



informatica

Storefront

Revision 14-9

# 1. Storefront

Informeteca offers a full featured, integrated ecommerce solution that requires your system to include a payment processing service (i.e., PayPal, Authorize.Net, Moneris, etc.). Any of the products that you offer within Informeteca can also be published to the storefront, including individual courses, Instructor Led Training, and digital downloads as well as offline products, such as training materials, text books, registrations to events and more. You are able to create different prices for different groups and create discount codes. Informeteca's ecommerce module also offers a full range of its own reports. Informeteca uses Comersus as our storefront module. If you have another ecommerce solution that has been custom integrated with Informeteca, then please contact your IT department or a company official to obtain more information on an integrated ecommerce solution.

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### 1.2 Catalogue Descriptions

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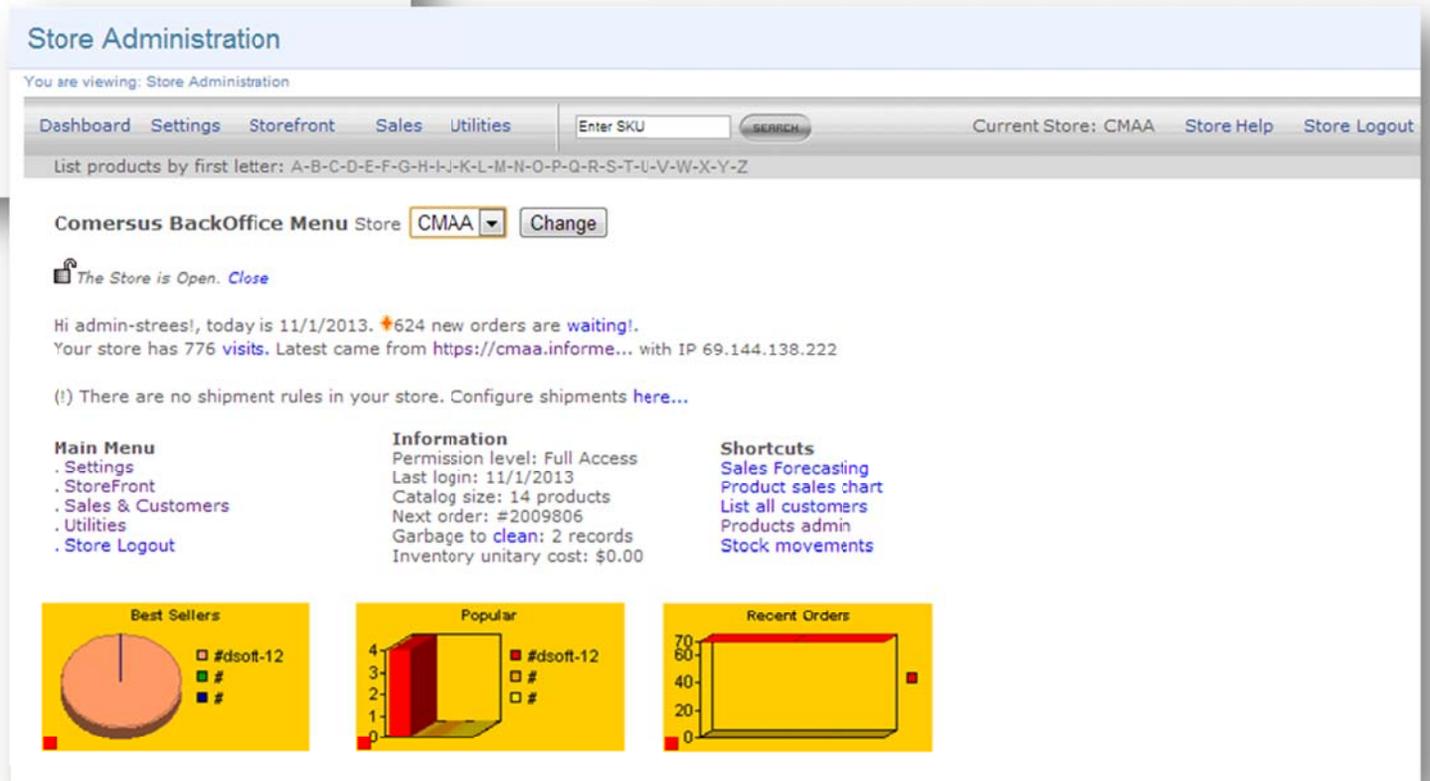
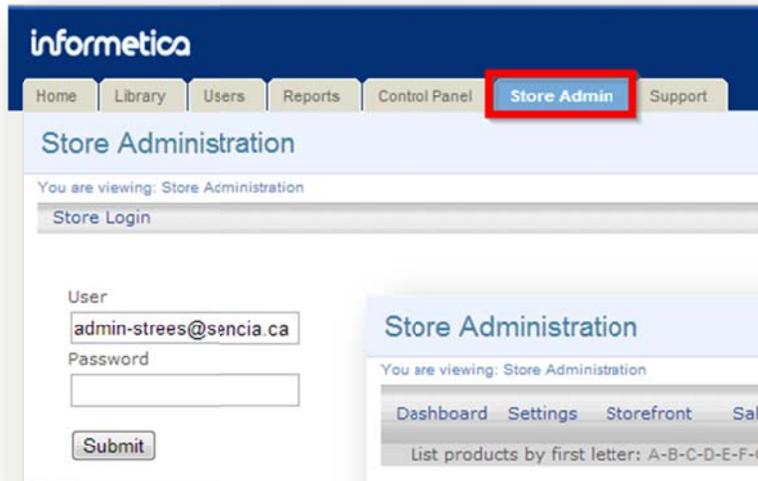
### 1.7.3 Tax per Product

### 1.7.4 Editing or Deleting Taxes

### 1.7.5 Sales Terms and Conditions

### 1.8 Comersus Reports

To access your system's storefront, click the Store Admin tab from any page after logging into Informetica. The Store Administration requires its own log in; log in information is generally the same information that you used to access your Informetica system.

