element

This image shows the names of the elements that we use to describe a web site

This image shows the names of the elements that we use to describe a web site.
This site is an ecommerce site with a products panel on the left

Kolbe Business Systems | Systemisation & Business Coaching | Organising Charts | Business Organisation | Quality Assurance | Continuous Improvement | Perth WA

KolbeSystems

Advice Line
Ph: 1300 005 356
Email Enquiry

When business owners want clarity and accountability in their business they call Kolbe Systems

Home | Why Kolbe Systems | FAQ | Client Comments | Case Studies

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Navigation Header

Navigation Left Menu

Business Systems
- Business Organising Charts
- Business Statistics
- Quality Assurance
- Continuous Improvement
- Policy Writing
- Internal Communications
- Business Consulting
- Job Manuals
- Filing & Paper Systems
- Business Templates

We Systemise...
- Small Business
- Medium Business
- Company and Corporate
- Industrial and Mining
- Goverment
- Country Business
- Your Business!

Contact Details

Contact Details
130 Edward Street
Perth WA 6000
P: 1300 005 356
Email Enquiry
MAP Details

Changing Image Panel

Kolbe Organisational CD/DVD Offer!

ONE CD — The Seven Secrets of Business Systems Explained
ONE CD — The Five Myths About Business Systems
BONUS DVD — The Benefits of Business Systems - Hear from Three of the best

CD OFFER Act Now

Lead Generation Panel

FREE Business Organising Checklist
Plus receive a Free Business Systemisation Education Pack
Download

Free Up Your Time and Increase Your Profits with our Award Winning Business Systems

Would you like to find out how the **best business owners of Perth** systemise their business for total organisation.

We will show you how to
- Massively **improve** your **staff's efficiency**
- Prepare your business for **expansion and profit growth**
- **Train new staff** in less time
- Consistently produce products and **services to your standards**
- **Manage** the business **effectively**
- **Remove yourself** from the day to day running of the business

Watch Our Video - Click

For 7 years Kolbe Systems has been **systemising and coaching businesses** in Western Australia with our unique program.

With over **1oo successful clients** including multiple "Forty Under Forty Award winners" and several clients listed in BRW's fastest growing companies in Australia we have proven that we can **help your business go from being good to great!**

Whether you feel like you are overworked at the moment or just **want to be the best**, Kolbe Business Systems can revolutionise your business and balance your lifestyle.

Home Page Content

We Are Looking For Good Businesses Who Want To Become Great!
Take the first step to getting your business totally organised and download your FREE business organising checklist and receive your BONUS CD and DVD business systems Education Pack.

The Factory | MOMENTUM wealth | Great Aussie Patios
aspire | Bstore | INTERNET COMMERCE PTY LTD

Footer Repeating Services Links

Footer Content Standard

KolbeSystems TOTAL ORGANISATION
- Business Organising Charts
- Business Statistics
- Quality Assurance
- Continuous Improvement
- Policy Writing
- Internal Communications
- Business Consulting
- Job Manuals
- Filing and Paper Systems
- Business Templates

Copyright © 2010 Kolbe Systems Perth Western Australia | All Rights Reserved   Home | Partners | Privacy Policy | Disclaimer | GTP Web Site Design | Stats

This image shows the names of the elements that we use to describe a web site

This site is an information only site that has a web pages section on the left menu.

Products versus Pages

This image shows where the products tab is and the web pages tab in the cms

- Products are managed in a different section to web pages in the CMS.

- Some sites only have web pages with information and no products

- Some sites also have product pages for adding to cart or enquiring about

Managing Your Web Pages

- Web Pages contain information only and are edited from the web pages tab

- Click on List & Edit Pages to list all the pages you can edit
  - See the next page to see an example page of what loads.
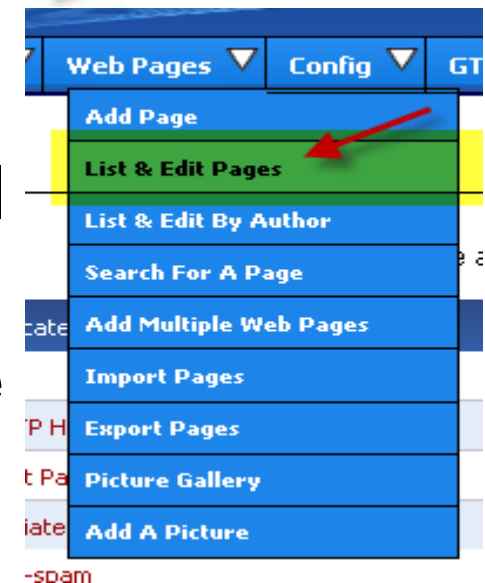
Editing Web Pages – List Pages

- Your web site is preloaded with many web pages

- Some are administrative or system pages

- Some are pages specific to your web site and your unique services and products.

- Note: Please don't delete any pages without checking with GTP.

There are 60 pages in the database

Category:	Subcategory	Low Level Cat	No. Stories
			2
#GTP How To	#GTP How To		1
Affiliate	Alert Pages		4
Forms	Affiliate		1
	Anti-spam		1
	Brochure		1
	Catalogue		1
	Competition		2
	Contact		2
	Email Reminders		1
	Enter		2
	Join		3
	Links		3
	Membership		1
	Newsletter		1
	Thank Yous		7
Instructions	View Cart		1
	View Quote		1
Membership	Alert Pages		10
Navigation	Footer		4
	Header	About Us	1
		Portfolio	1
	Left Banners		1
	Left Navigation Bar		2
	Right Navigation		2
Newsletter	Feb-10		1
	Jan-10		1
Web Pages	Checkout		1
	Home Page		1

Example showing the categories and subcategories of pages and the numbers of pages in each section.

Location of Web Pages For Editing

We try to organise web pages into groups for easier location and editing.

Common groups are

- Web Pages
  - Home Page
  - Other Web Pages
- Navigation
  - Header : for pages in the header
  - Footer: for pages in the footer
  - Left Navigation: for pages that are linked from the left hand side
  - Right Navigation: for pages that are linked from the right hand side
- Newsletter: for pages related to the newsletter
- Forms: for content that sits within web forms and the thankyou pages the follow submission of forms.

Editing Home Page

- The home page content is located near the bottom when you click on

  Web Pages -> List & Edit Pages

- The home page is located in the category called web pages and the subcategory of home page.

Location of Pages in the Header Navigation Area of Your Site

- You will find web pages in the header or top navigation area of your web site under the Category of "**Navigation**" and a subcategory of "**Header**".

- Click on the page name to bring up the next screen.
E.g. click "About Us"

Editing a Web Page

- Once you click on a subcategory name a page appears showing all the pages that can be edited.

- Click on the "title" to open up the editing window so you can make changes to that page.

There is 1 story in the Header subcategory

TIP: To change the order of the pages, click on the heading you wish to sort by

ID	Insert Date	Last Updated	Title	File	Status (change status by clicking type)	Order	Comments	
64132	21-May-2010	16-Jun-2010 18:34:46	About Us		Inactive Active Archived	20		Add Like Plain Edit Delete

Means Selected Status

Click

Location of Footer Web Pages

- Footer pages as their name indicates are located at the bottom or foot of your web site.

- The category is "Navigation" and Subcategory is "Footer"

- Common footer pages are privacy policy, disclaimer & security

Location of Other Information Pages

- We generally place pages under common sense headings. Check your site and notice whether the page link is in the left column, right column, header or footer.

- If you cannot locate a page this way use the **web pages search function** and use a keyword you know is part of that page to find it.

- Once you find it in the search results take note of its category and subcategory for next time.
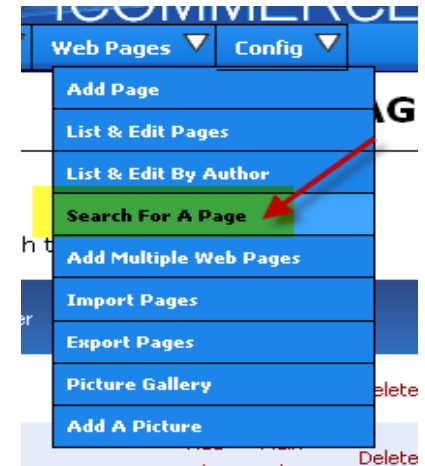
How to Use the Rich Text Editor

Video Tutorials List

Opening A Web Page for Editing

- Once you have located the web page you wish to edit, **click on the title** of the page to open up the rich text editor.

Click on the Title to Open The Editor

- The rich text editor as shown on the next screen will open up.

Editing a Web Page with the Rich Text Editor

- The Editor has several tabs across the top
- When it first opens up it will be on the Web Page tab
- Generally you should not need to change anything under this tab unless you are moving the location of the page
- You can also change the page name here by editing the Title
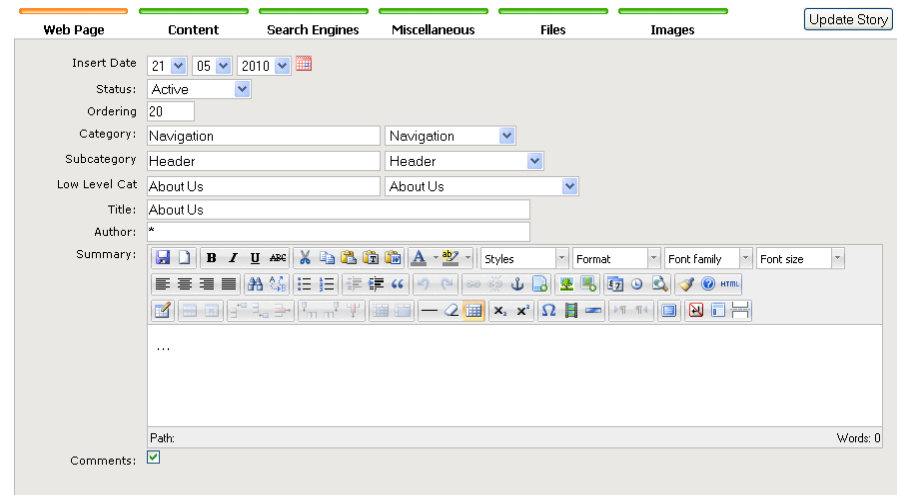
The status tab should be set to **active** for pages you want to show and **inactive** for pages you don't want to show on your site

Editing a Web Page with the Rich Text Editor

- Click on the <u>content tab</u> to edit the content

- <u>Click here</u> to see one of our videos on how to use the rich text editor.

- Remember to click "Update Story" before exiting the web page editor to save your changes.
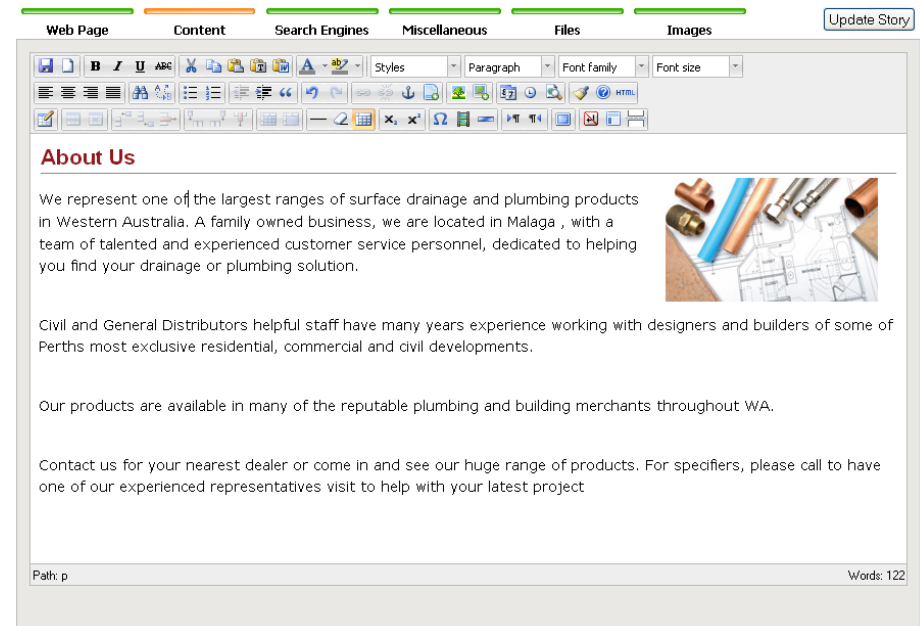
Example of content tab with content in it

There are many things you can do in the rich text editor. Please see our comprehensive list of video links at the end of this section.

Editing A Web Page – Search Engine Tab

- Click on the search engines tab if you wish to control the Page Title, Meta Keywords and Meta Description tag.

- Use your keywords that you want to be found for in Google.

The search engines tab allows you to better control which keywords you are targeting in the search engines.

For more information on search engine optimisation **ask for our SEO Training presentation**.

Text Layout Tips for Web Pages

- Use short sentences that are no longer than 2-3 lines. Break long sentences (4-5 lines) up into shorter sentences.

- Make sure you have no more than 3-4 lines of text without a gap (paragraph). A gap helps eyeflow between each paragraph.

- Use Heading 2 tags at the very top of your page.

- Use heading 3 tags to break the page into sections

- Use a bullet point list where possible. The eye is attracted to bullet point lists

- Always have an image near the top of the page either above the text or on the right hand side.

Bolding Tips to Improve Readability

- Don't just have a load of text with no headlines, no bolding and no gaps. It won't be read, it wont be understood, it wont sell your product or service.

You Must

- Bold the first 3-10 words of most new paragraphs.

- Bold core keywords

- A core keyword/phrase would be product benefits, product names, product features.

- Don't bold everything. Anything more than 7- 10 words is usually too much.

- The bolding helps bring the eye into the start of each paragraph as the eye scans down the page.

- You can use bolding to tell a story within the overall page content.

- The bolded keywords stop or slow down the eye so make sure the words that are bolded get across some part of your message.

Example of Simple Text Layout

- Use a H2 Tag
- Bold the first few words of each paragraph
- Use a bullet point list
- Have gaps between paragraphs
- Have an image top or top right

Rich Text Editor Basics - Text Layout - Videos

- An overview of the rich text editor and its capabilities.
  - See http://www.webdesign4perth.com.au/videos/iNews-RichTextEditorOverview.htm
- How to Set Your H2,H3 Header Tags
  - See http://www.webdesign4perth.com.au/videos/iNews-HeaderTagsOverview.htm
- How to cut copy and paste text
  - See http://www.webdesign4perth.com.au/videos/iNews-CutCopyPaste.htm
  - From a word document
  - From a text document
  - From another web site

Rich Text Editor Basics - Text Layout - Videos

- How to format your text on your web page for good readability
  - See (See http://www.webdesign4perth.com.au/videos/iNews-HowToFormatTextTips.htm
  - How to Bolding, Underline and Italicise and strike through
  - Setting text colours and highlight colours
  - Superscripting and subscripting and custom characters
  - Inserting datestamp and timestamps
  - Why we don't want you setting font types, sizes and colours within the editor
  - How to adjust your text alignment
  - Finding and Replacing Text

- How to create a bullet point lists or a numbered lists.
  - See http://www.webdesign4perth.com.au/videos/iNews-BulletPointsNumberLists.htm

- How to text align, center, justify, right align, indent,outdent and blockquote your text:
  - http://www.webdesign4perth.com.au/videos/iNews-TextAlignment.htm

Rich Text Editor Basics - Creating and Editing With Tables

Please see this video tutorial
http://www.webdesign4perth.com.au/videos/iNews-EditingWithTables.htm

This video Covers

- Creating Tables

- Adding Rows and Columns

- Merging Cells to create complex structured tables

Rich Text Editor Basics – Images (Videos)

This section covers how to upload, insert and position an image on your web pages.

- Uploading your images
  - http://www.webdesign4perth.com.au/videos/iNews-HowToUploadImages.htm
- Images Video 1 - Inserting an Image to the right of text
  - http://www.webdesign4perth.com.au/videos/iNews-Images-InsertingIntoPage1.htm
- Images Video 2 - Inserting an Image at the top of a page
  - http://www.webdesign4perth.com.au/videos/iNews-InsertingImagesAtTheTopOfAPage.htm
- Cropping and Resizing Images Online
  - http://www.webdesign4perth.com.au/videos/iNews-CroppingAndResizingYourImagesOnline.htm
- How to delete an image file off the server:
  - http://www.webdesign4perth.com.au/videos/Images-HowToDeleteFilesOffTheServer.htm

- Keyword Optimising Your Images for Search Engines
  - http://www.webdesign4perth.com.au/videos/iNews-KeywordOptimisingYourImages.htm

Web Page Editing - How to Link (Videos)

- How to link to an external web site
  - http://www.webdesign4perth.com.au/videos/iNews-Linking-AnotherWebsite.htm
- How to link to one of your own web pages
  - http://www.webdesign4perth.com.au/videos/iNews-Linking-InternalPage.htm
- How to link a PDF file or other type of file
  - http://www.webdesign4perth.com.au/videos/iNews-Linking-PDF.htm
- How to make an image a link to another page, website or file.
  - http://www.webdesign4perth.com.au/videos/iNews-Linking-FromImage.htm
- How to create a link from one part of a page to another section using anchor links
  - http://www.webdesign4perth.com.au/videos/iNews-Linking-AnchorTextLinking1.htm
- How to use anchor point linking to link to a section of a different web page on your site - An SEO Strategy
  - http://www.webdesign4perth.com.au/videos/iNews-Linking-AnchorTextLinkingForSEO.htm

Anchor Point Linking to Another Web Page

This is the most in depth linking technique to learn. It can be used as an advanced SEO strategy

Phase 1

1. In the CMS Find the web page you want to **link to**
2. Edit this page and place an anchor point (using a targeted keyword) at the desired location on the page.
3. Also create a link on this page that links to the anchor point.
   (See: http://www.webdesign4perth.com.au/videos/iNews-Linking-AnchorTextLinking1.htm)
4. Save and then close this page
5. Go to your web site and load this page
6. Click on the Anchor point link and the page should move to the location of the anchor point set in step 2.
7. Copy the web address now showing in the web address area. It should contain a # near the end. All anchor point links contain a # followed by the anchor point name.

