



# Getting Started With Actinic v9

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*Note: This guide covers Actinic version 9 created by Actinic Software Ltd. All the screen shots are taken from Actinic version 9*

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# Getting Started

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## Installation

To install the software onto your PC:

1. Place the Actinic installation CD in your CD drive.
2. It should automatically run. If it does not, you will need to:
  - Click the 'Start' button in Windows taskbar and go to 'Run'.
  - Click 'Browse' and then go to 'D:' (where D: is your CD drive).
3. Select 'setup.exe' and double click.

This will start the first of the 'Installation Wizards' that will guide you through the set-up process. It is possible to achieve a perfectly satisfactory installation by accepting all the default settings suggested to you. Click 'Next' to take you from screen to screen, click 'Back' to take you to the previous screen and click 'Cancel' to abort the installation process.

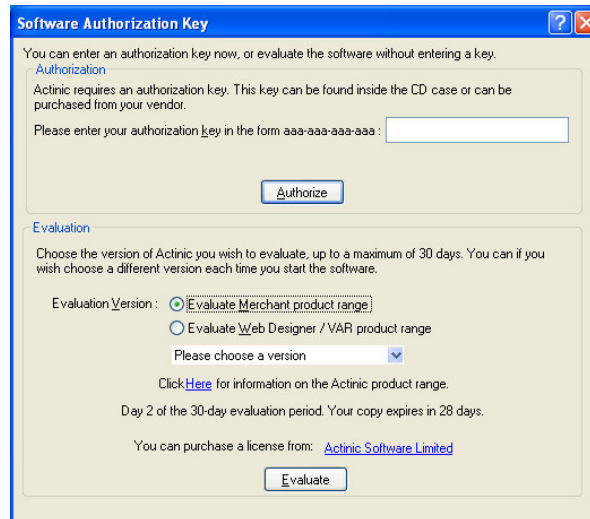
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## Starting Actinic

Actinic is designed to publish an online store onto the internet, and then receive and process orders from that store.

It works by taking all your product data and turning it into a set of web pages, based on the design options you have selected. It then also manages all the functionality to control the shopping cart, search and online security at your online store.

When you first start Actinic, you will see the following screen:



If you have a license key for Actinic, enter it in the field provided and click 'Authorise'.

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If you are setting up a multi-user site with Business Plus, you will also need to enter a username of **Administrator** and a password of **Administrator**.

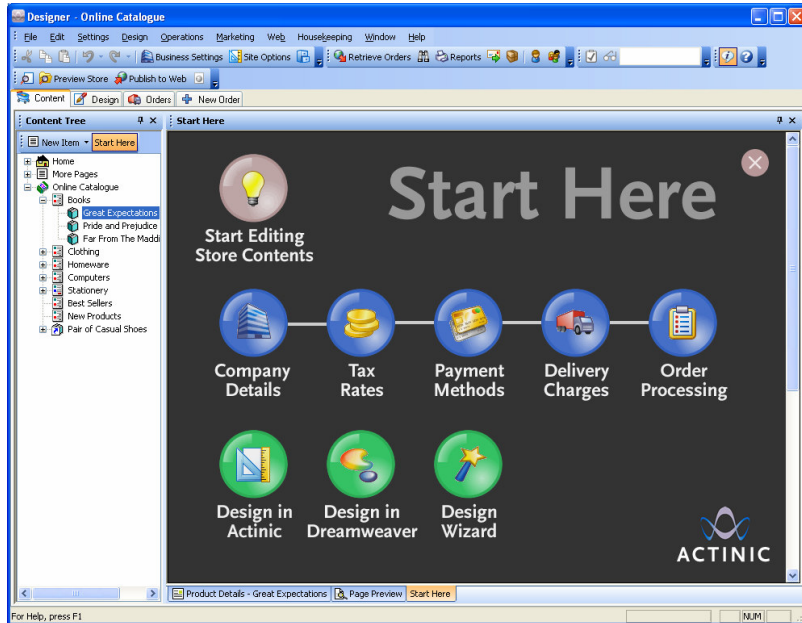
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If you want to evaluate Actinic then you need to select one of the 'Evaluation Version' options at the bottom half of the window.

- To evaluate Actinic Catalog, Actinic Business or Actinic Business Plus select the 'Evaluate Merchant Product Range' option.
- To evaluate Actinic Designer select the 'Evaluate Web Designer / VAR Product Range' option.

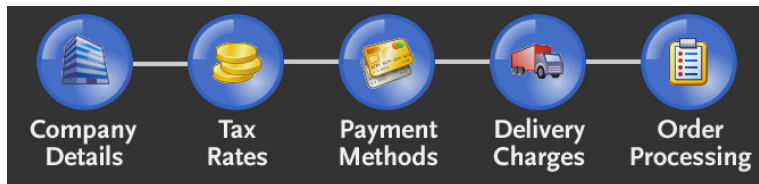
Then select a product to evaluate and click 'Evaluate'.

You will then see the following screen:

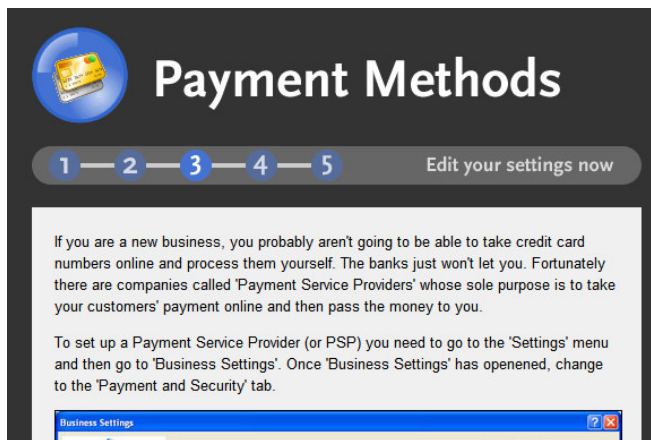


## The Start Here Panel

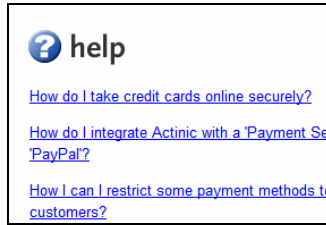
In the main part of the screen is the 'Start Here' panel. This is designed to take you through the most important areas of the software.



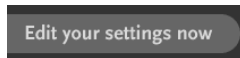
Click on one of the buttons and it will open up to show more information:



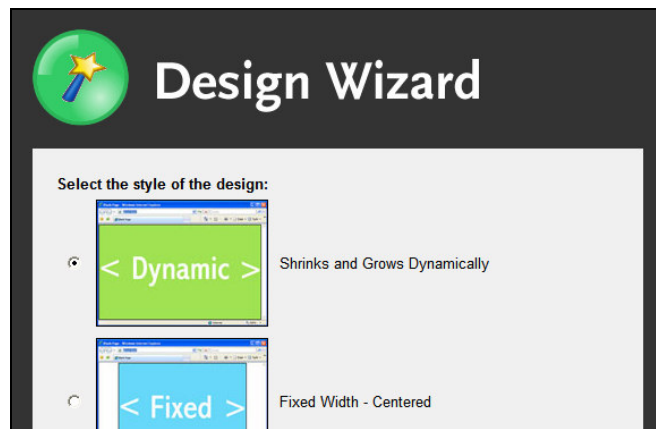
At the bottom of each page of the Start Here panel are some links to some useful chapters in the main Actinic help.



Also, while looking through the Start Here panels you will see some links that will take you straight to that related area of Actinic.



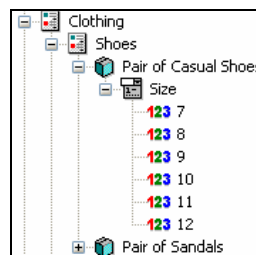
Also, if you click on the link that says 'Change the look and feel of the store', you will see a button to start the 'Design Wizard'.



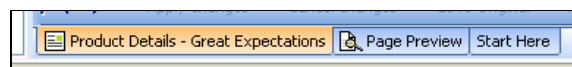
The Design Wizard is a quick way to apply a basic design to your store where you can set the layout and colours for the design. Give it a try to see what happens. If you don't like the basic theme it gives you, there are some others to choose from in 'Design | Themes'.

## Checking Out The Example Store

Down the left hand side of the program is the 'Content Tree'. This shows you the section, products, pages and information items in your store. Click on the '+' icons in the tree to expand a branch of the tree.



Click on any item in the tree to see its details appear in the 'Details' panel to the right.



You can also click on the 'Page Preview' panel to see how the item you have clicked on will look in your online store.



## Other Places To Look

There are two other main tabs along the top of the Actinic screen:



- The 'Design' tab is where you can change the look and feel of your store pages. This won't be there if you are using a 'Client' version of Actinic. There are details of this in "The Design Tab" on page 79.
- The 'Orders' tab is where you manage and process the orders received at the store. More details on this are in "Processing An Order" on page 56.

## Exercise - Personalising Your Store Design

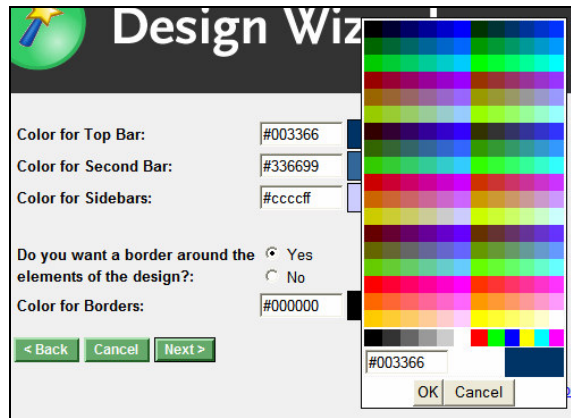
This exercise will show you how to give the default Actinic store your own personal stamp.

To begin with, you are going to run the Design Wizard to customise a quick new look and feel for the store.

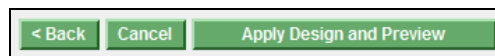
1. Click on the Page Preview tab at the bottom of the Content tab. This shows what the store looks like at the moment. You can get this look and feel back at any time by re-selecting the default 'theme' (called 'Reflective'). This is talked about later in "Choosing A Theme" on page 70.
2. Look at the Start Here panel and click on the 'Design Wizard' button:



3. On the first page, you can select whether your store design will have a fixed width, or shrink and grow with the browser window. Make a choice and then click 'Next >' to continue.
4. On the next page, you can choose some colours for the different parts of the design. Select some colours (by clicking on the coloured boxes) and then click 'Next >' to continue. You can always re-run this wizard to choose some different ones.



5. On the next page you can decide whether your store has one sidebar down the left hand side, or a sidebar down each side of the design. Make a choice and then click 'Next >'.
6. In the next few screens you can choose where Actinic will place things like quick search bars, section lists and best sellers lists. Again, you can always re-run this wizard if you are not happy with your choices.
7. Eventually you will get to the final screen where there will be an 'Apply Design and Preview' button.



8. Click this button to see what effect all your changes have had on the Actinic store. You will be taken to the Page Preview panel to see your new design.

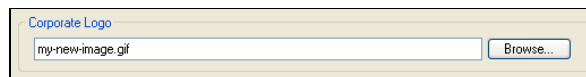
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If you don't like what you see, re-run the Design Wizard or go to 'Design | Themes' to choose a ready-made look and feel for your store.

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Next you are going to select a new 'Corporate Logo' image to go at top of every store page.

1. Go to 'Design | Themes'.
2. At the bottom of the window, under where it says 'Corporate Logo' click the 'Browse' button and select a new image from your PC.

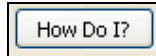


This might be an image you use in letterheads, or one you use on an existing website. It needs to be a '\*.gif' file or a '\*.jpg' file and not be too enormous (i.e. not more than about 600 pixels wide).

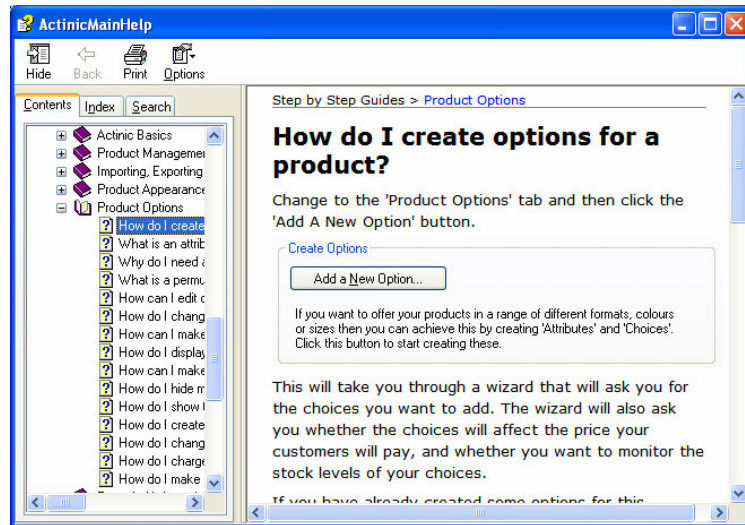
3. Once you've selected an image, click 'OK' to use it in Actinic.
4. Check the Page Preview panel to see how your new logo looks.


## More Information - Getting Help With Actinic


Whenever you are looking at a new area in Actinic, look out for the 'How Do I' buttons.

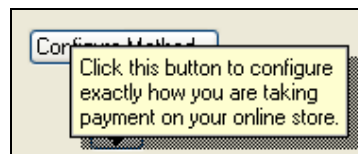


Click these buttons to bring up a help file with link to lots of relevant step by step guides to using Actinic.



You can access the entire Actinic help file by going to the 'Help' menu and selecting 'Help Topics'. Or you can click the  button on the toolbar. When viewing the help, use the 'Contents' tab of the help to browse by topic. Alternatively, use the 'Index' or the 'Search' to locate key words or phrases.

In addition, click on the question mark -  - at the top right of the Details panel (or any of the windows within Actinic) and then click in a field. You will be shown a little piece of help about the field.





# Previewing

Each separate section (and each brochure page) in the store will eventually become a single web page in your online store.


The Page Preview panel shows you what the page you have selected in the content tree will look like online. If you are finding the panel too small, or you would like experience more of how your customers will see the site, you can always do an offline preview. This allows you to check out your store design in a web browser.

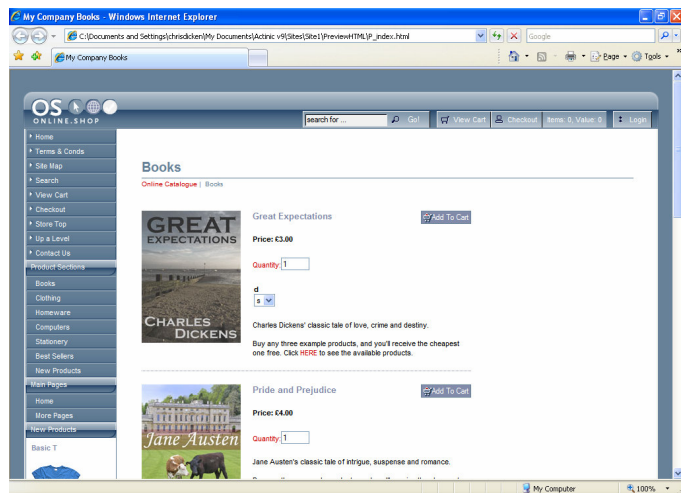
There are two ways to preview


- **Preview Current Page** - Opens only the current page in a web browser. To do this, click the  button on the toolbar, go to 'Web | Preview Current Page' or press [Ctrl + A] on your keyboard.
- **Preview Store** - Previews all the brochure pages and section pages in your store, showing you how it all fits together. To do this, click the  button on the toolbar, go to 'Web | Preview Store' or press [Ctrl + W] on your keyboard.

## Exercise - Previewing

This exercise will step you through the two different kinds of previewing.

1. Make sure you are on the Content tab.
2. Click on any section (or brochure page) in the store and click the  button on the toolbar.
3. This will display your page in your normal web browser.



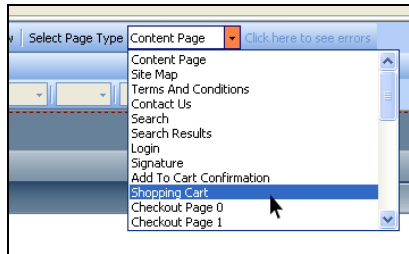
4. Now go back to Actinic and click the  button on the toolbar.
5. Navigate through the sections in your store (using the links provided) to view them.


6. Try adding something to the shopping cart. You should get a warning message. This is because you cannot test store functionality with a preview - only the look and feel.

## Exercise - Previewing Other Pages

This exercise will show you how to preview pages that are not in your content tree.

1. Go to the Design tab (not available in Client versions).
2. Locate the 'Select Page Type' drop down, which is above the preview panel on this tab.



3. Select a page other than 'Content Page'. The page you select will appear in the preview panel.
4. You can then click the  button to see how this page will look in a web browser.

If you are previewing a shopping cart or checkout page within a preview page, it will contain some example data.

## More Information - The Design Tab

The preview panel on the Design tab is different from the one on the Content tab as it is interactive. You can click on something in the preview, and the HTML code for that item will appear in the 'Layout Code' panel within the tab.


For more information about using the Design tab, please see the chapter called "The Design Tab" on page 79.

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# Products


The whole of Actinic is effectively geared around the presentation and promotion of your products. Consequently there are many options within Actinic that change how your products look and work. With Actinic you can (among other things):

- Enter a stock level for a product.
- Create an extended information window, containing a larger image and/or a longer description.
- Set whether the product price is shown including or excluding tax.
- Set whether a downloadable file will be available to customers who buy a product.
- Set up a list of related items that will appear underneath a product.
- and many more...

Within the content tree products look like this: 

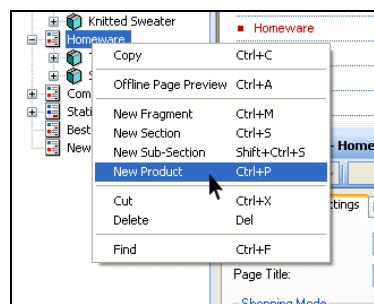
If there is a '+' next to the product, it is because that product contains options such as 'size' or 'colour' etc.

