

The Boss.Console Manual

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1. Preface

1.1. *About this manual*

This manual describes the Boss.Console and explains how to use it to manage a website which has already been designed and configured.

1.2. *Acronyms/Abbreviations*

| | |
|------|----------------------------|
| CSS | Cascading Style Sheet |
| HTML | HyperText Markup Language |
| SEO | Search Engine Optimisation |

1.3. *Publication Record*

| Version | Date | Description |
|----------------|---------------|--|
| 1.0.0.0 | June 2007 | Created for v3.6.0.0 of the Boss.Console |
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2. Introduction

2.1. What is Boss?

Boss™ is a stable and easily deployable website framework. The Boss™ framework was designed to encourage unlimited creativity in web design. Because of this, Boss™ can be used to deploy a wide variety of websites using differing web based technologies.

2.2. The Boss.Console

The Boss.Console is the user-friendly interface where most of the oversight and control of the website is accessed. The Boss.Console allows you to add, remove, and edit website pages, manage clients and sales, and perform other custom functions.

It is not necessary for you to know about web programming languages or other interfaces relating to the Internet (such as databases etc.), but a web designer with HTML and CSS skills is generally needed for the initial set-up of the website, and the design of the website's template (overall look and feel).

3. Logging In

To log in to the Boss.Console, open your Internet browser (e.g. Mozilla Firefox), and go to the Boss.Console login page, using the Internet shortcut from your Boss™ supplier.

On the Boss.Console login page, type the username and password from your Boss™ supplier into the **username** and **password** fields respectively. Click the **log in** button to proceed.

4. Menu Item: Console

4.1. Console Overview

The Overview is the first page to appear after you log into the Boss.Console. It provides an overview of the website, allows you to edit some of the overall settings, and provides access to valuable resources including this user manual.

4.1.1. Overview

Website

This is a link to the website on the Internet.

Statistics

This is a link to a page where you can view the website's statistics. These include typical website statistics such as the number of people that have visited the website, the relative popularity of the website pages etc.

Modules

This is a list of the Boss™ modules currently installed on the website. These can include:

- Boss.Console - The interface you use to manage the website.
- Boss.Cart - The shopping cart utilities.
- Boss.Client - The client (customer) management utilities.
- Boss.Catalogue - The product or service management utilities.

Website email address

This is the email address that the website will use as its sending address whenever it contacts clients. This address can be edited on the Console Overview page.

Send alerts/enquiries to

This is the email address that the website will send emails to when a client or other person tries to contact you, or if there is a new sale from the website. This address can be edited on the Console Settings page.

4.1.2. Suggestion Box

Use this box to suggest any changes or improvements to the Boss.Console that would make things easier for you. Simply type your suggestion into the box and click the ***Tell us about it*** button.

4.1.3. Browser Support

This is the list of Internet browsers that are recommended or supported for using the Boss.Console.

- Firefox 3+ - This is the browser that Verb recommends.
- Internet Explorer 7+ - The Boss.Console will support this browser.
- Safari 3+ - The Boss.Console will support this browser.

4.1.4. 3rd Party Plugins

This is the list of Internet browser plugins that are required for various features in the Boss.Console. A plugin is an optional extra that can be installed and used by your browser.

Adobe Flash 8+ - This is necessary to upload multiple media files.

4.1.5. System Requirements

This is a list of requirements that your computer workstation must meet to be able to use the Boss.Console.

JavaScript enabled

JavaScript is a web programming language. Ensure that your web browser is set to allow JavaScript usage. This setting is usually located in your web browser's menu under Tools → Options → Content.

Cookies enabled

Cookies are small files that contain information about your preferences for the website to which they pertain. Ensure that your web browser is set to allow cookies to be used. This setting is usually located in your web browser's menu under Tools → Options → Content.

4.2. Console Settings

This section allows editing of the website email settings and tax details. Each of the Console Settings is summarised below.

4.2.1. Email Settings

These settings determine the email addresses that are used by the website.

Website Email Address

The email address that will appear in the "From" field for all emails that originate from the website (displayed on the Console Overview page).

Send Alerts/Enquiries to

This is the email address on which you will be contacted if the website needs to contact you (displayed on the Console Overview page).

Test Email Settings

Use this button to send a test email to the Alert Email Address. You can use this function to check the formatting and content of emails being sent from the website.

Design HTML Email

You can use this section to design the website email templates using HTML and CSS. This can include adding images, formatting text, changing colours and layouts etc.

4.2.2. Tax Settings

This section allows you to set up a tax option for the website.

Financial Year

Select a start month for the financial year (typically April).

Add New Tax

Select a name for the tax (e.g. GST), and the tax rate (e.g. 12.5%) to be used.

If required, the tax can be automatically added to products on the website by ticking the **Included in product prices** box.

Click **Save all tabs** to save the new tax scheme.

In which country is your company registered for tax purposes?


Select the country that your company is registered in. Sales within this country will have the tax settings applied.


Does this tax apply to sales from countries other than the one above?

Tick this box if you would like your tax settings to also apply to all other countries.

4.3. User Logins

This section is used to add or edit login details for other people who need access to the Boss.Console for your website. You can specify the level of access that each login allows.


To edit a current user's login details, click the name of the login, or the  icon to the right of the login name.

To permanently delete the login, click the  icon to the right of the login name.

4.3.1. Content Editor Groups

This section allows you to create groups of Content Editors who only have the ability to edit specific pages within the website. After a group is created, any Content Editor user can be added to the group so that they are limited to the pages that they can edit.

Edit a group


To edit an existing group, click the group's name or the  icon to the right of the group's name.

Delete a group

To permanently delete the group, click the  icon to the right of the group's name.

Add a New Group

To create a new Content Editor Group, supply a name and relevant description for the group, and click the **Add Group** button.

Next, click the new group's name or the  icon to the right of the group's name to choose the pages that this group is allowed to access. Tick the boxes next to the appropriate pages and click the **Update Page** button at the bottom of the list.

The new group will now be available to assign to new Content Editors when adding them from the Create New User section (see below).

4.3.2. Create New User

Click the **Create New User** button to allow a new person to gain access to the website and its contents. Specify the following information:

- User's first and last names
- Login (usually the user's email address)
- Password

- Login type (see User Login Types below)
- Group (see Content Editor Groups above).

4.3.3. User Login Types

There are five types of login, each with a different access level.

Site Owner/Designer

Users with this access level have full permissions and can create other logins. This login also has access to website templates, to make site-wide design changes.

Site Owner

Users with this access level have full permissions and can create other logins.

Web Designer/SEO

Users with this access level have permission to change website templates and access all pages. Web Designers are unable to view sales and client information.

This login is suitable for a user who will perform Search Engine Optimisation (SEO) for the website, or make changes to the website template.

Site Manager

Users with this access level have full permissions but cannot create other logins.

Content Editor

Users with this access level can only edit the content of existing pages. Content Editors can be further limited to specific pages by being a member of an associated Content Editor Group. See Content Editor Groups for more information.

4.4. Utilities

This section contains various tools and links that may be helpful when setting up the website for the first time.

4.4.1. Search Engine Optimisation Links and Information

This is a list of quality resources and articles that will help you get the website ranked more highly. This is a hugely complicated subject with a lot of misinformation, dishonest business and wild claims, so we have put together this list so you are better equipped to tackle the subject. It's best to be well read because you can damage the website's rankings easily.

Required Reading

This selection of links contains useful information about search engine optimisation.

Submit Your Site

Use these links to submit the website to the major search engines.