Phase 2

- In the CMS find the web page you want to **link from**
- Open up this page in the editor
- Find or create a location from which you want to link
- Highlight the chosen link text or image and click on the insert/edit link tool
- Paste the copied web address into the "Link URL" field
- Click Insert
- Save the page
- Test on your web site that the anchor point link takes you from one page to specific position on another page

Video Demonstration:
http://www.webdesign4perth.com.au/videos/iNews-Linking-AnchorTextLinkingForSEO.htm

Editing the Fading Images on Your Page

- Many GTP sites which use fading images on the home page or on other pages on occasion,
- These images can be changed or the sequence of images changed or certain images can be removed while new images can be uploaded. The general rules are
- New images must be created to be exactly the same size as current images
- Get your images professionally created if you don't think you are very good at creating images. These images impact on client perceptions of your business so spend money to make sure they project the right image.
- New images must be saved in the same format as the current images, usually a jpg file.
- New images must be uploaded to the same file location as the existing images. Usually this can be done via GTPs image upload in the inews editor.
- The image name will need to be put into the Misc1 field of the inews editor from the Miscellaneous tab. It needs to be comma separated from the other image names.
- The image name must include its extension e.g. image1.jpg,image2.jpg,image3.jpg etc.
- VIDEO LINK: http://www.webdesign4perth.com.au/videos/FadingImages1.htm
- POWERPOINT: Ask for our training powerpoint "How to Change The Fading Images"

How to Embed Media

- How to embed a you tube video
  - http://www.webdesign4perth.com.au/videos/iNews-EmbeddingAYouTubeVideo.htm

- How to embed an audio file into your web page
  - Audio files are usually provided in mp3 format.
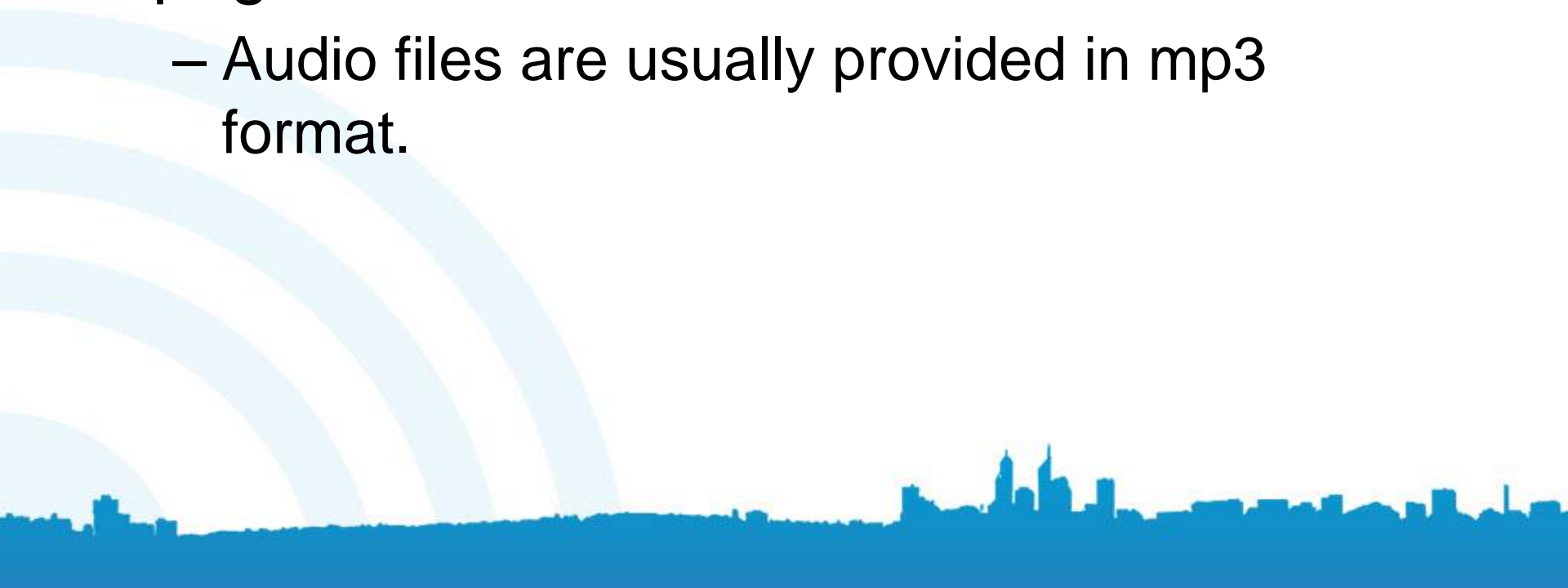
The Image / Picture Gallery

Note: The terms image gallery and picture gallery
mean the same thing.
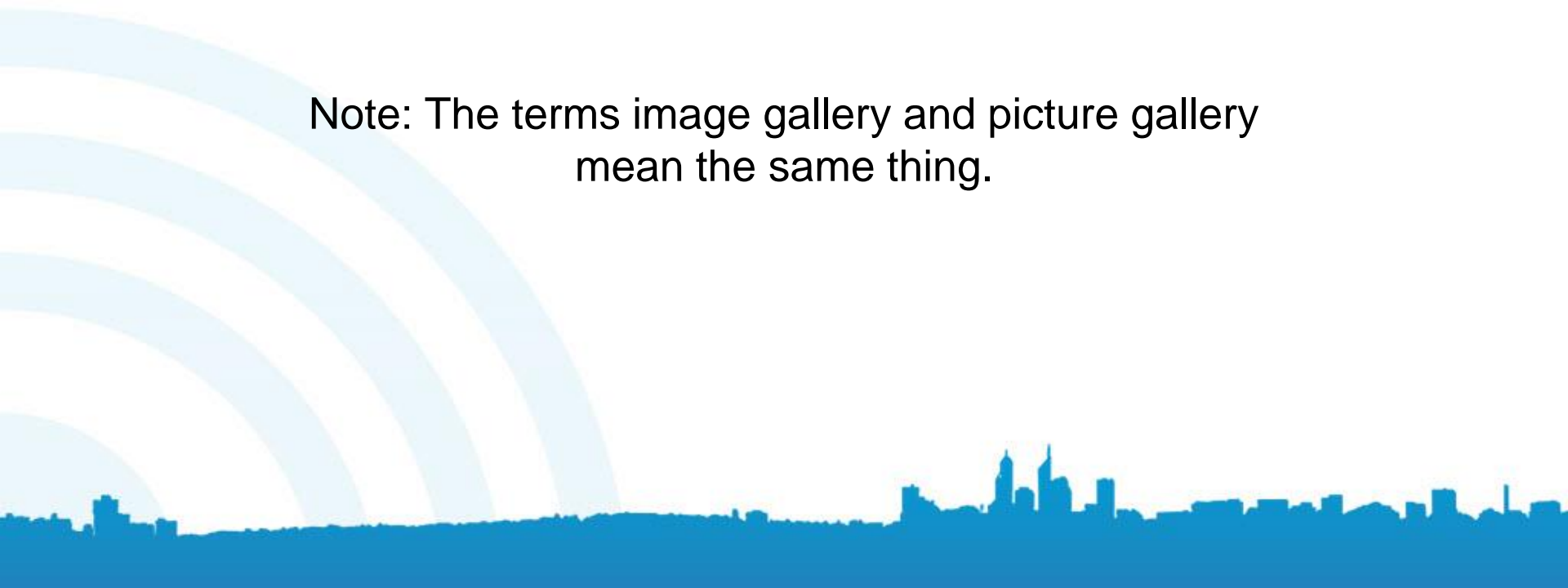
Image Gallery

- **Definition:** An <u>image gallery</u> or <u>picture gallery</u> is a where a number of images can be uploaded which will then be shown on the web site in a predefined format.

- All GTP CMS sites have an area for uploading images that can be used or shown in an image gallery.

- Most new GTP web sites will have basic image gallery code available for use at wwww.yourdomain.com.au/gallery

- The image gallery styling may not be suitable for the site and usually additional investment is required to style the gallery to your requirements

Image Gallery Example - Styled

- The example right is of an image gallery that has been styled.
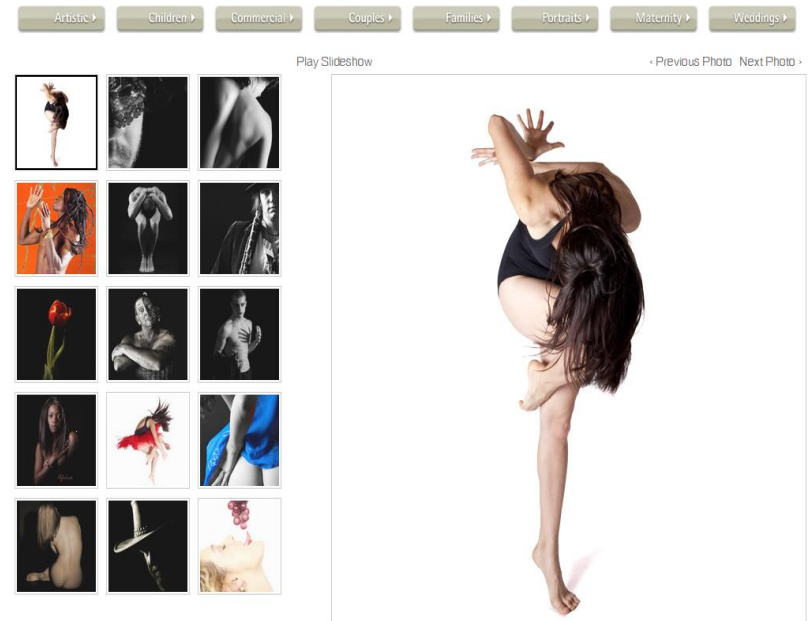
Image Gallery with Categories
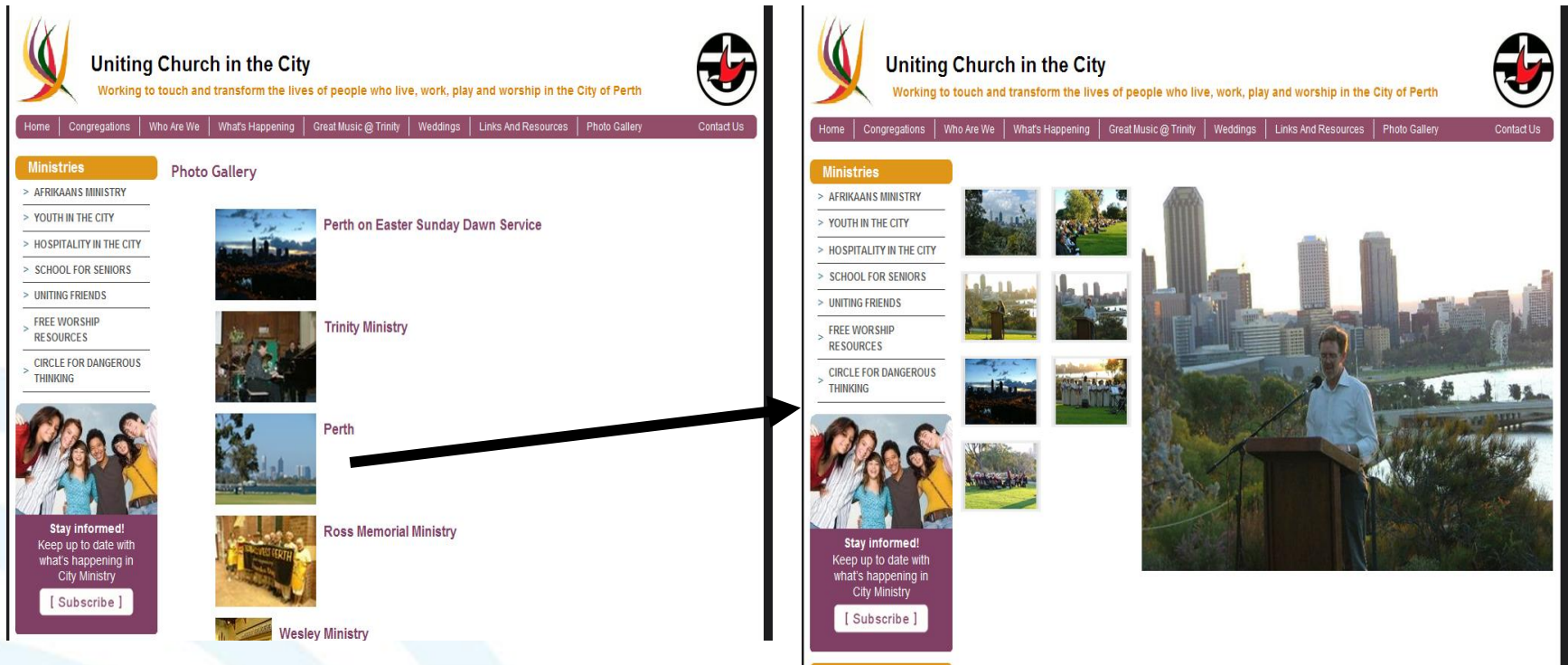
Example showing the category display followed by the images in that category.

How to Insert Images into Your Image Gallery

- The image Gallery area is located under the "Web Pages" or "iNews" tab.

- To Edit existing image entries click "Picture Gallery"

- To add a new image click "Add a Picture"
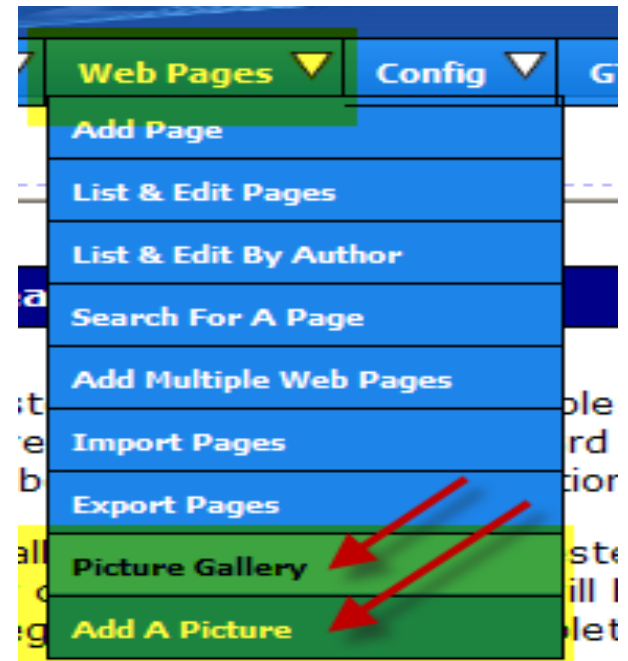
Image Gallery - Adding A Picture

- To add a new image click "Add a Picture"
- Put in a desciptive heading for Style, Category and Subcategory.
- They can all be the same
- Put in a summary of Picture
- Click show Picture
- Click Update Gallery
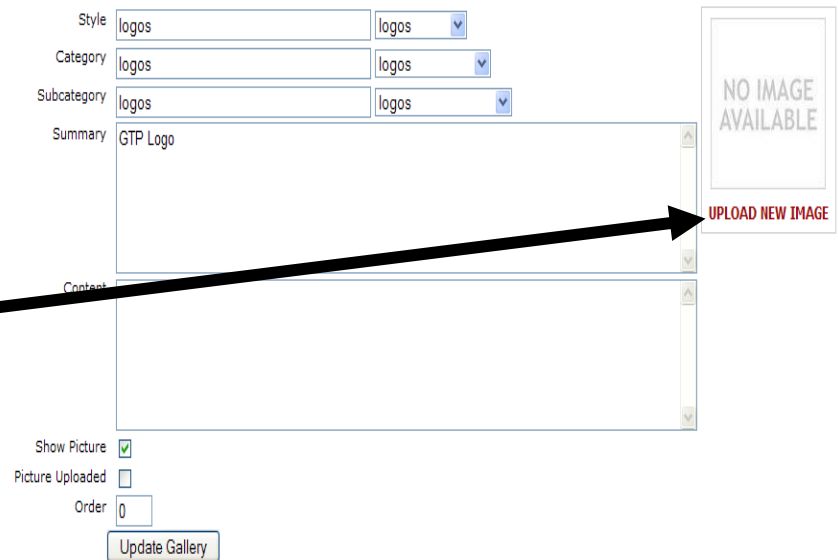
Image Gallery - Adding A Picture

- After updating the gallery entry the page will return showing an Upload new image panel
- Click the words "Upload New Image"

Uploading Image

- Click Browse and find a jpg image on your computer

- Change thumbnail and Large Images Dimensions if desired

- Change default sizes for next time if desired

- Click Upload Now

- You can see the large image by clicking the view large image link
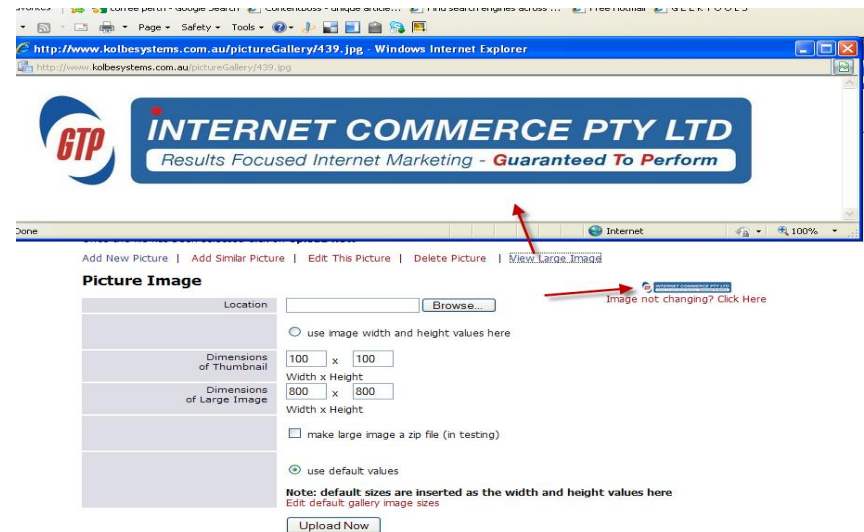
Managing Your Picture Gallery

- Managing your Picture gallery means to edit existing entries in the gallery

- To Delete

- To Re-upload Images

- To Change Categories, Subcategories, Styles and Descriptions.