Try clicking on some of the example products that are in Actinic, and look at the panels in the Details panel to see the sort of things you can configure on a product.

Don't forget you can get information about a setting by clicking on the  at the right of the Details panel title bar and then clicking in a setting.

## Exercise - Adding a New Product

1. Right-click on the 'Homeware' section in the content tree.
2. On the right-click menu, select 'New Product'.



3. Make sure you are looking at the 'General' panel by selecting 'General' in the list of panels to the left of the 'Details' panel.
4. In the 'Short Description' field, enter 'Running Shoes'.
5. In the 'Price' field, enter '50.00'.
6. In the 'Full Description' field enter 'Pair of lightweight running shoes'.

7. In the 'Image' field click 'Browse'. You need to be in the 'Site1' folder. If you are not there, browse to the '...\Sites\Site1' folder on your PC.
8. Select 'x-sneakers.jpg' from the 'Site1' folder.

9. Switch to the 'Layout' panel and change the 'Price Layout' to 'Standard Tax Inclusive Price'. This will mean that the price for this product will be displayed including tax.
10. Click the 'Apply Changes' button.

Your new product will appear in the content tree and also in the preview panel.

## Exercise - Formatting Text

This exercise will show you how to change the appearance of the text in your product description.

1. Highlight the text 'running shoes' within the 'Full Description' field of your new product.
2. Press the **B** button on the toolbar at the top of the details panel.
3. Click 'Apply Changes'.
4. This will make the text 'running shoes' appear bold in the preview.

Feel free to experiment with the other text formatting options on the toolbar to see what effect they have.


## Exercise - Extended Information Windows

This exercise will add an extended information window to your 'running shoes' product.

1. Switch to the 'Extended Information' panel.
2. Select 'Generate Pop Up Page'.
3. In the 'Image' field, just select 'x-sneakers.jpg' again.
4. In the 'Text' field enter 'This is a longer description for the running shoes'.
5. Under 'Display By', click 'Text Link'. In the 'Link Text' field type 'More Info...'.
6. Click 'Apply Changes'.

This change has created an additional 'extended information' page that will be opened in a pop-up window when you click the 'More Info' text on your running shoes product in the preview.

In order to see the effect this change has made, you will need to:

7. Do a page preview by clicking the  button on the toolbar.
8. Then browse to your running shoes, which are currently in the 'Homeware' section.
9. When you get there, click the 'More Info...' link.



The main help file includes some information on how to open an extended information page in the same browser window, and include a cart button in the page. That way, you can use these pages as 'full detail' pages for your products, and also allow customers to order from these pages.

## More Information - Other Product Settings

If you want to ask a general question when people buy this product, then enter the question within the 'Other Info' field on the 'Prompts' panel. You can also add a date-related question here such as 'When would you like the flowers delivered?'.

What name would you like on the gift tag?

Use the 'Product Layout' field in the 'Layout' panel to try alternative layouts for this product. If you want a more compact layout, try the 'No Image No Description Laid Out In Single Line' layout. Feel free to experiment with the different layouts there to see the effect they have. Change it back to 'Use Parent' if you want to put it back to the way it was.

There is more information on choosing layouts in "Choosing Alternative Layouts" on page 76.

It is also possible to import a whole load of products in one go from a spreadsheet with an import. This is described in the main help in the section called 'Importing'.



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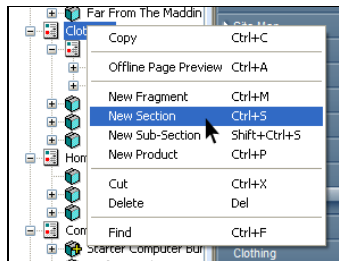
## Sections

You can use sections to organise your products into separate pages - a section becomes a web page in the online store. You can create sections within other sections to create a store hierarchy - and Actinic will automatically create a link from one section to another.

### Exercise - Adding a New Section

This exercise will add a new section to the store, and show you how to place your new 'Running Shoes' product within it.

1. Right-click on the 'Clothing' section and select 'New Section'.

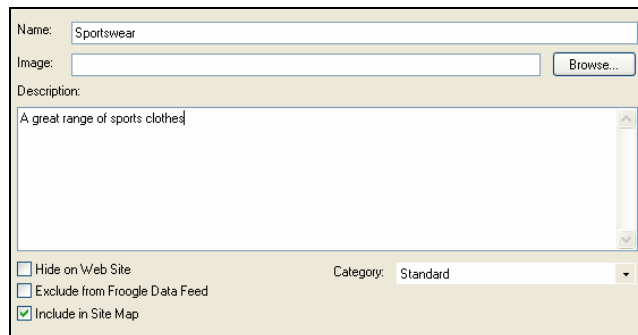


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Note: If you select 'New Sub-Section', it creates the section within the current section.

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2. Enter a name of 'Sportswear' and a description of 'A great range of sports clothes'.
3. Click 'Apply Changes'.

A screenshot of a form for creating a new section. The form has the following fields and options:

- Name: Sportswear
- Image: [Empty field] [Browse...]
- Description: A great range of sports clothes
- Hide on Web Site:
- Exclude from Froogle Data Feed:
- Include in Site Map:
- Category: Standard

Your new section has been created in the content tree. The description will be used in the link to the section, which will appear on the store front page (you can view this page by clicking on the green 'Online Catalog' icon in the content tree).

You are now going to drag and drop your 'Running Shoes' product into the new 'Sportswear' section.

4. In the content tree click on the 'Running Shoes' product and hold the mouse button down.
5. Keeping the mouse button held down, drag the mouse cursor into the 'Sportswear' section.

6. Release the mouse button. The running shoes product should now be in the 'Sportswear' section.



## Exercise - Optimising A Section

This section will show you how to use the 'Shopping Mode' feature - which controls how products in a section behave when they are added to the shopping cart.

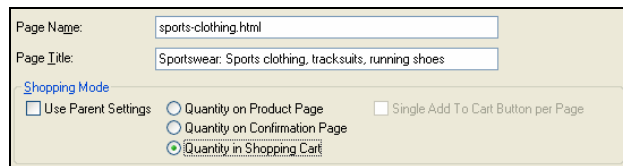
You will also see a few search-engine optimisation features.

1. Go to your 'Sportswear' section and go to the 'Page Settings' panel.
2. Change the 'Page Name' field to 'sports-clothing.html' (all lower case).
3. In the 'Page Title' field enter 'Sportswear: Sports clothing, tracksuits, running shoes'.
4. Click 'Apply Changes'.

These two changes will help your page to be more visible to search engines.

The next change will remove the 'Quantity' field from the HTML page.

5. Under 'Shopping Mode' (on this panel) de-select the 'Use Parent Settings' checkbox and select 'Quantity in Shopping Cart'.
6. Click 'Apply Changes'.



Online customers will now enter the quantity of products they require once they have added product to the shopping cart.




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# Product Options

There are many different ways to add options to a product. Here are some examples of things you can do in Actinic:

- A simple range of colour options.
- A range of colour options where each colour is individually stock monitored.
- A range of size and colour options.
- An extra add-on that costs extra.
- A range of options where each choice costs a different amount.

Options in the content tree look like this:

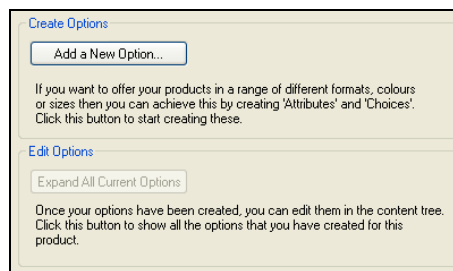
- **Attributes** -  - These are characteristics of a product that can vary such as 'style', 'length', 'size', etc.
- **Choices** -  - These are individual options within an attribute.
- **Components** -  - These allow you to create more sophisticated options such as an optional extra (that costs money) or a range of options where each option is a different price.

You can create options using the 'Product Options' panel of a product.

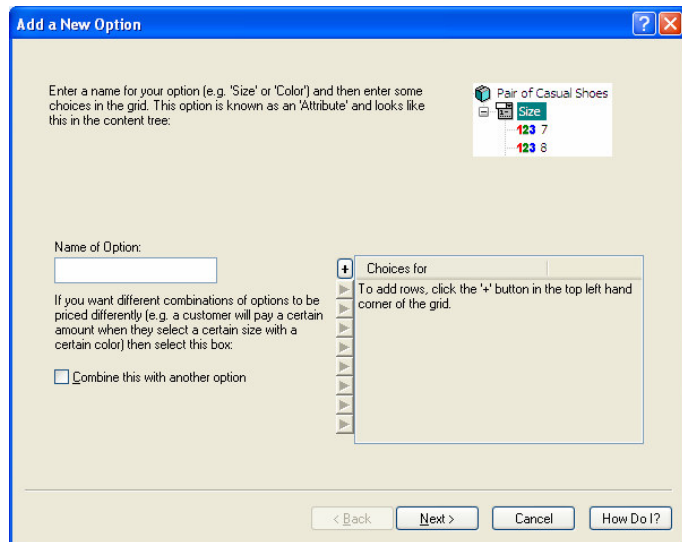
## Exercise - Creating Simple Choices

This exercise will allow you to create a range of simple size choices for your running shoes.

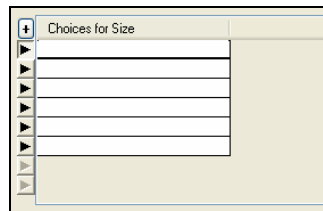
1. Click on your running shoes and select the 'Product Options' panel.



2. Click the 'Add a New Option...' button to start the 'Add a New Options' wizard.



3. In the 'Name of Option' field, enter 'Size'.
4. In the 'Choices for Size' grid, click the '+' button (at the top left) six times to create six blank rows.



5. Click in the first row and enter '7'.
6. In the rows under that enter '8', '9', '10', '11' and '12'. You can use the 'down' arrow on your keyboard to move to the next row quickly.
7. When you have entered your choices, click 'Next'.
8. Just click 'Next>' again twice (as you are not setting prices, stock levels or layouts) and then click 'Finish' to create your options.

Your new options will be visible in the content tree. You might need to click the 'Expand All Current Options' button to see all the options.



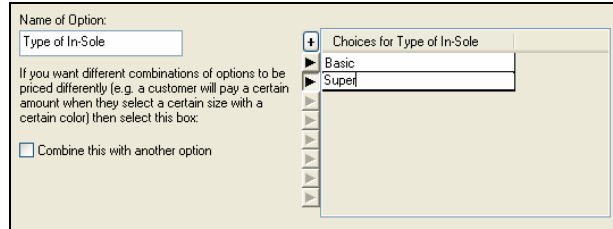
By default, choices appear as a drop down list in your store. If you wanted to change your choices to radio buttons, you can select an alternative layout within the 'Layout' panel of the 'Size' attribute.

## Exercise - Choice-Dependent Pricing

This exercise will add a new option to the running shoes of 'In-soles'. When customers purchase the shoes, they will be able to choose whether

they want an in-sole or not, and which type they want - with each one being a different cost.

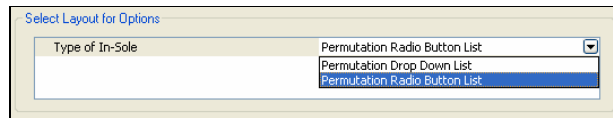
1. Go to the 'Product Options' panel of the running goes again, and click the 'Add a New Option' button.
2. Under 'Name of Option' enter 'Type of In-Sole' and then enter two choices - 'Basic and Super'.



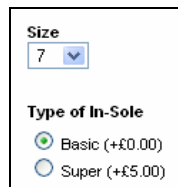
3. Click 'Next' and in the grid on the next screen, enter a price of '5.00' for the 'Super' option.

Type of In-Sole	Price	Stock
Basic	£0.00	0
Super	£5.00	0

4. Click 'Next' and in the next screen, change the 'Select Layout for Options' drop down list to 'Permutation Radio Button List'.



5. Click 'Next' and then click 'Finish' to create the new option.



You now need to do a couple of changes to the 'component' Actinic has created in order to make the 'Type of Insole' optional (i.e. the customer can choose not to have one).

6. Look at the options within the 'Running Shoes' product within the content tree. You should have two components - 'Option' and 'Option1'.



7. Click on 'Option1'.
8. Look at the details of the component, and change to the 'General' panel if you are not there already.
9. Change the 'Component Name' from 'Option1' to 'Optional In-Sole'.

- Select 'Is Optional' and also select 'Include None in Attribute Choice List'.

- Change to the 'Permutations' panel.

+	Type of In-Sole	Valid	Pricing	Price	Product
▶	Basic	<input checked="" type="checkbox"/>	Override	£0.00	(None)
▶	Super	<input checked="" type="checkbox"/>	Override	£5.00	(None)

The main grid here is where you can edit prices if required.

- Click 'Apply Changes' to confirm your changes.

## More Information - Stock Levels

When you create options for a product, you have the option of entering stock levels for your choices.

Cover	Price	Stock
Hardcover	£20.00	20
Softcover	£10.00	108

When you do this, Actinic creates a 'hidden product' for each choice.

These hidden products contain the stock for each option. They are associated with each choice within the Permutations panel of the component. The associated product is in the 'Product' column in the grid.

+	Cover	Valid	Pricing	Price	Product
▶	Hardcover	<input checked="" type="checkbox"/>	Override	£20.00	Pride and Prejudice {Cover:Hardcover} (7)
▶	Softcover	<input checked="" type="checkbox"/>	Override	£10.00	Pride and Prejudice {Cover:Softcover} (21)

So when your customers select a certain choice online, they are effectively purchasing a specific hidden product.

---

## Brochure Pages

Brochure pages are optional information pages you can include with your store pages such as 'Special Offers', 'Latest News' etc.

There are two example brochure pages supplied with Actinic - 'Home' and 'More Pages'. You will find these at the top of the content tree. In the preview, you will see a list of the brochure pages in the sidebar.

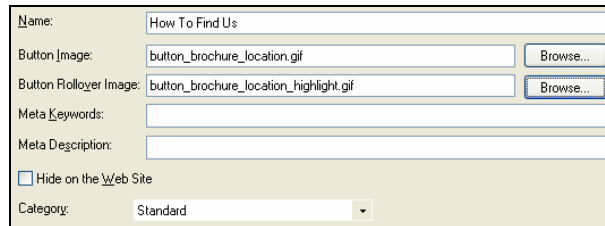


Brochure pages cannot contain products, but they can contain 'Fragments' - which are information items on a page. Sections can also include fragments.

### Exercise - Creating A Brochure Page

This will create a new 'How To Find Us' page in your store, and include an example information item within it.

1. Right-click on the 'Home' page at the top of the content tree and select 'New Brochure Page'.
2. In the 'Name' field enter 'How To Find Us'.
3. In the 'Button Image' field click 'Browse' and locate 'button\_brochure\_location.gif' in your 'Site1' folder.
4. In the 'Button Rollover Image' field click 'Browse' and locate 'button\_brochure\_location\_highlight.gif' in your 'Site1' folder.

A screenshot of a configuration dialog box for creating a new brochure page. The fields are: 'Name' (How To Find Us), 'Button Image' (button\_brochure\_location.gif), 'Button Rollover Image' (button\_brochure\_location\_highlight.gif), 'Meta Keywords' (empty), and 'Meta Description' (empty). There is a checkbox for 'Hide on the Web Site' which is unchecked. The 'Category' is set to 'Standard'.

---

These images are not used in the default Actinic theme, but they may be visible in other themes.

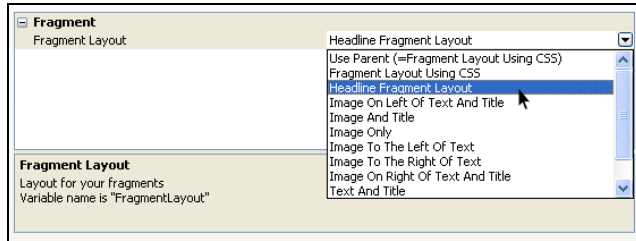
---

5. Click 'Apply Changes'.

This has created a new page in the content tree.

You are now ready to include a fragment into the page.

1. Right-click on your new 'How To Find Us' page and select 'New Fragment'.
2. In the 'Fragment Title' field enter 'How To Find Us'.
3. In the 'Text' field enter 'Here is how to find our offices....'
4. Change to the 'Layout' panel and change the 'Fragment Layout' to 'Headline Fragment Layout'.



5. Click 'Apply Changes'.

If you have a suitable image to use for e.g. a map then you can always select it in the 'Image' field in the 'General' panel.

## More Information - Links

If you are creating a fragment that refers to a product or a section in the store, you can use the 'Links' panel to create a link to that item. Then just include [LINK] in the 'Text' field, where you want the link to appear.




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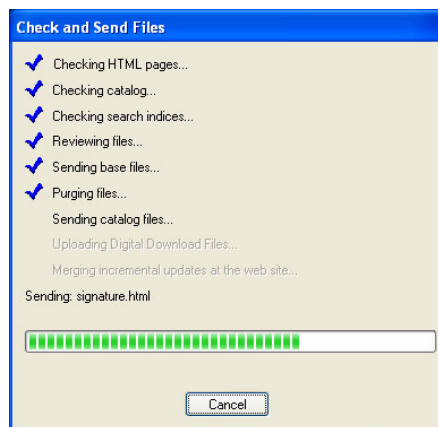
## Uploading Your Store

In order to really see your store in action, you need to upload it to a website. This will publish your website to the internet, and you will be able to use the search, shopping cart and checkout functionality, and place test orders.


### Exercise - Uploading a Trial Copy of Actinic

If you are using a trial version of Actinic, which has been pre-configured to work with a specific site, it is simple to upload it to the internet.

1. Press the 'Publish To Web' button (  Publish to Web ) on the toolbar (or go to 'Web | Publish to Web').
2. You will be prompted to enter a username and password.
3. If you do not have a username and password then you will need to register for one online.
  - Click on the 'To Apply For A New Account' link, and follow instructions on the website.
  - Once you have supplied the required information and received a username and password, enter the username and password into the fields provided in Actinic.
4. The upload should then continue.



The first time you upload, it will take quite a while as it needs to upload the entire site. After that, however, Actinic will only upload the files that have changed.