Advertise Your Site

Use these links to advertise the website with the major search engines.

4.4.2. Google Site Map Generator

These processes are used to generate a site map for your website, which will be compatible with Google Webmaster Tools. You will need a Google account in order to complete these processes. (See <https://www.google.com/webmasters/tools/docs/en/about.html>).

Verification Process

Use this process to verify to Google that you are the owner of the website, and that you have the permissions required to make changes to the website.

Generate Site Map

Use this process to generate the website's sitemap and register it with Google. This allows Google to gain a hierarchal view of the website for searching and statistical purposes.

4.5. Support

This section contains links to helpful resources on the BossHQ website. These resources include manuals, tutorials, and contact information to assist your learning.

5. Menu Item: Website

This section allows the creation and maintenance of website pages, and overall control of the website look and feel.

5.1. About Website Template and Navigation

The website's template produces the overall structure of the website, including its design and functionality. It is designed by the web designer, with input from the website owner. The scope for style and originality is only limited by the imagination – virtually anything is possible.

Dynamic Menus are created and modified by Boss.Console users. As pages are added, moved, or taken away, the dynamic menus will update automatically. These menus allow website visitors to gain access to the full hierarchy of pages, products, articles etc., and are incorporated into the website by the designer as part of the template. The website designer can force dynamic menu pages to be fixed, so that they cannot be deleted by other users.

Preset Pages are reserved for hard-coded navigational links in the website template; they are an integral part of the website's overall structure. Only your web designer can delete these pages, but Boss.Console users can still edit their content.

The screenshot displays the website's layout. At the top is a banner for 'Preset Page Links' with a blue background and cartoon characters. Below the banner is a navigation bar with links for 'Start', 'Mr Game', 'Mrs Game', 'Master Game', 'Miss Game', 'Login', 'Your Account', and 'Your Cart'. The main content area is divided into several sections:

- Board Games:** A list of categories including 'Our Absolute Favourites', 'Top Shelf Games', 'Recommended Games', 'Settlers of Catan Series', 'The Carcassonne Series', 'Card Games', 'Two Player Games', 'Fast and Fun', 'Rainy Afternoon Games', 'Kid's Games', 'Party Games', and 'Just Arrived'.
- The NZ Chronicles:** A list of 'About the Chronicles', 'Currently in Print', and 'Out of Print'.
- Second-hand Games:** A list of 'Second Hand Games'.
- The Best Board Games Ever!** A featured section with a 'Buy or Try' offer, 'Delivery Info', and 'Safe, Secure and reliable' text. It includes logos for VISA and MasterCard.
- Latest Listings!** A section featuring three board game listings: '1910', 'Cleopatra', and 'Stonewall!'. Each listing includes a product image and a brief description.
- Profile:** A section for user status, showing 'Status: Not Logged In' and 'Date: 25 September 2007'.
- Shopping Cart:** A section showing 'Your cart is empty' and 'Total: \$0.00'.

At the bottom of the page, there is a footer with links for 'Contact Us', 'Terms and Conditions', 'Privacy Policy', and 'Testimonials'. A 'Dynamic Menu' label is overlaid on the left side of the page, and a '100% NZ OWNED & OPERATED' logo is visible in the bottom left corner.

Figure 1: Example Boss™ website structure from www.thegames.co.nz

5.2. Manage Pages

This section displays the website pages and structure. From here you can manage all of the pages on the website, including their locations and content.

Right-click Menu

Each page in the Manage Pages section has a right-click menu. Right-click on the Page name to invoke the menu. The menu options are as follows:

❑ Delete

This option will delete the selected page.

❑ Rename

This option allows you to instantly rename the selected page.


❑ Visit Live Page

This option opens the selected website page in a new tab or window for viewing.


❑ Toggle Active State

This option changes the Active state of the selected page from Active to Not Active, or vice versa.


Edit Page Attributes

To edit the page's attributes, click the  icon to the right of the page name. This will allow you to change the page's properties, such as the page name, order, editor type etc.

Edit Page Content

To edit the content of a page, click the page name or click the  icon to the right of the page name. This will allow you to make changes to text, pictures, or formatting on the page.

Delete Page

If the page has the  icon to the right of its name, it can be deleted by clicking this icon. A page can only be deleted if there are no "child" pages below it in the hierarchy, i.e. if the page is not a parent page.

Drag and drop pages to reorder them

The mouse cursor will change to the  icon when you hover over a page name.

To change the order in which the pages appear in the website's navigation (for dynamic menus), drag and drop the pages to the appropriate position in the list. To add a page to another page as a child, drag and drop the child page onto the name of the parent page.

5.2.1. Create New Page

This link allows you to create new pages for your website. You may wish to create a page to contain a new set of articles, or perhaps to create a new category (range) for your products. See Page Type below for more information about the types of pages you can create.

A typical use of this feature will be to create a new dynamic menu item, i.e. a new link in the main navigational system of your website. This may be a top-level menu item (parent) or a sub-menu (child) item. There is no preset limit for the depth of the menu hierarchy; the only question is how many clicks your website users will have to take to arrive at their goal.

Name

This is the title for the new page; it will be used to provide the name of the new menu item.

Page Type

The following is a list of the available page types and a description of each type.

❑ Simple Page

A Simple Page is the most basic type of page; its content is displayed in only one section. An example of a good use for a Standard Page would be an "About Us" page.

❑ External Link

This creates a link to a web page that already exists, but may not necessarily be on your website. A web address (link URL) is required, and if a new window should be opened for the new link, tick the **Open in new window** box.

❑ Articles Page

An Articles Page is similar to a Standard Page, but its content is displayed using a paged approach. Articles are either displayed one at a time and are selected using a menu, or multiple titles with previews are displayed in a list and can be selected and viewed in full. Once you have created an Articles Page, you can then add articles underneath it using the **Create new Article** feature in the Toolbox.

❑ Picture Gallery

This is a page comprising a collection of images (typically photos), which are displayed as thumbnails that can be selected to view in full. This may be useful, for example, if you want to display items that are not necessarily part of your sales stock.

❑ Contact Page

A Contact Page uses a Standard Page as its basis, but also contains a simple enquiry form for website visitors to fill out. An email will be sent to the alerts/enquiries address, as specified in the Console Settings section.

❑ Simple Poll

This allows you to create a simple statistical poll to gather information from website visitors. For example, if you want to find out how people heard about your website, you could create a simple poll for them to fill out. Only one poll per page can be active at any given time.

❑ Category Page

A Category Page is used to create a product category for the available products or services on the website. Once you have created a Category Page, you can then add products underneath it using the **Create new Product** feature in the Toolbox. Using the Boss.Cart module, clients can then purchase the products via the website.

Location

The Boss™ Framework allows for a hierarchal page structure for the website. If you want to create a sub-page (child page), select the appropriate Parent Page from the dropdown list. The new page will automatically appear below the Parent Page in the hierarchy.

Use the **No Parent Page** option if the new page should be at the top of the hierarchy (i.e. not a child page). If you want this page to be a sub-page (child page) of another page, then specify the Parent Page here.

Expiry Date

This is the date on which the page will automatically be made inactive (unavailable). Set the month field to **None** if the page should be permanently active.

Active

This option specifies whether a page is available to your website visitors. By default, new pages are active, but if you do not want the public to view this page yet, you may remove the tick from this box.

❑ A Note about Live Mode / Preview Mode

You can preview inactive pages by using the Boss.Console in **Preview Mode**. If both the Console AND your website are open a single browser program such as Firefox (i.e. not two different browser programs), you can choose to view your website in Preview Mode.