- Click Web Pages – Picture Gallery
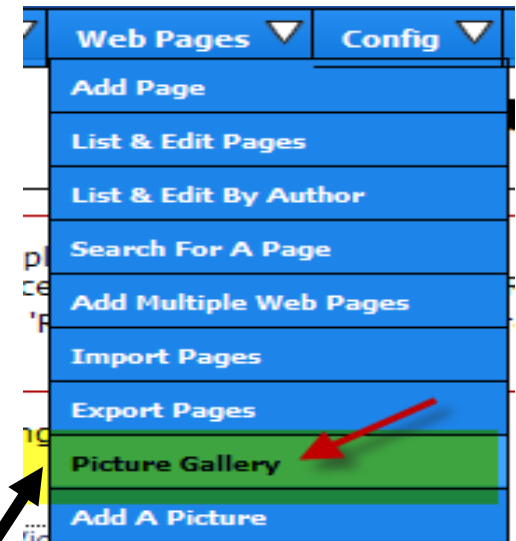
Managing Your Picture Gallery

- Clicking the picture gallery link shows you your categories and subcategories of images already uploaded.

- Clicking a subcategory lists the images.

- Clicking an image name or image takes you back to the image editing screen.

There are 121 pictures in the database

Category	Subcategory
Artistic	Artistic
Children	Children
Commercial	Commercial
Couples	Couples
Families	Families
Portraits	Portraits
Pregnancy	Pregnancy
Weddings	Weddings

There are 15 pictures in this category

ID	Style	Summary	Image?	Show	Order	Add Like	Delete
304	Artistic	nicole2		Yes	0	Add Like	☐
		Click to Edit					
307	Artistic	rob		Yes	0	Add Like	☐
306	Artistic	back		Yes	0	Add Like	☐
305	Artistic	joromi		Yes	0	Add Like	☐

Managing Your Picture Gallery

Add Like Function

- The add like function clones an entry. It creates a new image entry containing all the same details as the item that it is based of.

- An image has to be uploaded for the Add like item however as no image is transferred, only the text.

- Once you have created a new entry with Add like you can adjust it to suit the new item.

- Add like can be a useful tool when adding images in the same category and subcategory as it speeds up data entry.

There are 15 pictures in this category

ID	Style	Summary	Image?	Show	Order	Add Like	Delete
304	Artistic	nicole2		Yes	0	Add Like	☐
307	Artistic	rob		Yes	0	Add Like	☐
306	Artistic	back		Yes	0	Add Like	☐
305	Artistic	joromi		Yes	0	Add Like	☐

Deleting Images from Your Picture Gallery

- You can delete pictures from the list of images

- Click on the check box of any image you wish to delete

- Click on the "Delete Pictures" button.

End of Image / Picture Gallery Section

Product Management Training

Products Section Overview

- The products section is used in different ways for different sites

- It is mostly used for
  - loading in products and their pictures to sell online (add to cart – ecommerce sites) or
  - to display online as a catalogue with an add to quote function (Prices not showing) or
  - to display online with a link to a product enquiry form.

- Sometimes we use the product area as a place for other information that we wish to have laid out in a consistent fashion.

Adding or Loading Products

- Products can be added by using the add product form
- Products can be imported using the import products tool
  - When importing a specified formatting of information is required
  - The file format requires is a CSV file
  - CSV files can be edited in an excel spreadsheet

Managing or Editing Products

Managing Products is required where you wish to change or update

- Product categories
- Product names
- Prices
- Availability
- Descriptions
- Photos
- Options that are available
- Related products
- And a variety of other product fields
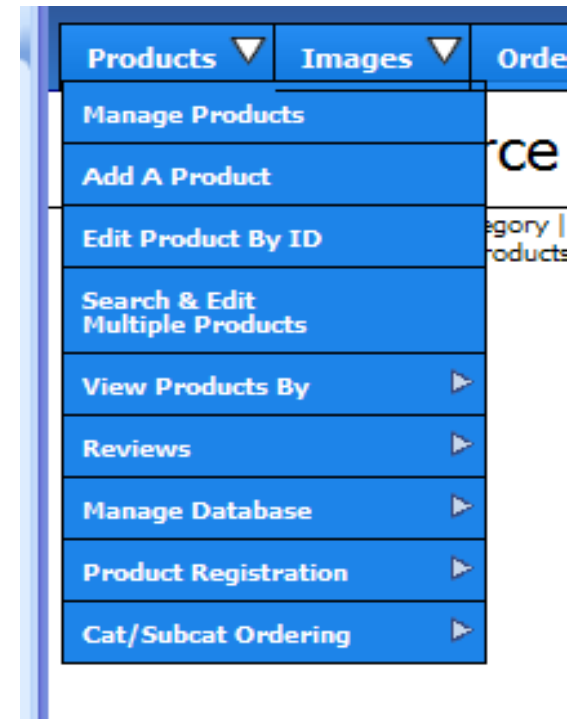
Managing or Editing Products

You can access product information and edit it in a variety of ways from the Products tab

- One product at a time
  - Use "Manage Products" or
  - "View Products" by…
  - Or "Edit Product by ID"

Products ▼   Images ▼   Orde

Manage Products

Add A Product

Edit Product By ID

Search & Edit Multiple Products

View Products By ▶

Reviews ▶

Manage Database ▶

Product Registration ▶

Cat/Subcat Ordering ▶
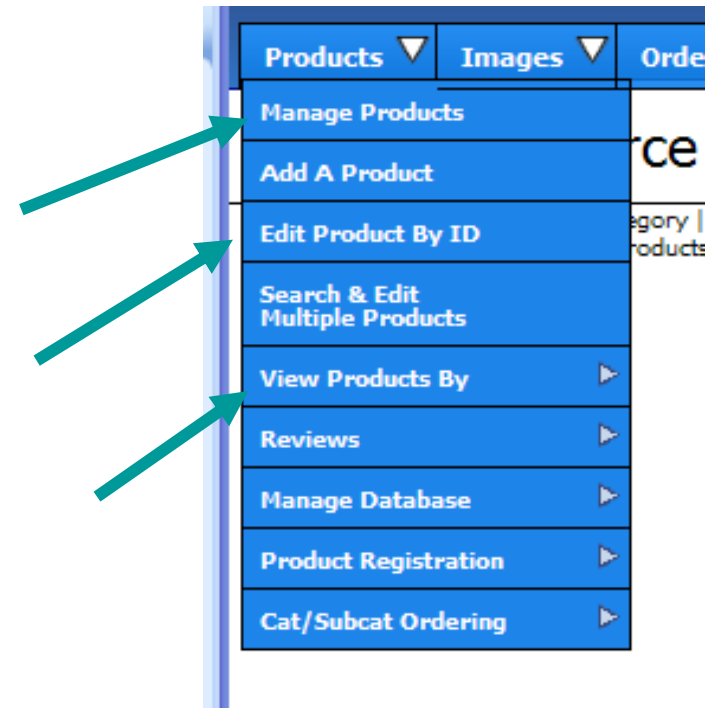
Managing or Editing Products

You can edit more than one product at a time

Many products at a time

- Use "Search & Edit Multiple Products

- Use "Manage Database"
  For importing and exporting from CSV files.

Products ▼	Images ▼	Orde
Manage Products		
Add A Product		
Edit Product By ID		
Search & Edit Multiple Products		
View Products By ▶		
Reviews ▶		
Manage Database ▶		
Product Registration ▶		
Cat/Subcat Ordering ▶		
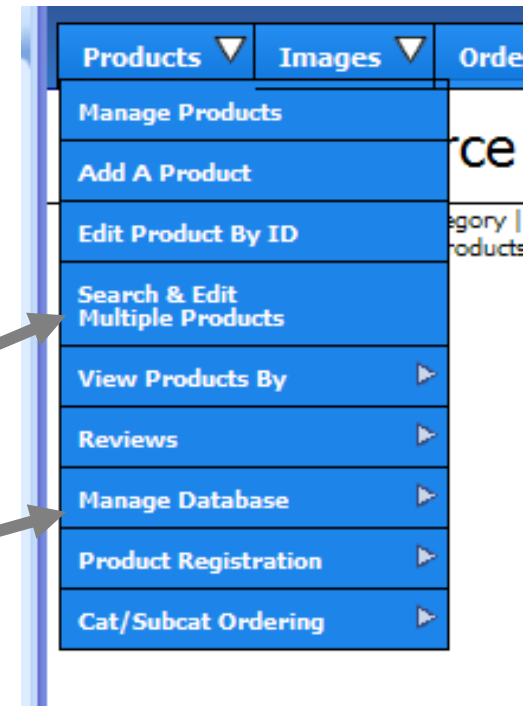
Managing Products

- Clicking Manage Products will display a list of your categories and subcategories where you have entered products.

- Clicking on the subcategory name will list all products in that subcategory

- You can then choose which product to make changes to
  - To open a product click on its id-code or product name.

There are 1411 products in the database

Category	Category Description	Subcategory	Subcategory Description	Low Level Category	Low Level Category Description	# of Products
1st Birthday Party Products	Edit	1st Birthday Princess	Edit		Edit	26
		Baby Einstein	Edit		Edit	15
		Barnyard Bash	Edit		Edit	20
		First Party	Edit		Edit	16
		My 1st Birthday Blue	Edit		Edit	22
		My 1st Birthday Pink	Edit		Edit	11
		One Special Boy	Edit		Edit	19
		One Special Girl	Edit		Edit	21
Boy or Girl Birthday Party Products	Edit	Curious George	Edit		Edit	11
		In the Night Garden	Edit		Edit	15
		Mr Men and Little Miss	Edit		Edit	9
		Ocean Friends	Edit		Edit	16
		On the Farm	Edit		Edit	12
		Peppa Pig	Edit		Edit	8
		Tom and Jerry	Edit		Edit	8
		Underwater Friends	Edit		Edit	19
		Wiggles	Edit		Edit	14
		Winnie The Pooh	Edit		Edit	6

There are 6 products in this category

Choose   ◉ Ascending   ○ Descending

Select	ID	Product Name	Brand	Image?	Order	Show	On Special	Prices	Add Like	Mac
☐	230010	Winnie the Pooh Invitations (pkt 8)	Party Kids	Yes	10			View	Add Like	Old Edit
☐	230040	Winnie the Pooh Plates (pkt 8)	Party Kids	Yes	40			View	Add Like	Old Edit
☐	230050	Winnie the Pooh Cups (pkt 8)	Party Kids	Yes	50			View	Add Like	Old Edit
☐	230060	Winnie the Pooh Napkins (pkt 16)	Party Kids	Yes	60			View	Add Like	Old Edit
☐	230080	Winnie the Pooh Hats (pkt 8)	Party Kids	Yes	80			View	Add Like	Old Edit
☐	230090	Winnie the Pooh Treat Bags (pkt 8)	Party Kids	Yes	90			View	Add Like	Old Edit
☐	Select All Products									

○ Change Category/Subcategory To ...
  Category [   ] [Choose Category ▼]
  Subcategory [   ] [No Subcategories ▼]
○ Toggle Specials Status ...
  Start Date [18 ▼] [06 ▼] [2010 ▼]
  End Date [18 ▼] [06 ▼] [2010 ▼]
○ Toggle Show Product status ...
○ Permanently Delete Product from database ...

[Submit]

Edit Product Screen –Product Tab

- ## The Product Editor opens in a new window

- On the first tab (Product) you can edit the

- id code, brand,

- category, subcategory,

- product name,

- Active status, weight and a range of other fields.

- Plus you can upload a new main image and additional images.

Edit Product Screen – Description Tab

- The description tab is a rich text editor that gives you the ability to arrange your information how you want it.
- You can also insert additional images, tables, charts
- Some consideration needs to be taken for how your product display template is set up when entering descriptions
- This varies from web site to web site.
- The editor used in this section is the same as that covered in the web page editing area.
- How to edit tutorials and the related videos can be accessed from the web pages section
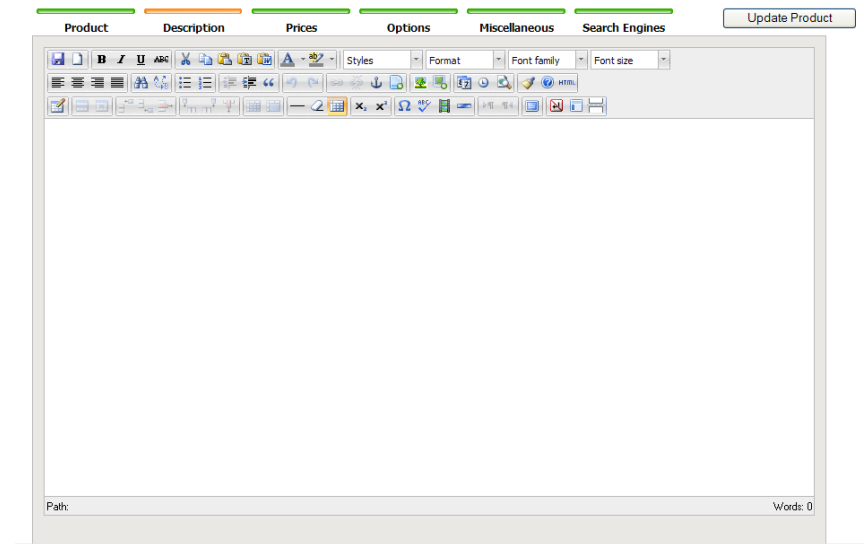
How to use the rich text editor is covered in the web pages section with links to many useful tutorials.

Edit Product Screen - Pricing

- The Prices tab is where you can change product prices, mark items to be on special, indicate the GST status of a product

- A total of 6 price fields for different pricing levels is available to be switched on

- When putting an item on special a special price, start date and end date must be set.

- All prices must be entered in as inclusive of GST

- GST Type should always be left as goods.

- Only products like fresh fruit and vegetables can have the GST checkbox un-ticked. Any product that attracts GST must have the GST box checked

Edit Product Screen - Options

- The options tab is where options like colour & size etc can be entered.

- Options are comma separated

- These are turned into drop down menus on the web site for customer ordering.

- We have up to 6 custom option fields available

Edit Product Screen - Miscellaneous

- Over the years, different clients have wanted to be able to display products differently or control where those products can also be viewed.

- The miscellaneous tab allows us to create CONTROL fields which you use to control **where, when and how** products are displayed.

- If you have control fields or special fields for other purposes they will be located under the miscellaneous tab.

Miscellaneous tab screenshot. Control fields in this example are are whether to include the product in the newsletter or to be a clearance item

Edit Product Screen – Search Engines

- This tab is for when you wish to control the search engine tags of products to a higher degree.

- The GTP system usually uses the product name extensively as the core optimising keyword.

- However, when greater control is required we can turn on the additional Title, Meta Keywords, and Meta Description tags.

- Additional coding changes may be required to activate this facility to work on your web site depending on age and configuration of site.

Don't use the search engines tab unless you are going to add more keywords than are already part of the product name. It is a lot of work.

Make sure the Meta Description also contains those keywords.

The Meta keywords tab is least important but make sure if used that you only use keywords/phrases that appear on the page.

Uploading Product Images

- Good photo(s) of your products will massively improve your web sites ability to sell or generate leads.

- Each product can have one or more photos attached to it depending on your product layouts.

- Click on the upload new image link to be taken to the image uploading screen.

UPLOAD NEW IMAGE

1. The upload new image link is located on the products tab of the product editor.

2. You can upload over the top of an existing image

3. You upload a product image only after you have added your product text.

Uploading Product Images

Before uploading a product image make sure it is

1. A .jpg image
2. Less than 1000 pixels wide OR less than 300KB in file size so uploading is fast.
3. Greater than 500 pixels wide where possible as too small an original image will result in blurry /fuzzy images.

Is your image not changing after you have uploaded it?
Hold down the 'Shift' key and right click in the window (where there is white space) and choose 'This Frame' > 'Reload Frame' for Firefox or hold down the 'Ctrl' key and right click in the window and choose 'Refresh' for Internet Explorer to view the correct image.

To upload an image to the GTP server, select the image from your hard disk by clicking on **Browse...**

Once the file has been selected click on **Upload Now**

Main Product Image

Search Results Images
Medium Product Display Image
Large Product Display Image

Image not changing? Click Here

Location [   ] [Browse...]
[Upload Now]

Uploading images direct from your digital camera without resizing and cropping first will make the upload process many times slower than if you quickly prepare your images first

Ask us for information on preparing your image if you don't yet have the knowledge or skills.