Once the upload is completed, click the  button on the toolbar (or go to 'Web | View Online Website') to view your store online.

### More Information - Uploading Actinic To Your Own Website

---

The instructions in this section will work for most web sites, but they won't work with all of them. If you find they don't work for your website then you will need to contact your web hosting company.

---

When the Actinic store is uploaded to your web site, all the store files (with a few specific exceptions) are uploaded to two folders on your website:

- 'CGI' folder (often called 'cgi-bin') where all the script files will be uploaded to in order to run the online search, shopping cart and checkout. These files are sometimes referred to as 'Perl files'.
- An online store folder, which Actinic will create, that contains all your store HTML files and images.

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Note: The 'home' brochure page can be uploaded to the directory level above the online store folder by selecting the 'Use as Web Site Home Page' box on the 'home' brochure page.

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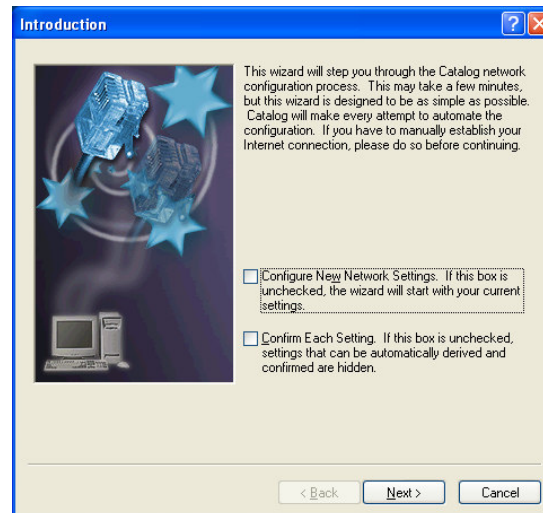
Before you try uploading your store you need to know:

- The URL ('http://') address of your CGI folder.
- Where the CGI folder is located on your web site (as it appears when you connect via an FTP program).

You will also need to know:

- The URL and the FTP location of the folder on your website that you would like Actinic to create the online store folder within.

When you have these pieces of information, you can start the 'Web Site Configuration Wizard' by going to 'Web | Configure Web Site Details'.



The Web Site Configuration Wizard will ask you for your username and password to connect to your website, and will ask you to confirm the locations, and the http addresses, of the folders mentioned above.

You can often just accept the defaults to achieve a successful upload.

When the wizard has finished, you can review the settings at any time by going to 'Web | Network Setup'.

From now on, simply click the  Publish to Web button on the toolbar to upload your store.

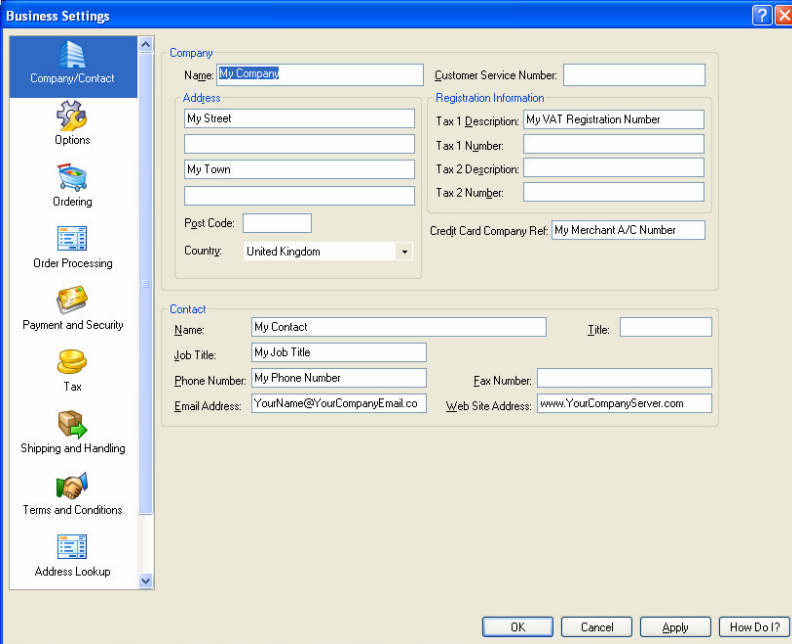
For more detailed information on uploading, open the main help and go to 'Putting Your Store Online'.



# Running an Online Business

## Business Settings

'Settings | Business Settings' is where you can enter details about your company and how you do business.



The screenshot shows the 'Business Settings' window with a sidebar on the left containing icons for 'Company/Contact', 'Options', 'Ordering', 'Order Processing', 'Payment and Security', 'Tax', 'Shipping and Handling', 'Terms and Conditions', and 'Address Lookup'. The main area is divided into sections: 'Company' (Name: My Company, Customer Service Number), 'Address' (My Street, My Town, Post Code, Country: United Kingdom), 'Registration Information' (Tax 1 Description: My VAT Registration Number, Tax 1 Number, Tax 2 Description, Tax 2 Number), and 'Contact' (Name: My Contact, Job Title, My Phone Number, Fax Number, Email Address: YourName@YourCompanyEmail.co, Web Site Address: www.YourCompanyServer.com, Credit Card Company Ref: My Merchant A/C Number). Buttons for 'OK', 'Cancel', 'Apply', and 'How Do I??' are at the bottom right.

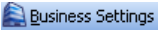
You can also set up how you will take payments and charge postage, which are both discussed in later chapters.

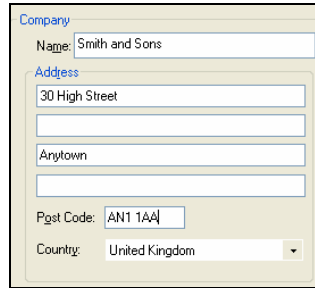
It is essential to communicate clearly with your customers on the site about who you are, where you are based, how long it's going to take to fulfil orders etc. This builds trust in your potential customers, and makes them feel more comfortable about placing an order with you. It also helps set expectations of customers about delivery times etc.

Actinic's main way of communicating all this information is via an online 'Terms and Conditions' page. This is linked to from every page, including the checkout, and contains all the information about who you are and how you do business. Contact information is also included on the online receipt, and all emails and reports generated by Actinic.

## Exercise - Entering Company Contact Data

This exercise will show you where to enter your company details into Actinic, and also enter information into an online terms and conditions page.

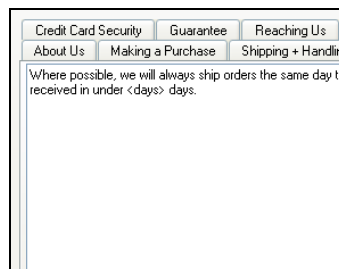
1. Go to 'Settings | Business Settings' or click the  button on the toolbar. Make sure you are on the 'Company/Contact' panel.
2. In the 'Name' field, enter your company name.
3. In the 'Address' and 'Post Code' fields, enter your address.



4. In the 'Contact' area at the bottom, enter your name into the 'Name' field.
5. You can delete whatever is in the 'Job Title' field - or change it to suit your requirements.
6. Enter a phone number in the 'Phone Number' field and an email address in the 'Email Address' field. You can also enter a telephone number into the 'Customer Service Number' field at the top.
7. Enter your website address into the 'Web Site Address' field.
8. Click 'Apply'.


Now you have entered some company details, you can enter some terms and conditions information.

9. Change to the 'Terms and Conditions' panel.
10. In the 'Delivery Schedule' tab, change 'We deliver your order right away' to 'Where possible, we will always ship orders the same day they are received'.



11. Feel free to make any other changes to the text in the tabs.

You can now check the results in the preview.

12. Go to 'Web | Preview Store' or click the  button in the toolbar. Make sure you are previewing the whole store and not just the current page.
13. Click the 'Terms & Conds' button (or 'Terms' or 'Info' or whatever it is called in the theme you are using) to check out your changes.

## Exercise - Tax

In 'Business Settings' you also set up whether you want to enter your product prices including tax or excluding tax.

1. Go to the 'Company/Contact' panel in 'Business Settings'.
2. Change the 'Tax 1 Description' field to read 'VAT Number' (or equivalent if you charge an alternative type of tax e.g. 'Sales Tax #').
3. In the 'Tax 1 Number' field, enter your company tax registration number.
4. Click 'Apply'.

Now change to the 'Tax' panel.

5. On the Tax panel, under 'Product Prices Entered', select 'Inclusive of Tax'.



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This means that you can enter prices for your products including tax, and Actinic will separate out the tax in the online shopping cart and in the order.

---

6. Click 'OK', or if you want to go back to entering prices without tax click 'Cancel'.

To find out more about configuring tax, look at the chapter called 'Setting Up Tax', within the 'Business Settings' section in the main help.

## More Information - Advice On Selling

The most important aspect of selling online is how effectively you communicate with your customers - both on the site as they customers are browsing, and also after the order has been placed. A missing postal address for your company, or unclear information about delivery times will lose you more orders than a design element that is slightly out of alignment. So take the time to get your terms and conditions right, before getting into the more technical aspects of the Actinic store.

---

## Taking Payments

Actinic offers a wide range of options for you to take payment from your customers.

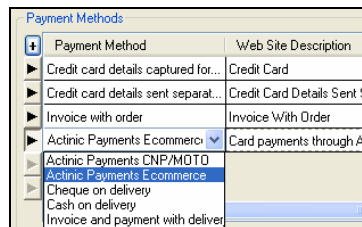
You may choose to use a 'payment service' to process your customer's card details. A 'Payment Service Provider' (PSP) is a company that will take your customer's card details online, and process them there and then. You will then download the confirmation that tells you the customer has paid. Actinic is integrated with a large number of PSPs, including 'Actinic Payments' - its own payment service.

If you have an existing business, and already have the ability to process credit card numbers yourself, then you may just need a way for your online customers to send you their card details. If you want to work in this way, you will need SSL - a method for sending information securely over the internet. If you want, you can purchase your own 'SSL certificate' for your site, and Actinic will work with it. You might want to talk to your web hosting company about this. Alternatively, Actinic (and others) offer a 'Shared SSL' service that will allow you to take credit card numbers securely for an annual fee without needing your own SSL certificate.

### Exercise - Adding a Payment Service

This exercise will show you how to integrate your store with an online payment service. In this example, we will be using Actinic Payments.

1. Go to 'Business Settings | Payment and Security'.
2. Click the '+' at the top left of the main grid.
3. In the new row created select 'Actinic Payments Ecommerce' from the drop-down in the 'Payment Method' column.



Payment Method	Web Site Description
▶ Credit card details captured for...	Credit Card
▶ Credit card details sent separat...	Credit Card Details Sent S...
▶ Invoice with order	Invoice With Order
▶ Actinic Payments Ecommerce	Card payments through Ac...
▶ Actinic Payments CNP/MOTO	
▶ Cheque on delivery	
▶ Cash on delivery	
▶ Invoice and payment with deliver...	

If you want to integrate with a different payment service, select an alternative one from the list.

4. Edit the 'Web Site Description' field to change how the option will be presented to your customers at the web site.
5. Now click 'Configure Method'.



The dialog box is titled "Payment Service Provider Configuration". It contains the following fields and options:

- Web site description: Card payments through Actinic
- Provider: Actinic Payments Ecommerce
- Operation:
  - Run in production mode
  - Run in test mode
- Transaction:
  - Pre-authorise transactions
  - Charge transactions immediately
- PSP settings:
  - Terminal ID: [text box]
  - Transaction Key: [text box]
  - Hash Key: [text box]
  - Verify CW2: Enforce (dropdown)
  - Verify Address: Check (dropdown)
  - Verify Postcode: Check (dropdown)
  - Verify 3D Secure: Off (dropdown)

Buttons: Information and Registration, OK, Cancel

This is where you can enter details about your account with the payment service. Click 'Information and Registration' if you want to apply for a test account to try it out with.

If you don't have any settings to enter here yet, just click 'Cancel' and remove 'Actinic Payments' from the list of payment methods (by right-clicking on the grid and selecting 'Delete Row').

## More Information - Capturing Card Details Yourself

If you have the ability to process credit card numbers yourself, your bank might allow you to receive card details from your customers at your online store, and then process them when you download the order.

If you want to do this, you need to make sure the 'Credit card details captured for later processing' payment method is available in the 'Payment Methods' grid.

You can then click 'Configure Method' to decide which security method you use, and which credit cards you wish to accept.

The dialog box is titled "Credit Card Capture Configuration". It contains the following fields and options:

- Capture Method:
  - Standard SSL or unencrypted (depending on whether SSL enabled)
  - Shared SSL
  - Actinic Inbuilt Encryption (Java Applet)
- Credit Cards Accepted:
 

Name	Issue	CW2	CW2 Di...	Start d...
Mastercard	<input type="checkbox"/>	<input type="checkbox"/>	3	<input type="checkbox"/>
Visa	<input type="checkbox"/>	<input type="checkbox"/>	3	<input type="checkbox"/>
Switch	<input checked="" type="checkbox"/>	<input type="checkbox"/>	3	<input checked="" type="checkbox"/>
Switch With No Issue Number	<input type="checkbox"/>	<input type="checkbox"/>	3	<input checked="" type="checkbox"/>

Buttons: OK, Cancel

---

## Shipping Charges

Actinic allows you to charge your customers for shipping their order to them. There are two approaches to charging for shipping:

- Use a simple rate that is easy for customers to understand. You could base this on the kind of products being ordered, or the number of items in the order.
- Use a more sophisticated calculation system that works out more precisely what the order will cost to ship, and passes that cost onto the customer.

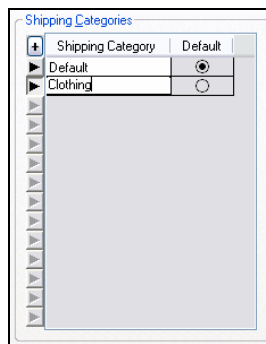
However you want to charge shipping, Actinic has a range of tools to meet your needs.

### Exercise - Charging Shipping Based on the Type of Product Being Shipped

This exercise will show you how you can set up basic shipping charges just for the three clothing products in the example store, which will be different to the charges for the other products in your store.

To start with, you are going to create a new 'Shipping Category' called 'Clothing' and then place your three clothing products within this category.

1. Go to 'Business Settings | Shipping and Handling'
2. Change to the 'Categories' tab.
3. Click the '+' at the top left of the grid to add a new row to the grid.
4. In the new field enter 'Clothing'.



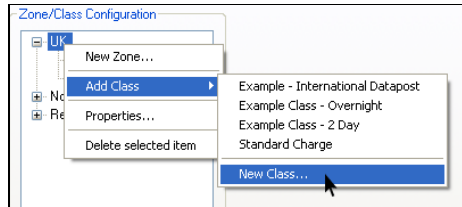
5. Click 'OK' on 'Business Settings' to close it.
6. Now click on the 'Basic T' product in your tree.
7. Change to the 'Details' panel.
8. Change the 'Shipping Category' for this product to 'Clothing'.



9. Click 'Apply changes'.
10. Repeat this for the other two products in the section.

You can now enter some shipping charges for the 'Clothing' products in your store.

1. Go back to 'Business Settings | Shipping and Handling'.
2. Change to the 'Zone/Class Tables' tab.
3. In the white box to the left, right click on the 'United Kingdom' zone and select 'Add Class | New Class...'

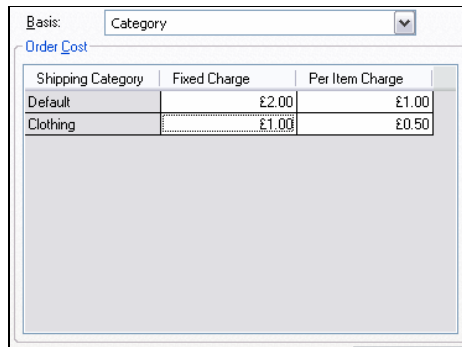


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If you don't have 'United Kingdom' in the box, you could use any of the countries you see there.

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4. Give the new class a name of 'Test' and click 'OK'.
5. With 'Test' selected in the white box, change the 'Basis' drop down to 'Category'. A grid should appear in the 'Zone/Class Tables' tab.



6. In the 'Default' row, enter a 'Fixed Charge' of '£2.00' and a 'Per Item Charge' of '£1.00'.
7. In the 'Clothing' row, enter a 'Fixed Charge' of '£1.00' and a 'Per Item Charge' of '£0.50'.
8. Click 'Apply'.

Your t-shirts and sweater will now incur a different shipping charge to the other products in your store.

## Exercise - Calculating Shipping Based on the Weight of the Order

This exercise will show you how to calculate shipping based on the weight of products in the order.

1. Within 'Business Settings | Shipping and Handling | Zone/Class Tables', click on the 'Test' class you created in the last exercise.
2. Now change the 'Basis' drop down to 'Weight in kg'.

3. Click the '+' at the top-left of the grid that has appeared. In the new row, enter a weight of '0.25' and a cost of '£2.00'. This means that orders that weigh up to 0.25 kg will be charged a cost of £2.00.
4. Add another new row that has a weight of '0.50' and a cost of '£3.50'. This means that orders that weigh between 0.26 kg and 0.50 kg will be charged a cost of £3.50.
5. Add another new row that has a weight of '1.00' and a weight of '£5.00'.

You now need to handle what will happen with orders that weigh over 1.00 kg.

6. Change the 'Excess' setting to 'Highest Table Value'.

This means that anyone with an order that weighs more than 1.00 kg will be charged no more than £5.00.

Finally you are ready to enter some weights in for your products. This is done in the 'Weight in kg' field at the bottom left of the product 'Details' panel.

## Exercise - Setting Up Free Shipping for Specific Products

It is simple to give certain products free shipping.

1. Go to the 'Details' panel of a product that you want to have free shipping.
2. Select the 'Exclude from Shipping Band Calculation' checkbox.

3. Click 'Apply changes'.

This product will now be exempted from any shipping charges.

You can also enter a value in the 'Shipping Supplement' field here if you want a product to always cost a specific amount to ship.

## More Information - Shipping By Volume

Actinic supports calculating shipping charges based on the dimensions/volume of the order.