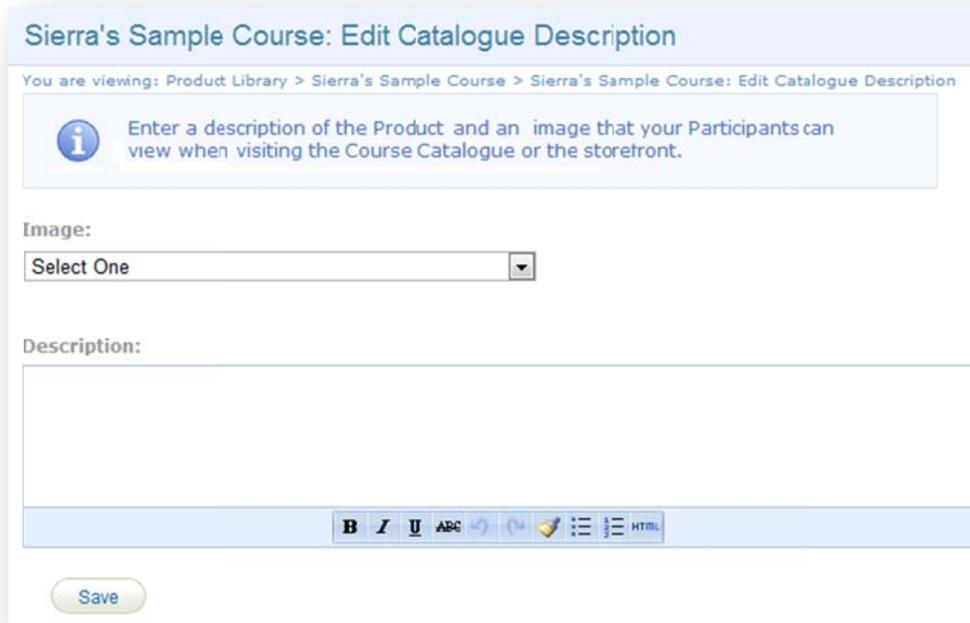
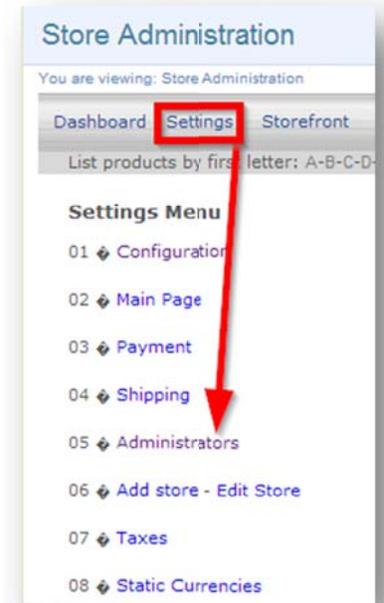


## 1.1 Create a New Store Admin Account

New admin accounts must be created within Comersus. You may only need to enter this area rarely, since your store setup is completed when your system goes live. However, you may find you need to add a new store admin account. Log into the storefront to open the Comersus Backoffice Menu, click "settings" from the main menu, and then click on "05 Administrators". From here you can add or modify an administrator account.

## 1.2 Catalogue Descriptions

Catalogue text is the displayed course description. On the Informetica desktop, the catalogue text appears for the items within the catalogue and can be read by anyone with access to the catalogue. Clients that use Informetica's storefront feature will also see the catalogue text on the storefront as the product description. To write a catalogue description, open any product and click the catalogue link from the properties menu on the right.



## Keeping Your Storefront Neat & Tidy

Consider using short, simple descriptions to allow you to showcase more products on one page without requiring your users to do a lot of scrolling to view your offerings. It is best practice to use images either for all of your products or for none of your products so that store pages look uniform.

When using catalogue images, it is usually preferable to make them all a standard size. The thumbnails used on the category pages (see example to the left) are automatically resized to 100 x 100 pixels. However, the larger images that show up after a user clicks onto a product are only standard if you have uploaded them all as the same size. 300 x 300 pixels is a good starting point.

### 1.2.1 Writing Catalogue Text

The best method for writing text for a catalogue entry is via Informetica itself. Open the product you wish to edit or add catalogue text to and then click catalogue under the properties menu on the right to open the edit catalogue page. Edit the catalogue text with the publishing window and then click save. Note that the publishing tools are not quite as robust as those used to create content for products, however, HTML can be used to add some more robust features such as links.

### 1.2.2 Adding Catalogue Images

You can optionally define an image from your local library to represent the product in the catalogue. The example below is using a WHMIS logo to represent a WHMIS course. When within the content editor described in the Writing Catalogue Text section above, select an image from the Image drop down menu. The image will appear in both the Informetica and storefront catalogues and when the product is clicked.

### Catalogue Text vs Comersus Description

Best practice is to create and edit catalogue text within Informetica instead of within Comersus. When you publish or re-publish the product to the storefront, the description will be updated to both the storefront and Informetica catalogue. If you Updates made within Comersus only update the Comersus storefront, not the Informetica catalogue.



### 1.2.3 Catalogue Text for Bundles

Catalogue text for bundled courses is more limited than for individual products in the catalogue. Catalogue text for bundles can be written in the description area within Informetica. Click the product library tab and then the bundles link. Click the name of any bundle from list view or the edit link under the name from detailed view, enter your description, and then save.

Name	Description	Type	Status	Created	Edited
<a href="#">Compliance Lessons Sencia</a>	Internal compliance lessons. Topics include violence, harassment, health & safety (WHMIS) in the workplace	Product Enrollment	active	4/28/2011 9:29:51 AM Jason Bruce	4/28/2011 10:23:54 AM Jason Bruce

**Compliance Lessons Sencia**  
Created by Jason Bruce on 4/28/2011 9:29:51 AM  
Updated by Jason Bruce on 4/28/2011 10:23:54 AM

Details [Edit](#)    User Groups (1) [Edit](#)    Products (3) [Edit](#)

Description: Internal compliance lessons. Topics include violence, harassment, health & safety (WHMIS) in the workplace

1. SENCIA OFFICE

1. EMERGENCY PLAN  
2. WHMIS  
3. WORKPLACE HARASSMENT

**Edit Details** close or Esc Key

Edit Bundle Details

Name:

Description:

\* You have 255 characters left

or [Cancel](#)

#### Bundle Description Limits

Bundle descriptions are limited to 255 characters within Informetica. There are not as many publishing tools available, so only simple descriptions are possible unless you wish to write a more robust description within Comersus instead.