The following "Logged In" window will appear at the top-right of the browser window:

To enter Preview Mode, select the Preview Mode radio button. The website will refresh, showing inactive pages/articles, and the "Logged In" window will change to the following:



5.2.2. The Tool Box

This is a set of relevant tasks that are available in the left hand pane for this section of the Boss.Console. Below are the various tools, and an explanation of how they are used.

Note: The content of the Tool Box varies according to the section you are currently in.

5.2.3. Create new Article Link

This link will allow the creation of a new article on an Articles Page. Simply supply a title for the article, along with a location (Articles Page that the article will appear on). If desired, you can supply an article order (rank number) to force articles to display in a particular order.

5.2.4. Create new Product Link

This link will allow the creation of a new product on a Category Page. Simply supply a name for the product, along with a category page that the product will appear in. If desired, you can supply a product order (rank number) to force products to display in a particular order.

5.2.5. Upload Images/Files Link

Use this link to send images or other files to the website. Once the images or files are uploaded, they can be inserted into a page or article, or be referenced from a product entry.

Note: Adobe Flash v8 or later must be installed for this feature to operate correctly.

5.3. Manage Products

This section will only be available if you have the Boss.Cart or Boss.Catalogue modules. It allows you to create new products, and manage existing ones.

Right-click Menu

Each page in the Manage Pages section has a right-click menu. Right-click on the Page name to invoke the menu. The menu options are as follows:

□ Edit

This option opens the selected Product for editing.

□ Assign

This option allows you to assign the Product to any of the existing Categories.


□ Rename

This option allows you to instantly rename the selected Product.

□ Delete

This option will delete the selected Product.


Edit Product

To edit a product, click the product name or click the  icon to the right of the product name. This will allow you to make changes to the product's price, text, images etc.

Delete Product

To delete a product, click the  icon to the right of its name.

Duplicate Product

To make a copy of an existing product, click the  icon to the right of its name. The new copy of the product will then open for editing, but will have a name ending in “[copy]”, and will remain inactive until made active.

5.3.1. Create new Product Link

This link will allow the creation of a new product on a Category Page. Simply supply a name for the product, along with a category page that the product will appear in. If desired, you can supply a product order (rank number) to force products to display in a particular order.

5.4. Media Centre

The Media Centre is where you can view and upload your website's images and files.

Right-click Menu

Each page in the Manage Pages section has a right-click menu. Right-click on the Page name to invoke the menu. The menu options are as follows:

□ Rename

This option allows you to instantly rename the selected Image or File.

□ Delete

This option will delete the selected Image or File.

5.4.1. Images

This section shows all of the uploaded images including .gif files, .jpg files, .png files etc. These images can be inserted or attached to a web page so that they appear in the page's content.

5.4.2. Files

This section shows all of the uploaded files including .pdf files, .doc files etc. These documents can be attached to a web page so that they appear as a link in the page's content.

5.4.3. External Media

This section shows all of the external media including flash objects, JavaScript, or HTML snippets etc. These can be attached to a web page so that they appear in the page's content.

5.4.4. Preset Image Sizes

This section is where you can edit and view the preset images sizes that show in the Upload Images/Files dialog box. The initial sizes are usually determined by the website designer, so that there is consistency across the website.

5.5. Website Settings

This section allows you to edit site-wide information, such as Meta Tags and the default Page Title. These settings have an influence on search engine rankings, so you should read our important information in the Search Engine Optimisation Links and Information section.

5.6. Form Settings

This section allows you to create HTML forms for your website users to fill out, and to add email addresses for those forms to be sent to.

Once the form is created, it needs to be associated with an Article. You achieve this by choosing an Article to edit (on an Articles Page) via the Manage Pages section, then clicking on the Article Features tab. There is a drop-down box called 'Associated Form', which gives a list of all the available forms to choose from. Click 'Save All Tabs' to confirm your choice.

When a form is filled out by the website user and subsequently submitted, the form is sent to the Boss Form handler, which takes the values from the form and processes them. The processing can include an email being generated and sent to a specified address, and/or the creation of a new Article on a specified page containing the form values.

5.6.1. Special Elements

The following is a list of the special Boss form elements that can be inserted to provide special functionality:

The <form> tag

The form tag defines a new form. In the Boss Form system, the form tag should have the following attributes:

- ❑ **class="ReturnForm"**
- ❑ **action="/formsubmission.boss"**
- ❑ **method="post"**
- ❑ **enctype="multipart/form-data" (only required if a file is to be uploaded with the form)**

The "bossformsubmit" input

The bossformsubmit input is required so that the form submits correctly. It has the following attributes:

- ❑ **value="true"**
- ❑ **name="bossformsubmit"**
- ❑ **type="hidden"**

The "pageid" input

The pageid input is required if the form will be used to create a new Article. The Article Page number must be specified for this feature to work. This input has the following attributes:

- ❑ **value="100" (the page number)**
- ❑ **name="pageid"**
- ❑ **type="hidden"**

The "email" input

The emailid input is used to specify the email sender address. This is not a mandatory input; if unspecified, the default website email address will be used. This input has the following attributes:

- ❑ **name="email"**
- ❑ **value="address@domain.com" (the email address)**
- ❑ **type="hidden"**

The "emailid" input

The emailid input is used to specify the email recipient address. This is not a mandatory input; if unspecified, the default website email address will be used. This input has the following attributes:

- ❑ **name="emailid"**
- ❑ **value="1"**
- ❑ **type="hidden"**

The "subjectline" input

The subjectline input is used to specify an email subject line. This is not a mandatory input; if unspecified, the default email subject line will be "[website name] form submission". This input has the following attributes:

- ❑ `name="subjectline"`
- ❑ `value="This is the email subject line"`
- ❑ `type="hidden"`

The “fileupload” input

The fileupload input allows the uploading of an image or file to be attached to the Article. This is not a mandatory input; if not used, any Article created will have no associated images or files. This input has the following attributes:

- ❑ `name="fileupload"`
- ❑ `type="file"`

Anti-spam inputs

It's very likely that after some time on the internet, your form will be “discovered” by a spam bot. This is a computer running a program that searches through websites for forms to fill out, or email addresses that it can harvest. Once it discovers a form, it fills out the most commonly used values (e.g. name, address etc.) and submits the form. Our anti-spam measures involve detecting whether a ‘name’ field has been filled out. The name field is invisible to humans, so only a spam bot can see it and fill it out.

To take advantage of our anti-spam system, use the following two inputs as follows. The enclosing `<div>` is used to hide the inputs from humans.

Note: Since this system use a ‘name’ attribute called “name” to catch the spam bots, you won't be able to use this in your own Name inputs. Instead, use “yourname” etc.

```
<div id="nobots">
  <label>Please leave this field empty, it is for avoiding spam.</label>
  <inputname="name" type="text" >
  <inputname="backwardsfix" value="Test" type="text" >
</div>
```

Other inputs

Any number of other inputs may be specified. If it is desired that these inputs are collected and sent in an email, or are to be included in a new Article, they must have a ‘name’ attribute specified. An example might be as follows:

```
<input name="firstname" title="First Name?" type="text">
```

5.6.2. Email Addresses

This section is used to enter email addresses for use in the Boss Forms feature. Typical steps are as follows:

1. Click ‘Add New Email Address’ to enter an email address for a given form.
2. Enter the number of this email address into the ‘emailid’ element of the form.