Uploading Product Images

When you upload an image in the products area, we take the one image that you upload and create 3 images of different sizes in one step

– A thumbnail or small image
– A medium sized image
– A large image

- The default image sizes can be preset in the configuration area of the site. Config>>Image Setup
- If you decide to change the image sizes you will need to re-upload images previously uploaded.
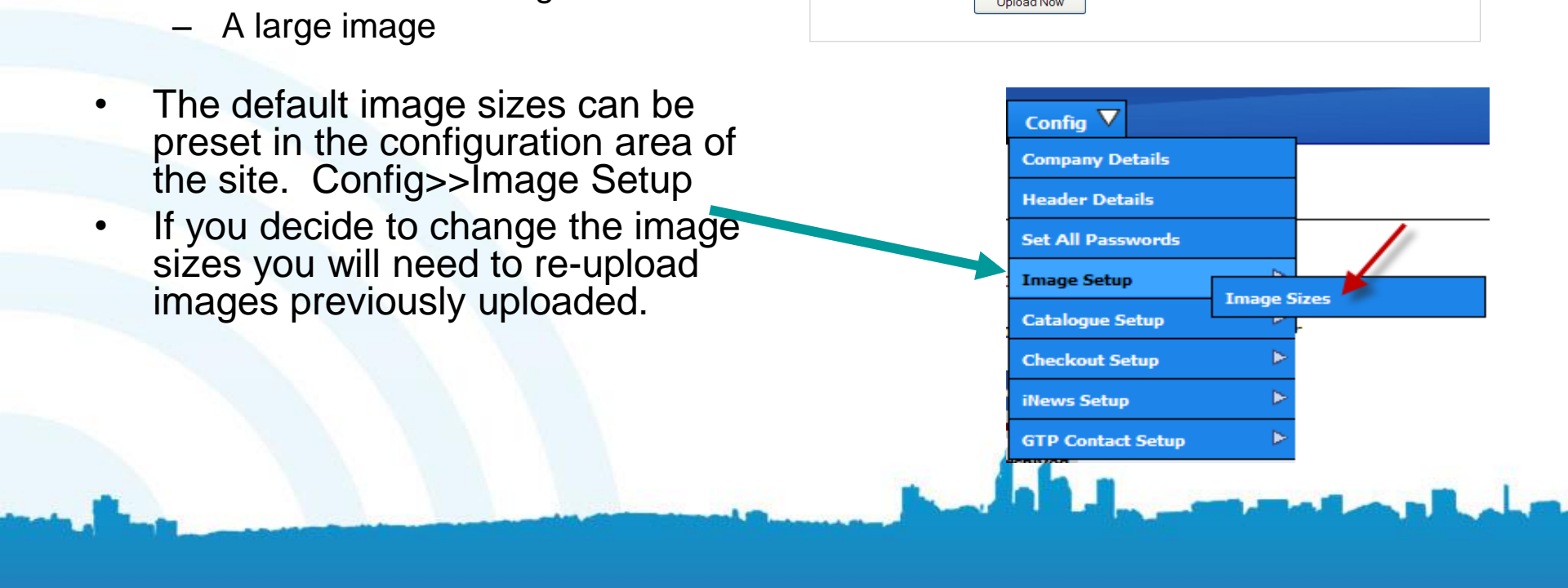
Uploading Additional Product Images

- You can upload more than one image per product.

- How the additional images are displayed on your website will require customisation of your product displays

- To upload a 2nd and third image, scroll down the image-upload-page to the "Add New Accompanying Product Image"

Main Product Image

Search Results Images
Medium Product Display Image
Large Product Display Image

Image not changing? Click Here

Location [ ] [Browse...]

[Upload Now]

To upload a **new** Accompanying Product Image use the **last** form below
To view or edit an **existing** Accompanying Product Image, use the appropriate listing form

Add New Accompanying Product Image

'Browse' and 'Upload' to ADD a new accompanying product image

Alternate Text [ ]
Location [ ] [Browse...]

[Add]

Additional Images: Click the Browse button to browse your computer for an image to upload and then click Add to upload it.

Returning to the Edit Product Screen

- To Navigate from the upload image screen back to the product

- Click on the "Edit this Product Link" near the top of the page

iCommerce   **UPLOAD P**

List 1st Birthday Party Products » Barnyard Bash | Add New Product | Edit This Product | Delete Main Product Image
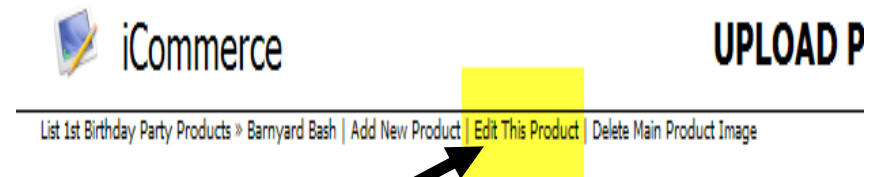
Tip: You can navigate to many pages within the same section of the CMS by looking for the small links as shown in the above example.

Common Questions for Product Editing

- How do I change the id or product code? – There is a link next to the code.
- How do I create a new category or subcategory? – Add a product or Edit a product and simply type in a new category name. Update the product and the new category will be available.
- How do I move products into a new category or change a category name? – Edit the product and change the category of this product.
- Can I show a product in more than one category? – Yes see Note 1
- Can the system manage my stock levels? – No it has very limited stock level management. Essentially we can debit a stock level back to 0 and deactivate a product if their stock level is 0.
- What do I put in the weight field? - Just numbers and weight measured in KG. eg 500 grams is 0.5 and 1.5 kg would be 1.5
- Do you allow me to have different price levels for different customers? – (Yes – this is commonly standard)
- Can I choose only to show prices and allow purchasing to clients who have a login and password? – Yes see Note 1

- Note 1. (Your site needs to be specifically coded for this scenario)

All The Other Images

- Product based sites need to have more than just the product image uploaded. Otherwise your site will show lots of broken images. This is the most common mistake we see in new sites. You also must upload

    - Category Images
    - Subcategory Images
    - Brand Images

Category Images

- For every category there needs to be an image uploaded for it.

- Click on

  Images >>Manage Images
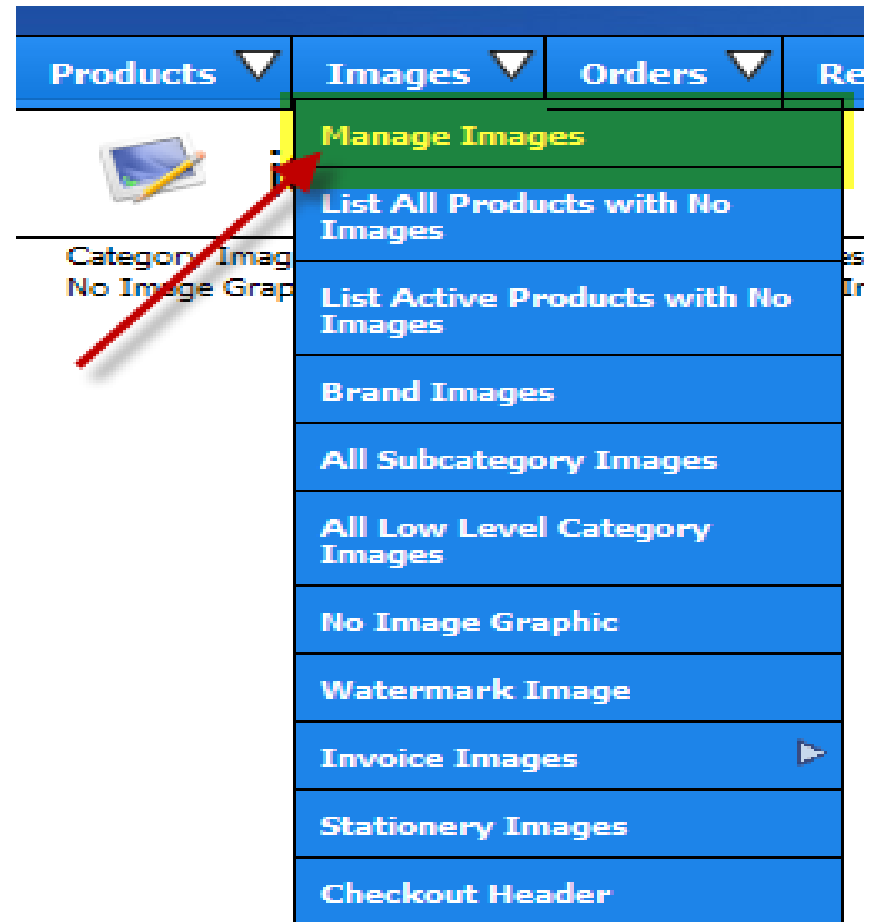
Category Images

- To upload a category Image click on the category name

- Then Browse and upload an image from one of the products in that category

- Repeat the process for all categories listed.

Subcategory Images

- To upload subcategory images click on the subcategory name

- Then browse and upload one of the product images from that range

- Repeat the process for all subcategories listed

The upload category and subcategory images is accessed from the same page.

Brand Images

- If your site shows brand images then you need to upload a brand image for every brand you have in the products database

- To upload brand images click on Images then Brand images as shown right.
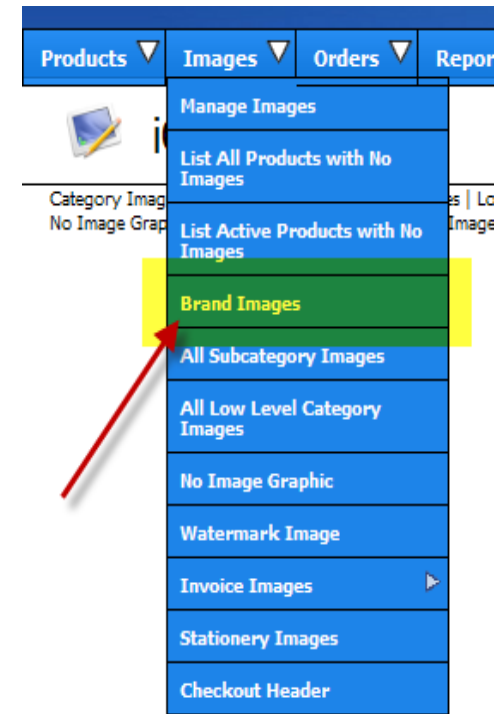
Brand Images

- Like category and subcategory images – click on the brand name to get to the image upload screen

- Then Browse and Upload the image.

Brand/Logo	# of Products
	75
*	95
ABERLOUR	2
ABSOLUT	4
ABSOLUT SWEDEN	4
AKROPOLIS	2
ALKOOMI	4
AMATE	1
AMBERLEY ESTATE	12
AMBRA	2
ANDREW GARRETT	6

NO IMAGE AVAILABLE

Add/Update Brand Image

Choose File:

[   ] Browse...

Upload

1

2

Other Image Types

Other image types for the products and ecommerce section can be uploaded from the images menu.

The no image graphic is the image you want to show if a product does not have a photo

Images ▽ | Orders ▽ | Reports ▽ | Affiliate ▽

Manage Images

List All Products with No Images

List Active Products with No Images

Brand/Logo Images

All Subcategory Images

All Low Level Category Images

No Image Graphic

Watermark Image

Invoice Images

Invoice Header

Invoice Footer

Stationery Images

Misc Images

Checkout Header

gtp icommerce
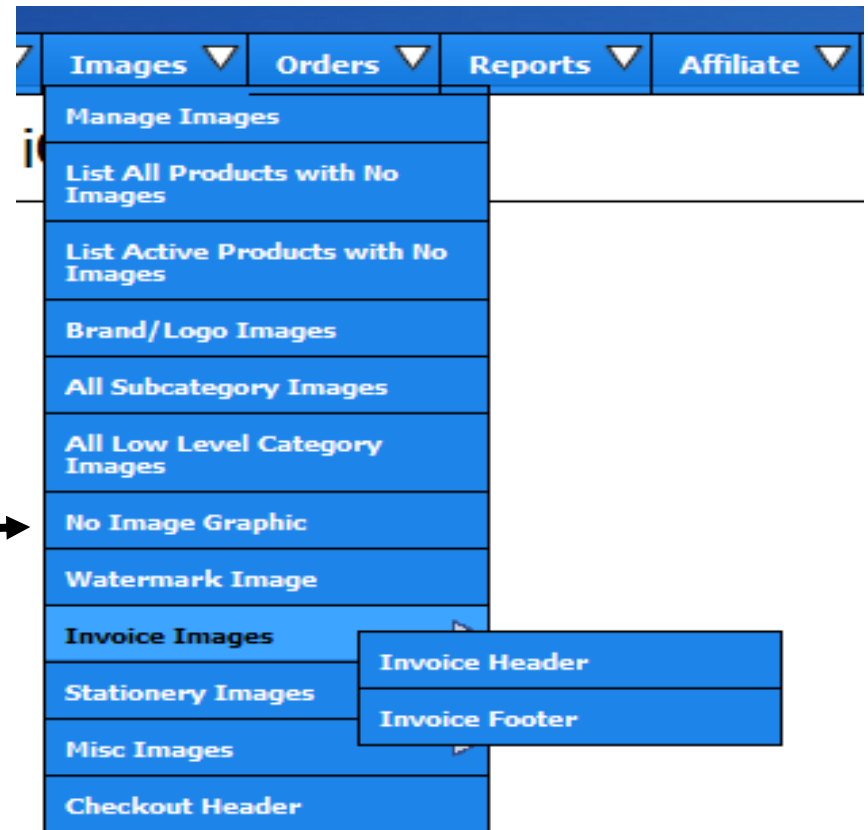
Product Management and Editing Videos

- This email is to provide links to resources on how to add and edit your product information.
- **ADDING AND MANAGING PRODUCTS**
- **Adding Products**
- http://www.gtp-icommerce.com/videos/products/Addprodq.html
- **Short Overview Video** - Adding Products
- http://www.gtp-icommerce.com/videos/products/2-AddingProductsShort.htm
- **Comprehenisve Video** - Adding Products (18 mins)
- http://www.gtp-icommerce.com/videos/products/2.AddingProducts.htm
- **Deleting Products**
- http://www.gtp-icommerce.com/videos/products/Products-Deleting.htm
- **Editing Multiple Products at the Same Time**
- http://www.gtp-icommerce.com/videos/products/Editing-Multiple-Products.htm
- **How to export your Product Database.**
- View Exporting Products Tutorial (Version1)
- http://www.gtp-icommerce.com/videos/products/Products-Exporting.htm (Version 2)
-
  Product Field Labels
- Product field labels are used to add extra options to your Products. This tutorial explains what they are and how you can use them.
- http://www.gtp-icommerce.com/videos/config/fieldlabels.html

gtp icommerce

That Concludes the Product Adding and Management Training

Tasks to consolidate training

1. Add a product and upload pictures for it
2. Add four more products and their pictures
3. Change a category name, subcategory name and brand name
4. Enter in some descriptions for your products

Orders

The Order Process Explained
Accessing New Orders
The Order Page
Printing Orders
Taking Payments
Credit Card Risks
Order Status Definitions
Editing Email Responses to Orders

The Order Process Explained

- When an order is placed by a customer several things happen
- An order is placed in the database
- A thankyou for your order email is sent to the customer
- An Order notification is emailed to you

```
        Order is Placed
         By Customer
              |
    ----------+----------
    |         |         |
Order Put   Email     Email
into        Sent to   Sent to
Database    Customer  Business
```
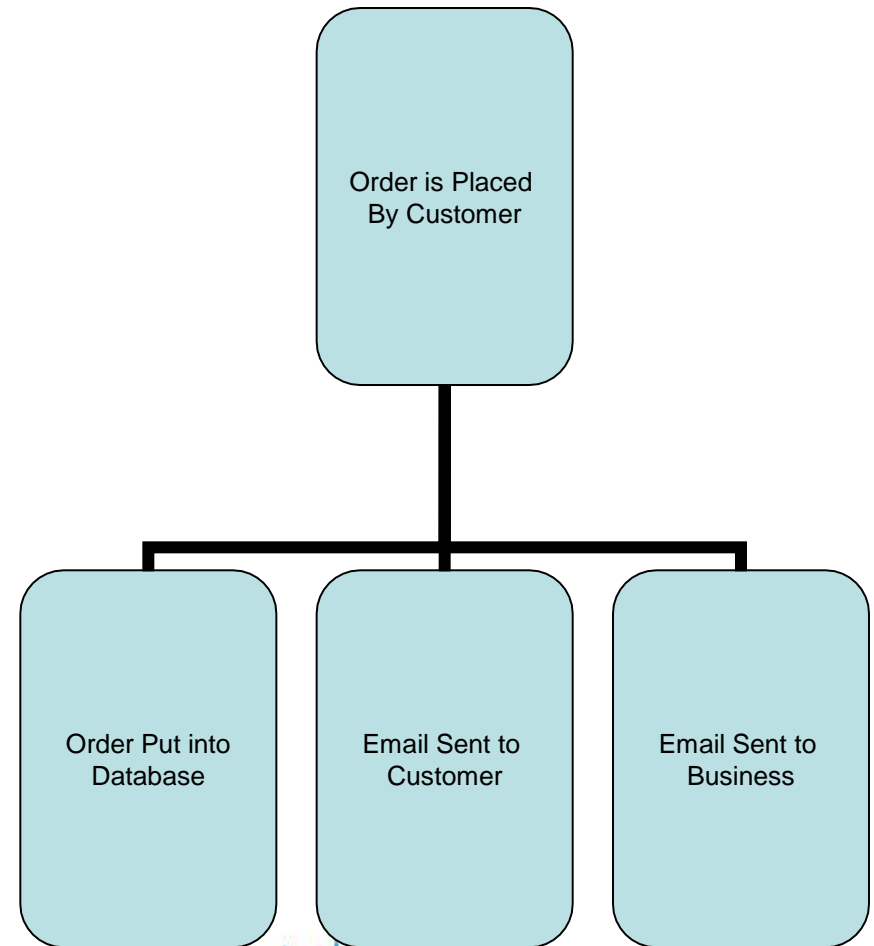
The Order Process Explained

Where do the orders go?

