ProteanPaper Simple Shopping Cart – Quick Start Guide

Introduction

Once logged into the ProteanPaper system, you will be brought directly into the BACK OFFICE (Figure 1). This area provides two modules containing lists of functions based upon permissions granted by the super user. Since we are assuming that the user reading this document for the first time set up the company, the initial user is considered a super user. Therefore you have access to all functions in all modules purchased. You may grant addition access for other users at any time. Further details can be found in section three of this guide.

The BACK OFFICE is the starting point from which you can set up your business. Consider the back office your virtual executive suite as it contains everything you need to establish your company, manage employees, enter/track products, view reports, and more. The back office can even be decorated to suit your tastes. The BACK OFFICE displays all active modules and functions contained therein. Take a few moments to acquaint yourself with the available options before proceeding.
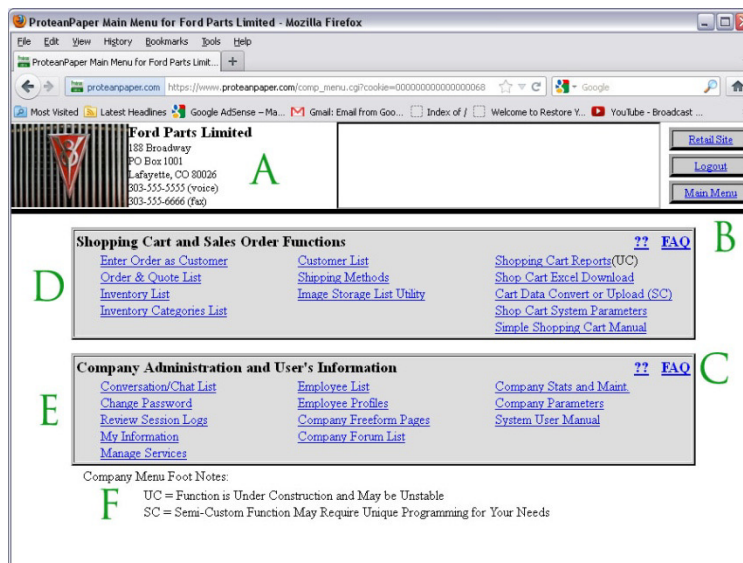

Figure 1 - Typical Back Office

A - Header logo with company information.
B - Navigation Menu.
C – Links to FAQs and help functions.
D – Shopping Cart and Sales Order Functions module menu.

E – Company Administration and User's Information module menu.
F – Company menu notes.

Once familiar with the basic BACK OFFICE setup, the following steps will allow you to establish the parameters for the appearance of your shopping cart and checkout system. You will also enter the items that you want to sell, their descriptions and prices, and define their item numbers. You will describe your location and set up shipping and sales tax parameters. You will indicate what types of payment you will accept. Next, if you have elected to use PayPal, you will need to establish a payment account with them and set up the parameters for receiving payments. The last thing you will do is to set-up your store's web site. Here you will use whatever tools you already have to edit your web pages and put in BUY buttons, and CHECKOUT buttons so that your web pages are connected to the ProteanPaper shopping cart.

This may sound like a lot of work, and it is a significant effort, but you will be surprised at how fast you can get all this working. Here are the steps again:

1. Sign up for an evaluation or a subscription to the ProteanPaper shopping cart system. (we assume you have already done this).

2. Using the ProteanPaper menu system, enter all information about your company.

3. Enter information about employees who will have access to the ProteanPaper menu.

4. Set-up the look of the ProteanPaper back office.

5. Set-up the appearance of the ProteanPaper shopping cart and checkout process. This is what your customer's will see.

6. Describe where your company is, what sales taxes to charge, and other specifics of your company

7. Enter items you want to sell into the ProteanPaper inventory. You will need descriptions, prices, and an item code to refer to the item via hyperlinks.

8. Enter shipping information. Describe shipping methods, the locations you can ship to and the corresponding charge for these shipping methods.

9. Indicate what types of payment you will accept. Enter any pertinent data such as COD charge or PAYPAL account codes.

10. If you elected to use PAYPAL, go to their site: http://www.paypal.com and set up a business account to receive payments into. This costs little to nothing and is a great way to accept credit card payments. You will need to set up the options for receiving payments at their site.

11. Here is where most of your creative work will occur. You now need to put in buttons or links into your web site so that customers can buy things. You have a lot of choices here but the

simplest implementation just needs a "BUY" button for each item you display for sale on your site, and a 'VIEW CART' button to see what they have ordered and to allow them to check out. The shopping cart system parameter page gives examples of the link code to implement the 'VIEW CART' function in static pages. Likewise, the shopping cart inventory edit page gives examples of code for a BUY, WISHFOR, QUOTE and DETAIL buttons.

12. Any items that you show on your web site for sale can draw information from the ProteanPaper inventory database. That is to say, you can either have pricing information static on your web pages, or you can have your web pages refer to the ProteanPaper database for pricing, descriptions, etc.

13. Now you promote your site in whatever way seems best to you and wait for email notification of all your sales. When you receive a notification, you can get more information about customers and orders from ProteanPaper BACK OFFICE menu.

1) Establishing Your Company within ProteanPaper

We are assuming you have already done this and can log into the ProteanPaper BACK OFFICE menu system. However, if you can not, then go to http://www.proteanpaper.com and click on the link "Evaluate ProteanPaper for free". Follow the instructions there to create a bare bones company and a super-user (yourself) to administer the company. While you are at the home screen you can click on the links describing ProteanPaper and its philosophies.

When you establish a company, you need to enter a few basic items. These are a code to refer to the company by, the company's formal name, and a valid email contact for the administrator of the company (presumably your email).

You also have to supply information for the super user who will be administering the company (again presumably you). Enter a user name for the super user. Then check the modules you will be using/evaluating for the company. Last of all click CREATE. This will set up the bare bones data base for you company. You will get an error if the code you selected for your company is not unique. If this happens click the back arrow on your browser and select a different code. Keep in mind your company code will form the base for your web address in the ProteanPaper system. Choose something concise and appropriate (Figure 2).