## 1.3 Post Items to Your Storefront

The storefront is automatically populated with a lot of the product information already within Informatica, which helps make creating new products for the storefront quick and easy. You can publish anything in the Informatica product library to your storefront. Extensions and bundles of products may be placed on the storefront for purchase as well.

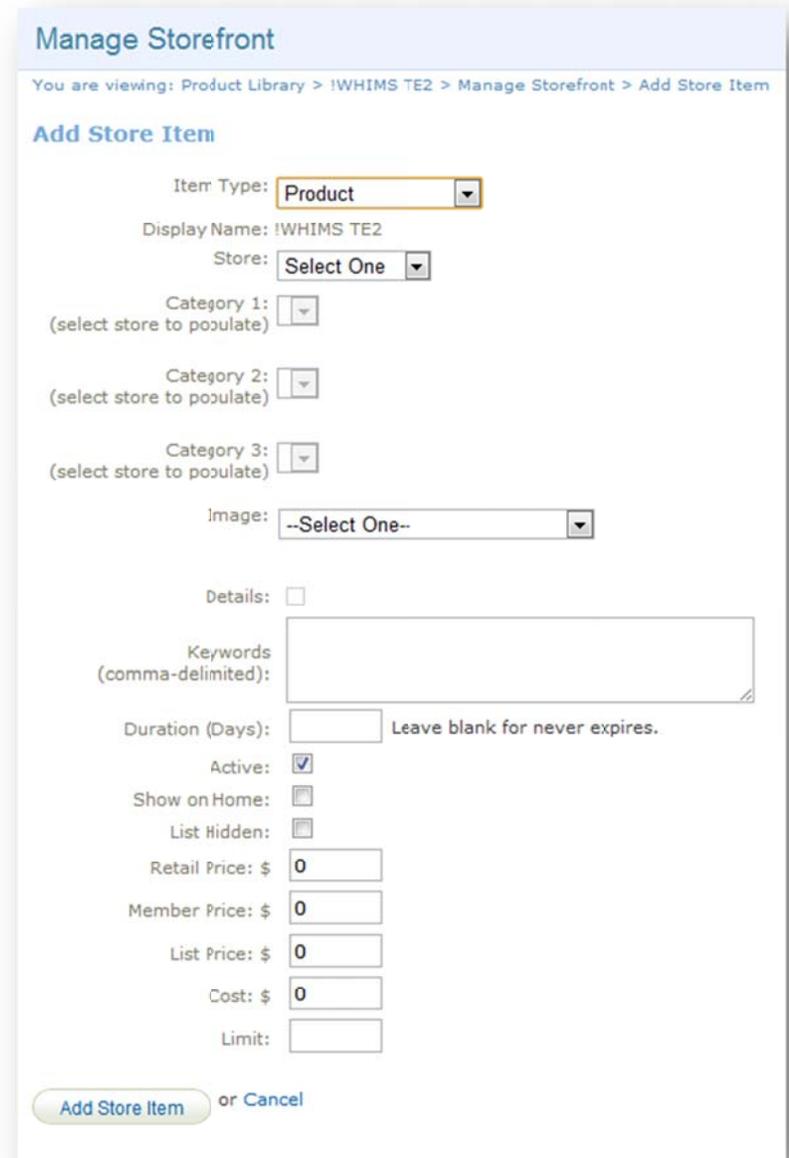
### 1.3.1 Add Products to the Store

To post products from the Informatica LCMS to the storefront, start by visiting the product library. Click the product name to open it and then click “storefront” on the right under the properties menu to open the manage storefront page. Click the “create” button to open the add store item page. Fill out the add store item form, shown at the right, and then click add store item. This item will be added to your storefront and you will be returned to the storefront page where you can review the item you added. You can create another copy to sell or create an exception for the same product. You can also make edits or delete the item from here.



#### One or More Categories Required

You must place a store item into at least one category and make it active for it to be seen on the storefront.

A screenshot of the 'Add Store Item' form. The breadcrumb trail is 'You are viewing: Product Library > !WHIMS TE2 > Manage Storefront > Add Store Item'. The form fields are: Item Type: Product (dropdown), Display Name: !WHIMS TE2, Store: Select One (dropdown), Category 1: (select store to populate) (dropdown), Category 2: (select store to populate) (dropdown), Category 3: (select store to populate) (dropdown), Image: --Select One-- (dropdown), Details: (checkbox), Keywords (comma-delimited): (text area), Duration (Days): (text input) Leave blank for never expires., Active: (checked checkbox), Show on Home: (checkbox), List Hidden: (checkbox), Retail Price: \$ 0 (text input), Member Price: \$ 0 (text input), List Price: \$ 0 (text input), Cost: \$ 0 (text input), Limit: (text input). At the bottom are 'Add Store Item' and 'Cancel' buttons.