5.6.3. An Example Form

The following is an example 'Guest Book' form for collecting user's comments about your website. This includes all of the inputs that are required for Article creation and emailing:

```
<h1>Guest Book</h1>
<strong>Please leave us a comment!</strong>
<form class="ReturnForm" action="/formsubmission.boss" method="post">
  <!-- Email related inputs -->
  <input name="bossformssubmit" value="true" type="hidden">
  <input name="email" value="comments@website.co.nz" type="hidden">
  <input name="emailid" value="1" type="hidden">
  <input name="subjectline" value="There's a new comment on your website!"
    type="hidden">

  <!-- Article related inputs -->
  <input name="pageid" value="5" type="hidden">
  <input name="articletitle" value="New Comment" type="hidden">

  <!-- Anti-spam section -->
  <div id="nrobots">
    <label>Please leave this field empty, it is for avoiding spam.</label>
    <inputname="name" type="text" >
    <inputname="backwardsfix" value="Test" type="text" >
  </div>

  <!-- Other inputs -->
  <p>Name:</p>
  <input name="yourname" type="text">
  <p>Comment:</p>
  <textarea cols="25" rows="6" name="comment"></textarea>

  <!-- Submit button -->
  <button type="submit">Submit Comment</button>
</form>
```

5.7. How to...

5.7.1. How to Create an Article

This section describes the process for creating a new article, either on an existing Articles Page, or on a new Articles Page.

Step 1: Create a new Articles Page

An article can only exist on an Articles Page. If the Articles Page is already created, you can skip this step and begin creating the new article.

- Click on the **Create New Page** link (top right in the Manage Pages section). See Figure 2 for an interface example.
- Choose **Articles Page** from the drop-down **Page Type** list.
- Choose a **Name** for the new Articles Page, and a **Location** (Parent Page) if necessary.
- Set the **Permissions** as appropriate.



Create New Page

Name: Page Type: ▼

Location: ▼ Expiry Date:

Active:

Page Type: Articles

Ideal for when a page is needing to act like a news page with multiple ordered articles

Permissions:


No permissions (public)

Allow only signed-in clients to view this page

Figure 2: Create New Articles Page Interface

Step 2: Edit the new Articles Page

Now that there is an Articles Page existing, it is important to ensure that all of the settings for the page and its subsequent Articles are correct.

- Click on the name of the Articles Page or the  icon to edit the Articles Page.
- The **Page Features** tab shows the current settings for this Articles Page. Here you can specify how articles on the page will be displayed by changing the **Article Options**. See below for explanations of the main options.

❑ Display just latest article with links to older ones

This option will display the page header followed by the latest article, and show links to all the old articles that are no longer displaying. This is a good option if there are many articles to display. The links will be ordered according to the **Sort Articles by** setting.

❑ Display all articles with in-page links

This option will display the page header followed by all of the articles in a list, ordered according to the **Sort Articles by** setting. A list of links to the articles will be displayed at the top, along with a link to “top” under each article.

❑ Plain list of articles on one page

This option will display the page header followed by all of the articles in a list, ordered according to the **Sort Articles by** setting.

- Click **Page Attributes** on the Page Features tab to change the settings that were initially entered when you created the Articles Page.
- The **Page Content** tab shows the list of articles currently on this Articles Page.
- Click **Add a description for this page** to create a header for the Articles Page. This feature uses the same interface as for creating a new article. See Step 3 below for an example of this process.

Step 3: Create a new Article

Place the new Article on its Articles Page.

- Click on the **Create new Article** link in the Toolbox (Manage Pages section). See Figure 3 for an interface example.
- Choose the appropriate Articles Page from the drop-down **Location** list.
- Choose an appropriate **Article Title**, and an appropriate **Order** number if you want the articles to be ordered by rank. Click **Create new Article** to create the article.



The screenshot shows a dialog box titled "Create new Article". It contains the following fields and controls:

- Article Title:** A text input field containing "New Article".
- Active:** A checkbox that is checked, indicated by a green checkmark.
- Location:** A dropdown menu showing "New Articles Page".
- Order:** A text input field containing "100".
- Buttons:** Two buttons at the bottom: "Create new Article" and "Cancel".

Figure 3: Create New Article Interface

Step 4: Edit the new Article

- Click on **Article Features** to change the settings that were initially entered when you created the Article. You can also associate a form with the article by using the ‘Associated Form’ dropdown. See Form Settings for more information. Click **Save All Tabs** when finished.
- Click on **Content** to edit the Article content as desired. See Figure 4 for an example screenshot of the article editing process. Click **Save All Tabs** when finished.

- Click on **Images** to add an image or file link to the Article. Click **Save All Tabs** when finished.
- Click on **External Media** to attach a Flash object or other HTML snippet to the Article.