Assuming that your code is unique, you will get a screen indicating that the company was successfully created. Now you will need to open your email reader and look for an email sent to you by the ProteanPaper robot. In this email is some more disclaimer text and a temporary password for the super user. You need to log into your newly created company and change this temporary password as soon as possible. This ensures that the company is secure, even if someone had intercepted the email. The temporary password is a random collection of numbers and characters, so you might want to cut the password from your email reader and paste it into the login screen for ProteanPaper to eliminate any possibility of input error.

Once you are logged into ProteanPaper menu system click on the "Change Password" function and select a new password for the super user. Now your system is secured and you can begin the process of bringing your store online.

2) Entering Your Company's Information

In this step, you will determine what your back office web pages looks like. There are limited options for changing the look, but more than enough to present an attractive and unique presentation. This helps to provide visual cues for yourself and your employees while they are working within the back office. Of course, there is more information to put in besides just the look of the company.

You also need to enter contact information, and some email control information. The contact information is straight forward, so lets start there. Click on the Company Parameters link found in the Company Administration and User's Functions menu of the ProteanPaper BACK OFFICE. A form appears which allows you to enter and edit the contact information. The company code cannot be changed and is shown for reference only. The company name should already be set from when you created the company. If you wish to change it, you may do so by entering the new information into the Company Name field. The Company EIN is the federal employee identification number which is used with payroll applications and which is a common requirement for companies that buy from you. (They have to report this number to the IRS). The

company address is obvious. However, The Country, Foreign and Zip code fields might be confusing, especially if your company is located out of the United States of America.

Addresses used by ProteanPaper will format in one of two ways. Either by the USA standards of City, State, zip code or by a non-formatted standard where state and province and postal code are entered in the field called "foreign". Which standard is used depends upon what the Country is. If the country is "United States of America", then the standard is the USA standard. The Country field is a drop down combo box. Initially, the only country available is the United States of America. Sorry, if this seems USA centric, but this product was written in the USA on the assumption most users would be in the USA. To enter a country other than the USA, you must enter it into the shipping methods database for the shopping cart. The same limitation exists for your customers. The only options they have for selecting a country are those you have indicated that you ship to. Make sure you enter a shipping method for all countries you expect to sell to on a regular basis.

Next enter the telephone numbers and the email addresses and your web home web site. Your home web site does not need to be the same as the sales site. The public sales email will appear on sales based communications. The webmaster email will appear on communications pertaining to the web site itself and the private contact email is used to communicate with the administrative contact for the company. A note of interest is the contact email semaphore. This value will appear in the subject line of all email to the company contact. So, you can use this in conjunction with your email client to filter and mark these emails. This allows you to identify emails from ProteanPaper as separate from all spam or other emails.

Several options are available to present your site (Figure 3). Available options are "coming_soon", "down_for_maint(enance)", "store_search", "single_page", and "custom_call". In order to make a selection from the BACK OFFICE click the COMPANY PARAMETERS link in the Company Administration and User's Information module. Find the field titled "Initial Consumer Site Selection". Use the drop down menu to make your selection. Options are as follows:

Coming Soon – Displays a message indicating your site is under construction.
Down for Maintenance – Displays a message your site is down for maintenance.
Store Search – Will display your site in the normal fashion.
Single Page – Displays the page you created using the rich text editor found in the COMPANY
        PARAMETERS.
Custom Call – Will set your page to display based on the address you provide in the "Custom
        Call to Initial Consumer Site" field.

Initially your site may have very little content to display to your customers. You may wish to use the coming soon option until you are ready to present your site. The default setting is store search which will direct your customers immediately to your products. This will update as products are added. These options may be changed at any point by selecting a new choice from the drop down menu. Save your changes by using the UPDATE button at the bottom of the page.

Edit Company Parameters

Company Code: fordpar
Company Name: Ford Parts Limited
Company EIN:
Company Address1: 188 Broadway
Address2: PO Box 1001
City (USA): Lafayette , CO
Postal Zip Code (USA): 80026
Foreign (nonUSA):
Country: United States of America

Sales Phone Number: 303-555-5555
Switchboard Phone Number:
General Purpose FAX: 303-555-6666
Public Sales Email: sales@fordpartsltd.com
Webmaster Email: admin@fordpartsltd.com
Company's Web Home Page: www.fordpartsltd.com

Initial Consumer Site Selection for (fordpar.proteanpaper.com): coming_soon
Custom Call to Initial Consumer Site (fordpar.proteanpaper.com):
    coming_soon
    coming_soon
    down_for_maint
    store_search
    single_page
    custom_call

Private Contact Email: opmanager@fordpartsltd.com
Contact Email Semaphore: FORDPAR