You can enter a 'volume' value in the 'Volumetric Weight' field within the 'Details' panel of a product. Then you can set the calculation basis for a particular shipping class to 'Alternative Weight' using the 'Basis' drop-down within the 'Zone/Class Tables' drop down list. Then fill in a table of values in the same way as for weight - as described above.



# Marketing and Promotion

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## Best Sellers and New Products

'Best Seller Lists' and 'New Products Lists' are list of products that can appear on every page (or just on specific pages) to promote certain products to your customers.

Best sellers lists work out the best selling products from the orders that have been received, and display them as a list in the store. The best selling items in your store are the ones that most people will come to your site to buy, so by displaying them prominently in your store you will help customers find them more quickly, which will hopefully turn into more new orders.

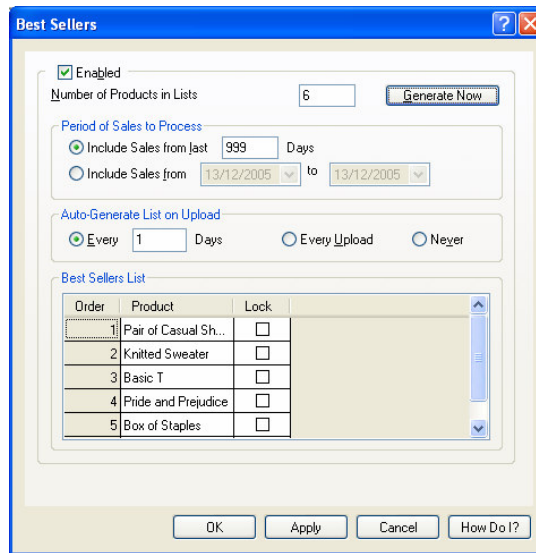
New products lists are made up of the newest items that have been added to the store. It is important to keep displaying your newest product lines as this keeps your store content current and up to date and hopefully gives customers a reason to keep coming back to your store.

By default in the example Actinic store there is a new products list in the sidebar of every page, and also on the brochure home page.

### Exercise - Adding A Best Sellers List

This exercise will add a 'Best Sellers' list to your store pages.

1. Go to 'Marketing | Best Sellers'.
2. In the 'Include Sales from last' field, enter '999'.
3. Click 'Generate Now'.



This will search through the demo orders that are in Actinic and work out the best selling items from that.

4. Change the 'Include sales from last' field back to '30' and click 'OK'.
5. Now click 'OK' and look at your site in the 'Page Preview' panel. You should see a best seller list in the sidebar of every page, and also one on the home page.



6. Now go to 'Marketing | New Product Listing'.
7. Click 'Generate Now'. The running shoes should be added to the grid.
8. Click 'OK' and you should see the running shoes in the 'New Products' list on the sidebar of each page.

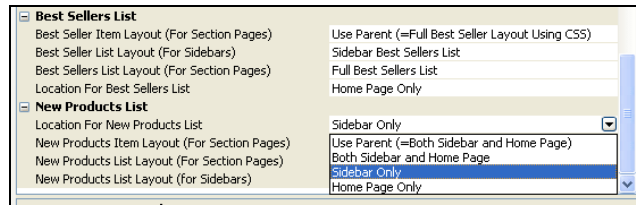




## Exercise - Changing Where The Lists Appear

This exercise will allow you to control where the best sellers and new products lists appear in the store.

1. Go to 'Settings | Site Options' and change to the 'Layout' panel.
2. Find the 'Best Sellers List' sub-heading at the bottom of the grid.
3. Change the 'Location For Best Sellers List' setting to 'Home Page Only'.
4. Now under 'New Products List' change the 'Location for New Products List' setting to 'Sidebar Only'.



5. Click 'OK'.

You should now have best sellers list appearing on the brochure home page and the new products listing appearing in the sidebar of every page.

---

Note: If you try and change the 'New Products List Layout (For Sidebars)' or the 'Best Sellers List Layout (For Sidebars)' it doesn't change anything in the default theme, but it will have an effect in other themes.

---

## More Information - Customising the Lists

If you go to the grid at the bottom of 'Marketing | Best Sellers' or 'Marketing | New Products Listing' you can click on any item in the list and use the drop-down list to manually change it to a different item.

You can also click the 'Lock' checkbox to fix that product in the list and let all the other products auto-generate around it.

Order	Product	Lock
1	Basic T	<input checked="" type="checkbox"/>
2	Premium T	<input type="checkbox"/>
3	Knitted Sweater	<input type="checkbox"/>
4	Not Used	<input type="checkbox"/>
5	Not Used	<input type="checkbox"/>

If there is a certain product that you don't want to appear in the marketing lists, de-select the appropriate checkbox within the 'Marketing' panel of the product.

Include in Automatic Lists

Best Sellers  New Products  Also Bought

---

## Related Item Lists and Also Bought Lists

As well as the best seller lists and the new products lists, it is also possible to place some marketing lists underneath the products in the store. There are two types of these lists:

- **Related Product lists** - where you can set up a list products that are all related in some way to a certain product.
- **Also Bought lists** - (Actinic Business/Designer only) - these are automatically worked out by Actinic. Actinic can take a product in your store, then look at all the orders that include that product, and then look at what else the customers order. These then become a 'customers who bought this also bought...' list underneath the product.

As well as appearing underneath products in the store, these lists can also appear on the shopping cart page in the online store. That way, customers can see some products that are related to the products that they already have in their shopping cart.

### Exercise - Creating a Related Products List

This exercise will include a related products list for the 'Basic T' product in your store.

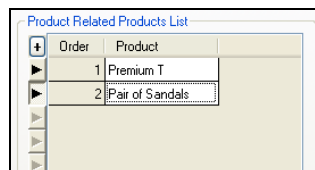
1. Go to 'Marketing | Related Products'.
2. Select 'Enabled'.
3. Click 'OK'.
4. Now go to the 'Basic T' product (within the 'Clothing' section).
5. Go to the 'Marketing' panel and click the '+' at the top left of the 'Product Related Products' list.
6. In the row created, choose 'Premium T' from the drop-down list.

---

This is an example of how you might use the related products list to create an upsell from one product to another.

---

7. Now click the '+' and this time select 'Pair of Sandals' from the list.



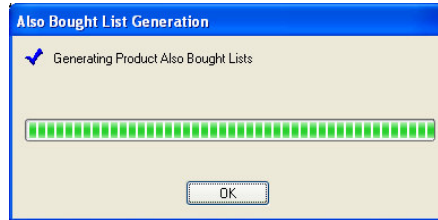
8. Click 'Apply Changes' and check out your changes in the preview.

### Exercise - Also Bought Lists

Actinic Business/Designer only

This exercise will generate 'customers who bought this also bought...' lists into your store, and show you how to change the layout of them.

1. Go to 'Marketing | Also Bought...'
2. Select 'Enabled'.
3. Change the 'Include Sales from last' field to '999' and then select 'Generate Now'.




---

This will generate a list for nearly every product in the default store.

4. Change 'Include Sales from last' back to '30' and click 'OK'.
5. Go back to the 'Marketing' panel for the 'Basic T' product.

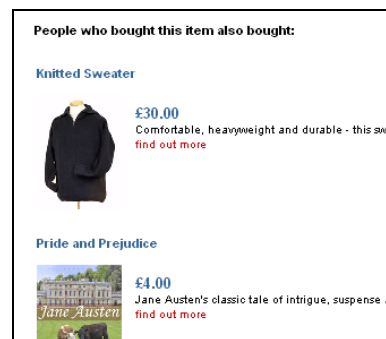
You should see that some products have been automatically added to the list. These products will appear in a fairly standard numbered list by default, but there is an alternative layout option.

6. Go to 'Settings | Site Options | Layout'.
7. Under the 'Product' sub-heading, find the 'Product Also Bought Item Layout' setting.



8. Change this setting to 'Mini Also Bought Item' and click 'OK'.

This should include an image, price and description into the also bought list for the 'Basic T'.



The related items list also has an equivalent layout option.

## More Information - Lists in the Shopping Cart

Once you enable either related item lists or also bought lists you will see a list appearing in the online shopping cart underneath the grid of products. These lists show the related products and also bought products for the product that is currently in the shopping cart. If there is more than

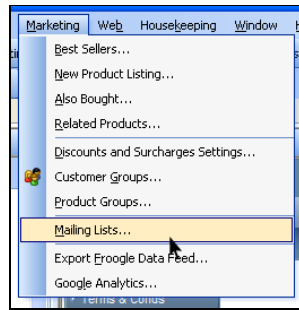
one product in the shopping cart, then Actinic will merge all the related products and also bought products into a single list.

---

# Mailing Lists

Actinic gives you the ability to easily extract your customers' contact details out of Actinic. This information can then be imported into emailing programs like Microsoft Outlook or GroupMail in order for you to mail your customers with promotional material.

This feature can be found at 'Marketing | Mailing Lists'.

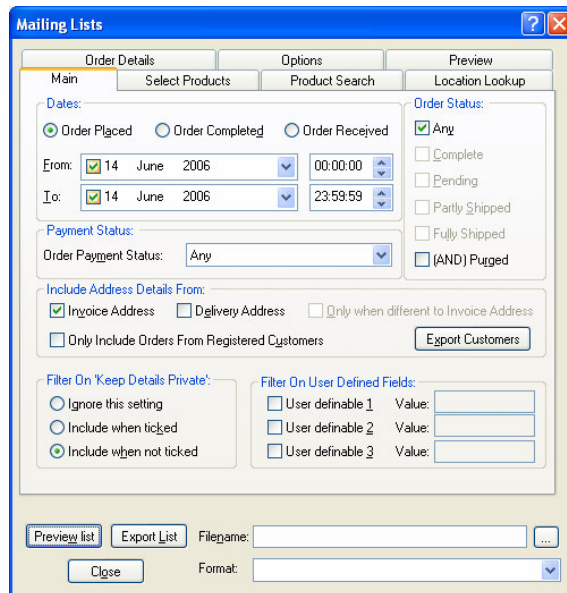


All versions of Actinic allow you to filter your customers' contact details based on when they placed orders, and what the status of the order is. Actinic Business/Designer customers can go further and filter the list based on what products were ordered, where the customer is located and how large the order was. With Actinic Business/Designer, you can also print mailing list information onto labels and envelopes.

## Exercise - Creating a Mailing List

This exercise will show you how to build a mailing list based on the three example orders that are in the 'Orders' tab in Actinic.

1. Go to 'Marketing | Mailing Lists'.



2. Under 'Order Status', de-select 'Completed' and select 'Any'.

3. In the 'From' field, make sure the date is somewhere before May 25th 2006 - as that is when the three example orders were created.
4. Make sure that 'Order Payment Status' is set to 'Any'.
5. Click the 'Preview List' button.

E-mail Address	Name	Title	Home Street
jack.smith@yourcompanyem...	Jack Smith	Mr	Anywhere
janesmith@yourcompanyem...	Jane Smith	Mrs	Anywhere
jsmith@yourcompanyemail.c...	John Smith	Mr	Anywhere

---

This shows you the three sets of customer data that are ready to export.

---

6. In the 'Format' field, select 'Standard Format'.
7. Click the '...' button next to the 'Filename' field.
8. Browse to your computer's desktop and enter 'export.csv' in the 'File name' field. Click 'Save'.
9. Back on the 'Mailing Lists' window, click the 'Export List' button.

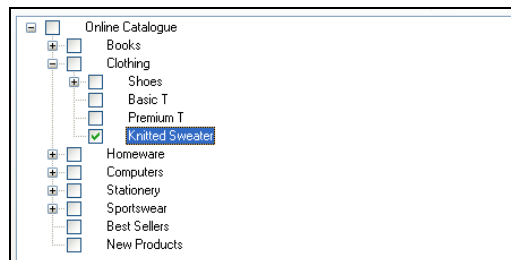
Actinic automatically removes any duplicate records, based on the email address supplied with the order.

## Exercise - Advanced Filtering

### Actinic Business/Designer only

This exercise will show you how to filter the mailing list based on whether customers have ordered the 'Knitted Sweater'.

1. Go to 'Marketing | Mailing Lists' and go to the 'Select Products' tab.
2. Click 'Get Products'.
3. In the tree, click the '+' next to 'Online Catalogue'. Then click the '+' next to 'Clothing'.
4. Select the 'Knitted Sweater' checkbox.



5. Now go back to the 'Main' tab and make sure that the 'From' field is set to sometime before May 25th 2006.
6. Finally, press the 'Preview list' button to update the list. It should only contain 'Jack Smith'.

Filtering can also be done on location (in the 'Location Lookup' tab) and order size (in the 'Order Details' tab).

---

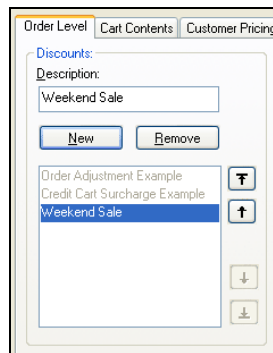
## Order Level Discounts

Order-level discounts are available in all versions of Actinic, including Actinic Catalog. They allow you to create discounts in the store that are triggered by how much the customer has spent online. For example, you can use this to create a discount that says "10% off all orders" or "£10 off all orders over £75".

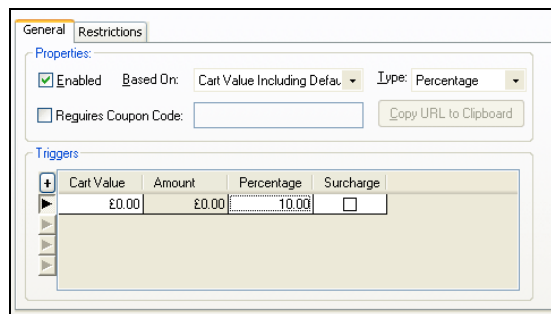
### Exercise - Creating a Discount Based on Order Value

This exercise will create a 'weekend sale' where all orders have 10% off within a set time period.

1. Go to the 'Marketing' menu and then select 'Discounts and Surcharges Settings...!'.  
2. Go to the 'Order Level' tab (if you are not on it already).  
3. Click the 'New' button at the right and enter a name for your discount of 'Weekend Sale'.



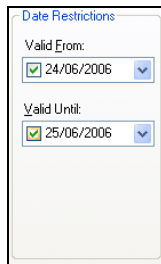
4. Change the 'Based On' field to 'Cart Value Including Default Tax'.  
5. Change 'Type' to 'Percentage'.  
6. In the 'Triggers' grid click the '+' at the top left and enter a value of '10' in the 'Percentage' field.  
7. Click 'Apply'.



This will put a discount on your store right away, so before you upload and test this, you are going to restrict the discount to only being for this coming weekend.



8. Change to the 'Restrictions' tab (within the 'Order Level' tab).
9. In the 'From' field select the upcoming Saturday.
10. In the 'To' field select the upcoming Sunday.



11. Click 'OK'

There will now be a 10% discount on all orders placed at your store for the coming weekend.

---

Note: you may want to remove this discount if you are about to put your store live!

---

## More Information - Restricting Discounts

In the exercise above you restricted a discount to a date range. You don't have to set both the 'For' and 'To' fields - you can set one or the other if you want to start a discount now and end it on a certain date, or start a discount on a certain date and let it run indefinitely.

Additionally, if you are using Actinic Business/Designer, you will see in the 'Restrictions' tab there is also a 'Restricted to Customer Group' grid. If you wanted a discount only for your retail customers or for specific customer groups you can use the grid to set it up.

Customer groups are discussed in a later chapter.

---

# Advanced Discounting

## Actinic Business/Designer Only

As well as creating discounts based on order value, Actinic Business and Actinic Designer allow you to create discounts that are based on the items that are in the shopping cart. This allows you to set up discounts such as '3 for the price of 2' and 'Buy any three books for 5.00'.

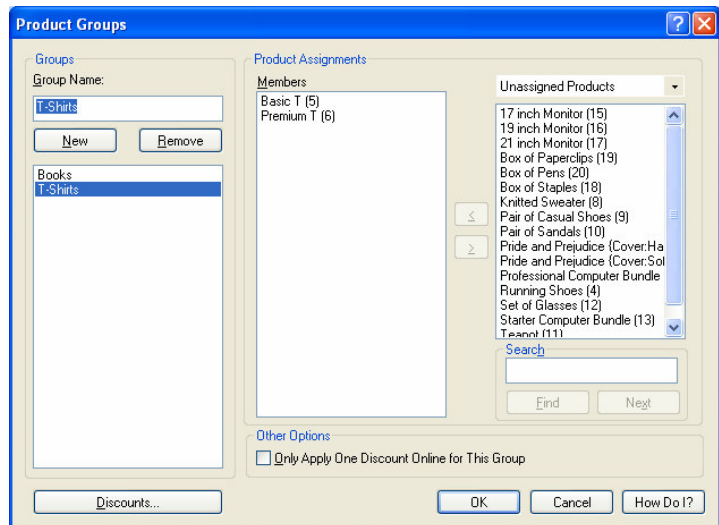
There is an example '3 for the price of 2' discount already set up in the 'Cart Contents' tab in 'Marketing | Discounts and Surcharges Settings'.

Also, you have the option to activate any of the discounts by customers entering a specific coupon code online.

## Exercise - Buy Both T-Shirts for 10.00

This exercise will create a new 'Fixed Price' discount for the two t-shirt products that are in the default database. The first thing you need to do is tell Actinic that the two t-shirts are related to each other. This is done by putting them both into a 'Product Group'.

1. Go to the 'Marketing' menu and select 'Product Groups'.
2. Click 'New' and enter a name of 'T-Shirts'.
3. Select the 'Basic T' product from the right-hand list and use the '<' button to move it to the 'Members' list.
4. Do the same for the 'Premium T'.



5. Click the 'Discounts' button and click 'OK' on the message that appears.

---

You should now be on the 'Cart Contents' tab within 'Discounts and Surcharges Settings'.

---

6. Click 'New' and enter a discount name of 'T-Shirt Offer'.
7. Change 'Based On' to 'Quantity'.
8. In the 'Trigger' field, enter '2'.

9. Change 'Product Group' to 'T-Shirts'.
10. Change 'Reward Type' to 'Fixed Price'.
11. In the 'Reward Amount' field enter '10.00'.