- If the order has not been paid for it goes into – "View New"

- If the order has received payment against it from PayPal or credit card verification it is placed in "View Pending Shipment"
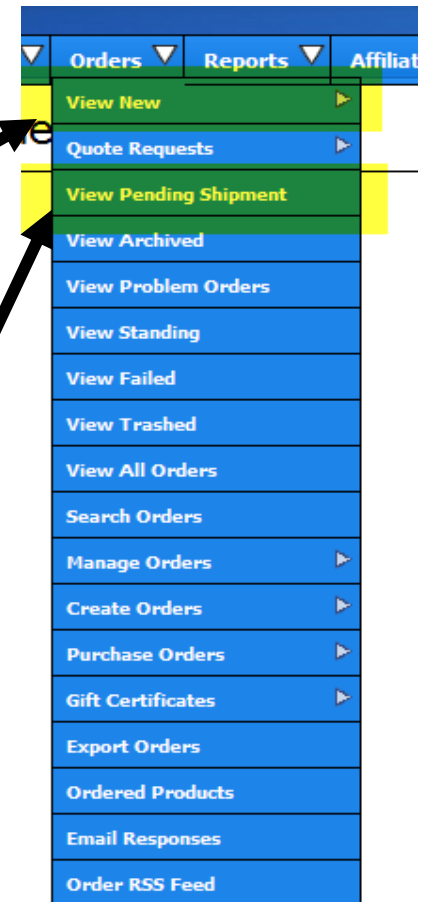
Accessing New Orders

- Login
- Click on Orders
  - View New or
  - View Pending Shipment
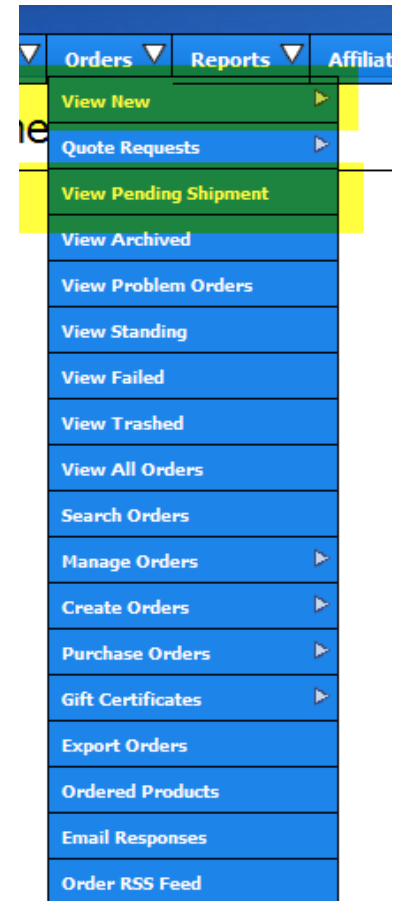
Accessing New Orders

- All pending or new orders will be listed
- To access an individual order click on the Order number
- Various order archiving tool options are available

The Order Page

The Order Page shows

- Time and date of order

- Billing and Delivery Address Details

- Postage Information

- Payment Information

- Actions that you can take to process the order.

Order Page Printing

- There are several basic print templates
- Copy of the order
- Tax Invoice
- Delivery Docket
- Credit Card Authority Slip
- Picking Slip
- Customised print template are additional

Liquor Home Delivery
Shop 4 31 Pimlott St
Dianella 6059 WA Australia
Phone: (61+8) 9248 1999
Fax: (61+8) 9248 1932
ABN: 17 754 880 331

Tax Invoice
13th of March, 2010 - 10:09 GMT
Order ID: 10 000 552

Billing Details
GTP TEST
Mr Dale Carter
10 Marradong Street
Coolbinia WA 6050
Australia
dale@gtp.com.au
0411352766

Delivery Details
GTP TEST
Mr Dale Carter
10 Marradong Street
Coolbinia WA 6050
Australia
0411352766

Products Ordered

Qty	Product & Options	Weight	Price Inc. GST	GST Comp	Subtotal
1	1525 : BOHEMIA BRAND BEER	18.00	$63.99	$5.82	$63.99

Total Product Charge Inc. GST:	$	63.99
Packaging Charge:	+ $	0.00
Delivery Charge:	+ $	0.00
Total Charge:	= $	63.99
GST Component:	= $	5.82
BALANCE DUE	$	63.99

Taking Payments From Orders

- If payment is by credit card you will be able to view the credit card number and process in your Eftpos Terminal at your business

- If you use a credit card gateway like securepay the card is automatically processed.** (Code 200 = Success)

- If Paid by Paypal – Check Your Paypal account and emails for payment confirmation

- If paying by Direct Deposit or other then confirm that payment is received before sending goods.

- ** Only if you select this option

Credit Card Risks

- You have almost no protection with online credit card processing if the transaction is disputed.

- Disputed transactions will result in money being debited from your account as well as loss of product.

- You need to be confident in the integrity of the person placing the order

- High value purchases in fraud risk businesses should always be followed up so that a signature can be obtained prior to handing over goods.

- There are many simple strategies to apply to make taking credit card payments safe and low risk to you as the business owner.

GTP Order Status Definitions

- **New Orders:** Orders that have been placed but no payment has been received and order is not sent.
- **New Orders – Waiting**: Orders that have been placed but no payment has been received and order is not sent AND you are waiting on product to arrive to process.
- **Pending Shipment**: Orders where payment has been received but the order is not yet sent.
- **Archived Orders** are orders that you have finished with. They have been paid for and sent.
- **Standing Orders:** Used to create fixed prices for customers on some products. Requires client login. Coding is additional
- **Trashed Orders:** Orders that have been cancelled.
- **Problem Orders:** A status set by you to indicate an order that you are having problems with
- **Failed Orders:** Orders where the credit card failed to process successfully.

Order Email Responses

- Order emails are sent in text only format

- You can customise some of the order email text sent to your customers

- Edit by clicking on
Orders → Email Responses.
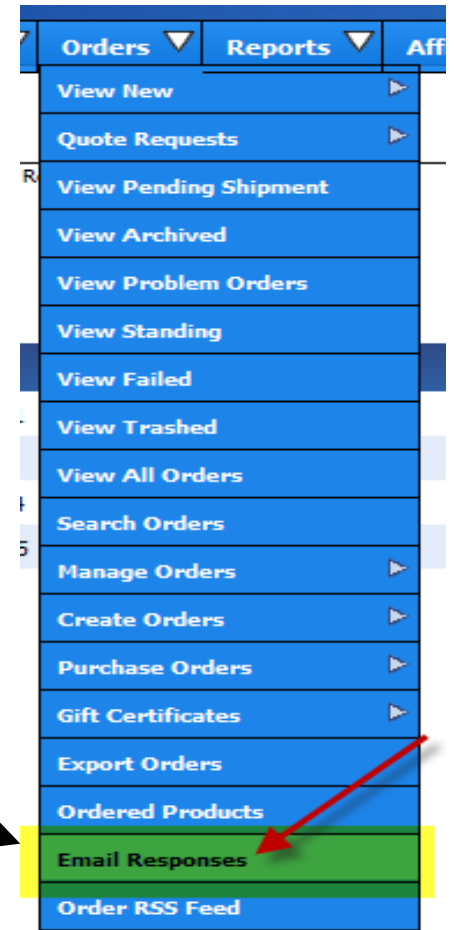
Key Order Email Responses

- Purchase: This email content is sent immediately when an order is placed

- Process: This email is sent when an order is manually processed as a 2nd email

- Success: Relevant only if credit card verification active. Email sent if credit card manually verified successfully

- Failed: Relevant only if credit card verification active. Email sent if credit card manually verified but it fails.

Orders Section Video Links

- The below video gives a good overview of the order processing section
- http://www.webdesign4perth.com.au/videos/OrdersProcessingOverview-Comprehensive.htm

That Concludes the Order Processing Training

Tasks to complete…

1. Place an order yourself on your web site

2. Check the customer email notification and edit the messages if necessary

3. Login and process your order as if you were a real customer

Core Configuration Areas

Company Details
Header Details
Passwords
Image Settings
Checkout Setup

Company Details Editing

- To edit your phone numbers, address and email address click on config and company details.

- E-Mail 1 is where all order notifications and general enquiry emails are sent to.
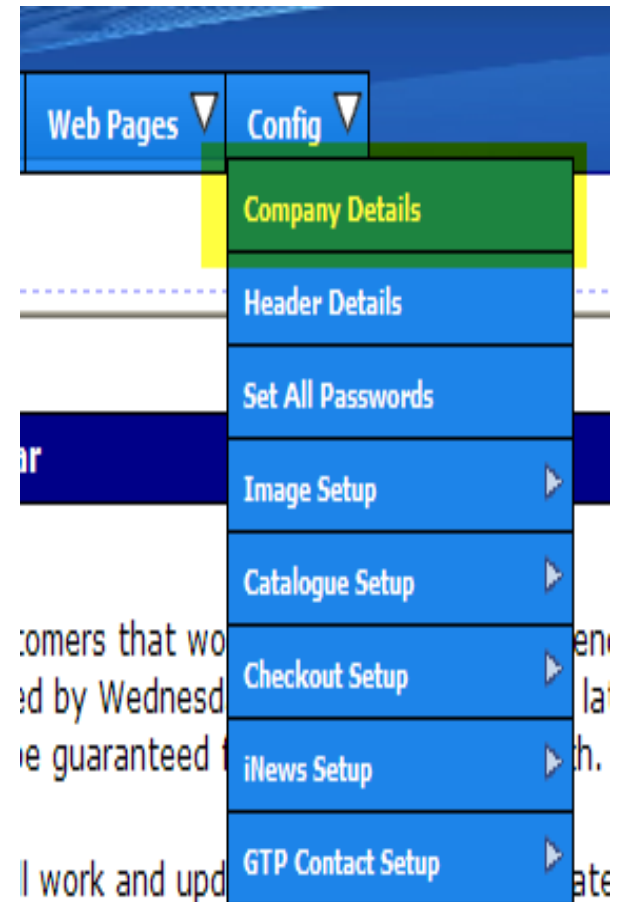
Header Details Editing

- The header details section is used for general search engine optimisation settings
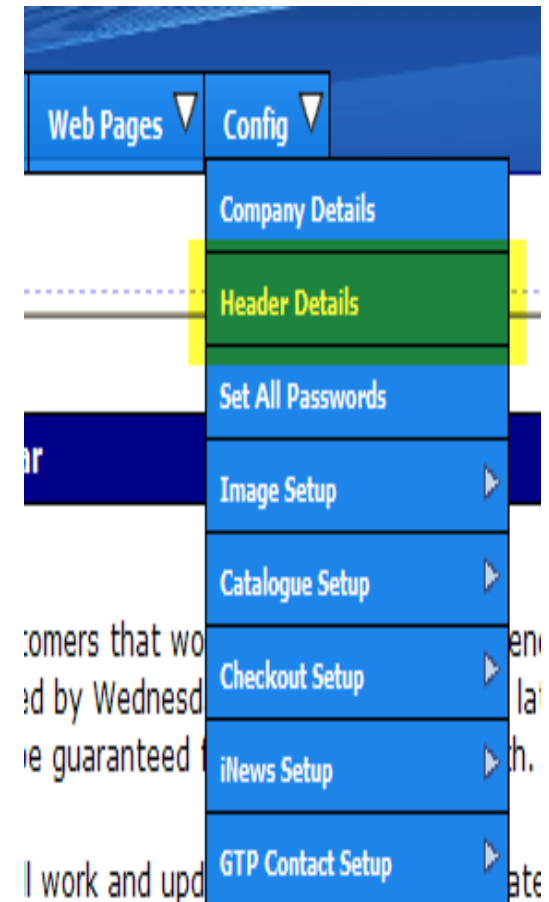
Header Details Editing

- Make sure this section is filled out.

- The Meta Title is the most important field.

- Pipe separate all your core key phrases and put your geographic target market in. e.g. Perth or WA or Australia.

- See Video:
  http://www.webdesign4perth.com.au/videos/Config-HeaderDetails.htm

Passwords

- Password can be accessed under the config tab
- Make your password strong by including Uppercase, lowercase, special characters like $ % & and numbers.
- Remember that you need to keep your password secure as you may have credit card details stored
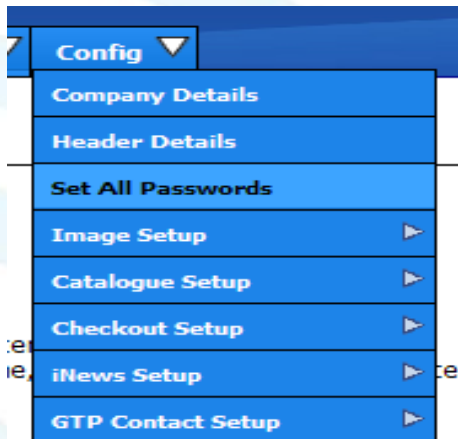
Please Note: A 'strong' password does not guarantee that your password is actually secure. Rankings given on this page are a general indication of relative password strength. Make sure to change your password regularly.

Image Setup Settings

- This section is usually set by GTP staff.
- Click Config -> Image Setup
- The image settings section is for ecommerce sites only
- The maximum width and height of the small, medium and large main image are set here
- The sizes of category, subcategory, brand images are also set here.
- As well as the two sizes for any additional product images that you upload.
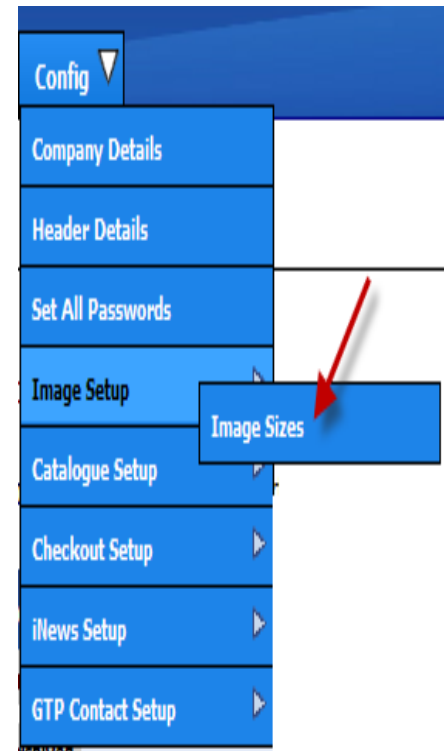
Checkout Setup

- This is for ecommerce sites
- You can add or remove payment methods
- Enter direct deposit details
- Insert sales tracking code from Google adwords or analytics.
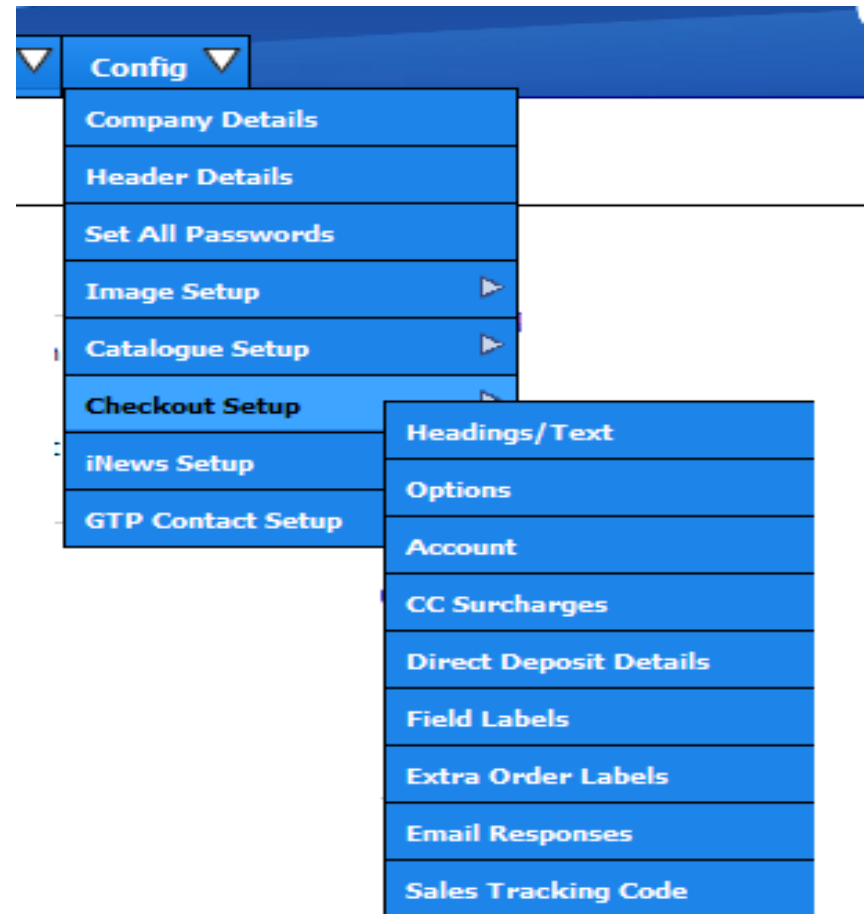
That Concludes the Configuration Section Training

Tasks to complete…

1. Check Your Contact Details
2. Update your Header Details and Targeted Key phrases according to GTP rules.
3. Update your passwords to strong passwords
4. Check your image sizes and your checkout Setup

Form Autoresponders

What are they?
Where are the located?
How do I edit them?
How do I test them?

What Are Form Autoresponders?

- An autoresponder is an automatic email response to a web form being filled in.

- An autoresponder contains an email message from your business.

- You need to check all of your form auto-responders for appropriateness and update them if they are not saying what you want them to say.

Where are my Form Autoresponders Located?

- To list your form autoresponders click on
    - Emails & SMS
    - List/EditEmails/Autoresponders

- To Edit Form Auto Responses

    - Enquiry is sent when your contact form is filled out
    - Competition is sent when your competition form is filled out
    - New Member is sent if a new member signs up.

Series Type	Email Series
Admin	Account Details
Affiliate	Add Web Link
	Refer A Friend
	Referral Points Confirmation
All	Email Reminder Thank You
Form Responses	Competition
	Enquiry
	Join Up
	New Member
	New Member - Voucher
Link Partners	Link Partners
Newsletter	June Newsletter 2010
Subscriptions	Subscription

Image shows a list of emails and Autoresponders in the CMS. Form Responses has the main bulk of auto responders.

How do I Edit My Autoresponders?

- Click on the autoresponder name to bring up all autoresponders in a series. Usually there is only 1.

- Click on the Edit Link to Bring up the editor

- Click on Email Text or Email HTML to edit the autoresponder.

- If you wish to make your autoresponder a formatted HTML response, remember that the editing functions are the same as in the web page section.

