# Recite CMS Control Panel Add-On User Guide: E-commerce

**Recite CMS Package: ecommerce-2.1.0**

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# Chapter 1. Introduction

The Recite E-commerce module allows you sell your products and services online. Users can place orders on your web site and pay in real-time using third party payment providers. This section covers the various aspects of the e-commerce module, including:

- Configuring e-commerce settings

- Managing products and product types

- Managing orders, payments and refunds

- Managing coupons

# Chapter 2. Getting Started

There are several Control Panel widgets available to help you manage your e-commerce store. These are as follows:

- **Products Browser**. This widget is used for viewing a list of all products in your online store. Clicking on a product will open it in the **Product Viewer** widget.

- **Product Viewer**. This widget is used to view and mange a single product. Clicking on a product in the **Products Browser** widget opens this widget.

- **Product Types**. This widget is used for managing product types. Every product corresponds to a single type, each of which can have any number of custom fields.

- **Payment Gateways**. This widget is used for managing the payment gateways that users can pay for their order with.

- **Pricing Profiles**. You can offer different pricing on products to different segments of users. This widget allows you to manage the different pricing profiles.

- **Order Browser**. This widget allows you to see a list of orders in the system. You can filter orders by their status. Clicking on an order opens it in the **Order Viewer** widget.

- **Order Viewer**. This widget is used to view and manage a single order. Clicking on an order in the **Order Browser** widget opens it in this widget.

- **Order Settings**. This widget allows you to control the ordering process. You can manage custom steps in the ordering process, as well as custom fields on any of the steps in the ordering process.

- **Payments Browser**. This widget allows you to see a list of the most recent payments in your e-commerce store.

- **Coupons Browser**. This widget allows you to view a list of coupons that are available to users. Clicking on a coupon opens its details in the **Coupons Viewer** widget.

- **Coupons Viewer**. This widget is used to view the details of a single coupon. Clicking on a coupon in the **Coupons Browser** opens it in this widget.

You can add these widgets manually (from the `E-commerce` category in the widget browser), or you can create a new tab using the **E-commerce** pre-defined layout.

The following figure demonstrates this layout. The tab is a two-column layout, with the **Order Browser** widget in the left column and the **Product Browser** widget in the right column.

*Figure 2.1. Sample tab layout for managing your e-commerce store*
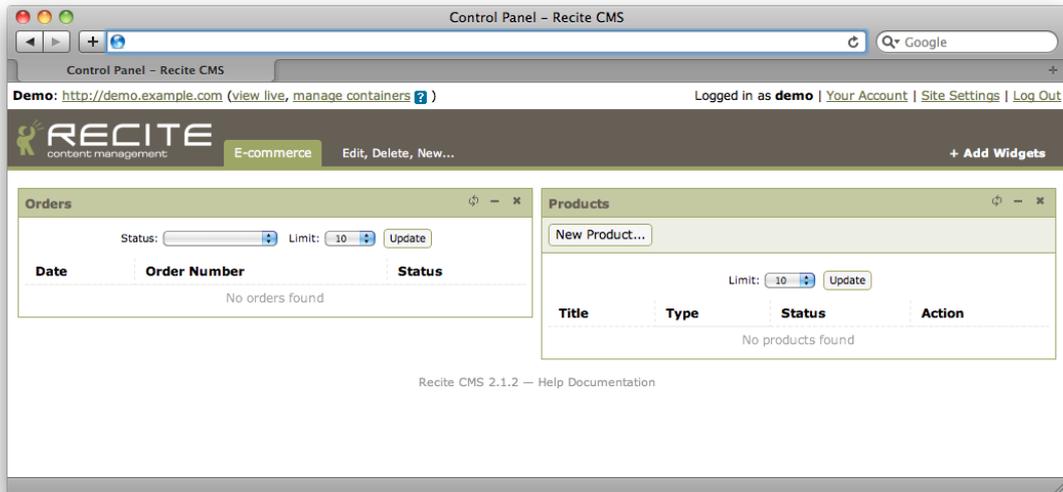
# Chapter 3. Managing Product Types

Product types allow you to store different properties for different products. For example, your online store might sell shoes and books. In this case you would create a product type called "Shoes" with a "Size" and "Colour" property, as well as a "Books" product type which has an "Author" property.

Product types are managed using the **Product Types** widget.

## Creating a Product Type

To create a new product type, click the **New Product Type** button in the **Product Types** widget.

You will then be required to enter a title for your product type, as well as selecting the custom fields for the type. As an example, if you were to create a product type called "Shoes", then you might add an `Integer` field called "Shoe Size".

Click **Create Product Type** to create your new product type. The product types widget will then refresh to show the new type.

## Editing a Product Type

To edit an existing listing type, click the **Edit** link beside the product type.

Make any changes as required, then click the **Save Product Type Changes**.

## Deleting a Product Type

To delete a product type, click the **Delete** link beside the product type you want to delete.

You must confirm this action before the product type is deleted. Click **Yes, delete the product type** to delete the product type.

### Note

You cannot delete a product type if there are still products using the type. You must first delete those products.

# Chapter 4. Managing Products

Products can be managed using the **Products Browser** Control Panel widget. Clicking on a product in the widget will open that product in the **Product Viewer** widget, which gives you more options for managing that product (such as setting pricing, related files and pricing).

## Creating a Product

To create a new product, click the **New Product** button in the **Products Browser** widget. If you have multiple product types configured you will firstly have to select which type of product you're creating (you must have at least one product type in the system in order to create a product).

You will then be shown the product creation form. Enter the details for the product and click **Create Product**. The new product will now appear in the list of products.

Clicking on this product will open it in the **Product Viewer** widget.

## Managing Product Pricing

To manage a product's pricing, click the **Pricing** tab when viewing the product. You can then set the price for each pricing profile in the system.