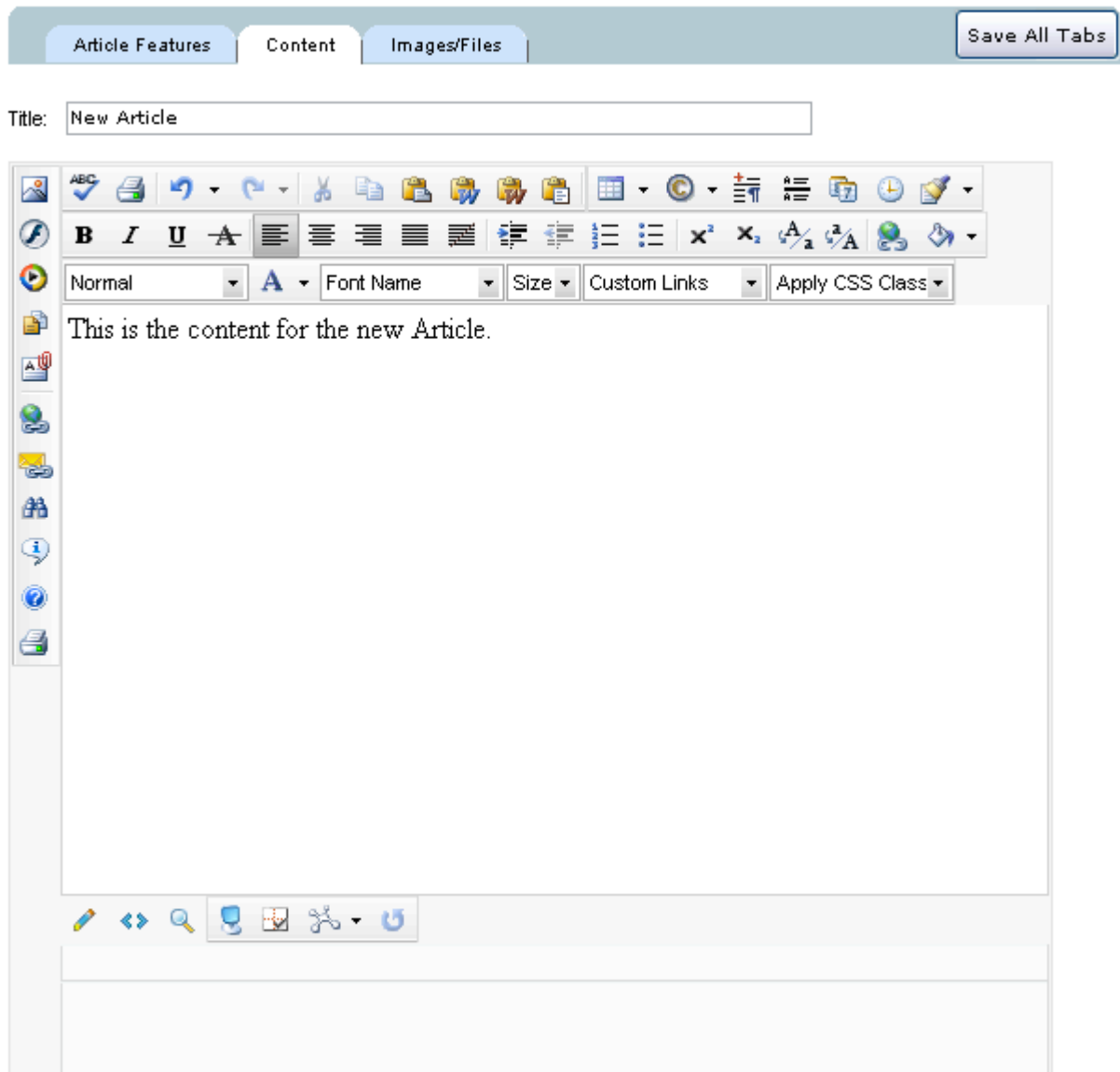


Figure 4: Edit Article Interface

5.7.2. How to Create a Product

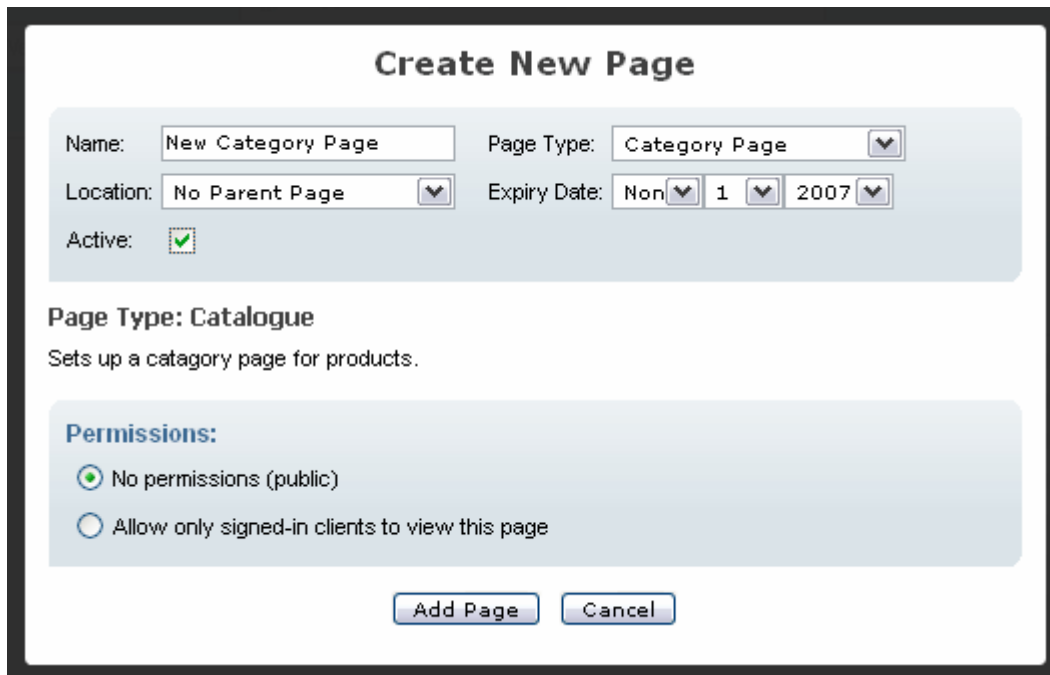
This section describes the process for creating a new product, either on an existing Category Page, or on a new Category Page. It is important to think carefully about how the products will be categorised; this may be according to brand, style, or perhaps size.

Note: A product can exist without a Category Page, but this will mean that clients can only view the product by using the search feature; they will not be able to view the product using the **Dynamic Menu** navigational system. The normal practice is to create the hierarchy of Category Pages, then create the products that belong in each category.

Step 1: Create a Category Page

If the Category Pages are already created, you can skip this step and begin creating the new product.

- Click on the **Create new Page** link (top right in the Manage Pages section). See Figure 5 for an interface example.
- Choose **Category Page** from the drop-down **Page Type** list.
- Choose a **Name** for the new Category Page; this name will appear as a title for the category when the website is viewed by clients.
- Choose a **Location** (Parent Page) if necessary, and set the **Permissions** as appropriate.




The screenshot shows a web interface titled "Create New Page". It contains several input fields and a form. The "Name" field is filled with "New Category Page". The "Page Type" dropdown is set to "Category Page". The "Location" dropdown is set to "No Parent Page". The "Expiry Date" is set to "Non", "1", and "2007". The "Active" checkbox is checked. Below the form, there is a section for "Page Type: Catalogue" with the description "Sets up a category page for products." and a "Permissions:" section with two radio buttons: "No permissions (public)" (selected) and "Allow only signed-in clients to view this page". At the bottom of the form are "Add Page" and "Cancel" buttons.

Figure 5: Create New Category Page Interface

Step 2: Configuration of the Category Page

Now that there is a Category Page existing, it is important to ensure that all of the settings for the page and its products are correct.

- Click on the name of the Category Page or the  icon to edit the Category Page.
- The **Page Features** tab shows the current settings for this Category Page. Here you can specify how products on the page will be displayed by changing the **Category Options**. See below for explanations of the main options.

❑ Display products from sub pages

This option will display all the products located in Category Pages below this one in the hierarchy. The products will be ordered according to the **Sort products by** setting.

❑ Display links to sub pages

This option will display links to all products located in Category Pages below this one in the hierarchy. The links will be ordered according to the **Sort products by** setting.

❑ Display attributes with products in table layout (1 across)

This option will display the products located in the current Category Page, ordered according to the **Sort products by** setting. The products will be displayed in a single column, with sortable values according to any Global Attributes (see the Create a Global Attribute section) that have been defined.

- Click **Page Attributes** on the Page Features tab to change the settings that were initially entered when you created the Category Page.
- The **Current Products** tab shows the list of products currently under this Category Page.
- Click **Add a description for this category** to create a header for the Category Page. This feature uses a similar interface as for creating a new product. See Step 3 below for an example of this process.

Step 3: Create a new Product

Place the new Product on its Category Page.

- Click on the **Create new Product** link in the Toolbox (Manage Pages section). See Figure 6 for an interface example.
- Choose the appropriate Category Page from the drop-down **Category** list.
- Choose an appropriate **Product Name**, and an appropriate **Order** number if you want the products to be ordered by rank. Click **Create New Product** to create the product.

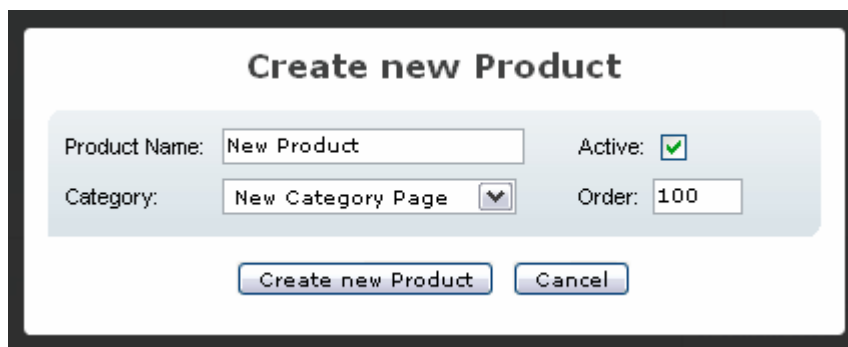


Figure 6: Create New Product Interface

Step 4: Edit the new Product

- Click on **Categories & Related** to choose which categories (Category Pages) the product will be displayed in, and to choose other products that are related to this one. Click **Save All Tabs** when finished.
- Click on **Details** to change the settings that were initially entered when you created the Product. Other product details such as Price, Shipping Weight, Group Based Pricing, and Quantity Based Pricing can be edited here. Click **Save All Tabs** when finished.