Email Series - Enquiry

Editor Version	Message #	Day Sent On	Text/Html	Unsubscribe	Subject	Attachment			
2	1	0	T T	No	[clientorg] Enquiry		Add Email Like	Edit	Delete

Email Details Email Text Email HTML Email CSS Attachments Analytics

Update

Thank you for your enquiry with [clientorg]

We appreciate that you have taken the time to look through our web site and to contact us.

This email is an auto-response to let you know that your email has been sent to one of our staff members and you should receive a reply email within the next working day.Don't forget that you can also contact us by phone on 1300 005 356

Regards

Evan Kolbe
[clientorg]
www.kolbesystems.com.au

How Do I Test My Autoresponders?

- To test your auto responders fill our every form on your web site and check your email for your auto response reply.

- If you don't get a reply then contact GTP. We will be able to identify what the autoresponder name should be for a particular form and add this into your list of autoresponders.

That Concludes the Form Autoresponders Training

Tasks to complete…

1. Fill in all of your contact forms as if you were a customer.

2. Retrieve your email to view your autoresponders

3. Make a change to your form autoresponders via the CMS and repeat from 1.

Email Marketing

Capture of Contacts
Autoresponders to Forms
Email Templates
Create Email Newsletters
Test Email Newsletter
Send Email Newsletters

Stage 1 - Preparing an Email Newsletter From Your Online Email Newsletter Template
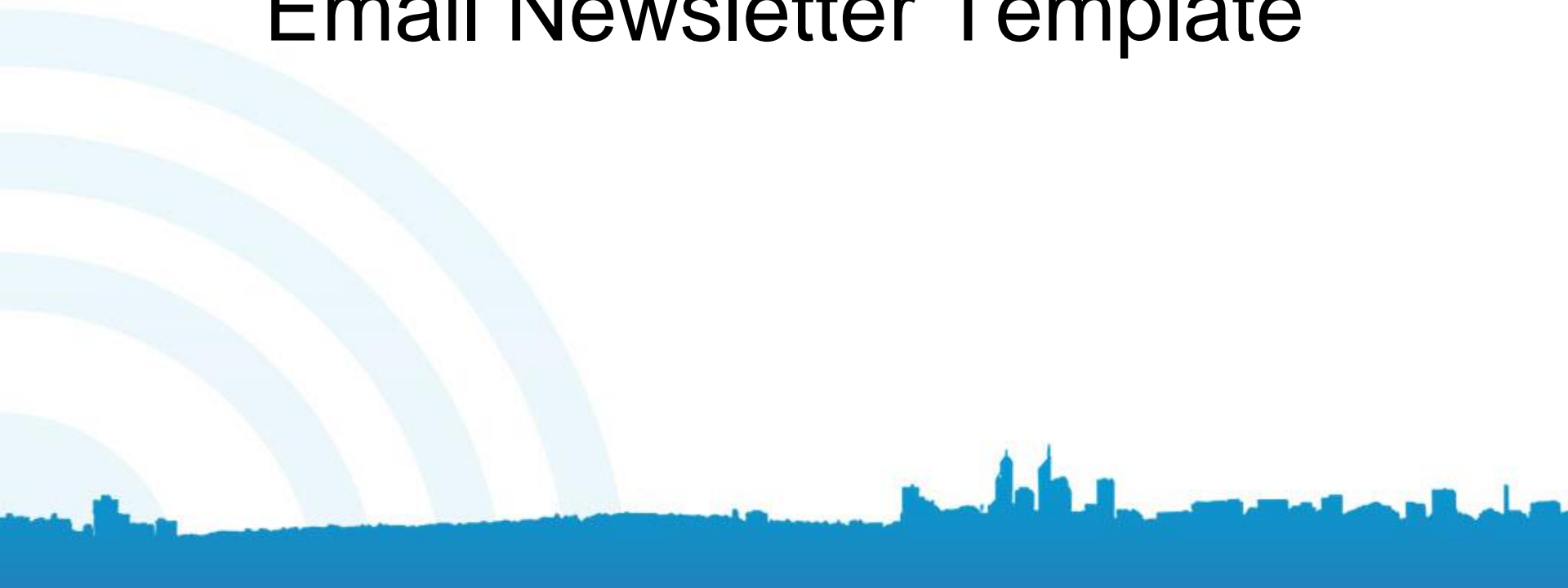
Definitions

- HTML Newsletter: An email that contains formatted text (bold, italics etc) and possible graphics, logos and photos.

- Newsletter Template: A HTML Newsletter layout that has a predefined structure into which to add your content.

Newsletter Template Location

Newsletter Templates are commonly created as a web page that you can then view and change and then import into the newsletter area of the CMS.

They appear on your web site and are often a hidden link.

Where an online newsletter template has been created for you the pathway to your newsletter templates will be one of the following

- http://www.YourDomainName.com.au/newsletter
  Replace YourDomainName with yours.

Or
- http://www.gtp.com.au/ownername/newsletter/
- Replace ownername with your login ownername
- http://www.gtp.com.au/officechoicemalaga/newsletter/

Editing the Newsletter Template That Appears on Your Web Site

- One way to create and view your email newsletter is to first prepare it as a web page in the newsletter template section of your website.

- Located at http://www.YourDomainName.com.au/newsletter

- Editing your newsletter that shows on your web page (pathways indicated in previous slide) is done via editing in the **web pages** or **iNews** section of your CMS and NOT the Emails & SMS section (Darth) or GTP Contact section (Luke)

Editing the Newsletter Template That Appears on Your Web Site

- The advantage of preparing Newsletters this way is that each edition of your newsletter can be created separately enabling viewing of all newsletters in the future for just yourself or your clients if you choose.

  For example March Newsletter, April Newsletter etc.

- The next section will cover how to create a Newsletter or HTML Email ready to import into GTPs email sending area

Format and Look of Standard Newsletter

Format of a Standard Newsletter

- **Issue**: Refers to the issue or edition. Reflects the number placed into the Subcategory Field
- **Header Graphic:** Part of the template. A jpg image.
- **Newsletter Topics:** Refers to the newsletter topics and comes from the Title field of the iNews web page
- **Newsletter Content:** Refers to the actual content of the newsletter. This comes from the content field of the inews web page
- Several iNews web pages with same Issue Number (Same Subcategory Field) will be displayed on the one newsletter.
- Note: If you have a custom newsletter design their will be some variations to these instructions.

Relationship Between iNews Web Page Fields and Newsletter Template

Arrows showing where content comes from for newsletter – Old Editor or Editor on Luke

Relationship Between iNews Web Page Fields and Newsletter Template

Arrows showing where content comes from for newsletter. New Editor or Editor on Darth.

Step By Step Instructions to Create a New Newsletter Online

- Login
- Click on Web Pages – Add a Page
- Set status to be active
- Set Category to "**Newsletter**"
- Set Subcategory to a number like 1,2, or 3 etc depending on edition. Or a month-year format like jun-10 for June 2010
- Set Title to be your article or topic headline like "Why XYZ is Good For You" for example.
- In the content tab, layout your text content and insert any images of your article. (Use rich text editing skills as explained in web pages section of this training document)
- Click Update Story to Save the page.
- Go to your online newsletter template at www.YOURdomainname.com/newsletter to view your work.
- Click on the edition number to view newsletter.
- Review content and appearance.
- Continue editing and updating via the CMS until happy with newsletter look and content.

You can add in additional Web Pages with the same category and subcategory (edition) to build a newsletter with various sections in it.

For example if you had three web pages with three different topics (Title's) you would have a newsletter with three distinct sections in it.

Once You Have Created the Newsletter to its finished product you are now ready to set it up ready for sending to your database.

Click to Watch Video

Video Demonstration of Creating Your Online Newsletter.

- This video demonstration is to show you how to create the online or web based version of your email newsletter.

- Once created you can load this into the email sending program

- Watch

  http://www.webdesign4perth.com.au/videos/EmailNewsletters-HowToCreateOnlineNewsletter.htm

Stage 2 – Importing Your Created Newsletter Ready For Emailing Out.

These Instructions also valid for importing the Newsletter Template For Sending Out to Database

Overview of Section

- So you have created your newsletter online as instructed in the previous section and it looks good in the web browser

- The following are instructions for copying your online newsletter into the email sending area of the site.

Stage 2 - Creating a New Newsletter For Emailing Out.

Darth Sites

- Click on Emails & SMS
- Create New Bulk Email

Luke Sites

- Click on GTP Contact
- Click on Emails and Auto Responders
- Create New Bulk Email

- A pop up editor page will open
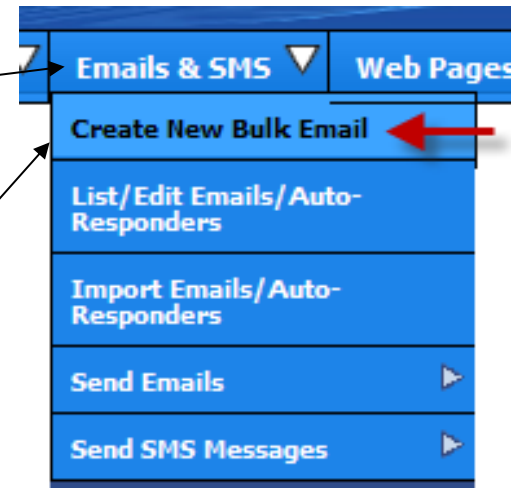
Creating a New HTML Newsletter (Setting Up)

Firstly Set Up The Email Details

- Set **Email Series Type**: (Leave as All if unsure or call it something meaningful to you)
- Set **Email Series** Name: Set this to the dat you are sending out the email or a name meaningful to you.
- Set **Message #** to 1 (Leave unchanged)
- Send Immediately (Should be ticked)
- Send as (Set as HTML with Alternate Text) – unless sending as a text email
- Unsubscribe Info – Leave on Yes (It's law)
- Leave From address blank **or** make it your email address
- Change Greeting to "No Greeting" - we'll merge names elsewhere
- Set Subject: Enter in a subject line for the email (you can merge in their name if wanted)
- The basics are now set – click the update email button to save these settings
- The next step is to import your prepared HTML newsletter that is showing online.

To Import Your HTML Email Template (Copying URL)

1. Where you have an email newsletter template already setup on your web site as demonstrated earlier in this training you can use the following procedure to pull your email template into the system.

2. Go to the web page that displays your email newsletter as formatted.
   Copy the URL of the newsletter.

To Import Your HTML Email Template (Importing HTML)

After copying the URL, Return to the Content Management System and load the Edit an Email/Newsletter Page (only if it is not already open)

- Click on **Email HTML** Tab
- Click on **Import HTML** button (you may need to click ok)
- Paste in the URL you copied earlier at step 2. into the space provided in the popup.
- Click ok
- This loads in the first part of the template
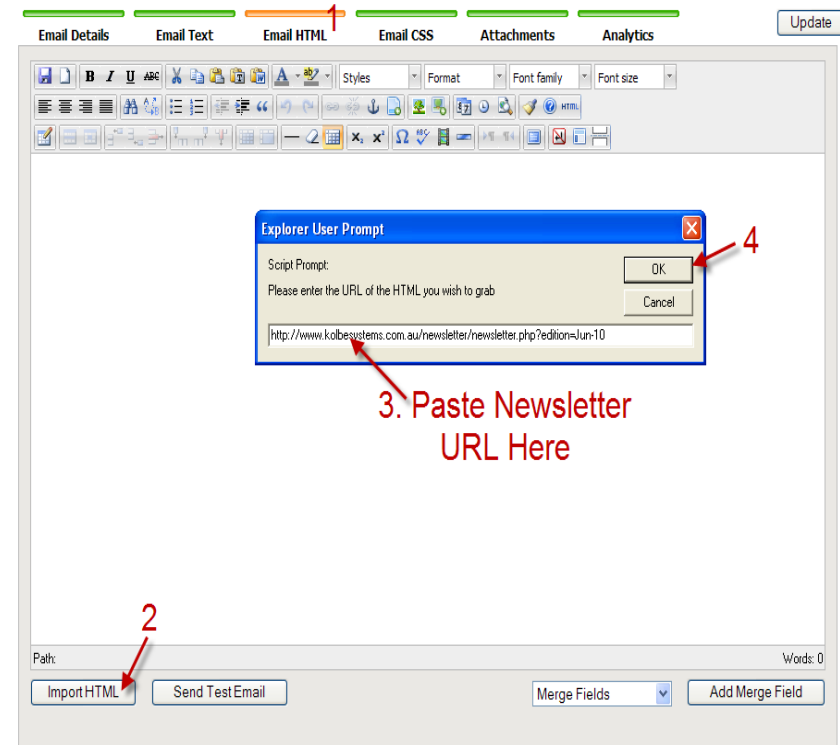
To Import Your HTML Email Template (Importing CSS)

After importing the HTML you now need to import any CSS code which also impacts on the layout of the newsletter.

- Click on the Email CSS Tab
- Click on the **import CSS** button (click ok)
- Again Paste the URL into the space provided in the popup.
- click ok
- A page possibly (not always) showing code will appear and the css tab will be showing
- Click on the HTML tab again to see the newsletter template
- Click on the "save icon" or click "update email" to save your work thus far
- The CSS code only styles the page once the page is saved
- click the update email button to save these settings prior to beginning editing proper.
- *Note: Advanced users can also cut/paste/ and edit html code directly if desired.*
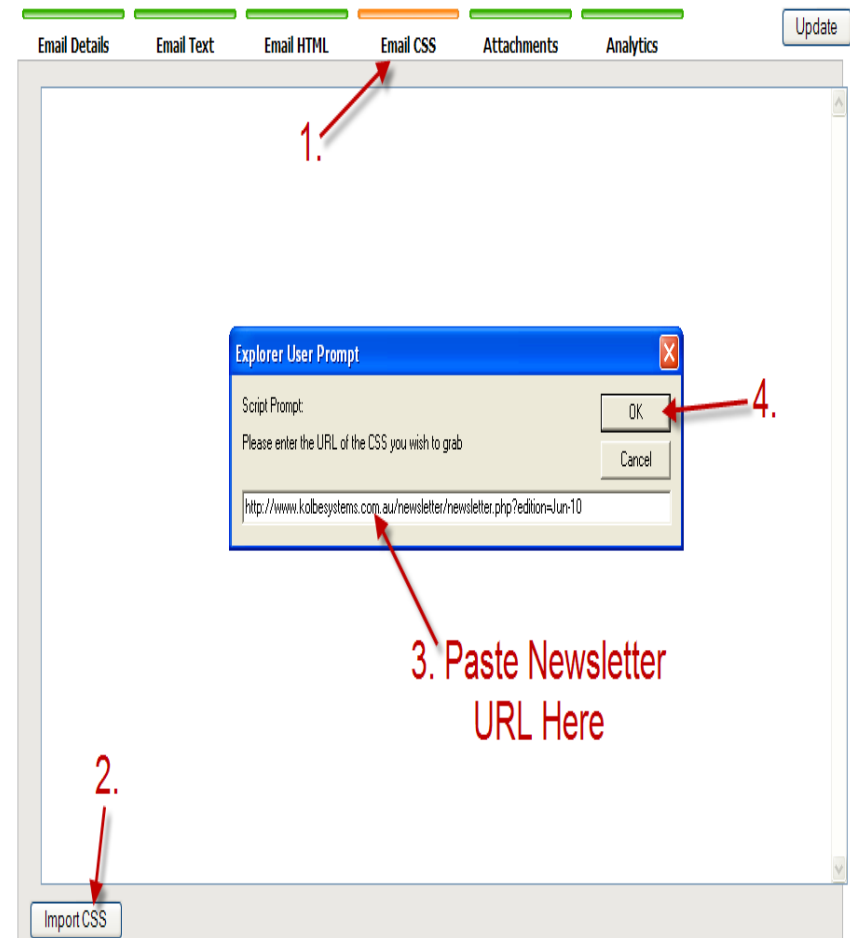
To Import Your HTML Email Template (End Result)

- Once you have imported the html and CSS click on the Email HTML tab to see the newsletter inside the Email Newsletter Rich Text Editor.

- Now click update to save your content.

- You can now make any final changes to the newsletter prior to sending out test emails to yourself.
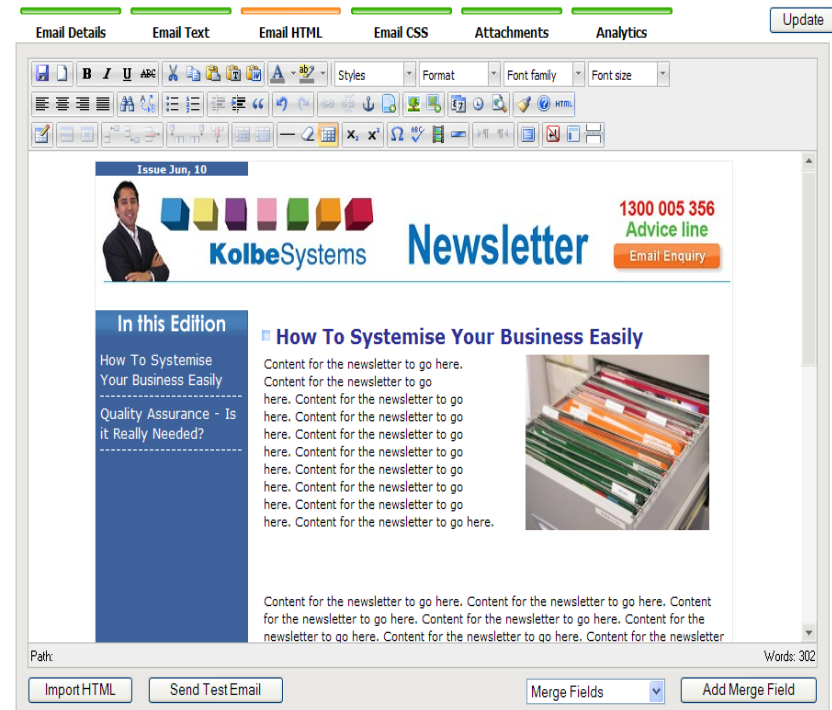
Clicking the Email HTML tab will allow you to see your newsletter content.