12. Click 'Apply'.
13. Change to the 'Presentation' tab.
14. Enter the following text: 'Buy both t-shirts together for only 10.00'.
15. Click 'OK'.

The 'Buy both t-shirts together...' message will appear underneath the descriptions of both t-shirt products in the preview, and will also appear in the shopping cart.

## Exercise - Coupons

This exercise will set up a discount that is only triggered when customers enter a coupon code online.

1. Go to the 'Order Level' tab within 'Marketing | Discounts and Surcharges Settings'.
2. Highlight the 'Weekend Sale' discount you created in the last chapter.

---

If you don't have this discount set up, then highlight the 'Order Adjustment Example' discount (which is in the default database) and select 'Enabled'.

---

3. Select the 'Requires Coupon Code' box.
4. Enter a coupon code of '12345'.
5. Click 'Apply'.
6. Now change to the 'Miscellaneous' tab.
7. Under 'Coupon Codes' select 'Store Pages'.
8. Click 'OK'

This should insert a coupon entry field into the sidebar of your store design.

## More Information - Offering Products as Rewards

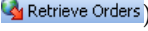
One of the 'Reward Type' options you have in the 'Cart Contents' tab of 'Discounts and Surcharges Settings' is 'Money off extra product' and '% off extra product'. These allow you to offer customers free/cheaper product as part of a promotion.

The 'extra product' in question is any product from a specific product group that you have set up in Actinic. If you want just to offer a specific single product then you will need to create a product group that just contains that one single product.

# Day to Day Administration

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## Retrieving Orders

To retrieve any orders placed at the store, click the 'Retrieve Orders' button on the toolbar () or go to 'Operations | Retrieve Orders'. Actinic will connect to your store and see if there are any orders on the site waiting to be retrieved. It then downloads them and lists the orders within the 'Orders' tab. You can view the details of an order by double-clicking on it.

Some people check for new orders throughout the day. If you are not expecting that many orders to be placed at your store, you can just check your email inbox for 'New Catalog Order Received' notification emails. This email is sent just after the first order is placed after the most recent order download. You will then know there is at least one order to download.


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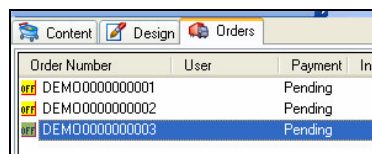
Note: You must select the 'Send me an Email When I Have an Order to Download' checkbox in 'Business Settings | Ordering' to have this email sent to you.

---

## Exercise - Downloading and Viewing Orders

This exercise will show you how to download and view order details with Actinic. You need to have placed some test orders on the site in order to have anything to download.

1. Once you have placed one or more test orders at your Actinic store, switch to the 'Orders' tab.
2. Click the 'Retrieve Orders' button () on the toolbar.
3. Your order should then be listed in the list on the 'Orders' tab.



Order Number	User	Payment	Inv
DEMO0000000001		Pending	
DEMO0000000002		Pending	
DEMO0000000003		Pending	

---

Note: There are three demonstration orders already in Actinic.

---

4. Double click on your new order to open it.

5. The 'Customer' tab shows you the name and address information supplied with the order.
6. Change to the 'Line Items' tab. This shows you the items that have been ordered.
7. Change to the 'Progress and Payments' tab. This shows you the payment information entered at the store.
8. Now click the 'OK' button to close the order.

In the next chapter you will see how to process an order.

## Exercise - Creating a Packing List

When you receive new orders, you can print a 'packing list' for each order, which can be used when making up the order, and also can be used as a delivery note on the front of the package sent. This exercise will show you how to print packing lists.

1. Go to 'Operations | Report Selection'.
2. Change to the 'Order Processing' tab.

3. Select 'Outstanding Packing Lists'.

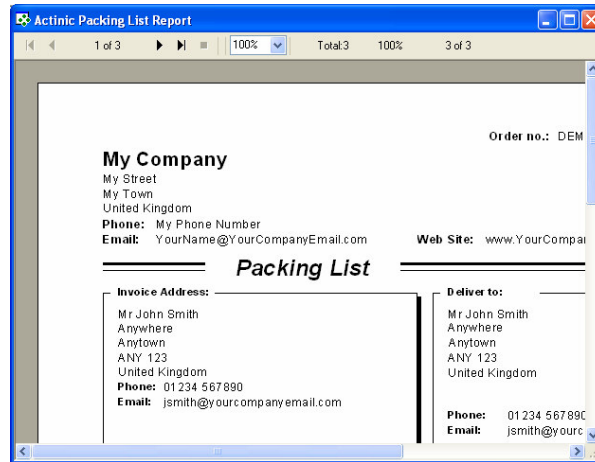
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If you haven't placed any test orders, you might get a message box popping up at this point telling you that there no outstanding reports to be printed. You can still see the report, however, by right-clicking on an order and selecting 'Reprint Standard Packing List Report'.

---

4. Click 'Preview'.

This will lay out the order information within a packing list report.



## More Information - Assurances

Orders are encrypted to two levels on the site. Any credit card information is encrypted with a 1024-bit encryption key - which you can view by going to 'Housekeeping | Security'. The name and address information is then encrypted as well, but with a lighter level of encryption as that information is less critical.

Orders are stored as files on the website with an extension of \*.ord. Once the order is fully downloaded into Actinic, Actinic will send up a command to the web site to delete the order files on the site. This only happens once Actinic is sure the order has been safely received.

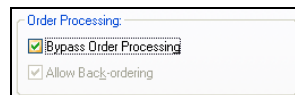
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## Processing An Order

There is a set of order processing techniques built into Actinic. Some are optional, and some are required - i.e. Actinic will not consider an order as being 'complete' until you carry them out. The required order processing steps are:

- The lines of the order must all be marked as 'shipped' or 'cancelled'. This is shown below.
- All payments for the order must be marked as being 'received'. This is also shown below. If you are using a PSP (Payment Service Provider) the payment will be taken online and so the payments will be marked as received before the orders are downloaded into Actinic.
- An invoice must be printed for the order.

Alternatively if you don't want to process orders within Actinic then you can select the 'Bypass Catalog Order Processing' option in 'Business Settings | Order Processing'.



This will mark the order lines as shipped and the payments as received as soon as the orders are downloaded. You can then do one of the following actions:

- **Print a 'Data Entry' report.** This is a single piece of paper containing every piece of information about an order. To enable this feature, you need to select 'Enable Data Entry Reports' in 'Business Settings | Order Processing'. To print a data entry report, select 'Outstanding Data Entry Reports' in the 'Order Processing' tab of the 'Operations | Report Selection' window.
- **Export orders.** This exports order information as a set of csv spreadsheet files for importing into another application. This is typically done in conjunction with 'Actinic Link' - Actinic's accounts integration package (Actinic Business/Designer only). To enable exports, select 'Enable Export to Files' in 'Business Settings | Order Processing'. To carry out an export, go to 'Operations | Outstanding Exports'.

### Exercise - Processing an Order

This exercise will show you how to use Actinic's in-built tools to complete a new order. This exercise is based around order number 'DEMO0000000001' in the example Actinic database, but you could easily carry out these steps with any order.

1. Change to the 'Orders' tab (if you are not there already).
2. Double-click on order number 'DEMO0000000001' in the list.
3. Change to the 'Line Items' tab.
4. Highlight 'Great Expectations' and click the 'Ship' button.



Product Description	No. Ordered	No.
Great Expectations	1	
Pair of Casual Shoes	1	
Size: 11		
Teapot	1	
Selection - Size: 5 Cup	1	

---

If the 'Ship' button is not available, it might be because you have selected 'Bypass Catalog Order Processing' in 'Business Settings | Order Processing'.

---

5. Highlight 'Pair of Casual Shoes' and click the 'Ship' button.
6. Highlight 'Teapot' and click the 'Ship' button.

---

Obviously if you have different order contents, then ship whatever order lines are in the tab.

---

7. Click the 'Mail' button. This will generate an 'Order Shipped' email ready to be sent to the customer.

The screenshot shows a 'Mail' dialog box with the following fields and content:

- To:** jsmith@yourcompanyemail.com
- Layout:** Order Shipped Email
- Subject:** My Company : Order DEMO0000000001 : Order Shipped Email
- Body:**

Dear John Smith,

The following order has been shipped to your delivery address:

\_\_Invoice Address and Deliver To\_\_

Email Address: jsmith@yourcompanyemail.com

\_\_Customer/Recipient Details\_\_

Mr John Smith  
Anywhere  
Anytown  
ANY 123  
United Kingdom  
Phone Number: 01234 567890  
Fax Number:

\_\_Order Status\_\_
- Buttons:** Send now, Done, Cancel

8. Click 'Done'.

---

You can view the email in the 'Mail' tab of the order. And send it by going to 'Operations | Send Emails'.

---

9. Change to the 'Progress and Payments' tab, and click 'OK' on the warning message that appears (you might want to select the 'Don't show this message again' box).
10. On the 'Progress and Payments' tab you should see the demonstration credit card details. Click the 'View Payments' button.
11. Click 'New Entry' and then click 'OK'.

Date	Status	Transaction	Amount
19/02/2008 14:22:00	Received	Cheque received	£471.13

Date/time Created: 19/02/2008 14:22:00    Status: Received  
 Mode: Production    Transaction: Cheque received  
 Type: Manual    Amount: £471.13

Comment:   
 CC Auth. Code:   
 PSP Provider Ref:   
 Customer Ref:   
 PSP Response:   
 Date/time Actioned: 19/02/2008 14:22:00

**Results of Security Checks**  
 Post/Zip Code:    3D Secure (vby, MC SecureCode):  
 Address (AVS):    Enrolled:  
 Security Code (CV2):    Result:

**Actinic Payments**  
 Commit    Refund    Void    Actinic Payments Help

OK    New Entry    Delete    Cancel

This has made an entry in the payment history of the order saying that the credit card payment has been received. You would normally only do this once you have put the credit card information through a credit card terminal.

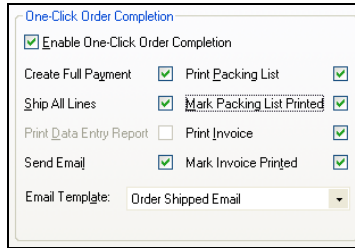
12. Click 'OK' to close the order.
13. Go to 'Operations | Report Selection' and make sure you are on the 'Order Processing' tab.
14. Select 'Outstanding Invoices' and click 'Print'.
15. This will print the invoice to your printer.

The order should now have disappeared from the 'Orders' tab. You will find it by going to the 'Completed' tab (change tabs at the bottom of the window). The order is now marked as completed.

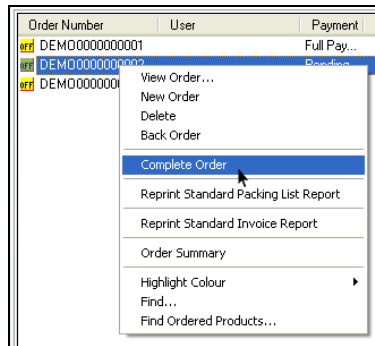
## Exercise - One-Click Order Processing

Rather than doing each step of the above exercise, it is possible to pre-configure the things you want Actinic to do to each order, and then simply 'Complete' the orders with a single click. This is described below.

1. Go to 'Business Settings | Order Processing'.
2. Select 'Enable One-Click Order Completion' (if it is not selected already).
3. Select 'Print Packing List'.
4. Select 'Mark Packing List Printed'.



5. Click 'OK'.
6. Now right-click on any order in the 'Pending' tab and select 'Complete Order'. Or highlight an order and click the 'Complete' button.



The order should move to the 'Completed' tab.

## More Information - Full Order Details

All the tabs within an order are described below:

- **Customer** - This is where you can view and edit the customer contact information.
- **Line Items** - Use this tab to ship items, and cancel them. You can also click the 'Add New Item' button to add a new product to the order.
- **Shipping and Handling** - You would only really use this if you want to change the selected shipping method after receiving the order. Change the shipping class in the 'Class' field at the bottom right, and then click 'Update Order Shipping'. You can also manually enter a shipping charge into the 'Calculated' field.
- **Taxes** - View the tax charges on the order.
- **Totals** - For reviewing any changes you have made to the order
- **Progress and Payments** - Where you can view the order status and enter/edit payment information.
- **Misc.** - This is where you can check any supplementary information provided with the order such as purchase order number, or answers to the 'General Information' questions in the checkout.
- **Mail** - View the emails generated regarding this order. You can also send any pending emails, and generate new ones.

- **Journal** - For making notes about the order.


---

# Monitoring Stock

Actinic includes a 'stock monitoring' feature that helps you keep track of the stock level of the products in your store. The stock level of a product is reduced when an order for that product is downloaded into Actinic.

You can enter stock levels for products by going to the 'Stock' panel of a product and filling in the 'Estimated Stock In Hand' field. You will also need to make sure the 'Stock Monitoring' checkbox is enabled.

Stock Monitoring  
Estimated Stock In Hand:   
Warn If Below:  Use default value of 5  
Suspend Orders If Below:  Use default value of 2

You can also get an overview of the stock levels of all the products in your store by going to 'Operations | Stock Levels' or by clicking the  icon on the toolbar. This allows you to quickly add/review stock levels in Actinic across a number of products.

Name	Monitor...	Stock	Warn bel...	Warning?	Suspend be...	Sus
Great Expectations	<input checked="" type="checkbox"/>	55	[5]	<input type="checkbox"/>	[2]	
Pair of Sandals	<input checked="" type="checkbox"/>	43	[5]	<input type="checkbox"/>	[2]	
Teapot	<input checked="" type="checkbox"/>	56	[5]	<input type="checkbox"/>	[2]	
Set of Glasses	<input checked="" type="checkbox"/>	12	[5]	<input type="checkbox"/>	[2]	
Starter Computer Bundle	<input type="checkbox"/>	0	[5]	<input checked="" type="checkbox"/>	[2]	
Professional Computer Bundle	<input type="checkbox"/>	0	[5]	<input checked="" type="checkbox"/>	[2]	
17 inch Monitor	<input checked="" type="checkbox"/>	23	[5]	<input type="checkbox"/>	[2]	
19 inch Monitor	<input checked="" type="checkbox"/>	12	[5]	<input type="checkbox"/>	[2]	
21 inch Monitor	<input checked="" type="checkbox"/>	76	[5]	<input type="checkbox"/>	[2]	
Box of Staples	<input checked="" type="checkbox"/>	3	[5]	<input checked="" type="checkbox"/>	[2]	
Box of Paperclips	<input checked="" type="checkbox"/>	2	[5]	<input checked="" type="checkbox"/>	[2]	

There are two stock warning levels for Actinic:

- **Warn If Below** - if the stock level of a product falls below this level, you will receive a warning when you download orders.
- **Suspend If Below** - if the stock level of a product falls below this level then the add to cart button will be replaced with an 'OUT OF STOCK' message.

You can set default values for these two stock warning levels in 'Business Settings | Options'.

Default "Warn If Below":   
Default "Suspend Orders If Below":

---

By default, none of the products in the example store are stock monitored.

---

## Exercise - Stock Monitoring

This will simulate what happens when a product goes out of stock.

1. Go to your 'Running Shoes' product you created earlier.

---

If you don't have this product, you can use any product.

---

2. Switch to the 'Stock' panel.
3. Set the stock level at '20'.
4. Click 'Apply changes'.

---

This product is now stock monitored. If you place a test order for this product the stock value will go down.

---

5. Now change the stock level to '1' and click 'Apply Changes'.
6. You should find that the add to cart button has been replaced with an 'Out Of Stock' message.



7. Now go to 'Operations | Stock Levels'.
8. Change the 'Select Product Type' drop down to 'Ordering Suspended' to see the product you have just put out of stock.

You would now need to upload the store in order to see the product marked as being out of stock online.

## More Information - Stock Reports

There are a few reports available to help you monitor stock levels in your store. If you go to 'Operations | Report Selection' there is a 'Catalog' tab that features four 'Stock Level' reports. You can print these to help you monitor the stock levels in your store.

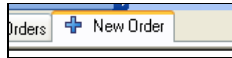
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## Entering New Orders

As well as receiving orders from your online store, Actinic also allows you to enter orders straight into the program. This allows you to also take orders over the phone or via fax, and keep all the order information in one place.

### Exercise - Adding a New Order Into Actinic

If you are using Actinic Business (or Actinic Business Plus) then you can enter new orders into Actinic using the 'New Order' tab.



To enter new orders into Actinic using the 'New Order' tab, you need to do the following:

1. Click the 'Search' button (in the 'Product Entry' box) to select a product to add to the order.



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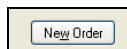
If you know the reference of the product you want to add, you can just type it in the 'Ref' field and click 'Show'.

---

2. The product details will show up in the 'Selected Product' area. You can select options and quantities and then click 'Update Cart'.
3. Then all you need to do is enter the name and address information into the fields provided and select a shipping method.
4. Once you've confirmed the cost of the order with the customer (assuming you are taking this order over the telephone) you can take the customers payment details and then click the 'Confirm' button to add the order to the order list in Actinic.



If you are using Actinic Catalog, you won't have the 'New Order' tab so you will need to click the 'New Order' button on the 'Orders' tab to add a new order to Actinic.



To add a new order into Actinic using the 'New Order' wizard:

1. Go to the 'Orders' tab and go to 'Operations | New Order' (or click the 'New Order' button at the bottom of the tab).
2. On the first screen select 'Shopped Before'. This will save you a lot of typing later on.

3. Click the 'Search' button and then click the 'Search' button on the new window. This should give you a list of all the orders currently in Actinic.
4. Select an order and click 'Select'.

5. Click 'Next >' to move to the next screen.
6. Review the contact information and then click 'Next >'.
7. This screen is where you add items to the order. Click 'New'.
8. From the 'Select Product' drop down list select 'Set of Glasses'.
9. In the 'Components/Attributes' window select the '8 Glasses' option.

10. Click 'OK' and then click 'Next >'.
11. This screen is where you can select the shipping method and enter payment information. Make sure 'Payment Method' is set to 'Credit Card' and select 'Type' of 'Visa'.
12. For the 'Number' enter '1111222233334444'.
13. Select a valid 'Expiration Date' and click 'Next >'.
14. Click 'Confirm' to complete the new order.