- Click on **Description** to edit the product page content as desired. See Figure 7 for an example screenshot of the product editing process. Click **Save All Tabs** when finished.
- Click on **Images/Files** to add an image or file link for the Product. Click **Save All Tabs** when finished.
- Click on **Attributes/Quantities** to add a Global Attribute (see the Create a Global Attribute section), or to specify the quantity of products available in stock. Click **Save All Tabs** when finished.

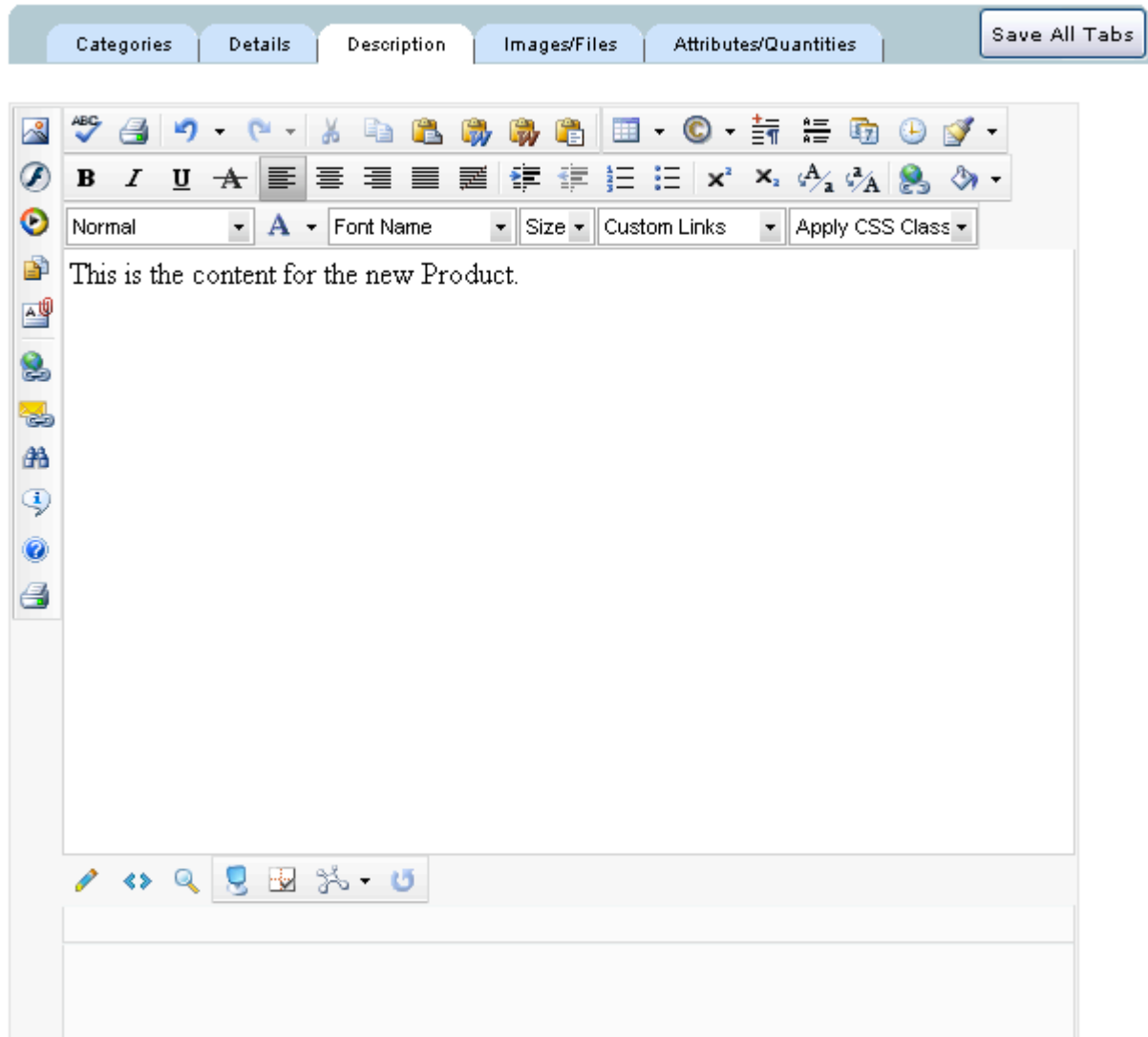


Figure 7: Edit Product Interface

5.7.3. How to use Global Attributes

A Global Attribute is used to define variations within products. For example, there may be several different colours available for a given product, so a “colour” attribute should be created for the clients to choose from.

Create a Global Attribute

This section describes how to create a new Global Attribute.

- Click on the **Create Global Attribute** link on the top right of the **Attributes/Quantities** tab in the **Edit Product** section. See Figure 8 for an interface example.
- Choose an appropriate **Name** for the new Attribute, and the **Type** that the new Attribute should be. See below for an explanation of the **Type** options.

Note: The Type setting cannot be changed once the Attribute has been created.

□ Attribute can be used in product comparison tables

Select this option if the Attribute will have only one variation, and will be displayed with its relevant products in a comparison table using the **Display attributes with products in table layout** option (See Section 0 for more information). When displayed in the table layout, Global Attributes of this type can be sorted according to the attribute entries. The client simply has to click on the name of the Attribute to sort the table according to that Attribute.

□ Attribute can have multiple variations

This is the most commonly used option. Select this option if the Attribute will have one or more variations such as sizes or colours. If selected, the **TQ**, **Plain Text**, **Dropdown**, and **Tickbox** columns will become available for that Attribute on the **Attributes/Quantities** tab. These options are described in the Edit Global Attributes section below.

- Click **Create** to create the Global Attribute.

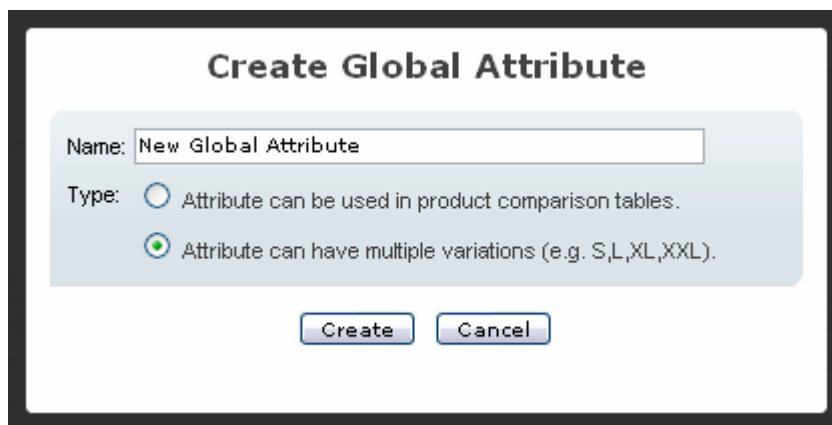


Figure 8: Create Global Attribute Interface

Edit Global Attributes

Global Attributes can be edited in the **Attributes/Quantities** tab in the **Edit Product** section. Below is an explanation of each of the Global Attribute settings. See Figure 9 for an interface example.