User Password Expiration: 366 days

Figure 3 - Site selection options

3) Grant Access to Other Employees so they can use ProteanPaper

Now you need to let any additional employee's have access to your system. Start by creating a few employee profiles if desired. The default profile is SUPERUSER. Should you wish to grant total access to all functions in the back office to any employee able to log in, then you need go no further with profiles and may skip to EMPLOYEE LIST below. Should you desire to limit access to various functions to an employee now is the time to create a new profile. Start by clicking the EMPLOYEE PROFILES link in the Company Administration and User's Information menu in the BACK OFFICE. The only profile available at this point is the default SUPERUSER profile. Create a new profile by clicking on the Add-Blank link. Modify the profile name and description as needed, check the appropriate boxes to grant access, and update to save your changes (Figure 4).
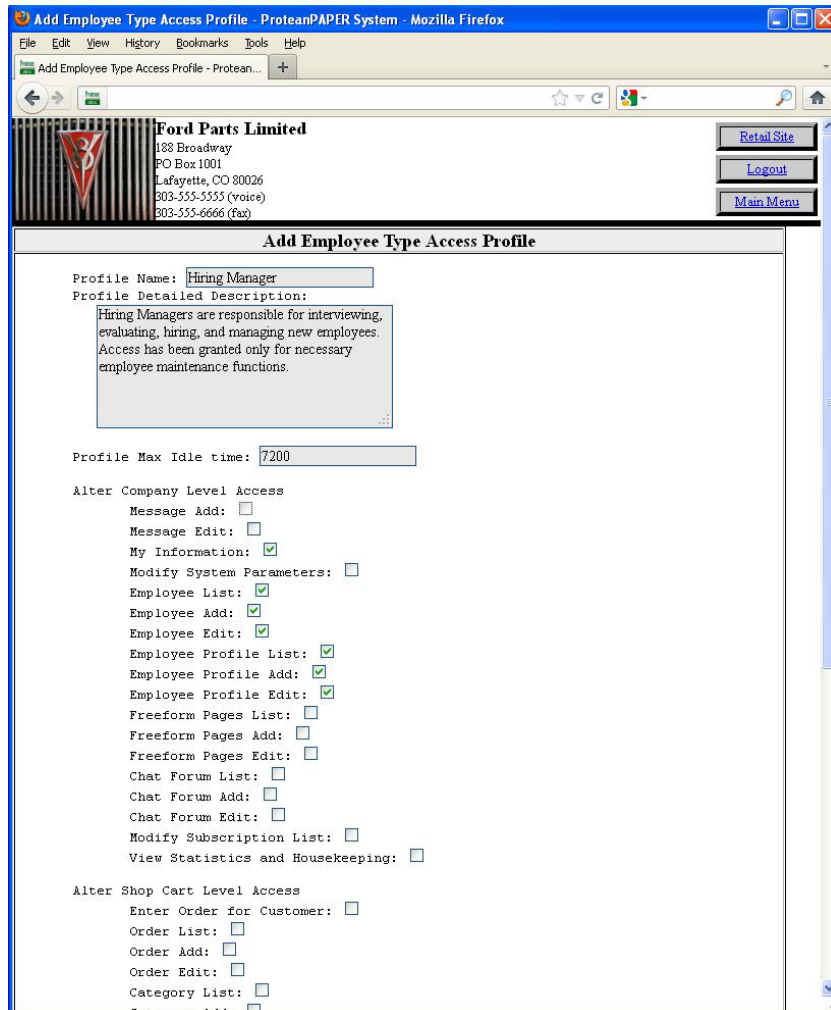
Figure 4 - Editing an employee profile

Now that the proper profile has been created, return to the BACK OFFICE and click EMPLOYEE LIST link in the Company Administration menu. Here you will see a list of Employees that have been entered for your company. At this point, the only employee will be the administrative super user. Add a new employee by clicking on Add-Blank . This will create a new record in which you will need to enter all information and grant specific accesses to the new employee. Not all employees entered need be granted access to the ProteanPaper menu. Certain modules may need the employee record to grant them access as a known user of limited functions (like interoffice communications, or the payroll system). Other employees may be given access to some but not all functionality within ProteanPaper, while other employees may be given full access as backup administrators.

Fill in the required employee code (of your choosing), name, email address, and email semaphore. Should the employee need perform a job which requires access to the BACK OFFICE, check the Login Permission box. Now is the time to use the profile you created above to grant specific permissions. Using the drop down menu at the Access Profile field, select the desired profile for this employee (Figure 5). Further information, such as supervisory duties,

budgeting authority, and communications access can be granted below. Update, using the button at the bottom of the screen, to save changes.

Figure 5 - Adding a new employee

4) Set up the Look of the ProteanPaper Back Office

Setting up the back office appearance can be accomplished by clicking on the COMPANY PARAMETERS link in the Company Administration menu (Figure 6). Once the Company Parameters page has loaded, two new lists will be generated which affect your company information as well as the appearance of the back office.

Company Administration and User's Information		?? FAQ
Conversation/Chat List	Employee List	Company Stats and Maint.
Change Password	Employee Profiles	Company Parameters
Review Session Logs	Company Freeform Pages	System User Manual
My Information	Company Forum List	
Manage Services		

Figure 6 - Company Parameters link

EDIT COMPANY PARAMETERS:
Fields in this area allow the user to change company information such as the company name, address, email addresses, and contact numbers which appear in the header of the company back office pages, other pages within the Protean Paper system, and some documents generated using the system.

BACK OFFICE PRESENTATION:
These options allow the user to change the appearance of all back office pages. Foreground and background color can be selected in hexadecimal format and entered into the appropriate field. In addition one can choose a color by simply clicking on the small color pallet and selecting the desired color. Once selected, these changes take effect after updating the page using the **UPDATE** button at the bottom of the page.

BACKGROUND IMAGE:
A background image may be selected to replace a solid color background. These images can be uploaded directly from your computer in .jpeg, .bmp, .gif, .tiff, .png, and others. Background images will repeat to match your display size. We would suggest avoiding an animated background due to the fact that it becomes very distracting on the screen.

In order to upload an image, select upload from the drop down menu, click the browse button for local image path, select the image file on your local machine, and finish by clicking open in the windows dialogue box. This will display the path to the file on your local machine in the local image path field. Save your changes by clicking the update button the bottom of the screen. Your background image will now be set to shown by default. Selecting hide from the "Use Background Image" drop down menu will retain the image while hiding it from view on your pages. In order to show your image again on back office pages, simply select show in the drop down menu. To remove the image from memory as well as pages, select delete. A different image may be selected at any time by repeating the upload process mentioned above.

*It may be necessary to refresh the page in your browser in order for the image to properly display on your local machine.

HEADER LOGO IMAGE:
The header image is displayed in the upper left corner of all back office pages. Header images can be selected using the same methods described in the background image section above. Header images are best displayed in 225(w) x 100(h).