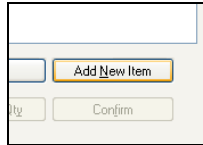
Your new order should now be added to the list of orders in the 'Pending' tab.



## Exercise - Editing An Existing Order

It is possible to edit an order to add new items. This exercise will show you how.

1. Double-click on an order in the 'Orders' tab.
2. Change to the 'Line Items' tab.
3. Click the 'Add New Item' button.

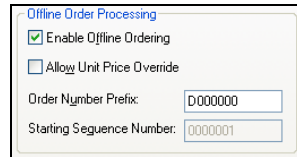


4. Click 'New' and add the 'Far From the Madding Crowd' product to the order. Click 'OK'.
5. Click 'Next >' then click 'Next >' again and then click 'Confirm' to complete the addition.

Your new book should now be visible within the 'Line Items' tab.

## More Information - Settings in Business Settings

If you go to the 'Order Processing' panel within 'Business Settings' you will see there are few settings here under the heading of 'Offline Order Processing'.



Select 'Allow Unit Price Override' if you want to be able to change the price of items while you create new orders.

You can also choose a different prefix for the offline order numbers in the 'Order Number Prefix' field.

---


## Regular Customers

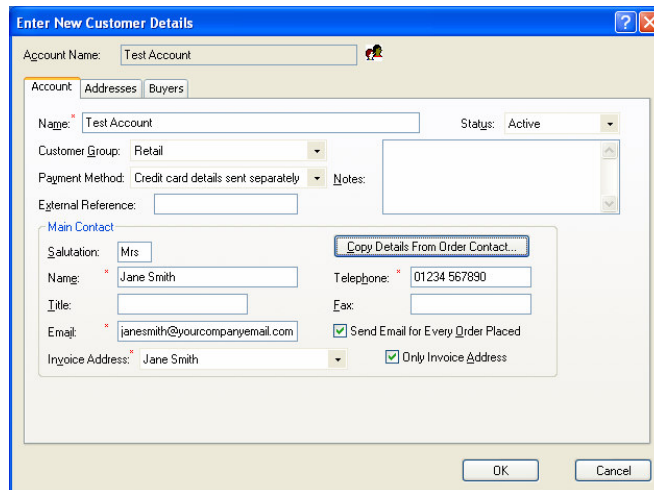
Using Actinic, you can set up customer accounts for your regular customers. This allows customers to log into the store with a username and password, and have their name and address information preset in the checkout.

If you are using Actinic Business/Designer you can go further and group your customers into 'Customer Groups'. You can then assign discounts to these customer groups and also hide products from certain groups of customers.

### Exercise - Creating A Customer Account

This exercise will show you how to create a basic customer account.

1. Go to 'Operations | Customer Accounts' or click the  icon on the toolbar.
2. Click 'New Customer'.
3. In the 'Name' field enter 'Test Account'.
4. Click the 'Copy Details From Order Contact' button. This shows you all the order contact information already in Actinic.
5. Double-click on one of the names in the list. This will populate the rest of the fields here - and saves some typing.



The screenshot shows the 'Enter New Customer Details' dialog box. The 'Account' tab is selected, and the 'Name' field contains 'Test Account'. The 'Customer Group' is set to 'Retail'. The 'Payment Method' is 'Credit card details sent separately'. The 'Main Contact' section is pre-populated with details from an order contact, including Name (Jane Smith), Telephone (01234 567890), Email (janesmith@yourcompanyemail.com), and Invoice Address (Jane Smith). A 'Copy Details From Order Contact...' button is visible. The 'Status' is set to 'Active'. There are 'OK' and 'Cancel' buttons at the bottom.

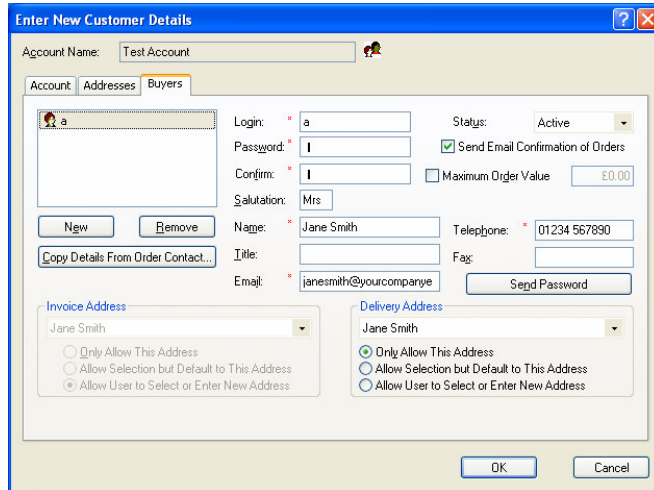
6. Change to the 'Addresses' tab. This has been pre-populated with the order information brought in by the previous step.
7. Change to the 'Buyers' tab and click 'New'.

---

A 'Buyer' is a customer who will actually log into this account with a username and password.

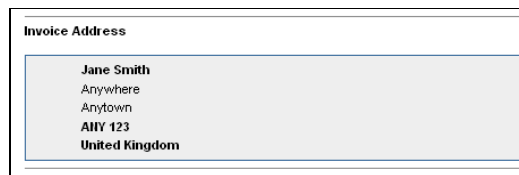
---

8. Change the 'Login', 'Password' and 'Confirm' fields all to be 'a'. This is so you can log into the store quickly to test this.



9. Click 'OK'.


Your new account has now been created. To test this, upload the store and click the 'Login' link. Then enter a username and password of 'a' to log into the account. Add something to your cart and checkout to see the preset address information.

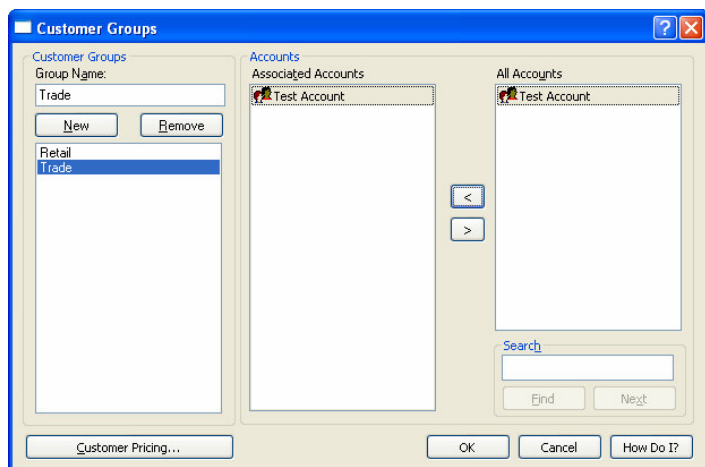


## Exercise - Creating A Customer Group

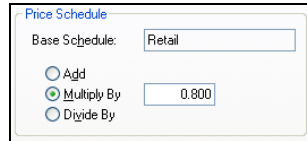
### Actinic Business/Designer Only

You will now create a 'Trade' customer group, who will receive a 20% discount when they log in.

1. Go to 'Marketing | Customer Groups' or click the  button in the toolbar.
2. Click 'New' and enter a name of 'Trade'.
3. Highlight your 'Test Account' account and use the '<' button to move it to the left 'Associated Accounts' column.



4. Click the 'Customer Pricing' button, and click 'OK' on the window that appears.
5. Highlight 'Trade' in the list and select 'Multiply By'.
6. In the field enter '0.8' and click 'OK'. This will give a 20% discount.



The screenshot shows a dialog box titled "Price Schedule". It contains a "Base Schedule" dropdown menu with "Retail" selected. Below this are three radio button options: "Add", "Multiply By" (which is selected), and "Divide By". To the right of the "Multiply By" option is a text input field containing the value "0.800".

Now upload the store and log in to test the discount for 'Trade' customers. You should see both a 'Retail Price' and a 'Your Price' appearing in the store.

## More Information - Sophisticated Buyer Options

Go back to the 'Test Account' account in Actinic and look at the 'Buyers' tab. There are quite a few useful options here:

- Select 'Hide Retail Prices' if you only ever want this buyer to see a single price (rather than 'Your Price' and 'Retail Price').
- Select 'Allow User to Select or Enter a New Address' if you want to allow your customers to enter their own new addresses into the store, as well as using a saved address online.
- You can enter a 'Maximum Order Value' for this buyer if you want to limit the amount they can spend on an order.



# Designing Your Store

Please note that the following features are **not** available in 'Client' versions of Actinic.

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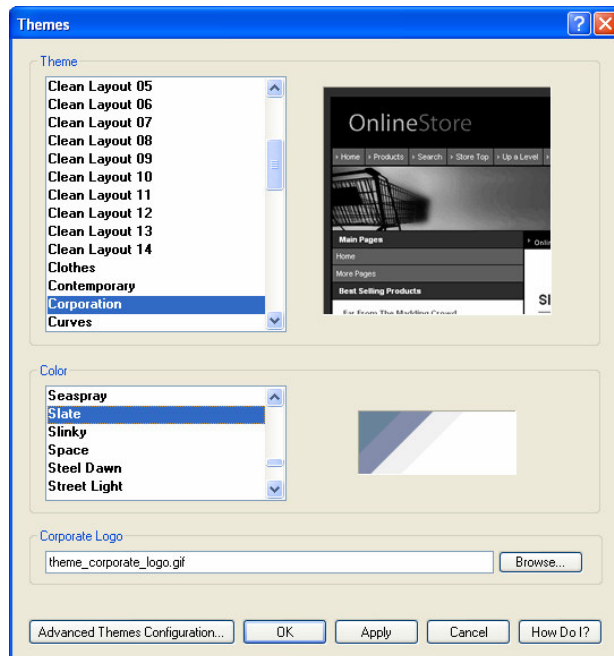
## Choosing A Theme

A theme is a quick way to give your store a new look and feel. It is worth experimenting with the themes that are available so you can find one you like - and then use it as a starting point for any further changes.

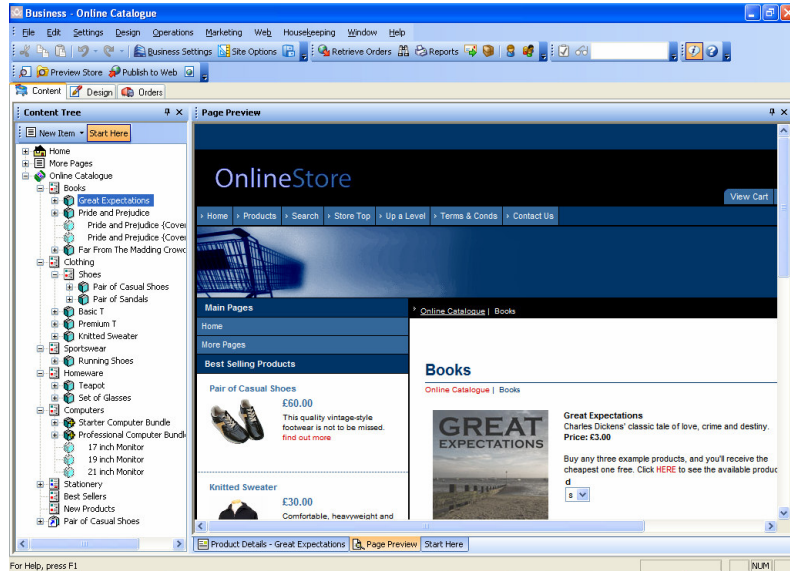
### Exercise - Changing Theme and Colour Scheme

This exercise will just use simple settings to change the look and feel of your store.

1. Go to 'Design | Themes'.
2. In the 'Themes' list, change it to 'Corporation'.

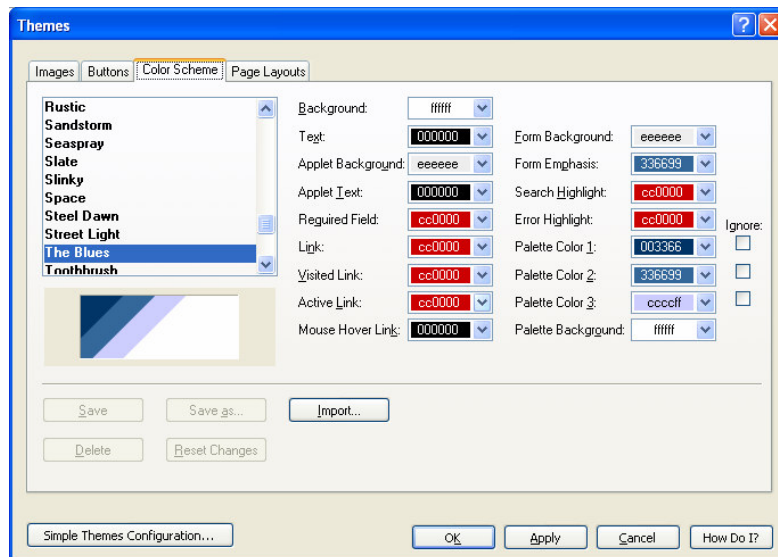


3. In the 'Color' list, select 'The Blues'.
4. Click 'OK'.



This has now applied a new look and feel to your store, but you can change each individual element at a much more granular level.

For example you can tweak the colours used in the design by going to 'Design | Themes' and clicking the 'Advanced Themes Configuration' button. Then change to the 'Color Schemes' tab.

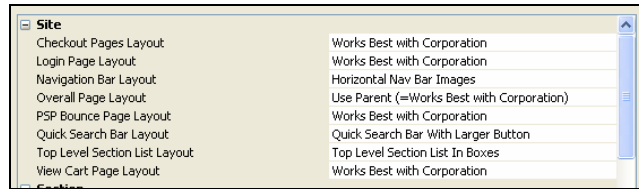


You can tweak the colours and then save your colours as a new colour scheme.

## More Information - Outer Layouts

When you change themes in Actinic, as well as copying in new logo images and background images, Actinic also changes the 'outer layout' for the store. The outer layout (also known as the 'overall layout') is a big piece of HTML code that controls the appearance of the header area of the design, the sidebars and also the footers. In other words, it lays out the elements that do not change when you browse from page to page.

You can see the outer layout that Actinic is currently using by going to 'Settings | Site Options' and looking at the top of the 'Layout' panel:



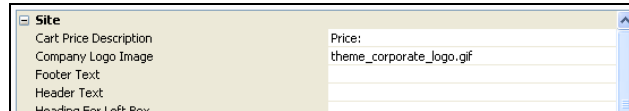
The important one here is the 'Overall Page Layout' setting, as that is the default one for your section pages. You'll also notice you can have different overall layouts for your brochure pages, shopping cart page, checkout pages etc. if you really want to.



---


## Adding Custom Fields

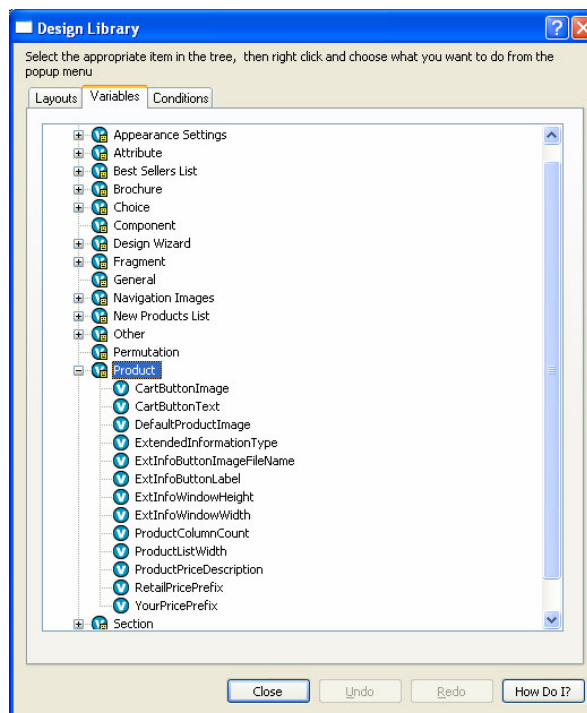
Actinic allows you to create any number of custom settings for the items in your content tree. Examples of this include an 'Artist' field for CDs, a 'Starring' field for DVDs, or an 'Author' field for books. These custom settings are referred to within Actinic as 'User-Definable Variables', and they appear within grids like this:



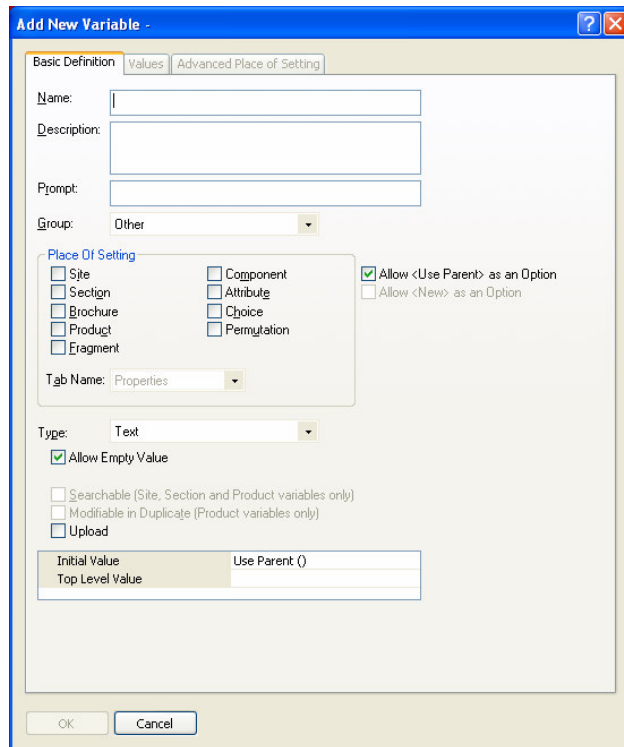
You can include these custom values into your store designs by inserting the variable into the layouts, as discussed in "Help With Design" on page 81.