**Brief description of the fields.**

Field	Description	Input
Item Type	Your system may have more than one product type. Select the appropriate type from the drop down menu.	Required
Display Name	The display name keeps the name of the course from within Informetica.	N/A
Store	Your system may have more than one store configured. Select the appropriate storefront from the drop down menu.	Required
Category	Category options are based on the store you select. Select one or more categories for your product to sit in so your customers can easily find what they are looking for. If you select no category, the product will not be linked to from the storefront, but you may supply customers with a direct link to it, if desired (i.e. email the url to someone).	Required
Image	Use the dropdown menu to select an image. Note that you can also select an image when writing the catalogue text. If an image was selected in the catalogue options, it will preview here.	Optional
Details	Automatically pulls in the text from the catalogue. If you need to edit this, please follow the instructions for writing catalogue text earlier in this chapter.	N/A
Keywords	Add as many simple terms as you like, each separated by a comma, to help customers using the search tool.	Optional
Duration	The duration determines the number of days that a customer will have access to the product after they purchase it. A duration that you set here will override an expiry that has been set up previously within an Informetica product's details. Our advice is to set product durations as generic as possible and then set the storefront duration to be more specific.	Optional
Active	You must check the active box before the product to be posted to the storefront.	Required
Show on Home	Show on home is used by clients who use a Comersus front page. This is like a featured section that will show up on the Storefront's landing page. You can choose what will show up on that front page, like featured items. Most of our clients use a website (such as a Sencia SIMs website) to feature the storefront, so this option often does not apply.	Optional
List Hidden	This is used in occasions when you don't actually want to show products in the store and people will not be able to browse to the item. List hidden is typically used in situations where you may want to allow people to purchase something (such as an exception) but you only want them to be able to purchase if they are provided a direct link to it, or if you do not want it to show on the browser with the catalogue.	Optional
Retail Price	This is the amount you are charging for your product on the storefront. A price of \$0.00 will essentially be a free item.	Required
Wholesale Price	Wholesale price is required only if you offer two different prices on your storefront. For example, if you have some customers who are members, you can offer the members the wholesale price, at a rate that is less than the retail price.	Optional
List Price	If you enter a price here, then you can use the show savings feature built into Comersus that shows customers how much they have saved on their purchase. Make sure that the list price is higher than the retail price.	Optional
Cost	You can track your own cost for the product, useful for the purpose of reporting. For example, you may purchase someone else's course to sell on your site and each sale costs you a particular amount.	Optional
Limit	Limit allows site managers to set a maximum order quantity for any product. This is useful in enforcing something like "1 item per customer" restrictions or similar. By default, products have no limitations on the amount a customer can purchase.	Optional

### 1.3.2 Add Bundles to the Store

To post bundled products to the storefront, start by visiting the bundles library. For the bundle you wish to add, click the “storefront button” from detailed view or the edit storefront icon from list view.

**Communication Skills**  
Created by Maxwell Frattolin on 2/7/2011 1:05:10 PM  
Updated by Sierra Trees-Turner on 10/20/2011 10:13:18 AM

Type: Product Enrollment  
Status: active

Details Edit    User Groups (1) Edit    Products (57) Edit

Description:    1. EJ4

1. ACTIVE LISTENING  
2. ADAPTING FOR DISC STYLES  
3. AFTER THE PRESENTATION  
4. ANALYZING THE UPCOMING NEGOTIATION  
5. APPLICATIONS OF

Storefront    Delete

Name	Description	Type	Status	Created	Edited	
Communication Skills		Product Enrollment	active	2/7/2011 1:05:10 PM Maxwell Frattolin	10/20/2011 10:13:18 AM Sierra Trees-Turner	   

Click the “add storefront item” button. From here the process is the same as it is for adding products to the store.

#### Adding Products to Existing Bundles

- When you add a new product to an existing bundle, it is automatically updated to the storefront items.
- If you add products to the bundle after a user purchased it, the user is not automatically given access to that new product within Informetca.

### 1.3.3 Add Exceptions to the Store

#### What is an exception?

Exceptions give additional access to a product with a duration that has expired for a user. Site managers can add exceptions to the storefront and allow users to purchase additional access to the product. For example, maybe you offer a course for purchase, but your user only has access to it for 30 days after they purchase it (duration). Sometimes a user cannot finish the course within the 30 days. Some clients allow a user to go back to the storefront and purchase additional time. Generally this is set up for a shorter time and a cheaper price, but that is entirely up to you. You can also create more than one exception with different amounts of time and prices.

#### Publish Your Exception

Site managers may choose to publish an exception to the storefront so that a customer can purchase extended access to a product that has expired for them. You can even set a limit as to how many times that exception may be purchased by each customer by using the Limit field. The process for adding exceptions to the store is exactly the same as adding products. Simply select “product exception” from the drop down menu under the item type. Users must be on the enrollment list to purchase a product exception, i.e., they must have first purchased the product itself or have been registered manually within Informetca.

#### Email Notifications for Exceptions

Informetca has the capability to e-mail reminders about an expiring product with a link to purchase an exception. Provided that the exception is available on the storefront to be purchased, the product expiration notice will include a link to purchase the related exception. This is done automatically based on these conditions:

- An extension has to have been created in the storefront.
- The preset text [[ Extension List ]] is added to the body of the email.

The link is usually just a standard link to automatically add the product into the cart. When the user clicks the link, they are brought to the storefront with the extension added into their cart.

For more information on setting up the email notification, please visit the Email Notifications chapter of this manual.

#### Exceptions Must Have Durations or Expiries

Exceptions are only applicable for storefront products that have a duration or expiry.

#### Product Exception Tips

1. The product does not need to be on the storefront to publish an exception for it on the storefront.
2. Extra time will be added to the original expiry, so only enter the duration days for the exception itself, not a total.

### 1.3.4 Edit or Delete a Posted Item

To edit an item that you have posted to the storefront, click the product name to open it and then click “storefront” on the right under the properties menu to open the manage storefront page. Click the edit icon  next to the item and make the necessary changes. After making changes to the storefront item, click “update store item” at the bottom. To delete an item that you have posted to the storefront, click the delete icon  and click yes when the confirmation window pops up.

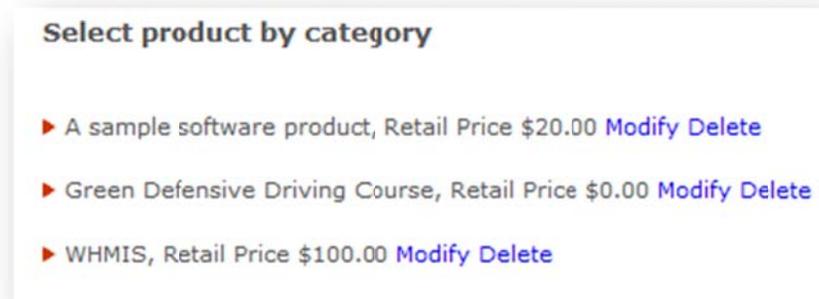
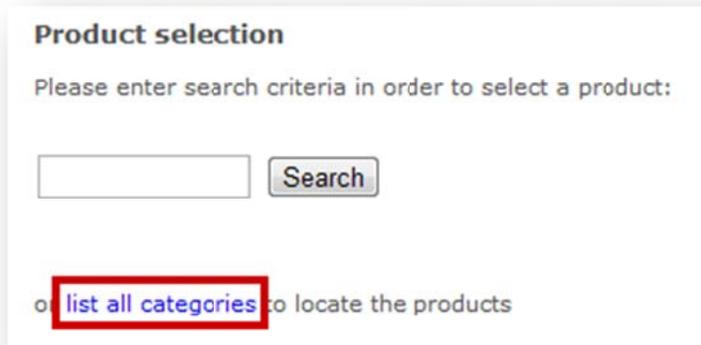


### 1.3.5 View Products Posted to the Store

To see products that you have posted to your storefront:

- Log into the storefront to open the Comersus Backoffice Menu
- Click on **Storefront** from the main navigation and then click **Products**.
- Under the Products menu, click **Modify**.