5) Set up the Appearance of the ProteanPaper Shopping Cart System

Setting the appearance of your shopping cart is a critical step in presenting your products to your potential customers on the web. Changing settings here will ultimately affect the way in which your items are viewed by millions of internet users worldwide. Therefore it is important to spend time considering how you wish to present your products. Shopping cart parameters will give you the options to change your storefront to suit your individual needs.

Equally important is the way in which you intend to use your shopping cart system. Are you using an existing website to which your cart will be added? Do you wish to use your cart to present your products as a stand alone website? Perhaps you intend to set up buy buttons only in your existing website? A few moments considering the way to integrate the Protean Paper shopping cart into your operations may save you many needless steps in the future.

Here are examples showing some of the different ways to use your shopping cart:

Static pages using buy buttons: www.nikonremote.com
Another static example: www.proteanlogic.com
Dynamic pages: www.howiebikeman.com

SHOP CART SYSTEM PARAMTERS can be reached by clicking on the link in the "Shopping Cart and Sales Order Functions" menu in your ProteanPaper BACK OFFICE (Figure 7).
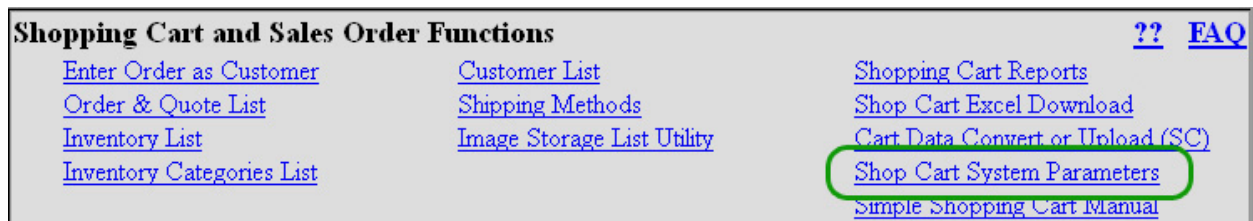

Shopping Cart and Sales Order Functions   ?? FAQ

Enter Order as Customer	Customer List	Shopping Cart Reports
Order & Quote List	Shipping Methods	Shop Cart Excel Download
Inventory List	Image Storage List Utility	Cart Data Convert or Upload (SC)
Inventory Categories List		Shop Cart System Parameters
		Simple Shopping Cart Manual

Figure 7 - Shop Cart System Parameters link

EDIT SHOPPING CART DISPLAY PARAMETERS:

>	**Company Store Web Site** – A URL address for your ProteanPaper website will be generated based on your choice of company code. If your company code is flyfishing, a site will be generated and automatically fill this field. Using the previous example the site will be flyfishing.proteanpaper.com. This field may be changed if using a static site. Simply enter your website address here, example, www.flyfishing.com.

>	**Title for Retail Pages** – Displays a title for your shopping cart pages.

Title Stub for Results – Displays in place of a title in your search results when a client views product details and other functions of the shopping cart.

Favicon – Displays an icon of your design in the address bar of the user's browser (Figure 8). Depending on the browser in use, the favicon may show up in tabs and bookmarks as well. This can be a great way to display your logo helping to establish your brand. Your clients will also remember your site and find it easier in their bookmark. Favicon use a special format and extension (.ico). A number of tools can help you prepare your image such as the one found at Dynamic Drive.

http://tools.dynamicdrive.com/favicon/
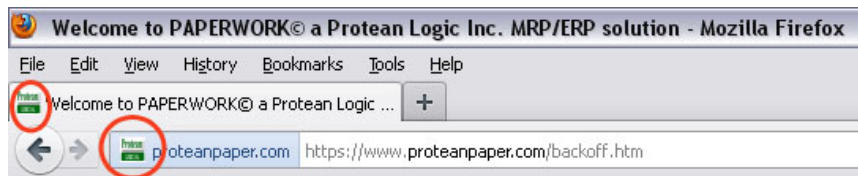
Figure 8 - Favicons displayed in Firefox browser

To add an icon to your site, select the upload image in the drop down menu at the "Favorite Icon (FAVICON)" field. Click the BROSWE button located next to "Local FAVICON Path". Find the file on your local machine and click open. UPDATE your page using the button at the bottom of the screen to save your changes. Your image will now be displayed in the "Current FAVICON" field. You may changes this image at any time by repeating the process above. You may also choose to hide or delete the icon by selecting the appropriate action from the drop down menu. The default value for this field is show. This will display the image the ProteanPaper logo until changed.

Foreground and Background Color – Displays the solid color of your choosing on every shopping cart page you create. Colors can be selected by entering a hexadecimal value for the color desired or by clicking on the color pallet icon.

Background Image – Displays a background image of choice on all shopping cart pages. To set and image select "upload" from the drop down menu, click the browse button next to "Local Image Path", find the desired file on your local machine, press open in the windows dialogue box, and update (Alt+Shift+4) or by clicking the update button at the bottom of the page. Use the drop down menu to show/hide/delete this image.

Header Logo – Using the header logo will present a banner at the top of your shopping cart pages very much like the back office banner image including full company name, address, phone numbers, etc.

Header Image – A custom image may be uploaded using this function. Uploading is accomplished in the same manner as setting the background image above.

Header Map Links – Enables the user to create customs links within the header image. This will allow the user to map out coordinates within the header image to create links to other pages or sites. Links can be created as rectangles, circles, or polygons. A rectangle uses coordinates pairs based on corners, such as lower left and upper right, creating a clickable area anywhere between these points. Circles use only three coordinates, the first pair sets a center point on the x,y axis. The third number represents how many pixels radiate from that point. Polygons are mapped in the same fashion however pairs need to be created for each point desired.

Many image editing programs contain features which will determine coordinates. MS Paint, included with all versions of Windows, is a good no cost option.

Once the map image has been created simply type the desired link into the "Link File" field and update to apply.

Frames - Entering an address in the Frames field will open the link in a new page or tab depending on browser. The default setting in this field, if one wishes to open in a new page, is _blank. Otherwise leave this field blank to continue browsing in the same page.