### Exercise - Creating a New Variable

1. To create a new variable, go to 'Design | Library' (or click the  button) and then change to the 'Variables' tab.



2. Right-click on 'Product' in the tree and select 'New Variable'.



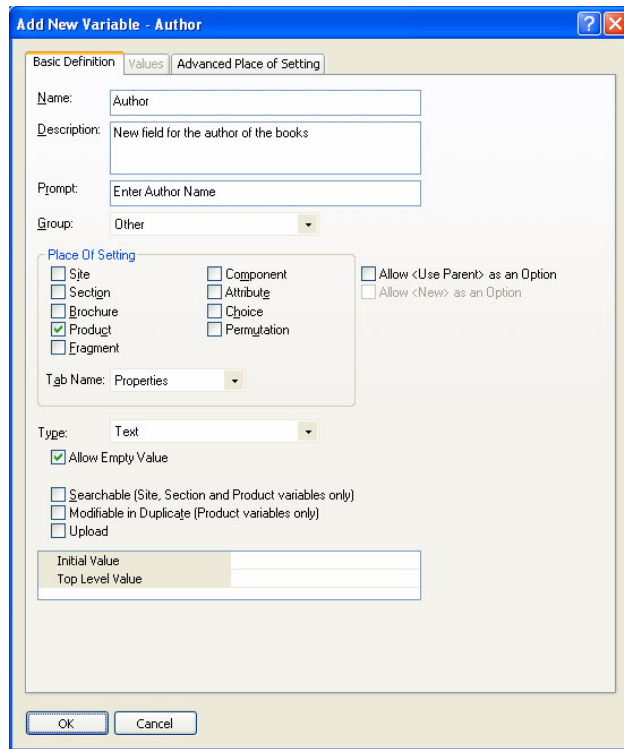
3. In the 'Name' field, enter 'Author'.
4. In the 'Description' field enter 'New field for the author of the books'.
5. In the 'Prompt' field enter 'Enter Author Name'.
6. Under 'Place Of Setting' select 'Product'.

---

This means that the new field will appear for your products.

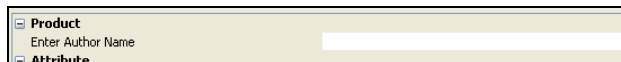
---

7. De-select 'Allow <Use Parent> as an Option'.



8. Click 'OK' and the 'OK' again to close the library.

You can now change to the Content tab in Actinic and enter the author value in for the three books. You will find the new field within the 'Properties' panel.



Later on in this guide, you'll see how to insert these values into the design.

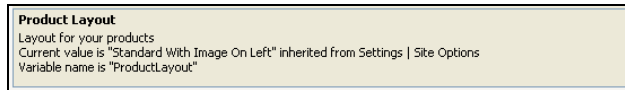
# Choosing Alternative Layouts

It is possible to select different layouts for every single item you see in the content tree. This is done by going to the 'Layout' panel of the item in question, and selecting an alternative layout.

Very often a setting will have the words 'Use Parent' in it.



'Use Parent' simply means that the value for this setting is set somewhere 'higher' up the Actinic structure. If you click on a setting it will usually tell you where the value has been set in the area underneath the grid of settings.

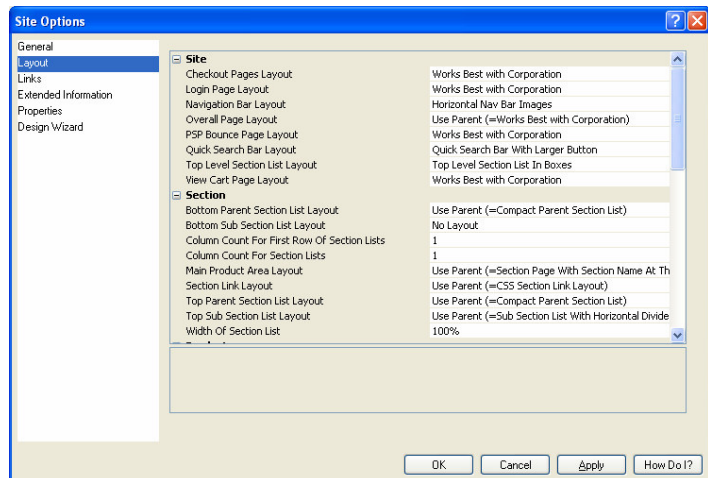


Note: When it says the value is coming from the 'Variable Definition' it just means that the 'Top Level Value' for that variable is set in the library.

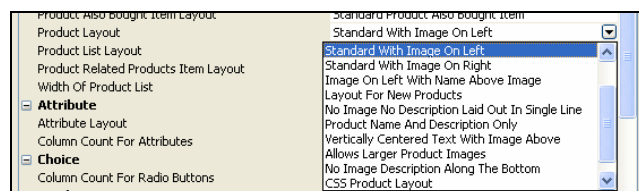
## Exercise - Changing Layouts

This exercise will show you a selection of changes you can make within Actinic. To begin with, you will change the way your products appear:

1. Go to 'Settings | Site Options' and change to the 'Layout' panel.



2. Locate the 'Product' heading, and within that, find the 'Product Layout' setting.
3. Change it to 'Standard With Image On Left'.



- Now locate the 'Column Count For Products' setting and change it from 'Use Parent (=1)' to '2'.

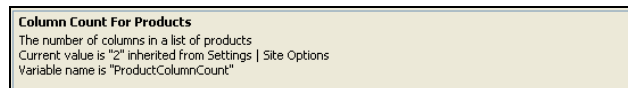


- Finally, locate the 'Price Layout' setting and change it to 'Standard Tax Inclusive Price'.
- Click 'OK' and then look at one of your sections to see the change.

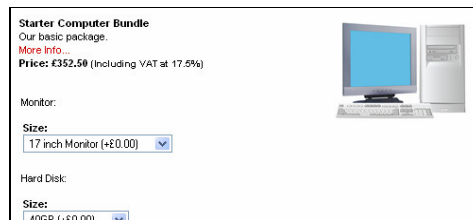


As well as setting default values for the entire store in 'Site Options', you can override settings at the section level and at the product level.

- In the content tree, change to the 'Computers' section.
- Go to the 'Layout' panel of this section.
- Click on the 'Column Count For Products' field. It says 'Use Parent (=2)' Notice at the bottom of the panel it is telling you that the value has been set in 'Settings | Site Options'.



- Change the 'Column Count For Products' from 'Use Parent (=2)' to '1'.
- Change the 'Product Layout' to 'Standard With Image On Right'.
- Click 'Apply changes' to see the difference in the preview.



It's possible to change the layout and column count for many different items in the store, such as attributes:

- Select your 'Running Shoes' product.
- Select the 'Size' attribute (within the 'Option' component).



3. View the attribute's details and change to the 'Layout' panel.
4. Change the 'Attribute Layout' to 'Standard Radio Button Attribute'.
5. Change the 'Column Count For Radio Buttons' from 'Use Parent (=1)' to '6'.
6. Click 'Apply changes' and check the preview. Your radio buttons should now be in one line.



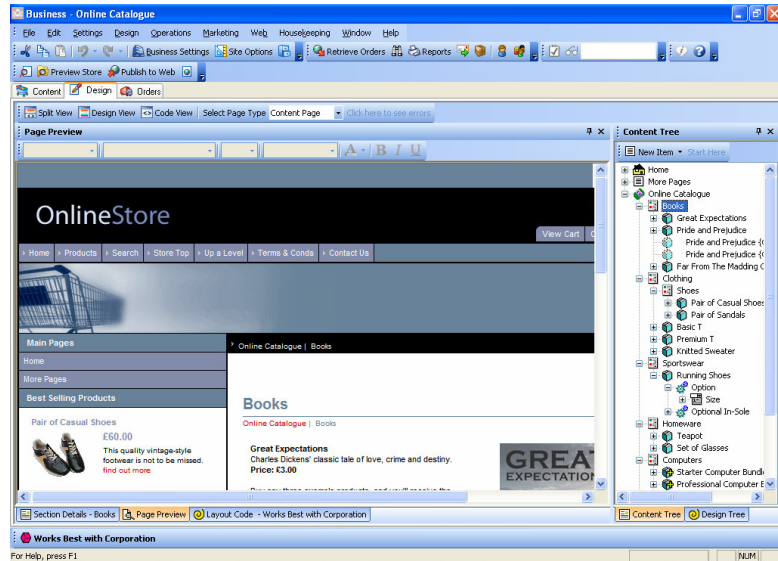
## More Information - Layout Selectors

The layout selection drop-down lists in Actinic are all controlled by things called 'Layout Selectors'. It is possible to edit the layout selectors in Actinic to change the order of layouts that are offered in the drop-down list, remove layouts and even add your own custom layouts.


There is more information on this in the next chapter - "Inserting Layouts" on page 88.

# The Design Tab

The 'Design' tab is used to change the look and feel of specific elements of your page design.




It has two main areas:

- **Interactive Preview** -  - Click on anything in the preview and a dotted line will appear around it. If a piece of text is selected, you will be able to change the appearance of it with the formatting controls in the toolbar above the interactive preview (e.g. bold, italic, colour etc.).



Also, the HTML that lays out the part of the page you have selected will appear in the 'Layout Code' panel.

- **Layout Code** -  - This shows you the code of whatever you have clicked on in the preview. You can edit the code here and click 'Apply' to see the effect on the preview.

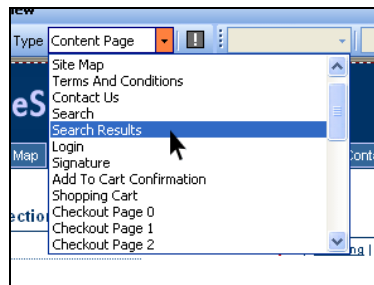
At the bottom of the Design tab are three main tabs where you can change between the Page Preview tab, the Layout Code tab and the Details tab (where you can edit names, descriptions, etc.)



You can also click the  **Split View** button to see the preview and the layout code at the same time.

Down the right-hand side of the Design tab is a narrow vertical panel that either contains the Content Tree or the 'Design Tree' - depending on what tab is chosen at the bottom of the panel. The Content Tree allows you to quickly change the section you are viewing in the Design tab. The Design Tree shows you all the layouts that make up the current page.

If you want to select a section to edit, use the Content Tree. If you want to edit a page that isn't a section (including email and style sheet layouts) then use the 'Select Page Type' drop down at the top left of the Design tab.



## Exercise - Changing Fonts


This exercise will show you how to use the Design tab to change the appearance of the text in your store.

1. Go to the 'Homeware' section.
2. Click on the 'Teapot' product name in the preview.
3. Click on the **I** icon in the preview toolbar to make the product name italicised.
4. Click on the **A** icon and then choose an alternative colour for the product names.

---

You can do this kind of text formatting for any text in the store.

---

5. Now click the 'Undo' icon on the toolbar - 
6. This should reverse out the colour change.
7. Now select a different colour.



Notice that the change you made changed all the products on the page - this is because they are all using the same layout. It will also change the appearance of products in other sections in your store.

## More Information - Working With Dreamweaver

Actinic comes with a Dreamweaver extension that allows you to supply a totally custom overall layout to Actinic, and also edit layouts using Dreamweaver. For more details on this, see the section in the main Actinic help called 'Working With Dreamweaver'.



---

## Help With Design

Designing in Actinic can take a little while to understand - this is just because there aren't that many programs that work in the way Actinic does. However, once you've learnt the basics, you will discover how flexible Actinic is to design with.

The important thing is to spend a bit of time trying to understand how the various features work, before ploughing ahead and trying to make a specific change.

These articles will lead you through the essential things you need to know.

### Using the Preview to Select a Layout

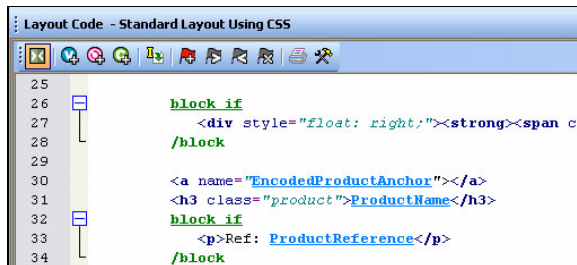
Try clicking within the preview panel in the Design tab.



You should see a dotted line appearing round the thing you've clicked on. This means you've selected a **layout** (or an item within a layout).

Layouts are the building blocks of Actinic pages. They are pieces of HTML that Actinic sticks together in order to create each page in the store.

It is possible to see the HTML code of the layout you've clicked on. To do this, look at the 'Layout Code' panel. This will either be underneath the preview, or it will be on a separate tab.




In the title bar of the Layout Code panel is the name of the layout.



Make a mental note of this, as it's useful to know what the layout is called in case you ever need to go back to it.

---

**Note:** The  button on the layout code toolbar is used to toggle between an 'advanced' and 'simple' view of the layout code. You generally just leave it on the 'simple' view.

---



### Navigating Round the Layouts

Once you have selected a layout in the Design tab, look at the layout **breadcrumb trail** that runs along the bottom of the Design tab.

The breadcrumb trail shows you that the layout you've clicked on is located within another layout 'above' it, and that layout in turn is located within another layout. So in the example above, the product layout is located within the product list, which in turn is located within the 'section page' layout - and so on until you reach the 'top' of the design, which is a special layout called the 'Overall Layout' (also known as the 'Outer Layout').

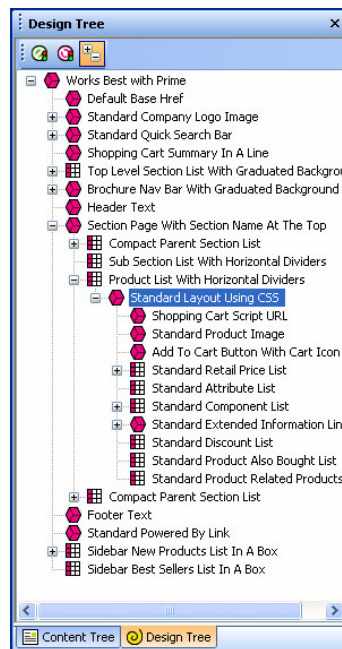
If you only see one layout in the breadcrumb trail, it's probably because you've already got the Overall Layout selected in the preview.

You can click on the layouts in the breadcrumb trail to select them, and this way you can move up in the design.

You can also click the  button on the layout code toolbar and the  icon in the preview to move up a level in the design.

The down arrows are for taking you back to the layout you were on previously.

You can see the full structure of the layouts used to build the page by viewing the 'Design Tree'. To see the tree, click on the tab at the bottom right of the screen.



## Page Structure

All Actinic pages are divided into two parts - the 'outer' and the 'inner'.

- The 'outer' part of the page controls the branding and navigation elements that largely stay the same as you go from page to page. They are the elements that usually go across the top and down the side of each page. The outer part of the page also contains the <head> section.

- The **'inner'** part of the page controls the content for that page - so if it's a section page it will be the section links and products, and if it's a checkout page it will be the checkout fields etc.

### Outer Layout

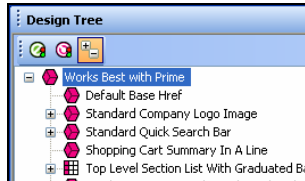
The outer part of the page is controlled by a layout called the 'Overall Layout' (also known as the 'Outer Layout'). This is the 'top' layout of each page - which every other layout is inserted within.

Outer layouts always contain a pink/purple placeholder called **INNERLAYOUT**, which will be replaced by the content (inner layout) for that page when the page is generated.

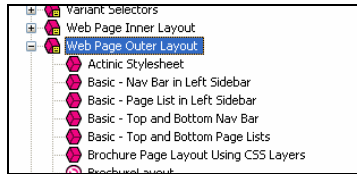
You can select the overall layout within the Design tab by clicking anywhere within the preview, and then clicking the first layout on the layout breadcrumb trail.



Alternatively, you can view the Design Tree and then click on the top item in the tree to select the overall layout.



All the outer layouts are kept together in the library within a group called 'Web Page Outer Layout'.



You'll find out more about the library in a moment.

### Inner Layout

The inner layout is harder to talk about as it will be different depending on which page you are looking at.

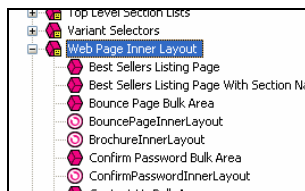
For section pages, the inner layout will probably have a name that starts within 'Section Page...' and when you look in the code of it, you'll see lots of references to 'section lists' and 'product lists'.

```

37
38     SubSectionListTop
39
40     CartErrorListXML
41
42     block_if
43     SectionDiscountList
44     /block
45
46     ProductList
47
48     block_if
49     <div align="right">
50     SingleAddToCartButton
51     </div>
52     /block
53

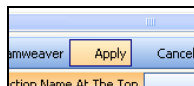
```

Every 'type' of page has a different inner layout that controls the layout of its content. All the inner layouts used by the store are collected together in the library in a group called 'Web Page Inner Layout'.



## Editing and Undoing

You can make a change to the HTML of a layout and then click the 'Apply' button to see what effect this has on the store.



The preview will be automatically updated when you click 'Apply'.

If you are not happy with the results, click the 'Undo' button on the toolbar to undo the change -

You can also edit layouts using Dreamweaver. This is described in the main help in a section called 'Working With Dreamweaver'.

---

Remember when making changes that this layout is probably going to be inserted within another layout, so be careful when making changes that you don't do anything that might distort or corrupt this 'parent' layout.

---

If you have made a mistake with a layout, and you cannot work out how to get the layout working again then you can always revert the layout back to its 'factory settings'. This is described in the next section.


## The Library

The Design tab allows you to edit the layouts that are used within a page, but the Library allows you to search through and edit **all** the layouts within Actinic.

You can open the library by going to 'Design | Library', then change to the 'Layouts' tab.

### Highlighting the layouts you've edited

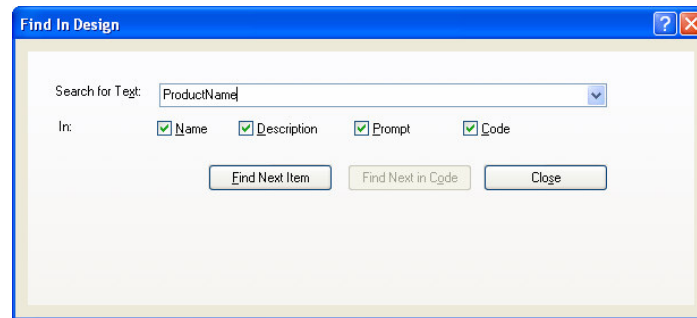
If you click the 'Highlight edited library layouts (\*)' checkbox at the bottom of the 'Layouts' tab, you will highlight any layouts you've customised, and new layouts you've created.