Editing The Email Template

Once you have loaded in the basic HTML template, if you have one, then you can edit it and save the drafts until you have finalised your newsletter for sending out.

- You can edit the content in the template
- Link to pdf files
- Link to your web site and specific products or pages on your site
- Delete text
- Delete images
- Write new text
- Insert new images
- See video tutorials for examples of how you can do this.
- Modify the table structure
- Create a master piece.

See the video tutorials on using the Rich text editor in the web pages section of this document.

Updating and Working on Your Newsletters and Other Auto Responders

- Note: You can come back to and continue working on your email newsletters or any autoresponders by saving it and following the below steps.

- Click Emails & SMS >>List/Edit Email Auto Responders.

- Then select the email/ autoresponder series you were working on from the list and click on edit after the page loads.

- This will bring you back to the email editor screen with your last saved version of the email newsletter.

Knowledge Review

You should now be able to

1. Create a newsletter using the iNews web pages section and have it showing as a web page online

2. Create a newsletter and import the HTML newsletter version created in step 1. above so that it is ready to send.

3. Next Steps
   - Managing Contacts
   - Sending Out Your Email

Managing Contacts

Before you can email out to your database
you need to load in your database
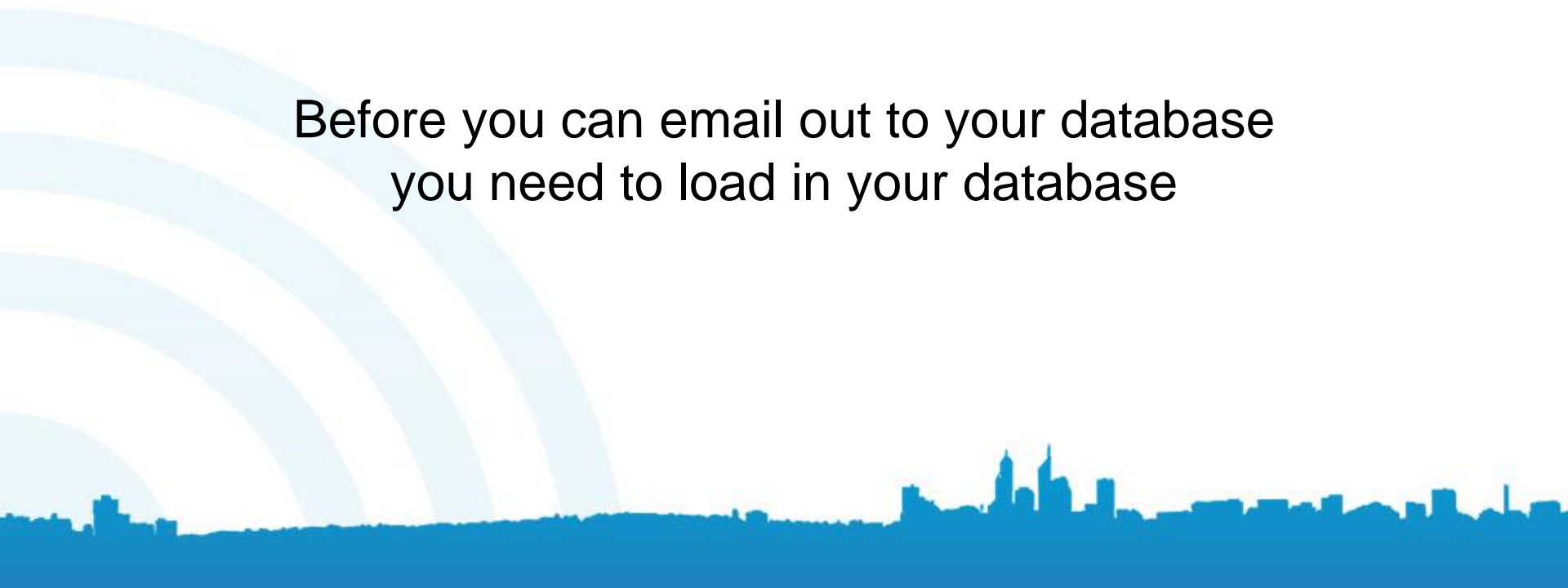
Adding Contacts

There are four ways to enter contacts

1. Manually one by one through the admin console "add a new contact" form.

2. Manually from your web sites contact page / joining page / competition page or other page accessible by you or your staff on your web site

3. Your clients join your database themselves from your web site

4. Importing on mass from a CSV or TAB delimited file provided you have placed the correct header names on the top of the CSV or TAB file.

To Add a Contact or Email Address Manually

- Click on GTP Contact >> Contacts >> Add a New Contact
- A page loads with a blank form
- Write a category for the contact e.g. "Staff" or "Customers" in the category box
- Write a subcategory. I usually use "All" but if you have a sub categorisation strategy then use this. For example "Wholesale or Retail"
- The only fields you need to fill in usually are 1. password, 2. First Name and 3. Email Address.
- Once entered click on Update Contact
- Your contact is now entered, repeat this process for all manually entered contacts or a) enter in manually from your web sites join form or b) import from an excel spreadsheet in either CSV or TAB form

To Add a Contact From Your Web Site Manually or Where your Clients Add Themselves.

- Go to your web site
- Go to either the contact page or the join now page or competition page or other appropriate form page on your web site
- Enter your client's details into the form

  Note: Your web site forms have a customisable automatic responder that is sent out to the persons email address entered into the form. Make sure you check this for appropriateness and edit it via the console.

  Note: You may wish for GTP to create a hidden form (hidden from customers) that you and you staff can enter client details into which sends out a specific message to autoresponder series to your customers. For example, a thankyou email sent out to customers who have purchased from you in store or have entered an in store competition.

- Submit the form.

Importing Your Contacts From A CSV or TAB file

- You can build your database of existing contacts to email to from your **email program** by exporting the contacts to an external file that you edit in spreadsheet program like excel. Similarly you can do this will all accounting programs by **exporting the client file**.

- You will almost always need to manually clean up your data in excel and remove inappropriate contacts and fix mistakes before importing into GTP Contact.

- If you need instructions on how to export contacts you can Google the topic or call our offices.

- Once Exported the columns need to have a header above each column. Below are instructions for preparing an import.

Importing Continued

- **The mandatory minimum columns for inserting a new list of contacts**
  - **email address**
- **Mandatory columns for updating existing contact information**
  - **email address**
  - **indexid or contact id** with the value given to it by the export of contacts

![gtp icommerce logo]

Recommended Contact Import Fields

- Email
- Title
- Firstname
- Lastname
- Password

The fields sit as header names above each column in an Excel spreadsheet which is saved into CSV format. Using minimal fields as above is the simplest method.

Importing File Formatting – Detailed Information

- **Other columns in addition to "email address" which are optional to include**

- **insertdate**, formatted YYYY-MM-DD

  category, defaults to Imports
  subcategory, defaults to yyyy-mm-dd date format

  order by, a number

  username, usually the same as the email address, but can be a set of alphanumeric characters
  password, a set of alphanumeric characters
  customer number, a set of alphanumeric characters
  expiry date, formatted YYYY-MM-DD
  unsubscribe, values are: 'no', 'admin only' and 'all'

Importing File Formatting – Detailed Information

Below are the list of field headings that can be imported. Each field heading used will sit at the top of the excel spreadsheet. Saved as a CSV

Insertdate
Category
Subcategory
Order by
Username
Password
Customer Number
Expiry Date
unsubscribe

- **title or salutation,** i.e., Mr, Mrs, Ms, Miss, Dr, Prof.
  firstname
  middle initials
  lastname
  dob, formatted YYYY-MM-DD
  sex, values are: 'M' or 'F'

  street
  street2
  suburb
  state, i.e., WA,SA,NT,VIC,TAS,QLD,ACT,NSW
  postcode
  country

  org
  orgdesc
  account number
  account name
  abn
  url
  position

- **email**
  alternate email
  phone1
  phone2
  fax
  mobile

  misc2
  misc3
  lastcontact, formatted YYYY-MM-DD

  old cat
  old subcat
  notes
  log
  change control

  delivery title
  delivery firstname
  delivery lastname
  delivery phone
  delivery street 1
  delivery street 2
  delivery org
  delivery suburb
  delivery country
  delivery state
  delivery postcode
- **delivery info**

Step 2. Importing Contacts After Formatting Your Data As Above

Once you have formatted your data as above AND saves as a TAB file or a CSV file then you can move to the next step of importing your contacts.

- Click Contacts> Export/Import(Tab Delimited) >> Standard Import
- Click on the Click Here to import contacts
- Select either Tabs or Commas and Browse for your Tab or CSV file.
- Click Upload File … and wait
- Click Confirm Upload and wait
- A Results screen should appear informing you of the number of lines imported.

  Check Import…
- Click on GTP Contact>>Contacts>>List Contacts
- Browse down categories to check contacts imported and all details imported successfully.

If you have problems with importing then email the file to support@gtp.com.au and explain what you have done and ask GTP to rectify. You will be invoiced a time charge for this however at this will help you save you substantial time and get the job done properly.

Contacts ▼	Emails & SMS ▼	Web Pages ▼
Add A New Contact		
List Contacts		
Search for Contacts		
Search for Contacts (Advanced)		
Bounced Contacts		
Remove Duplicates		
Random Select A Competition Winner		
Delete Contacts		
Create on Screen Contacts Report		
Export/Import (Comma Delimited) ▶		
Export/Import Tab/Comma Delimiter ▶		
Help Document	**Standard Export**	
	Standard Import	
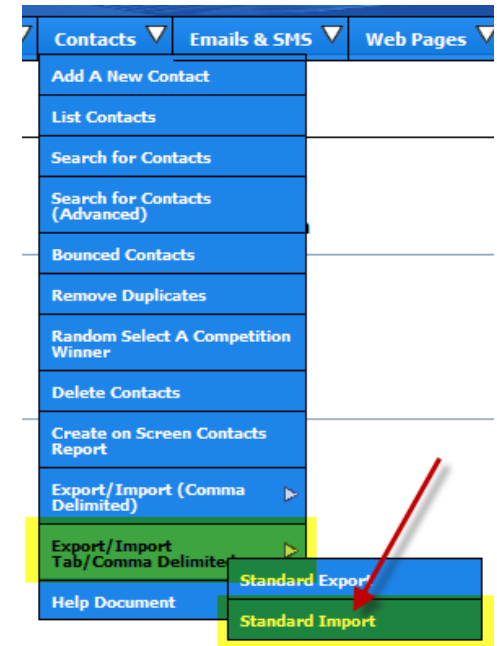
How to Search for a Contact

Click on GTP Contact>>Contacts >>Search for Contacts

- Type in a name or email or part of a name and click search
- Results will appear
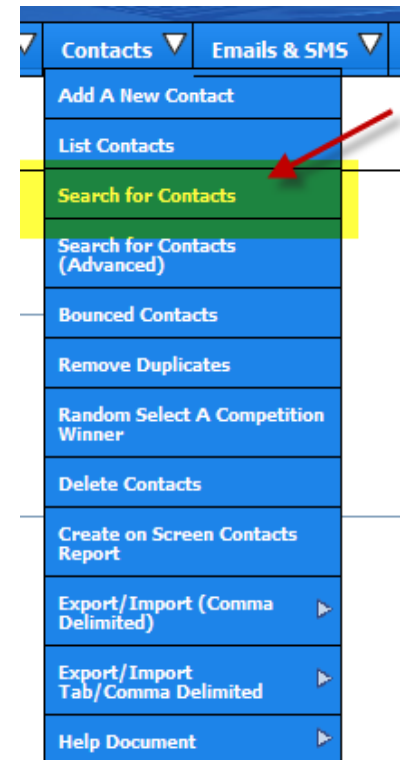
Advanced Search For Contacts

- Click Contacts>>Search for Contacts (Advanced)

- This section allows you to set a range of filter parameter to create a subset of contacts

- Once you have this list you can copy them into their own category which you can then email (This is very powerful)

- At a later stage you can delete the temporary category from by listing all contacts in this category and selecting "Delete from this category"
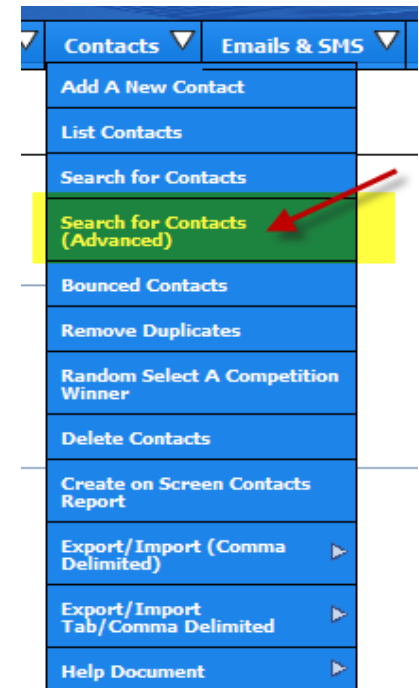
Bounced Contacts

- This section is to display contacts whose email addresses bounced.

- This section is currently incomplete
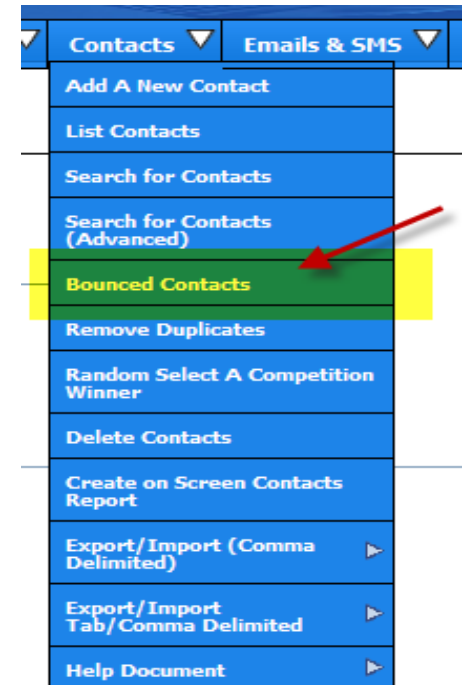
How to Remove Duplicates

Duplicates are when the same email address is in your database two or more times. This occurs when items are imported from an excel file.

Your GTP web site will generally not allow duplicate entries to be entered from your web site as we check for the existence of a contact before entering into the database.

Importing a file does not have this in place currently.

The Process
- Click on GTP Contact >> Contacts >> Remove Duplicates
- Click on the remove duplicates link in the text
- Duplicate contacts will be listed
- Click on each duplicate to remove it.

Contacts ▼	Emails & SMS ▼
Add A New Contact	
List Contacts	
Search for Contacts	
Search for Contacts (Advanced)	
Bounced Contacts	
Remove Duplicates	
Random Select A Competition Winner	
Delete Contacts	
Create on Screen Contacts Report	
Export/Import (Comma Delimited)	▶
Export/Import Tab/Comma Delimited	▶
Help Document	▶
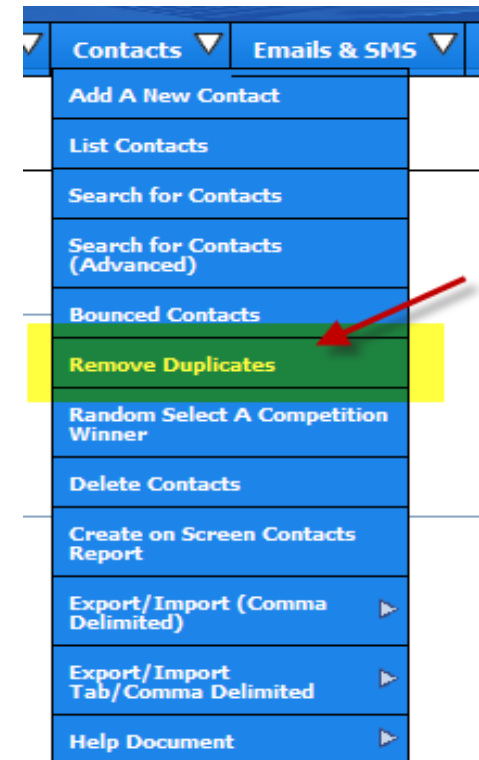
Selecting a Competition Winner Using Random Contact

This facility randomly selects a contact from a category and subcategory level

The Process

- Click on GTP Contact >> Contacts >> Random Select
- Select the Category and Subcategory from the drop down menu
- Your winner will appear.
- Write down your winner and contact them to organise their prize
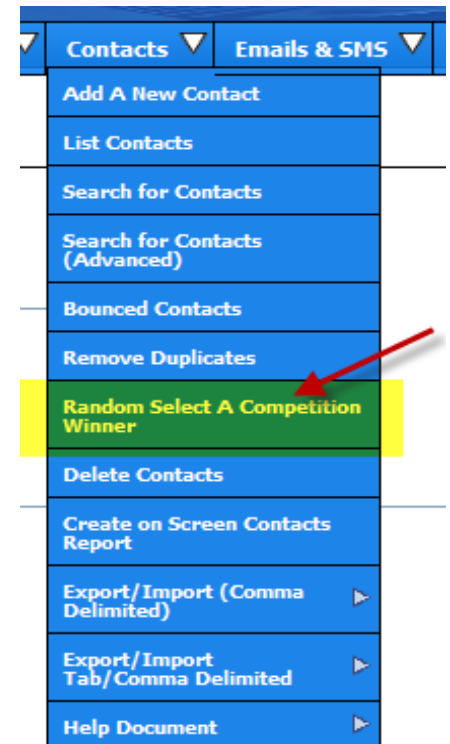
Delete Contacts

- Contacts can be deleted a number of ways

- Find the contact via searching or listing, select it and select the delete from database option

- The Delete Contacts section in the Contacts drop down menu is where a comma separated list of contacts to be deleted can be entered for bulk deleting.
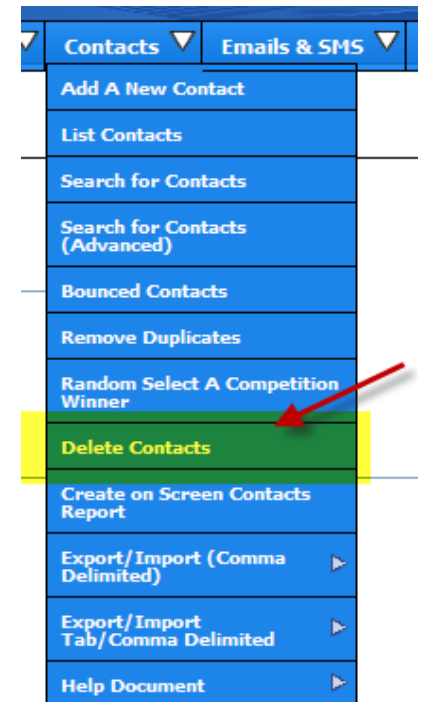
Create an On Screen Contacts Report

This is used for creating a printable list of contacts details such as business name, person, email and phone number.