Bottom Nav Link Word – Entering a word in this field will create a navigation link that will appear in the navigation bar at the bottom of shopping cart pages. The same navigation bar will also appear at the top of pages, under the header, if the "Use Text Nav Bar at Top" box is checked.

Buttons – Default images have already been created for use in the ProteanPaper system which may be used freely if desired. Sizes have been set by default to set the appearance of the page in a predetermined format. Custom images that are user created may be used but will not be resized. Some adjustments to image dimension may be necessary to achieve an acceptable appearance within the shopping cart.

The "Search New" button will allow your clients to view all newly added items within a defined time period. The default time period is sixty days. The number of days can be changed by entering a different number into the "Days Items are New" field and updating. Note this will not change the default image button which is set for sixty days (Figure 9). Changing the button to text will update with the current value set in the "Days Items are New" field (Figure 10).
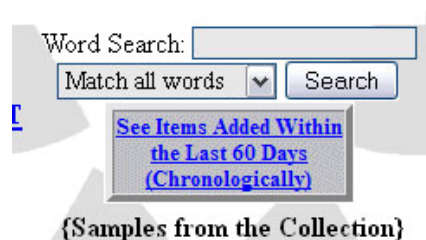
Word Search: [   ]
[Match all words ▾] [Search]

See Items Added Within
the Last 60 Days
(Chronologically)

{Samples from the Collection}
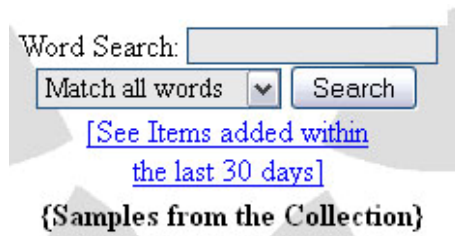
Figure 9 - Default Button Image

Figure 10 - Text Button

As mentioned above, the "Search New" button allows for user customization. The drop down menu will allow the user to show/hide an image. Change the image to text (Figure 9 above), return the current button to the default setting (Figure 10 above), delete the current button in use, or upload a custom image. To use a custom image, select upload from the drop down menu, click browse in local image path, select the desired image on your local machine, press open in the dialogue box, and update the page via the update button at the bottom of the screen.

The remainder of available buttons are: buy, quote, inquire, watch, remove, details, and email to. These buttons may be customized in the same way as the search new button mentioned above. These buttons also offer a rollover feature which will display a text message when the button is hovered over for a short amount of time in a browser. This can be used to create interactivity between the client and your site as well as providing some clarity for the function of a button.

Inventory Category Label – If using the ProteanPaper system solely for shopping cart functions, inventory category labels can be ignored. You may wish to make an entry in the category 1 field to denote your sales items especially if you are considering integrating your shopping cart with the ERP system. This will save you some time in the future going back to update all your items with the proper label.

Quick Search and Description Items – This list is used to define standard attributes of inventory in order to describe items quickly using a series of checkmarks. At the time this manual was written, this feature was still under development. Look for future guides to explain this feature or consult on-line documentation as it becomes available.

Accepted Payment Methods - Here you will be able to change the methods of payments you will accept from your clients. Check the appropriate boxes to enable payment types desired. PayPal payments will require the email address used on you PayPal account in order to direct your clients to the proper user. A PayPal page style may also be defined here. For more information on creating a customized PayPal page please visit :

https://www.paypal.com/cgibin/webscr?cmd=p/mer/cowp_summary-outside

Finally, a text box will allow you to send a customized default message to your clients. This message may contain specific instructions, details about purchasing, a short thank you note, or whatever you wish.

6) Describe Company Location and Sales Tax Parameters for the Shopping Cart System

Due to the many variables involved with taxation, including the fact rates always seem to be in flux, application of appropriate sales tax to your clients will be set up manually by the user. If you have some experience collecting tax from your clients, you may already be familiar with the tax rates on a national and local level. We strongly advise contacting your accounting division, tax advisor, or local government to determine these rates. Improper taxation can lead to loss of trust with your clients, auditing errors, and possible severe fines among other consequences.

Changing your tax rates is a straight forward procedure. Assuming you are in your back office main menu, click on the "Shop Cart System Parameters" link within the "Shopping Cart and Sales Order Functions" menu. Locate the "Material and Labor Sales Tax Rate" options on this page (Figure 11). Enter the appropriate information into the provide fields. When finished adjusting, update the page to save the changes.

Figure 11 - Sales Tax Tables

7) Enter Items you want to sell into the ProteanPaper Shopping Cart Inventory

If using the ProteanPaper shopping cart to present dynamic pages, entering inventory items is a critical step in presenting your products to potential clients. Adding pictures, descriptions,

setting pricing, and much more can all be found right here. Items can be divided into categories for ease of organization.

INVENTORY CATEGORIES LIST:
From the BACK OFFICE main menu, click on INVENTORY CATEGORIES LIST in the Shopping Cart and Sales Order Functions menu. Initially the list will be empty. Click on the Add-Blank link to enter your first category.

Category columns are largely ignored if using only the shopping cart module. If desired a category column may be entered in the SHOPPING CART SYSTEM PARAMETERS page. We would suggest ignoring the category columns if using only the shopping cart module.

Category code is a user generated code to identify your category. A description may be entered in the category description field. Category heading only may be enable or disable by checking the appropriate box. Category headings are helpful to divide similar items under a single heading, see example below (Figure 12). Category active either presents the category as active (available in your shopping cart) or disabled (unavailable in your cart) by checking the related box.