Layouts you've customised will be marked with a (\*) and have a  icon.

You can also highlight any new layouts you've added by selecting the 'Highlight new user layouts (+)' checkbox.

### Searching for layouts

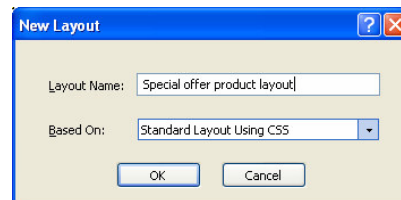
Right-click anywhere within the Layouts tab and select 'Find'.



You can search for the name of a layout or some code within a layout.

### Creating new layouts

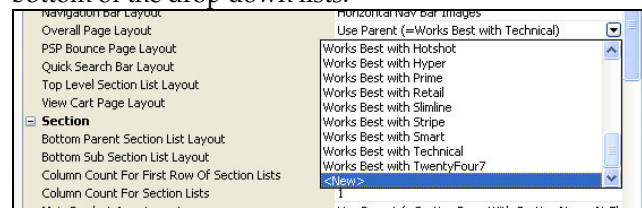
Right-click on a layout and select 'New Layout'.



Give the layout a name and click 'OK'.

---

**Note:** You can also create new layouts within the Layouts tab of a product/section/Site Options. Simply select the '<New>' option at the bottom of the drop down lists.

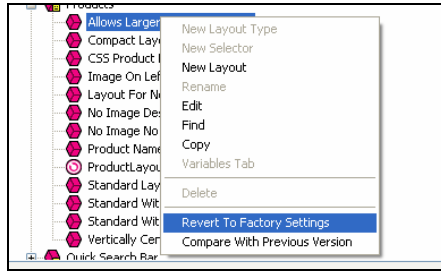


### Deleting layouts


You can only delete a layout from the library if it's a custom layout that you've created, and you haven't selected it anywhere.

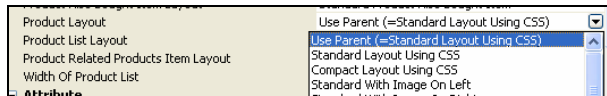
### Reverting to Factory Settings

If you have made a mistake in a layout, and you want to put it back to how it was before you started making changes to it, then you can right-click on it in the library and select 'Revert to Factory Settings'.



## Layout selectors

Layouts are only part of the picture. There are also round things called 'Layout Selectors' -  - that control how layouts are listed within the 'Layout' panels.



You can edit these layout selectors to change which layouts are listed within Actinic, and in what order.

## Inserting Variables


Variables are placeholders for Actinic data. When the pages are generated, the variables are replaced by real data.

Variables in layouts look like this:

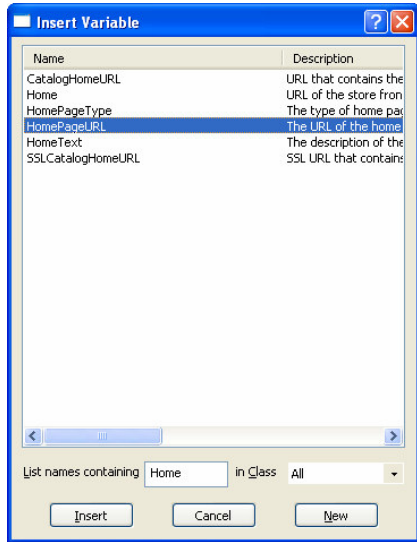
[ProductName](#)

Inserting a new variable is simple. Let's say you wanted to add a new link to your home page. To do this, you might add the following HTML into the layouts:

```
<a href="">Click here to go to the home page</a>
```

You can now place your cursor between the two quote marks and click the 'Insert Variable' button - .

The list of layouts is initially really long, but you can use the 'List names containing' filter the search. If you enter 'Home' into the list, the list becomes:



You can now highlight 'HomePageURL' and click 'Insert'.

```
<a href="HomePageURL">Click here to go to the home page</a>
```

## Exercise - Including the 'Author' Variable into the Design

Earlier on in this guide, you created a new 'Author' variable. This exercise will show you how to include it in the design.

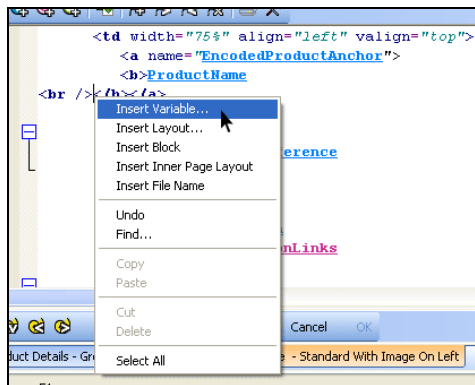
1. Go to the Design tab and then make sure you are looking at the 'Books' section.
2. Click on the name of one of the books on this page. This should highlight the 'ProductName' variable.
3. Add in a new blank line straight after the variable.
4. In the new blank line, type `<br />`

---

You might notice that Actinic prompts you here to complete the tag. This is a feature of Actinic - it will help you create the HTML within the layouts.

---

5. Just after the `<br />` right-click and select 'Insert Variable'.




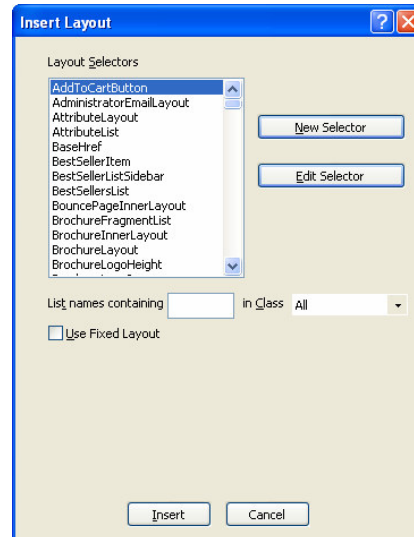
6. Select 'Author' from the list of variables that appears and click 'Insert'.
7. Click 'Apply' and check the preview to see if your value have appeared.



If the author value has not appeared for all your books, it may be because your books are using different layouts from each other. You may need to insert the `<br />`[Author](#) in more than one layout.

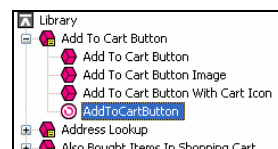
## Inserting Layouts

To insert a layout, use the  button on the layout code toolbar.

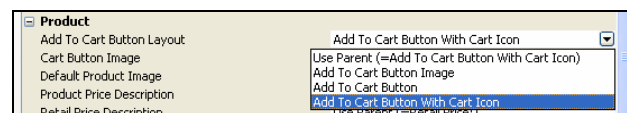


What you get presented with though is not a list of layouts - rather, you get a list of Layout Selectors (which you might have seen within the Library).

The job of a layout selector is to insert a **type** of layout into the design. You can see these layout types in the 'Layouts' tab of the library.

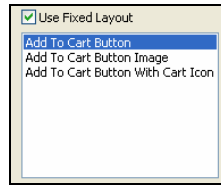


For example, inserting the 'ProductLayout' layout selector will insert a product layout into the design, and the 'AddToCartButton' layout selector will insert an add to cart button into the design. The actual layout that is used is controlled elsewhere - usually in Site Options.





If there is a specific layout that you know you want to insert, rather than just inserting any layout of a particular type, then you can select the 'Use Fixed Layout' button and select one from the list.



---

**Warning** - using 'Fixed Layouts' means that you will no longer be able to change the layout in Site Options or in the Layout panel of your sections/products. More details are in "Advanced: Fixed Layouts vs. Selectable Layouts" on page 90.

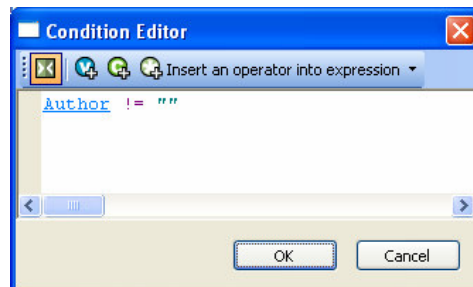
---

## Hiding Things With Conditions

When you look in layouts, you see lots of green '**block if**' tags.

```
block if  
  Written by: Author  
/block
```

These are **conditions**, which will hide the text between the block tags unless a certain condition is met. You can view and edit the condition by double-clicking on the opening 'block if' tag.



In the above example, the text shown is hidden unless the 'Author' field has a value. If the 'Author' setting doesn't have a value, then the whole thing is hidden.

## Using Stylesheets

Actinic makes use of stylesheets to control layout and fonts in the store. If you want to change the layout of items on a page, or the default appearance of text, you will probably have to think about editing the main Actinic stylesheet.

---

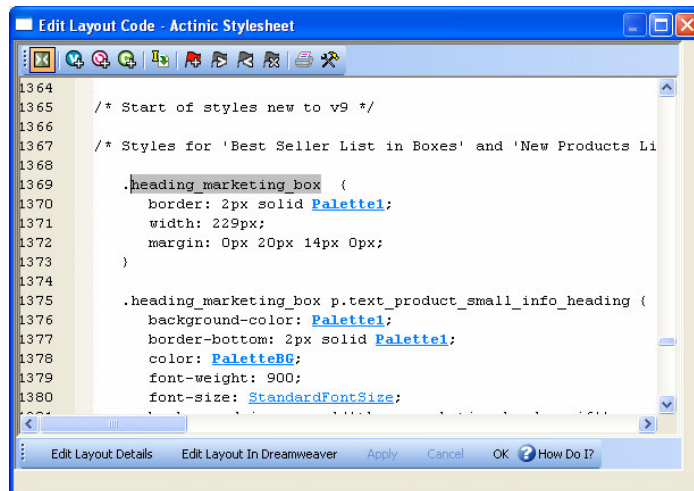
**Note:** You can edit the default font size and appearance in the 'General' panel of 'Site Options', and you can edit colours in the 'Color Schemes' tab of 'Design | Themes'.

---

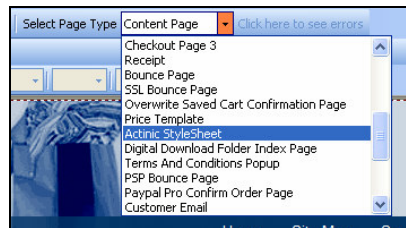
Whenever you see a style used in Actinic layout e.g.:

```
<div id="prime-top-bar">
```

... you can right-click on the style and select 'Look Up In Stylesheet'.



The layout that controls the stylesheet is called 'Actinic Stylesheet'. You can also select it from the 'Select Page Type' drop down list in the 'Design' tab.




---

**Note:** In the Library, you'll find the 'Actinic Stylesheet' layout within the 'Web Page Outer Layout' group.

---

You can use your own styles with Actinic. Either just add them to the bottom of the 'Actinic Stylesheet' layout, or save your stylesheet within the Actinic site folder and then use a tag similar to the following to add link your stylesheet in.

```

</script>
</block
<link href="actinic.css" rel="stylesheet" type="text/css">
<link href="my-custom-styles.css" rel="stylesheet" type="text/css">
|
  
```

This tag needs to go in the <head> section in the overall layout used by the site.

If you right-click on an HTML tag in your layout that is using a tag from your custom stylesheet, and then select 'Look Up In Stylesheet', Actinic will open up your custom css file in your default CSS editor.

## Advanced: Fixed Layouts vs. Selectable Layouts

In the section called "Inserting Layouts" on page 88 it talks about how when you insert a layout selector, you have a choice.

- You can insert a layout selector into the design, without specifying a specific layout - this is also known as using a

## Layout Placeholder

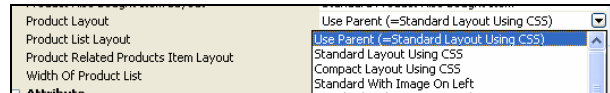
### AddToCartButton

- Alternatively, you can select a specific layout to insert into the design - this is known as a **Fixed Layout**

### Add To Cart Button With Cart Icon

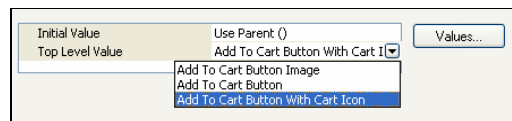
## Using Layout Placeholders

When you insert a layout placeholder (rather than a fixed layout) it will insert a **type** of layout into the design. You can generally choose the layout to be inserted within the 'Layout' panel of 'Settings | Site Options'.



You can then often override this setting within the Layout panel of a section, or of a product.

Not all layout selectors have a place of setting in Site Options. If you find one that doesn't, then you need to go to the 'Layouts' tab of 'Design | Library', and edit the layout selector there.

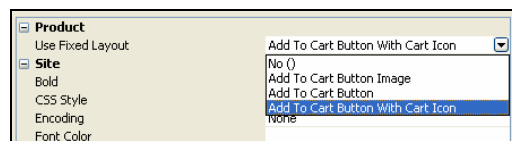


Edit the 'Top Level Value' there in order to change the layout that will be inserted.

## Fixed Layouts

When you insert a fixed layout, it effectively disables the layout selection options in 'Settings | Site Options'. The choice of layouts is still there, but they will be ignored when the pages are built.

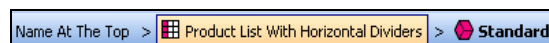
To change a fixed layout into a layout placeholder, you can right-click on the pink layout name in layout code and select 'Edit Appearance'.



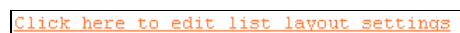
In the screen that appears, set the 'Use Fixed Layout' option to 'No()' and click 'OK'.

## Advanced: Editing Lists

As well as standard layouts, you will sometimes come across things called **lists**. They look like this in the layout breadcrumb trail:



Lists always have an orange link across the top of the layout code that says 'Click here to edit list layout settings':

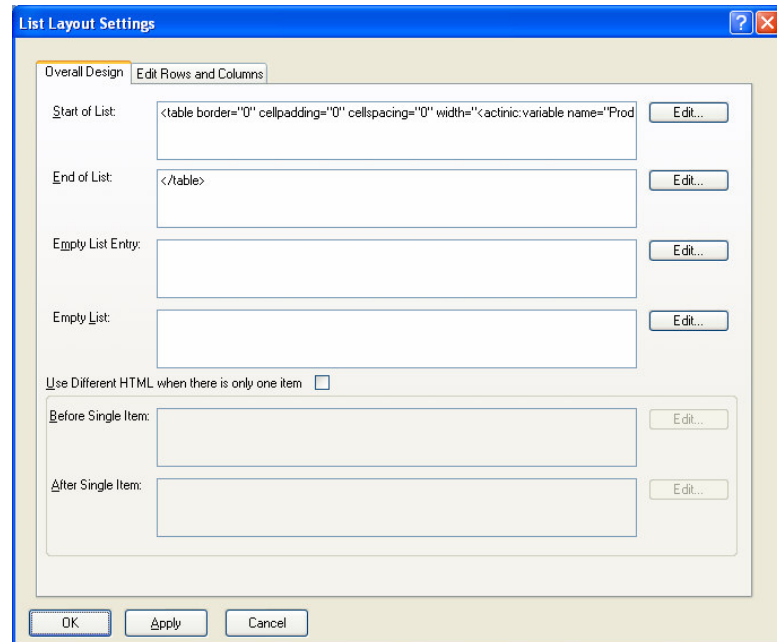


Lists work differently to other layouts. Their job is to insert a set of items into a page. Wherever you see a list of products, or a list of sub-sections,

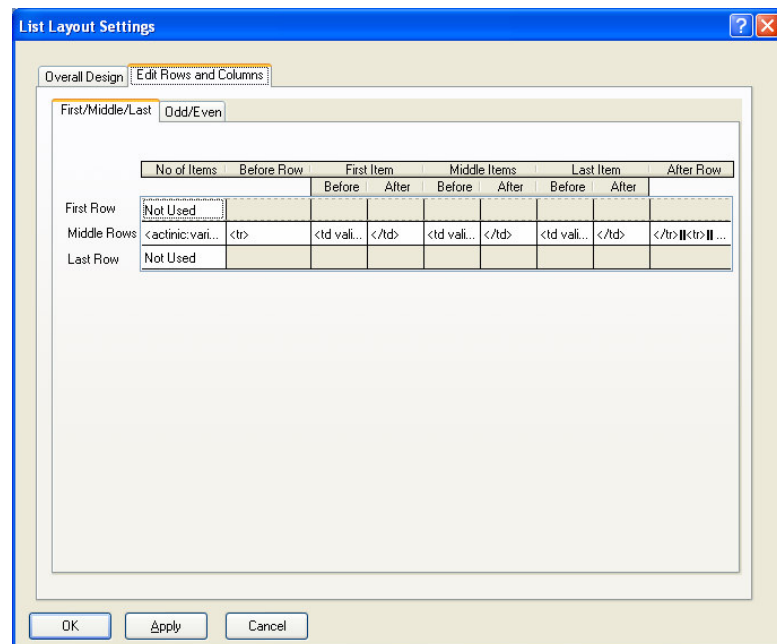
or a list of best sellers, or a list of locations, somewhere in there a list will be controlling the placement of the items.

Editing the list allows you to edit the HTML that goes at the start of a list of items, at the end of a list of items and around each individual item.

To edit a list, click the orange 'Click here to edit list layout settings' text at the top of the layout, or click the 'Edit List Layout Settings' button.



The 'Start of List' and 'End of List' fields here are self explanatory. It gets a bit trickier in the 'Edit Rows/Columns' tab:



Don't panic! This screen looks more complicated than it is. This is where you can control the code that goes before and after each item in the list.

Generally, you only have to worry about the 'Middle Rows'. Only use the 'First Row' and 'Last Row' settings if you want the first or last row to be different to the other rows. The 'No of items' is where you can set the number of columns in your list - but this only works if your list is a table. Otherwise, just leave this set to 'Dynamic'. If you see a variable within this field, it means you can set the number of columns in the 'Layout' tab of the section/product you are currently editing.

Also, there are three sets of 'Before' and 'After' fields just in case you have multiple columns in your list and you want the columns to look different from each other. Most of the time you can just put the same code into each set of fields.

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