❑ TQ (Track Quantities)

Choose this option if it is important to keep track of the individual quantities for each variation of a product. Choose the **Don't track option quantities** option if a total quantity for all product variations is desired.

❑ Values

If the **Dropdown** or **Tickbox** options are selected, the **Add Option** link will become available to create a new variation of the Attribute.

❑ Plain Text

Choose this option for a simple text label where only one value is required for this product. If more than one variation is required, choose either Dropdown or Tickbox as the interface type.

❑ Dropdown

Choose this option where multiple variations are required. This will present the variations to clients as options in a drop-down list on the product page.

❑ Tickbox

Choose this option where multiple variations are required. This will present the variations to clients as options in a tick box format on the product page.

Note: The **Plain Text**, **Dropdown**, and **Tickbox** options are mutually exclusive.

Note: The **Plain Text**, **Dropdown**, and **Tickbox** options are independent across the Global Attribute's product range. For example, if a Global Attribute called Colour exists as a **multiple variation** type of Attribute, one product may have several variations, but another product may have just one variation.

| Name | TQ | Value(s) | Plain Text | Dropdown | Tickbox |
|----------------------|----------------------------------|-------------------------------|-----------------------|----------------------------------|-----------------------|
| Comparison Attribute | | Default Value | [Disabled] | | |
| Variation Attribute | <input checked="" type="radio"/> | Variation 1 | <input type="radio"/> | <input checked="" type="radio"/> | <input type="radio"/> |
| | | Variation 2 | Quantity: 0 | | |
| | | Quantity: 0 | | | |
| | | Add Option | | | |
| | <input type="radio"/> | Don't track option quantities | | | |

Figure 9: Global Attributes


6. Menu Item: Clients


This section will only be visible if you have the Boss.Client module installed. Within this section you can add and remove clients, and sort them into manageable groups.

6.1. Client Search

This section allows you to search through the client database. Simply fill in the specific information you wish to search for and click **View Results**.

If desired, you can also download the search results in Microsoft Excel format, which will allow you to view or save a file called "Client-List.xls". This file will be compatible with most modern spreadsheet applications.

As soon as you have results from your search, you can view or edit individual client details. In the list of clients, click the client's name or the  icon to the right of the client's name to open the Client Details section (see below).

To permanently delete the client from the database, click the  icon to the right of the client's name.

6.1.1. Create New Client

Normally, a client will add themselves to the database when they make a purchase from the website. If, however, there is a reason to create one or more clients manually, you can do that here.

Note: When creating a new client, they can only be added to Static groups. Dynamic groups are not available when creating a new client due to their nature. See the Client Groups section for more information.

6.1.2. Client Details


In this section you can view all of the client's details, including their contact information, delivery addresses, and transaction history. Below is an explanation of the less intuitive settings.

Email Opt-In

This setting indicates whether the client ticked the box marked ***I would like to be kept in touch via email*** when they first became a client. This setting can be used as one of the search criteria on the Client Search page (or to create a Dynamic Group that contains all clients who have Opted In for your emails - see the Create Dynamic Group section). This setting can be changed on the **Edit Client Details** page.

Shop Account

This setting indicates that the client has an account with your company, and that they can be invoiced manually for their sales instead of paying through the usual manner on the website. When this setting is enabled, the client will bypass the payment section of the shopping cart. This setting can be changed on the **Edit Client Details** page.

To view the details of one of the client's transactions, click the client's name or the  icon to the right of the transaction.

To permanently delete the client from the database, click the  icon to the right of the group's name.

6.1.3. Edit Client Details

In this section you can edit any of a client's details, including their contact information, delivery addresses, or to which Static client groups they are part of.

Details

This section is used to change a client's basic database entry details, including their login and password.

Static Group Membership

This section specifies of which Static Groups the client is a member. Tick or clear each box as necessary to add or remove a client from a particular Static Group.

Address Book

This is a list of all addresses (delivery and billing) that are currently in the database for the client.

Add Address

Use this section to add a new address for the client. There are three types of address available: Delivery, Billing, and Delivery & Billing. If a client's delivery address is the same as their billing address, use a single Delivery & Billing address to hold this information.


6.2. Client Groups


Static groups are created and maintained manually; their members do not change automatically. Clients are added or removed manually using the Edit Client Details feature. See the Create Static Group section for more information.

Dynamic Groups are created manually, but the client members are then added or removed automatically according to the group's attributes. For example, if the Dynamic Group is designed for clients who have spent more than \$1000 on the website, the group will become larger as more clients reach the \$1000 threshold.

6.2.1. Client Groups

This section displays a list of all available client groups. At a glance, you can see the group's name, description, and type (Dynamic or Static).

To view the list of clients in a group, click the name of the group or the  icon to the right of the group's name. From here you can select individual clients to view or edit their details. See the Edit Client Details section for more information.

To permanently delete the client group from the database, click the  icon to the right of the group's name.

6.2.2. Create Static Group

Use this form to create a new Static Group. Specify a name and description for the group, and click **Add Group**. The group will now appear as an option in the Edit Client Details section and will be available when adding new clients in the Create New Client section.


6.2.3. Create Dynamic Group


Click the **Create a dynamic group** link to create a Dynamic Group. The method to create a Dynamic Group uses a process similar to searching the client database, as described in the Client Search section. The new Dynamic Group will then be based on whatever criteria were specified in the search. If a client's criteria change to match the group's criteria, the clients will be automatically added to the group. The reverse is true if a client's criteria no longer match the group.

6.2.4. Edit Group

If the group is Dynamic, editing the group will mean changing the membership criteria for the group. This is essentially the same process as creating a new Dynamic Group using different group criteria.

If the group is Static, you cannot directly edit any of the group's details here. Instead, you can view the list of clients that belong to the group.

To edit individual client details from here, click the client's name or the  icon to the right of the client's name to open the Client Details section.

To permanently delete the client from the database, click the  icon to the right of the client's name.

6.3. Email Clients

This section allows you to send an email to individual clients or to client groups.

6.3.1. Compose Email

You can create a fully formatted email here with images, tables, a background colour etc. The email can be designed using an interface similar to most common word processing applications.

Save Draft

At the bottom of the screen is a **Save Draft** button. This will save the email as a draft, allowing you to come back later to finish the email. It will also send the email to the address supplied in the **Alert Email Address** field in the Console Options section. See the Email Settings section for more information.

Reference Tags for utilising with Boss™ Emails

A Reference Tag is a dynamic tag that you can insert into the email. It will change based on the email recipient's name. For example, if you insert the Reference tag **#Boss:ClientFullName#** into the email, each client receiving the email will see their full name instead of the tag.

Another example is as follows:

"Dear **#Boss:ClientFirstName#**" will appear to Joe Bloggs as "Dear Joe".

6.3.2. Select Recipients

Choose the clients and/or client groups that will receive this email. Tick the boxes next to the client or client group that you wish to be included. Clear the tick boxes if you do not wish for the client to receive the email.

When you have chosen the recipients, click **Save and Proceed** to continue.

6.3.3. Review and Send

This section allows you to view the email exactly as the client will see it. If you need to make any changes, click the **Compose Email** link to go back to the first step.

Click the **Send Email** link when you are satisfied with the email content.