Add-Blank		Cat Type	Code/Tier	Category Description	Active	Aliased	Location	Last Reviewed
Edit, Copy, Review,	Sales	!	Reconditioned Custom Tools	Active			12/31/69 17:00:00
Edit, Copy, Review,	Sales	!	Reconditioned Parts	Active			12/31/69 17:00:00
Edit, Copy, Review,	Sales	!	Restored Cars for Sale	Active			12/31/69 17:00:00
Edit, Copy,	Sales	1100	**Body/Exterior**	Active			Title Heading
Edit, Copy, Review,	Sales	1101	Windshield Wipers	Active			12/31/69 17:00:00
Edit, Copy,	Sales	1200	**Electrical**				Title Heading
Edit, Copy,	Sales	1300	**Interior**	Active			Title Heading
Edit, Copy,	Sales	1400	**Powertrain**	Active			Title Heading
Edit, Copy, Review,	Sales	1401	Accessory Drive	Active			12/31/69 17:00:00
Edit, Copy, Review,	Sales	1402	Cooling System	Active			12/31/69 17:00:00
Edit, Copy, Review,	Sales	1403	Engine	Active			12/31/69 17:00:00
Edit, Copy, Review,	Sales	1404	Exhaust	Active			12/31/69 17:00:00
Edit, Copy, Review,	Sales	1405	Filters	Active			12/31/69 17:00:00
Edit, Copy, Review,	Sales	1406	Fuel System	Active			12/31/69 17:00:00
Edit, Copy, Review,	Sales	1407	Ignition	Active			12/31/69 17:00:00
Edit, Copy, Review,	Sales	1408	Transmission	Active			12/31/69 17:00:00
Edit, Copy,	Sales	1500	**Suspension/Steering**	Active			Title Heading
Edit, Copy,	Sales	1600	**Tools**	Active			Title Heading
Edit, Copy, Review,	Sales	1601	Brakes	Active			12/31/69 17:00:00
Add-Blank				End of List (19 items in list)				

Figure 12 - Inventory Category list

Enter a category description. These can be named using whatever convention makes sense to you. In the example above (Figure 12) the user has identified major systems associated with an automobile as headers. Under each header the user has created specific categories for each subsystem. This will keep the information logically organized within the company as well as within dynamic pages created for your shopping cart (Figure 13).

Figure 13 - Category results in dynamic pages

A category alias may be selected from currently active categories by using the associated drop down menu. Only active, non header type, categories may be selected. This can be helpful if you have identical product categories that are described differently. For example, you may refer to a category as "Engine Lubricants" but suspect some customers will think in terms of "Lubricants for Engines". Any inventory items that are added under the "Engine Lubricants" category will automatically appear under all alias categories as well such as the "Lubricants for Engines" category when customers view your site.

Category items location is a data field used to record the physical location of items within your facility. This site is for human consumption only, as no other system references this data. Also, each individual inventory item has similar fields for items which may be an exception to the rule in terms of its location.

Finally, you may associate an image with a category. This will present a small thumbnail next to your categories in search results (dynamic pages only). Images may be added by selecting UPLOAD from the drop down menu. Click the BROWSE button at the Local Image Path field. Select the file on your local machine and click open to close the dialogue box. Use the UPDATE button to save your changes.

Category images may be presented on your dynamic pages next to the category. To enable this feature return to the BACK OFFICE. Click the SHOP CART PARAMETERS link in the Shopping Cart and Sales Order Functions menu. Scroll down to the Search Categorization options. The drop down menu will allow you to select either none, small, and thumb(nail). See (Figure 14) to view the difference between the options. Use the UPDATE button at the bottom of the page to save your changes.

Figure 14 - Category Image Display Options

Now that you have created a few categories, the time has come to add your products. Return to the BACK OFFICE if needed and click on the INVENTORY LIST link in the Shopping Cart and Sales Order Functions menu. Since this list is empty, click on the Add-Blank link to enter your first item.

EDIT SHOPPING CART INVENTORY ITEM

These fields allow the user to enter a unique part number for the inventory item, a part description, an OEM (Original Equipment Manufacturer) company name, an OEM part number, show item options, and a category (Figure 15). All categories created in the previous step, aside from title headings, will be available in the drop down menu. Update the page using the button provided at the bottom of the screen to save changes.

Figure 15 - Inventory Item Options

SALES PARAMETERS FOR THIS ITEM

Options in this section will allow you to create the visible options that appear on your shopping cart pages associated with the item. Enter a title for your sales page first. A rich text editor has been provided to enter a detailed description for your item. Images are added next (Figure 16). A feature image can be added by choosing the "upload" option from the drop down menu located next to Use Feature Image. Click browse next to the "Local Image Path", select the desired image on your local machine from the dialogue box, click open to add the image. Before your update, you may select "make" from the "Use Thumbnail Image" menu to create a thumbnail for

the image at the same time. Update the page using the button provided at the bottom of the screen to save changes.

Images may be protected, or not displayed at all, by selecting the appropriate option from the "Image Download Protection" drop down menu. While this does not guarantee images will not be captured from your website, which is impossible, it does provide a measure of protection from the casual user downloading your images. Additional images may be added by clicking the "Add-Blank" link in the Additional Image List for Items box. Unlimited images may be added in this way.

Additional links to your items may be added using the fields provided. Enter a title for your link in the "Supplimental Link" field and your path, or url, in the "Link Path" field. This will create a link to addition information on your site or others on the web.

Changing the "Dynamic Sales Action" is crucial for displaying items on your site. The default setting is none, this means your item will not be displayed on your site until changed. Drop down the menu, change to buy (makes the item available for sale) or quote (displays the item but requires customers to contact you for a quote). You may change the option back to none (no display) at any time. Promotion of a particular item within your site may be accomplished by selecting a number from the "Feature Priority" drop down menu. Lower numbers equal greater priority.

Figure 16 - Adding Images

Enter the quantity of items available by selecting a unit of measure from the "Sales Unit" drop down menu. Available quantities should be entered in the "Sales Quantity On Hand" field. Items with unlimited stock, such as labor, may be indicated by checking the box marked "Unlimited Stock".