From here you can enter a search term, such as the name of the product in to the field and click search. To view a product that has been posted to the store, but is not placed within a category, you will need to use the search feature. You can also view all of the products that you have in a category at once by clicking the **list all categories link** and then selecting a category.

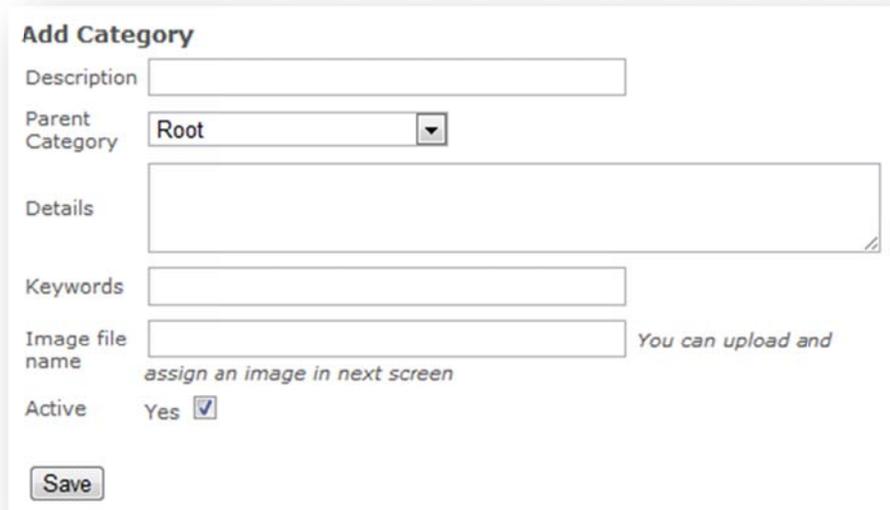


## 1.4 Product Categories

Once categories are set, you typically do not need to ever change them and assigned products to categories is managed from Informetica as mentioned in the “Post Items to Your Storefront” area of this chapter. However, you may find that you wish to add a category or change the name of one. To access the categories, click the storefront menu, click products, and then select categories. Newly added categories will automatically be populated to Informetica and available as selections when you post new products to the storefront. The category options are based on the store you select, if you have more than one store set up. Your products must sit in one more categories or your customers cannot easily find what they are looking for.

### 1.4.1 Add a Category

Click the storefront menu, click products, and then select categories. Select the add link to create a new category and then fill out the “add category” form. Remember to save your new category.



**Add Category**

Description

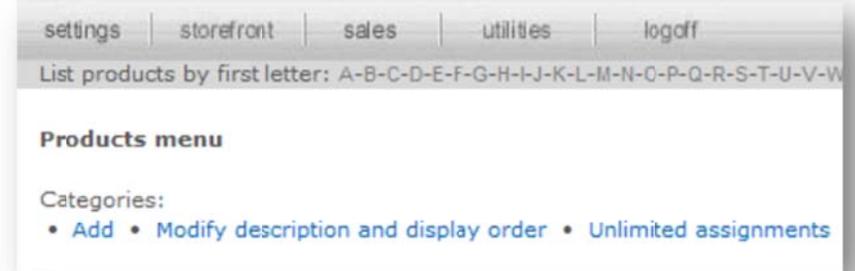
Parent Category

Details

Keywords

Image file name  *You can upload and assign an image in next screen*

Active Yes



### Category Tips

Categories must be active to be seen on the storefront. Any products within inactive categories will not be seen.

Comersus will not let you change the name of a category (description) unless there are no products within it. Therefore, you will need to temporarily remove the products within the category or contact a Sencia administrator to change the name for you.

The following is a brief description of the form fields.

Field	Description
Description	This is the category name that will be displayed in your store when people browse the store by category, together with the category image.
Parent Category	Select root to create a brand new category. If you select one of the categories from the drop down menu, you will create a subcategory that belongs to the parent category you select.
Details	Details lets you add more information not available in the description field. The text you enter here will show as a detailed view when customers click on the category.
Keywords	Add as many simple terms as you like, each separated by a comma, to help customers using the search tool.
Image File Name	Enter the file name for the category's general image. Make sure that the image has been uploaded first.
Active	Click the checkbox to make this category active and visible on your storefront.
Save	Click the "save" button to complete the creation of the category or subcategory.

### 1.4.2 Edit an Existing Category

Click the "modify description and display order" link to edit an existing category, and then click the "modify details" link next to the category you wish to make changes to.

Make any changes to the category fields and then click the "modify" button at the bottom.



The 'Modify Category' form contains the following fields and controls:
 

- Description: Text input field containing 'General'.
- Parent Category: Dropdown menu showing 'Root'.
- Details: Text area containing 'Misc Items'.
- Keywords: Text input field containing 'General, Misc, All'.
- Image: Text input field containing '10mileshigh\_1600.jpg'.
- Active: Radio button group with 'Yes' selected.
- Buttons: 'Modify' and 'Delete' buttons at the bottom.

### 1.4.3 Change Category Display Order

Click the modify description and display order to edit an existing category, and then click the “modify order” button next to the category you wish to make changes to. This will show all of the categories that you have set and the order they appear in on the storefront. Change the number in the box and click the “modify order” button to complete the change.