### Note

There must be at least one pricing profile created in order to manage the price of products.

When setting the price for a product, you can set different pricing based on the quantity included in the order. For instance, you can charge a lower rate per item if the customer buys 5 or more of a product.

Once you've set the pricing, click the **Save Pricing Changes** button.

## Managing Product Quantity

The manage the quantity for a product, click the **Quantity** tab when viewing the product. This tab shows you a summary of the current activity for the product.

Click **Edit Quantity** to make changes to the availability of a product. By default it is assumed you have unlimited quantity of a given product.

Once you've made the necessary changes, click the **Save Quantity Changes** button.

## Editing a Product

To edit a product, click the **Edit Product** button when viewing the product. You will then be shown the product edit form. Update any details as required then click the save button.

## Deleting a Product

You can delete a product by clicking the **Delete Product** button when viewing a product. You will prompted to confirm this action. Click **Yes, delete the product** to proceed.

# Chapter 5. Managing E-commerce Settings

There are many aspects of your e-commerce store that can be customised, such as shipping and tracking details, pricing profiles and payment gateways. These tasks are covered in this chapter.

Order settings, e-commerce settings bundle, pricing profiles

## E-commerce Settings Bundle

There are a number of settings that can be configured using the **Site Settings** link at the top of the Control Panel. Selecting the **E-commerce** bundle will reveal these settings. Updating any settings as required and click **Save Settings**.

## Managing Order Settings

Using the **Order Settings** Control Panel widget you can control the order process that users follow when they want to buy products.

This widget contains two primary sections: checkout steps and order emails. The checkout steps section allows you to add extra steps to the ordering process.

### Managing Order Steps

You can add custom steps to the order process, each of which can have custom fields. The values entered for these fields are then linked to the created order. Additionally, you can add custom fields to any of the existing steps. For instance, you can add a "agree to terms and conditions" label to the confirmation page if you wanted to.

Create a new step by clicking the **New Step** button when viewing the list of steps. You can change the order of steps by clicking and dragging the step in the list of steps.

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**Note**

Some steps cannot have their order changed. For instance, the confirmation page will always come last.

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### Managing Order Emails

The other aspect to managing the order process is to control emails that are sent. Using the **Order Emails** section, you can create any number of different emails. For example, you can create one email that is sent to an administrator when an order is placed, and a different email that is sent to the customer.

You can create emails for several different actions that occur: order placed, payment received, order shipped and order cancelled.

The email template must exist (using the template management tools) before you can add the new email to the order process.

## Managing Payment Gateways

A payment gateway is what is used to handle the transaction between you and the user. For example, if the user wants to pay using a credit card, a payment gateway linking your web site to your bank is used.

Recite CMS comes with several pre-defined gateways, including PayPal IPN (Instant Payment Notification), "offline payment" (meaning no payment is taken when the order is placed), and a "mock" credit card gateway (allows you to test accepting a credit card, but no funds are taken from the card).

### Note

Additionally, Recite CMS includes an API that allows developers to add custom payment gateway types. More details can be found on the Recite CMS Documentation Portal [http://docs.recite.com.au].

Payment gateways are managed using the **Payment Gateways** Control Panel widget. To create a new gateway, click the **New Gateway** button. You will then have decide which type of gateway to use.

You can have any number of gateways. For example, you may want to let a user decide which method they want to use to pay. Additionally, you can temporarily disable payment gateways (without having to delete them).

If you only have one gateway available, users will not be prompted to choose.

# Managing Pricing Profiles

Pricing profiles allow you to define a different set of pricing for different categories of users. For example, you may want to offer one price to registered members of your web site and a different price to anonymous users.

When managing products, you can enter the price for each pricing profile as required. You must have at least one pricing profile in the system in order to be able to sell products.

Pricing profiles are managed using the **Pricing Profiles** widget. To create a new pricing profile, click the **New Profile** button. When creating the profile, you can choose which user directory (or directories) the pricing profile applies to. To use a pricing profile as the default pricing, don't choose any user directories.

# Chapter 6. Managing Orders

When an order is placed it will appear in the **Orders Browser** Control Panel widget. You can filter orders by their status if required. Clicking on an order will open it in the **Order Viewer** widget.

This widget shows a variety of information of order. Firstly, the order status is displayed on the **Overview** tab. You can update the status as required (such as marking it as shipped and entering a tracking number).

The **Details** tab shows you details about the customer. That is, it shows the information they entered when placing the order.

Next, the **Items** tab shows all of the items that were ordered by the user.

The **History** tab shows you a complete history for the order, such as when it was placed or when the status was updated. You can add a custom message if required. If you are making orders available for viewing on your web site you can display this history.

The **Payments** tab shows a list of payments that have been received for the order. You can manually add a payment here if required.

# Chapter 7. Managing Coupons

Coupons allow you to give discounts to your customers by way of a coupon code. That is, users can enter a coupon code when they follow through your web site's checkout process. Coupons are managed using the **Coupons Browser** Control Panel widget.

## Creating a Coupon

To create a new coupon, click the **New Coupon** button on the **Coupons Browser** widget. You will then be shown a form to create a new coupon.

Enter all details as required then click **Create Coupon**. Once your coupon has been saved the list of coupons will refresh to show the new coupon. Click on the coupon to open it in the coupon viewer widget.

## Editing a Coupon

To edit a coupon, click the **Edit Coupon** button when viewing the widget. You can now update any details as required.

Click the **Save Coupon Changes** button to save your changes.

## Deleting a Coupon

To delete a coupon, click the **Delete Coupon** button when viewing the coupon.

You will be prompted to confirm deletion of the coupon. Click the **Yes, delete this coupon** button to confirm deletion.