Once your quantities are entered set a price for your retail and distributor customers. A unique feature of the ProteanPaper system is the ability to create quantity pricing. This process is easy to accomplish. Simply enter a price for a single unit in the "Price each (col0)" field. By default the first quantity in this field is set to one. Additional pricing may be added by entering a new price and quantity in the appropriate fields. It's just that easy. (Figure 17) shows the changes made in the BACK OFFICE (blue) and how they will appear on the live site (orange). Save your changes by clicking the UPDATE button at the bottom of the page.

Figure 17 - Quantity pricing, BACK OFFICE and website

Finally, adjust shipping information as required. The "Shipping Calculation" field contains a drop down menu allowing to set shipping costs by weight, as a fixed price, as a percent of total invoice, no shipping charges, and human calculation required. These will be used in conjunction with the shipping methods created in Section 8 below. Add a shipping weight if required in the Shipping Weight field and a Fixed Shipping cost if desired. Save changes by clicking the UPDATE button at the bottom of the screen.

Labor Sales tax may be checked if appropriate. This will calculate and add tax to the invoice based on values entered when setting up tax in Section 6. Use the UPDATE button at the bottom of the page to save your changes.

8) Enter Shipping Methods, Shipping Destinations, and Shipping Charges

ProteanPaper offers a flexible system to set up shipping method for a variety of carriers and destinations. Weight ranges can be set in imperial units (pounds or ounces) or metric (kilograms). From the BACK OFFICE, click on the COMPANY PARAMETERS link, in the Company Administration and User's Information menu. Scroll down until you reach the Shipping Weight Unit drop down menu. Change as required then save your changes by using

the UPDATE button at the bottom of the page. Select a method carefully as this will remain unchanged throughout your website. For example, if you set a shipping weight as 4lbs. for your item and later decide to change to ounces, the new weight for the item will be recognizing as 4oz. Therefore you will need to change every single item in your inventory list and shipping methods individually. In short, decide on a unit of measure BEFORE entering inventory items and shipping methods.

Setting up new shipping methods can be accessed from the back office by clicking on the "Shipping Methods" link in the "Shopping Cart and Sales Order Functions" menu. Initially the shipping list page will be blank aside from an "Add-Blank" link which will be used to set up your first shipping method. Once new shipping methods are created they will be added to this list.

Adding a new shipping method can be accomplished by first clicking on the "add-Blank" link which will take you to the "Add Shipping Method and Rate" screen. From here you can create a new shipping option suited to your needs. Field entries here are, for the most part, self explanatory. Zip codes, or postal codes depending on destination, can be set to encompass a range, such as an entire city or state. Use the UPDATE button at the bottom of the page to save changes.

Rates can also be set in a fixed fashion, as a percent of total sale, and as C.O.D. by entering the desired information into the proper fields. When creating a new inventory item you will be need to enter a specific weight for your item as appropriate. As your customers add items to their cart, ProteanPaper will provide shipping methods from your list which match the criteria for the item and location. Your customers may then select the preferred shipping method at which point cost will be calculated automatically.

9) Indicate the Payment Methods you Accept and Enter Associated Information

You can elect to accept several different types of payments from your clients. To change accepted payment methods click on the SHOP CART SYSTEM PARAMETERS link in the Shopping Cart and Sales Order Functions menu. Scroll down to the section named Accepted Payment Methods (Figure 18). Check all applicable boxes. If using PayPal, enter the email address used when creating the account. A PayPal pages style may also be entered here if available. Finally, a message of your choosing may be entered for your customers. UPDATE to save changes.

Minimum order settings may also be changed in the same section. Enter a minimum order amount, in dollars, into the appropriate field. You may specify either domestic orders, foreign orders, or both. UPDATE using the button at the bottom of the screen to save the changes.

Figure 18 - Accepted Payment Methods

10) If you use PAYPAL, go to Their Site and Setup your PayPal Account

Setting up your account with PayPal is a simple process. Visit:

https://www.paypal.com/

PayPal will walk you through, step by step, to get your account. PayPal offers several choices between accounts which limit the available options in regards to which types of payment you can receive, monetary limits, access to customer service, ability to accept credit/debit cards, and multi-user access to name a few. Please take some time to review the options to determine which account would suit your business the best.

While you are at the PayPal site it might be a good idea to review the PayPal page styles as well. These can be referenced in the ProteanPaper system to provide a customized checkout page for your PayPal clients.

When you have finalized your account with PayPal, enter this information into the ProteanPaper system by first clicking on the "Shop Cart System Parameters" link in the "Shopping Cart and Sales Order Functions" menu in your back office. Locate the "Accepted Payment Methods" area. Enter your address and page style in the appropriate fields. Update to save changes.

11) Enter Buttons and Links in your Sales Site so it Links to ProteanPaper's Shopping Cart

When using the ProteanPaper shopping cart with a static site it will be necessary to create links to your items. Once your products have been entered into the ProteanPaper system a specific link will be created for the various buttons available. To access the links to these buttons click on INVENTORY LIST in the Shopping Cart and Sales Order Functions menu in the back office. Click on the EDIT next to the inventory item desired. Scroll down to the Sales Parameters for this Item header where you will find a section for static hyperlinks (Figure 19).


```
Static Hyperlinks (For buttons from static pages)
    Buy-Button link text: https://proteanpaper.com/scart_add.cgi?comp=boon&part=5MGSP
    Detail-Button link text: http://www.proteanpaper.com/scart_results.cgi?comp=boon&part=5MGSP
    Price iframe link text: http://www.proteanpaper.com/scart_item.cgi?comp=boon&part=5MGSP&detail=2
    Cart-Button link text: https://proteanpaper.com/scart_edit.cgi?comp=boon
    MyLists-Button link text: https://proteanpaper.com/scart_myspace.cgi?comp=boon
```

Figure 19 - Button Hyperlinks

Each button has it's own static hyperlink. Highlight the appropriate link, copy (ctrl+C) or (right click, copy with your mouse). Adding this address as a link to your image (or text) within your site will create a path to your item in ProteanPaper.