The screenshot displays a navigation menu at the top with links for settings, storefront, sales, utilities, and logoff. Below the menu is a header for 'List products by first letter: A-B-C-D-E-F-G-H-I-J-K-L-M-N-O-P-Q-R-S-T-U-V-'. The main content area is titled 'Products menu' and includes a 'Categories:' section with links for 'Add', 'Modify description and display order', and 'Unli'. A modal window titled 'Categories' is overlaid on the page, listing eight categories with their current order numbers and 'Modify order' buttons. The categories and their order numbers are: Leadership in Business (1), Management Skills (2), Human Resource Management (3), Safety & Risk Management (4), Project Management (5), Innovation & Critical Thinking (6), Introductory Marketing (7), and Business Strategy (8). Each entry also includes a 'Modify Details' link.

Category Name	Order Number	Action
Leadership in Business	1	Modify order
Management Skills	2	Modify order
Human Resource Management	3	Modify order
Safety & Risk Management	4	Modify order
Project Management	5	Modify order
Innovation & Critical Thinking	6	Modify order
Introductory Marketing	7	Modify order
Business Strategy	8	Modify order

## 1.5 Reviewing Orders

You may occasionally want to match orders up against a customer's inquiry. If you use PayPal, then that is your best bet for looking this sort of information up. However, you can also review and lookup on orders that have been processed via Comersus. From the Comersus Backoffice Menu, click the "sales" button and then click "list all".

Order	Date	Customer	Total	Status	Actions
20076	10/12/2010	Jennifer Cameron	\$55.00	Pending	
20075	10/08/2010	Jason Bruce	\$79.00	Pending	
20074	10/08/2010	Jason Bruce	\$55.00	Pending	
20073	10/08/2010	Jason Bruce	\$55.00	Pending	

The following is a brief description of the form fields.

Field	Description	Interactive
Order	Click any order number to review details about the transaction (see the screen shot on the next page).	Yes
Date	The date that the transaction was completed.	No
Customer	The name of the person who made the purchase.	No
Total	The total amount that the customer was charged for the purchase.	No
Status	Indicates the current status of the transaction. <ul style="list-style-type: none"> <li>Cancelled: the transaction was started and never completed</li> <li>Pending: the transaction went through the check-out process but did not finish.</li> <li>Paid: the transaction has been processed as a paid order.</li> </ul>	No
Actions	Indicates the current status of the transaction. Invoice: Click the invoice icon to view an invoice for this transaction. Shipping Label: Click the shipping label icon to create a printable shipping label. Receipt: Click the receipt icon to print a that can be mailed to the customer.	Yes

## View order

Procedure: 1. Enter Transaction Results and mark order as paid 2. Enter Tracking Information and mark the order as delivered. Then you can RollBack, ChargeBack or Refund.

20064, Date 06/23/2010, Posted from IP: 216.211.21.254 - [View visits records](#)

Name	Justin Finlayson <a href="#">Block last name</a>
Email	<a href="#">Block email</a>
Phone	
Address	, 0 0
Shipping Address	(Same as billing address)
Details	1x #/21 Management Information Systems MIS variations = \$79.00
Comments	
Custom Fields	1: 2: 3:
Shipment	N/A \$0.00
Package volume	0x0x0
Payment	Credit Card
Discounts	
Status	Cancelled
Tax Amount	\$0.00
Total	<b>\$79.00</b>
Recurring billing	<input type="text" value="None"/> Next Billing <input type="text" value="06/23/2010"/>
Change Status	<input type="text" value="Select"/>
Delete	<a href="#">Delete order (!)</a> Warning: you cannot undo this action.

You can modify recurring billing, change the status, and the delete order from this screen. (If you have PalPal, this is typically managed through PayPal). More details can be found in the Comersus user manual.

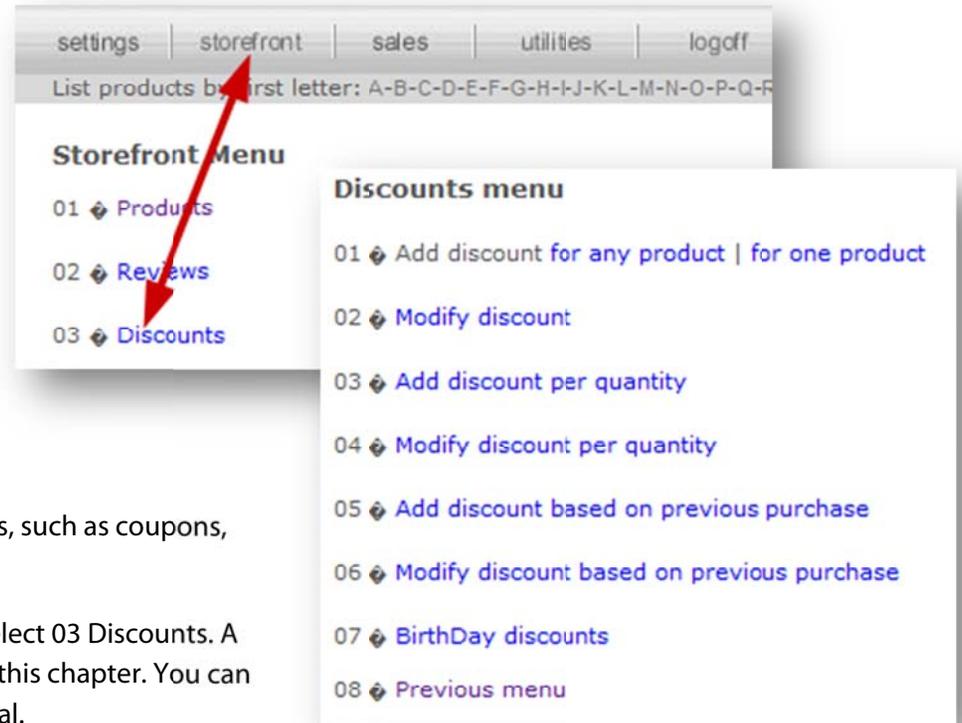
## 1.6 Discounts

Site managers can create a variety of discounts for a number of different scenarios including dollar amount, percentage off and discounts based on a previous purchase. Comersus also supports the ability to create bulk discounts and automatic discounts based on a user's prior purchase. Discount caps may be a combination of one or more of the following options:

- setting the discount as one time use only
- limiting to a maximum and minimum purchase quantity
- limiting to a maximum and minimum weight (applicable to shippable products)
- limiting to a maximum and minimum total shopping cart value/price

Creating a discount code allows you to implement a variety of scenarios, such as coupons, gift certificates, corporate discounts, etc.