6.3.4. Results

This section allows you to see whether the email was sent correctly, or if there were any problems with the sending process.

7. Menu Item: Shop

This section gives an overview of the sales made on the website and allows you to set up sales features such as vouchers and shipping options.

7.1. Overview

From here, you can download the current stock records or sales records in Microsoft Excel format. The **Download Current Stock Records** link will allow you to view or save a file called "Current-Stock.xls", and the **Download Sales Records** link will allow you to view or save a file called "BossSalesResults.xls". These files will be compatible with most modern spreadsheet applications.

This page also contains a summary of the last 12 months of sales on the website. Each month has three columns: Number of Sales, Number of Items, and Total Turnover.

7.1.1. Number of Sales

The orange column (left) for the month represents the total number of sales for that month. The number at the top of the column is the actual number of sales and its length is measured against the axis at the left of the graph. If no sales have been recorded for the month, you will see "0" at the bottom of the graph for that month.

7.1.2. Number of Items

The green column (middle) for the month represents the total number of items sold for that month. The number at the top of the column is the actual number of items sold, and its length is measured against the axis at the left of the graph. If no items have been sold during the month, you will see "0" at the bottom of the graph for that month.

7.1.3. Total Turnover


The blue column (right) for the month represents the total financial turnover for that month. The column is measured against the dollar axis at the right of the graph. If there was no turnover recorded for the month, you will see "0" at the bottom of the graph for that month.

7.2. Sales

This section allows you to view new (unprocessed) sales, cancelled sales, and the total sales history from the website.

If desired, you can click the **Download Results in Excel Format** link to download the search results in Microsoft Excel format, which will allow you to view or save a file called "BossSalesResults.xls". This file will be compatible with most modern spreadsheet applications.

7.2.1. Sales Processing

In the New Sales tab, you can click the name of the client, or the  icon on the right to process the sale. There are two processes that occur in a sale: receiving the payment, and dispatching the goods.

Awaiting Payment

The client has confirmed the sale, but payment has not yet been received.

Processing

The payment has been received and the goods are being prepared for shipping.

Dispatched


The goods have been shipped to the client; the sale is now considered to be complete, and will contribute to the sales graph in the Sales Overview section.


7.3. Shipping

From here, you can view the current shipping options, create new shipping options, and specify the shipping destinations that clients can choose.

7.3.1. Shipping Options

This section displays the available shipping options that clients can choose from. If clients wish to have their goods delivered, they will have to choose a shipping option from the list. This can include standard postage, courier delivery, or perhaps air freight. For each delivery type that you want to make available, you will have to create a matching shipping option.

To edit an existing shipping option, click the name of the option or click the  icon to the right of the option.

To permanently delete a shipping option, click the  icon to the right of the option.

7.3.2. Add New Shipping Option

Use the following options to create a new shipping option for clients:

Name

This should be an appropriate title for the shipping option (e.g. Speedy Couriers Ltd.).

Description

This description should be useful for clients to help them choose the most appropriate shipping option for them (e.g. "Next day delivery, if before 1pm", or "3 – 4 working days delivery").

Type

The type of price scheme for the shipping option: **Weight Range** or **Price per KG**.

The **Weight Range** option requires a minimum and maximum weight to create a range, and a price that covers all deliveries within this range. Typical weight ranges might be 0-5 kg, or 5-10 kg depending on the deliverer's weight restrictions.

The **Price per KG** option requires only the price per kilogram of weight. The cost of delivery is then automatically calculated from the combined weight of the items being delivered.

Destination


This is a list of destinations from which clients can choose for their deliveries. If the destination that you want to use is not listed, you can add it from the Select Destinations section below.

7.3.3. Select Destinations

Use this section to add or remove destinations from the list from which clients can choose for their deliveries. To add a destination, find it in the **Select Destinations** list and click the **Add to Destinations** button.

To select multiple destinations at once, hold down the Ctrl key on your keyboard and click each new destination. Click again to remove the selection.

To select a range of destinations from the list, click the first (uppermost) destination, then hold down the Shift key on your keyboard while you click the last destination. All destinations within the range will be selected for addition.

All current destinations will be displayed in the **Destinations** list on the left. To remove a destination from the list, click the  icon to the left of the destination.

If you want to include an option for all countries that use international shipping rates, tick the **Sell to all countries with standard international shipping rates** box. A new destination called “International” will be available for clients.

7.4. Email Templates

This section contains the templates for automatically generated emails from the website. These email templates are related to the payment options available for the website (credit card, direct deposit etc.), and are enabled by your Boss™ supplier.

7.4.1. Automated Emails

The website can automatically generate an email to a client each time they complete a particular task during an order. Tick the **Active** box to the right of this option to enable it, and click the **Update** button to save the new preferences.

To edit the content of this email, click the name of the Email Template. See the Edit Email section below for more information about this process.

7.4.2. Edit Email

This section allows you to edit one of the Email Templates described above.

Compose Email

Type the content of the email into this section; you can use HTML if desired.

Automatic tags are available to include personal information in the automated emails. See Boss™ Tag Reference below for more information.

Click the **Update** button to save the email and continue editing.

Click the **Save All Tabs** button to save the email and continue editing.

Click the **Send test mail** button to send a draft of the email to the Alert Email Address. You can use this function to check the email’s formatting and content.

Boss™ Tag Reference

This is a list of tags that you can insert into the email to provide specific sale information. The tags will create text that changes based on the email recipient’s details. For example, if you insert the tag **<Boss:OrderID>** into the email, clients receiving the email will see their order number instead of the tag.

Another example is as follows:

“Dear **<Boss:OrderName>**” will appear to Joe Bloggs as “Dear Joe Bloggs”.

8. Menu Item: Commerce

This section gives an overview of the payments made on the website, which can come from payment options such as donations or subscriptions.

8.1. Payments


This section allows you to view new (unprocessed) payments, cancelled payments, and the total payments history from the website.

If desired, you can click the **Download Results in Excel Format** link to download the search results in Microsoft Excel format, which will allow you to view or save a file called "BossSalesResults.xls". This file will be compatible with most modern spreadsheet applications.


Note: At this time, payments can only be processed using the DPS payment provider system.

8.1.1. Setting up a Payment Form

Payments can be set up using the Form Settings section of the Boss.Console. The following steps may be used to set up a new Payment Form.


1. Go to the Forms Settings section of the Boss.Console.
2. Click 'Add New Form' button, and enter an appropriate name for your form. Click 'Add Form' to create the new form.
3. Once created, click on the form number or the  icon on the right of the form name to edit the new form.
4. Click the 'Load Form Markup' button to populate the form with the default information.
5. Edit the form as necessary, and click 'Save All Tabs' to save the form.
6. Edit the Article that you would like to associate with the Payment Form.
7. In the 'Article Features' tab, choose your new form from the 'Associated Form' drop-down box. Click 'Save all Tabs' to finish.


8.1.2. Payments Processing

In the New Payments tab, you can click the name of the client, or the  icon on the right to process the payment. The processes that occur for a payment are identical to the sales processes. See the Sales Processing section for more information.

9. Menu Item: Search

This is a search engine for the website. Type the search information into the **Quick Find** box, choose the section of the website to search, and click the **Search** button.

A list of the search results will be shown at the bottom of the screen. Click the item or the  icon to the right of the item to edit its content.

To permanently delete the item, click the  icon to the right of the item name.

10. Menu Item: Log Out

Use this link to end your session as the current user on the Boss.Console. You will then be redirected to the login page.

Notes

Please feel free to use this section for your notes.