As an example, below you will find a static site using buy buttons. Note the address of the buy button in the lower left hand corner. Clicking on the buy button will direct the client to the ProteanPaper shopping cart.

Figure 20 - Using buy buttons in a static site

12) Make your Site Use as Much or as Little Dynamic Content

As we discussed in Section 5 there are several ways to present your products using the ProteanPaper system. Static sites are those created by the user and contain, for the most part, static pages which you have created about your company or products. Using the example above, www.nikonremote.com, is a great example. This site was created entirely by the owner but uses links to the ProteanPaper shopping cart. A static site provides customization to pages in order to create a theme or feel to the website. If you have an existing site you like or wish to create your own custom content, buy button links are a great option.

Dynamic sites use ProteanPaper as a framework for creating your entire site. Some customization is allowed as outlined in Section 5. An example of a dynamic site would be www.howiebikeman.com (Figure 21). This site uses some custom features, notably the ProteanPaper system is presented in a frame while everything outside this frame is presented in a static site. The banner (A) is custom made with image relative links. Additional content pages may be created and set in a navigation bar (B). Howie also uses custom image buy buttons (C) which can be created and uploaded to your dynamic site. Individual shopping cart items (D) are fully user created including pictures and descriptions.

Figure 21 - Dynamic ProteanPaper site

Now that we have seen a few examples of what is possible, determine which approach is right for you. Remember, a static site will provide greater flexibility in appearance options. While providing more options, this site will also have to be created and maintained from outside the ProteanPaper system. Dynamic sites are easier to create and maintain but offer less options for customized appearance. A dynamic site also offers the quickest option for creating a functional site where none exists already.

13) Promote your Site, Wait for Orders, Use ProteanPaper's Back Office to View Orders and get Customer Detail

SITE PROMOTION:

Site promotion is crucial insofar as clients will need to be directed to your site before orders will be placed. After all, it is hard to sell anything unless people know what you have to offer! A few simple steps will help your potential clients find your site and products.   These are commonly known as Search Engine Optimization (SEO) methods and will help drive traffic to your site. While it is beyond the scope of this humble guide to explain the complicated processes behind search engine result placement, we can offer a few helpful ideas for the DIY website promoter. Here are a few examples:

1. Ensure all of your pages have a title using appropriate keywords. Search engines count on page titles to match queries with potential sites of interest. Specific titles are important. For example, if you are selling 1935 Ford truck brake shoes an appropriate title might look something like this: 1935 1936 1937 Ford Truck Brake Shoes . This title contains a good amount of information such as the years applicable, the specific vehicle, the product, and the fact that they are for sale. A poor title might look something like this: Ford Brake Shoes. This title gives no information about which of the one hundred plus years, or hundreds of models of cars, light duty trucks, medium/heavy duty trucks, tractors, and any other machinery manufactured by Ford these brake shoes may belong to. Along with page content, a good title will go a long way to help search engines evaluate the content of your site. Avoid the temptation to make an overly elaborate title filled with all kinds of superfluous keywords. This practice is actually counterproductive in obtaining placement in search results. In short, keep it concise and relevant to the product.
2. Add alternate text to images. Search engines, especially those that offer image specific searches, give some weight to the text description of images. Image searches are another way to drive traffic to your site that may be missed solely by text searching results.
3. Submit your site to search engine providers. Given enough time a search engine will likely recognize your site and assign a placement in search results. This process can be expedited and improved by submitting this information yourself. Most search engines offer no guarantee of placement without user intervention. Make sure this happens, do it yourself!
4. Consider an online ad campaign. There are many services available today to help promote your site using click through ads. These options can be a cost effective solution, targeting your core users by promotion on related sites. Ads are generally paid for by the click and limits can be placed on total amount per week or month depending on your budget.
5. A little bit of research will go a long way. An entire group of professionals exist for the sole purpose of achieving site placement results. These services come at a cost of course and ultimately results are not guaranteed. Small businesses may or may not find these services to be of real value and larger companies generally attract top search engine placement naturally. Before seeking services from a company claiming to specialize in search engine placement, research what it is these people do. The internet provides a great host of information from

which one may find useful. You may find you can achieve these same results yourself at little cost.

6. Place links to your site on other related websites. Discussion forums are a great place to let people know what you have to offer. Ebay provides a place to write reviews of products. Craigslist is another source to advertise your site and products. A short video about your company or of your products in action would be great for YouTube. Facebook provides a space to talk about your company and products.

These are just a few ideas to get you started. The only real limitations to internet advertising are the time in which you are willing to devote to it. Ask those around you for ideas. Your associates can offer valuable insight concerning what has worked and what was lacking. When all else fails, try a few things for yourself. An idea you may have dismissed or proven ineffective in the past may now be just what is needed. Keep at it and the results you desire will surely follow.

ORDERS:
Depending on your existing client base, orders may come very quickly or may be a waiting game. In either event, the ProteanPaper system will alert you, via email, whenever a customer places an order. To review the new order, begin by logging into the BACK OFFICE. Click on the ORDER & QUOTE LIST in the Shopping Cart and Sale Order Functions menu. A list will be generated showing all current orders. EDIT will allow the user to make changes to the order while viewing full customer details. ACTION contains options which will vary depending on if payment has been received from the customer. Depending on the options you set up in Section 9, you may be required to enter a payment received from your customer. Otherwise you will be reminded to finish the order on the main menu. Use the ACTION option to ship the order/generate packing slip, invoice the entire order, invoice a partial order shipped, ask your customer for further instructions, or void the order as needed.

CONCLUSION:

In conclusion, this guide should provide an excellent starting point from which you can set up your company, access commonly used functions, and get your products into the world. Further details may be found by visiting the FAQs (accessed by clicking the FAQ link in the BACK OFFICE) or by utilizing the online users manual (click the ?? link for content specific search). Questions may also be directed by email to help@proteanpaper.net. We trust you will enjoy using this program and welcome any suggestions or comments you may have.