To set up a discount, click "storefront" from the main menu and then select 03 Discounts. A few of the more popular discount types are discussed in more detail in this chapter. You can also visit the Discounts and Promotions chapter of the Comersus manual.



## 1.6.1 Create Discount Codes

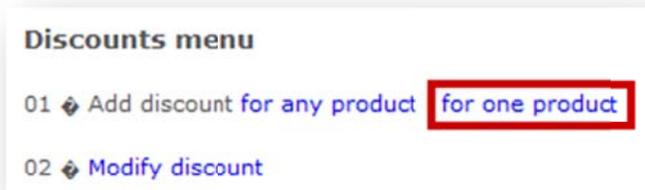
### Discounts for Any Product

To create a discount code to that can be applied to any item in your store, select Storefront / Discounts / 01 For Any Product from the Discounts Menu. To create a new discount, fill out the form shown at the right and click on Save.



### Discounts for a Specific Product

To create a discount code that can be applied to only one specific item in your store, select Storefront / Discounts / 01 Add Discount for Any Product from the Discounts Menu.



Next, locate the product that you would like to apply quantity the discount to. You can do list by typing the name into the search field or clicking list all categories. To create a new discount, fill out the form shown above right and click on Save.

The image shows the 'Add discount' form. The fields are: Description (empty), Valid for product (Green Defensive Driving Course), Price to discount (0.00), Percentage to discount (% 0.00), Active (Yes checked), One Time (Yes unchecked), Quantity (From 0, Until 9999), Weight (From 0, Until 9999), Total price (From 0.00, Until 99999.00), Discount code (D6jGg, maximum 15 characters), and Private (unchecked). A 'Save' button is at the bottom.

The image shows the 'Product selection' form. It has a search field containing 'WHMIS' and a 'Search' button. Below the search field, there is a red double-headed arrow pointing to the text 'or list all categories to locate the products'.

The following is a brief description of the form fields and how they affect your customers' orders.

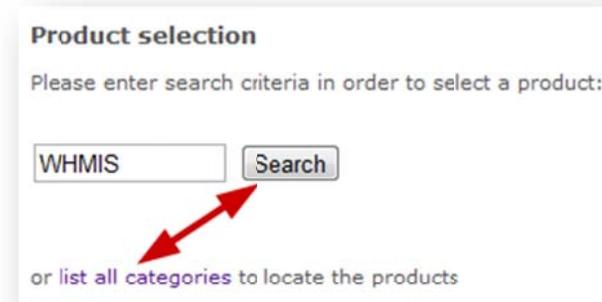
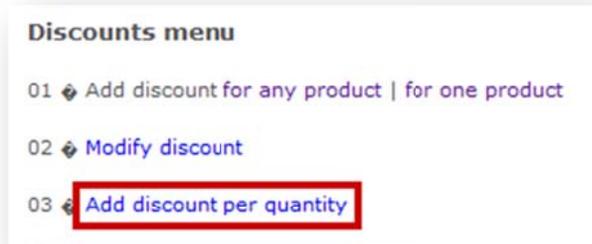
Field	Description
Description	Enter a description for this discount, e.g. "Clearance Sale".
Valid for product	The system automatically populates this field for the product that you have selected to discount. It will say "All" if you are setting up a discount for any product.
Price to discount	If you wish to set the discount as a flat dollar amount, enter it here, without the dollar sign. For example, you could give your customers \$10 off the total of an order. This type of discount is often associated to a minimum purchase amount, which you can specify below under Total Price.
Percentage to discount	If you wish to set the discount as a percentage of the order total, enter the percentage value here, without the % sign.
Active	You must check the active box before the product will be seen on the storefront. To disable a discount, make sure the box is not checked. Disabling a code allows you to create a discount code, but save it for use at a later point or to remove the code when a promotion has ended.
Discount Parameters:	The following parameters limit the applicability of the discount. You do not need to specify any of these parameters; they are optional.
One Time	Only one customer is able to use a <b>One Time</b> discount code, and then it will be disabled. You can tell if a one-time discount has been: a used indicator will be seen just to the right of this option when viewing from the modify screen. 
Quantity	You can limit the validity of the discount to orders that fall within a certain quantity range (e.g. between 5 and 10 copies, etc.)
Weight	Some clients sell physical products which include a weight. The weight can be used to attach shipping fees to an order on checkout.
Total Price	Here the parameter is the total order amount. Typically, you would set a minimum dollar amount for the purchase and any order under the minimum dollar amount would not receive the discount.
Discount Code	Enter the code that your customers must use to obtain the discount. The code is entered by customers on the checkout page.
Private	This check box allows admins to set certain discount codes as private within the system. A private code means that it will not appear on credit card order receipts.

## 1.6.2 Create Bulk Discounts

Creating discounts based on quantity gives you the ability to charge a lower price as the quantities go up on specific items, both with your retail and wholesale customers. The correct price is automatically calculated when the product is added to the shopping cart

To apply quantity-based discounts to a product, select Storefront / Discounts / 03 Add Discount Per Quantity from the Discounts Menu.

Next, locate the product that you would like to apply the discounts to by typing the name into the search field or clicking list all categories.



To create a new discount, fill out the form shown below and click on Save.



The image shows a form titled 'Add discount per quantity'. It has the following fields: 'Description' with the value 'Discount when purchasing 50 or more', 'Product' with the value 'WHMIS', 'Price to discount per unit' with the value '1.00', and 'Quantity' with 'From' set to '50' and 'Until' set to '9999'. There is a 'Save' button at the bottom left.