- Click on GTP Contact >> Contacts >> Create On Screen Contacts Report
- Select Category of Contacts and Subcategory Contacts are in
- Tick and un-tick field you wish to see or not see.
- Select a sorting method
- Click Create Report

Note: the category fields and subcategory fields in this report are not linked so you may need to view a list of categories and subcategories so you can remember which one to select. If you use the report a bit then email support@gtp.com.au to improve it. It is a rarely used feature.

Sending Out Your Email Newsletter or Email News

Sending Out Your Emails

Once you have created your email and verified its quality by sending test emails to yourself and to people you know for comment you are ready to send to part or all of your database.

You can send

- Send to broad category Lists
- Send to specific subcategories within a broad category list
- Send to individuals (1 specified person)
- Send to a variety where you can filter who you wish to send to by Category, Subcategory, Country, Postcode, Suburb and Company.

Sending Out Your Emails Cont.
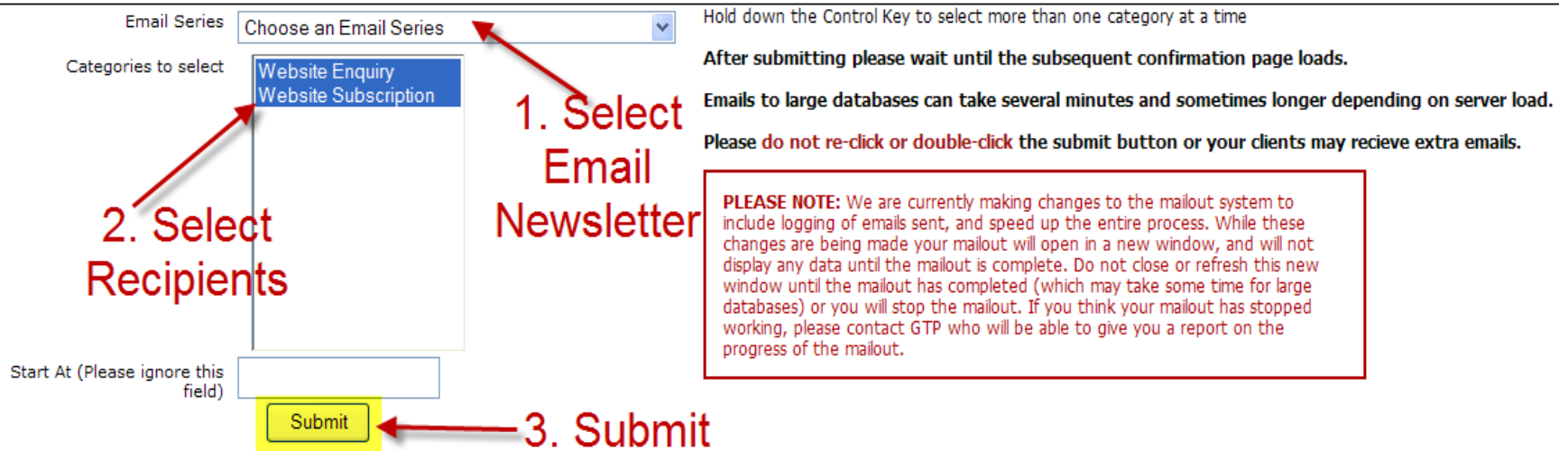
The Process is

- Click on GTP Contact> Send Emails > Sent to a Category
- Choose the name of your email series from the drop down menu
- Make sure that their is only one email in the series unless you made the autoresponder series to have several emails
- Select the categories of contacts to email to by clicking on them and hold the CTRL key down to select multiple categories.
- Ignore the Start At Field (leave blank)
- Click Submit
- Click ok to prompts or cancel to cancel
- A new window or tab is opened up which will updated every 1 minute showing progress of mail out.
- DO NOT CLOSE THIS WINDOW OR YOUR LOGIN SESSION UNTIL EMAIL PROCESS HAS FINISHED – you can minimise the windows so you can get on working with other stuff.

Sending Out Your Emails Cont.

- Screenshot of the send emails out screen. Send instructions are on previous slide

How to Monitor The Mail Out

- Monitoring mail outs provides an indication of how many emails were generated and sent.

- Click as shown right.

How to Monitor The Mail Out

The above image is a view or report of result of mail out after two test emails sent. A total of 12460 emails sent.

We don't not have statistics on email opens and clicks to the web site at the moment. We are investigating this.

Frequently Asked Questions About Sending Out Email Newsletters

FREQUENTLY ASKED QUESTIONS 1

- **Can I move a contact from one category to another category?**
- Yes. You would find your contact and click the checkbox next to it and select the move option and specify the new category you wish to place the contact(s) into.
- **Can I put a contact in two or more categories?**
- Yes. You can copy contacts into another category so that that may be in two or more categories at the same time. For instance, a wine web site may categories contacts as Shiraz drinkers and Chardonnay drinkers and some contacts may belong in both categories.

Frequently Asked Questions 2

- **Can I move selected contacts into a temporary category which I email a campaign to and then delete that category?**
- *Step 1. Find and Move Contacts into Temporary Category*
- Yes. You would go through a process of finding all the contacts in your database via search and listing categories and copying them to the new category specific for a mail out campaign using the GTP contact's copy tool.
- *Step 2. You would then conduct your mail out.*
- Conduct your mail out as described elsewhere.
- *Step 3. Remove the Temporary Category*
- You can then drill down to list all contacts in the temporary category that you created for this campaign and select all contacts and select the option delete from this category.
- As long as the contacts also belong in other categories, they will be removed from the temporary category. If there are instances where a contact is only in your temporary category, they will not be deleted and you will have a chance to move them if desired.

Frequently Asked Questions 3

- **Can I Delete Contacts?**
- Yes you would find your contact(s) and you can use the delete from database option to delete one or many at the same time.

- Remember that the contact database is more than just for email campaigns. It is a database to control access to pricing levels, and to enable faster repeat ordering, tracking of referral and affiliate recommendations. It is generally best to unsubscribe contacts who don't wish to receive email communications.

Frequently Asked Questions 4

- **Can I Unsubscribe Contacts?**
- Yes. You simple find the contact and move or copy it into the unsubscribe category. Once a contact is tagged as being in the unsubscribed category they will not receive future mail outs, even though they may still be in a marketing category ((such as Shiraz Drinkers)

- *Why would you not delete them?* Because you can always export into excel categories for mail merge processes used in traditional marketing. That way you can send a brochure or newsletter by post to email adverse customers.

- **Can I Prepare My Newsletter in Microsoft Word and Then Cut and Paste?**

- No and Yes. NO you cannot cut and paste directly from word into the editor without creating problems. If you prepare your text/copy in word then you need to copy the text and paste it into notepad or WordPad. You then re-copy and paste the text into the email editor. This strips all the hidden XML and Microsoft specific code which does not appear correctly in many non Microsoft email clients.

- You can prepare your ideas in word however but direct copying and pasting will be a problem unless you follow the above procedure.

Frequently Asked Questions 6

When Should I Send My Emails Out?

- We recommend that you send your emails out after 9.30 in the morning on a week day. This means that the person has likely cleared out their spam from the night before (and/or weekend) and so when your email comes in at can get more attention as a fresh email.

- Timing of emails will then be dependent on your industry. For example some travel deals may need to be sent out as soon as you have notice of them irrespective of day.

Frequently Asked Questions 7

What image sizes should I use?

- Images need to be resized on your computer before uploading and will generally by along the lines of
- 750 pixels wide for a full width image or newsletter banner header (this may be to big and 716 pixels would be the recommended maximum if printing out the newsletter is a consideration.
-
- 150- 250 pixels wide for a picture that sits to the left or right of some text is usually a good guide.
- So make sure firstly your picture is less than 750 pixel wide for an email newsletter. This means that a picture straight off a digital camera will be too big. You need to open it and save it as a smaller pixel width.
- Once you have resized and the uploaded some images and see what they look like when you drop them into the editor you should get a sense as to whether a 250 pixel wide image is suitable or too wide or too small for your particular newsletter.
- There is a tutorial on changing image sizes on our web site in the support section.

Frequently Asked Questions 8

Can I have a Custom Designed Email Template?

- Yes. We can organise a custom designed template that you can use over and over for your email marketing.

Can I Upload My Own Image Header for Email Newsletters?

- Yes you can create and upload your own image header for email marketing. We recommend that you don't make it any wider than 750 pixels and that 716 pixels wide should print on most peoples A4 printers.

Frequently Asked Questions 9

What width of email should I use in order for it to print will on A4?

- We recommend 716 pixels is the maximum width of the table an images to be able to print on an A4 sheet width wise. 700 pixels wide is quite common for the width of an email newsletter header. Ezine Articles newsletters are 645 pixels wide. PR Web Newsletters are 545 pixels wide. Netregistry alerts are 655 pixels wide.

- So you can see there is some variation in email newsletter widths. Ideally you would test which width you found to print appropriately. I found that 716 pixels was ok for my printer as an absolute maximum.

Can I create a whole series of Email Autoresponders?

- Yes – you can create emails/autoresponders to go out at times days after someone has subscribed to an autoresponder series.

- You can create hundreds of autoresponders so that one goes out each day or each week or you may create just three emails/autoresponders to go out at specified schedules.

Can I Download My Database in Excel Format

- Yes you can download your database in CSV format which opens in Excel and other spreadsheet programs. This makes your email database transportable.

- Plus you can

- - Download the entire database with all fields

- - Download selected categories only with selected fields

- - Download selected subcategories only with selected fields

Frequently Asked Questions 12

- **What is Download Multiple Category Contacts?**
- This enables the download in the contact list and the category lists which contact are assigned to as two separate files.

- **What Do I Need to Do Enable Bulk SMS Sending?**
- You need to create an account with ww.globalsms.com.au
- With GTP iCommerce Go to: Company>>iContact Details and enter your global SMS username and SMS password into the space provided.

Can I Get Phone Support and Training

- Yes. You can call our office weekdays for phone support, trouble shooting and training. Call 1300 856 533

- Training is provided on site at $132 per hour.

Promotional Codes

What are Promotional Codes?
How Do They Work?
Key Elements of a Promotional Code
How to Create a Promotional Code

What Are Promotional Codes?

- A promotional code allows customers to get a percentage discount or a flat dollar value discount off a purchase.

- For example. As part of a promotional email you may give customers a $20 discount voucher code to use within 7 days with a minimum spend of $100. Promotional Code: b1c34

How Do They Work?

- You create a promotional code and set the rules as to how it is to be used
- You send out the code to your database or the lucky recipient's as a promotion.
- Customers add items to their shopping cart and then at the checkout enter their code.
- The code is looked up for validity and amount and the voucher amount is discounted off the purchase price.
- Customer finalises order at a cheaper price.

Key Elements of a Promotional Code

- The Code
- Whether it is a percentage discount or a dollar amount discount
- The value e.g. 20% or $20
- The minimum purchase requirements e.g. $50
- The expiry date
- Whether only one person can use it once or whether the code can be used many times by many people.

Benefits of Using Promotional Codes

- There is no need to print out promotional codes hence; savings on promotional materials. You can email out your promotional code.

- This is by far the best marketing tactic to invite clients to make a first purchase or try their products and/or services.

- Promotional codes have an expiry date creating a sense of urgency to use them.

- Promotional codes could reach thousands of clients since it can be advertised or promoted in Facebook, MySpace and other social networking sites bringing greater probability of sales coming in.

How to Create a Promotional Code

- Click on Affiliate
- Campaigns
- Add Campaign
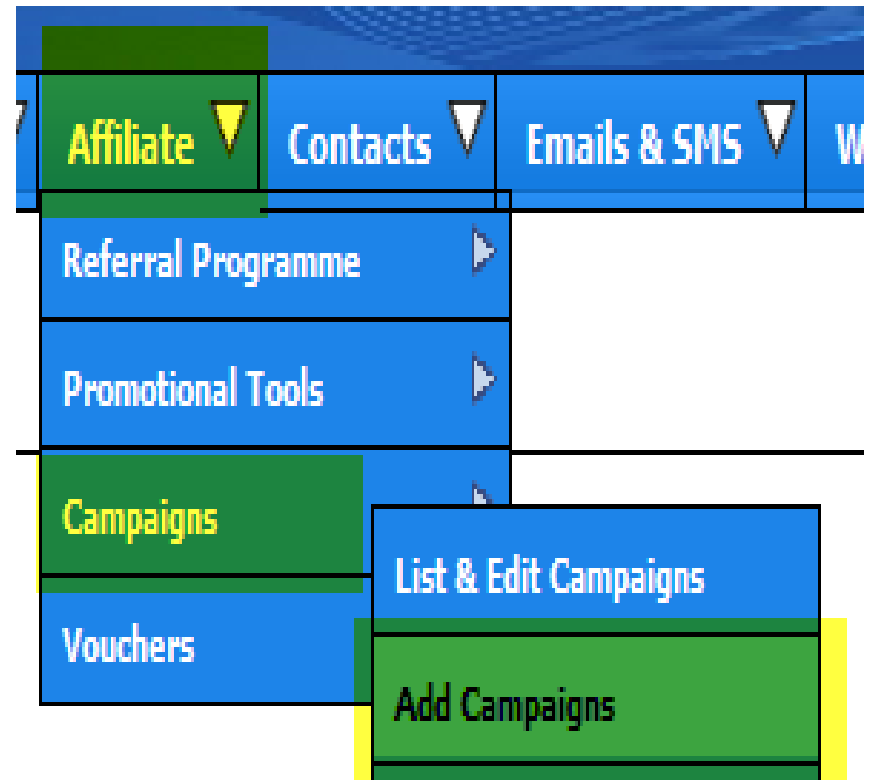
How to Create a Promotional Code

- Give a promotional series name for your reference only
- Set code expiry date
- Set discount as $ or %
- Set promotion code
- Set value of code
- Set minimum spend level
- Select whether the code can be used once or more than once
- Click Add Promotion

Only put numbers and no $ signs in the "Value of Promotion" and "Customer Must Spend" fields.

Automatic Voucher Generation For New Contacts Who Sign Up

What is an Automatic Voucher?

- An "automatic voucher" is where the web site automatically creates a voucher code of a certain value for a customer based on them filling in a form on your web site
  - Join
  - Competition
  - Contact Us

Automatic Voucher Generation For New Contacts Who Sign Up

- The CMS can be set up to automatically send a promotional voucher code to anyone who signs up or fills in a competition or contact form

- There is **separate power point** on how to make this work. Please request this or access this file from our resources section.

Affiliate Marketing on Your Site

Affiliate Marketing Relates to eCommerce Web Sites Only

What is Affiliate Marketing

- Affiliate marketing is where you reward others for promoting your web site.
- With GTP the reward provided is in the form of a money in credit towards future purchases from you.
- Read the following examples to understand…

How Does Affiliate Marketing Work

- Person A signs up as an affiliate to your GTP site
- Person A **creates a link to your web site** from their web site
- Person B goes to Person A's web site
- Person B clicks the link on Person A's Web Site and comes to your GTP built website
- GTP track that Person B has been referred by Person A
- Person B buys something from you
- Person A is given a credit in dollar terms based on a fixed percentage of the sale.

Affiliate Marketing – Practical Example

- Dale signs up as an affiliate to your GTP site that sells toasters (www.toastersales.com).
- Dale creates a link to your web site from his own web site www.ilovetoast.com
- Customer James goes to Dales site www.ilovetoast.com
- James clicks the link on www.ilovetoast.com and comes to your GTP Website www.toastersales.com
- GTP tracks that customer James has been referred by Dale
- Customer James Buys a Toaster for $50.00
- Dale is given a credit in dollar terms based on a fixed percentage of the sale. E.g. 10% which becomes $5.00
- 10 Customers like James buy toasters and Dale now has $50.00 in "affiliate credit".

How Does The Affiliate Use Their Affiliate Credit

- The affiliate credit that has been adding up can be used on future sales in your business.

- For example when Dale on the previous screen comes to buy a toaster from your website, he can log in and the $50 he earned in affiliate credit will be taken off his toaster purchase.

- This is his reward for bringing in an extra $500.00 in sales for you.

Affiliate Rules

Affiliate rules let you control how the affiliate program works for you. .. You can

- Set the percentage rate of the reward
- Set the minimum spend a customer must make before you provide a reward
- Set the maximum spend level that a reward will be accrued for. This caps the reward earned.
- Set the minimum spend an affiliate must buy from you before they can use their reward
- Set the maximum amount of affiliate credit that an affiliate can use on any one purchase.

The Real Benefit of a GTP Affiliate Program

- The way that GTP has developed their affiliate system means that each new affiliate link to your web will boost your link count from Google

- This is different from many affiliate systems which hold no search engine optimisation value.

- Affiliates can link to you just using your www.domainname.com link and we will know that the visitor has come from their website.

Feedback

- Please provide feedback on how well this document helped you understand your content management system and update your website.

- If you have improvements to suggest please send to dale@gtp.com.au for review.

Thankyou

End of Training Document

www.gtp-icommerce.com

1300 856 533