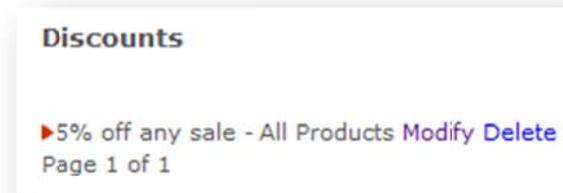
The following is a brief description of the form fields and how they affect your customers' orders002E

Field	Description
Description	Enter a description for this discount, e.g. "Discount when purchasing 50 or more".
Product	The system automatically populates this field for the product that you have selected to discount.
Price to discount per Unit	Enter the dollar amount to discount here, without the dollar sign. For example, you could give your customers \$1 off each item they purchase when they purchase 50 or more.
Quantity	Limit the validity of the discount to orders that fall within a certain quantity range (e.g. between 50 and 9999 copies).

### 1.6.3 Edit or Delete Discounts

To modify or completely delete a discount, select Storefront / Discounts / 02 Modify Discount or 04 Modify Discount Per Quantity as appropriate from the Discounts Menu.

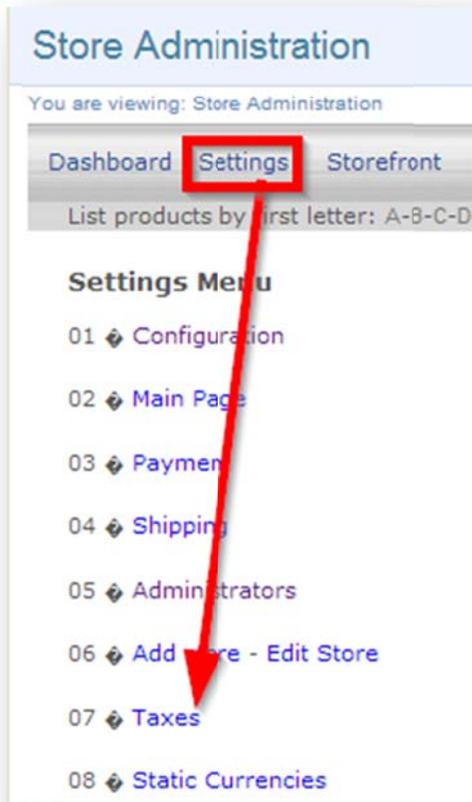
Next, locate the product that you would like to edit or delete from the list of Discounts shown, then choose to Modify or Delete the discount.



## 1.7 Taxes

Each of our ecommerce clients will need to set up their taxes based on their business practices. Sencia does not set up taxes for our clients as their own accounts department would know best how to properly set taxes up. What follows are some directions for common set up situations, but you will need to contact your company's accounting department to determine what taxes you need to have set up to comply with your tax laws.

- Log into the storefront to open the Comersus Backoffice Menu.
- Click on "taxes" section from the main menu column.
- From here you can select tax per place and customer type or select tax per product, complete the form and save.



### Taxes are Based on Customer Location

Comersus applies taxes based on the customer's location, not based on where the products are being offered from (i.e. the physical location of your campus).

## 1.7.1 Tax per Place and Customer Type

To create a tax that can be applied regionally and/or to a customer type, select Settings / 07 Taxes / 01 Tax per Place and Customer Type from the taxes menu, complete the form and save.

**Add Tax Per Place**

Tax %  (use - to discount)

VAT Yes

Zip Code

Zip Equal Yes

State Code  ▼

State Code Equal Yes

Country  ▼

Country Code Equal Yes

Customer Type  ▼

### Separate Tax Forms

You must set up a separate tax form for each country, province/state and customer type, needed by your storefront.

Field	Description
Tax	Enter the percentage of the purchase to tax. 15.00 would be 15%. Make sure to check the VAT checkbox to activate it.
Zip Code	Define the geographic limitation of this tax by entering a zip code or postal code. Make sure to check the zip equal checkbox to activate it. Take care if you have already set up a zip code tax in another rule.
State Code	To apply a state-wide/province-tax, use the drop down to select the state/province. Make sure to check the state code equal checkbox to activate it. Take care if you have already set up a state tax in another rule.
Country	To apply a country-wide tax, use the drop down to select the country. Make sure to check the country code equal checkbox to activate it. Take care if you have already set up a country tax in another rule.
Customer Type	Many of our clients have more than one customer type (e.g., members and non-members). Use the drop down menu only if you have more than one type. You will need to set up a separate tax for each, even if they are taxed exactly the same way.

## 1.7.2 Combining Taxes

The various tax setups (or rules) you create up will combine with each other (stack) and affect customers who meet the criteria of multiple tax rules. What follows are some examples of tax setups and their effects on customers.

### Blanket Tax

The example below shows that a 5% is applied, no matter where your wholesale member customer lives. There is no regional tax rule set up for zip code, state or country.

**Add Tax Per Place**

Tax %  (use - to discount)

VAT Yes

Zip Code

Zip Equal Yes

State Code

State Code Equal Yes

Country

Country Code Equal Yes

Customer Type

### Multiple Regional Tax Rules

The example below shows all of the rules set up for Non Member customers.

- A non-member customer living anywhere outside of Canada would pay 5% tax (line 3).
- A Non Member customer living within Canada (country code CA) would pay 5% tax and an additional 5% for living anywhere (line 1).
- A non-member customer living in Ontario would pay 5% tax for being in Canada, an additional 8% for living in Ontario (state code ON) and an additional 5% for living anywhere (line 2).

settings | storefront | sales | utilities

List products by first letter: A-B-C-D-E-F-G-H-I-J-K-L-M-N

### Tax per place

Tax	Zip	State	Country	Customer Type	Actions
5.00	All	All	CA	Non Member	<a href="#">Modify</a> <a href="#">Delete</a>
8.00	All	ON	All	Non Member	<a href="#">Modify</a> <a href="#">Delete</a>
5.00	All	All	All	Non Member	<a href="#">Modify</a> <a href="#">Delete</a>

### 1.7.3 Tax per Product

To create a tax that can be applied a specific item in your store, select Settings / 07 Taxes / 02 Tax per Product from the taxes menu. To locate the product that the tax applies to, type the name into the search field or click list all categories. Complete the form as shown below and save.

**Product selection**

Please enter search criteria in order to select a product:

WHMIS

or [list all categories](#) to locate the products

**Add Tax Per Product**

Product: A Look at the Future

Tax: %

Zip Code:

Zip Equal: Yes

State Code:

State Code Equal: Yes

Country:

Country Code Equal: Yes

**Separate Tax Forms**

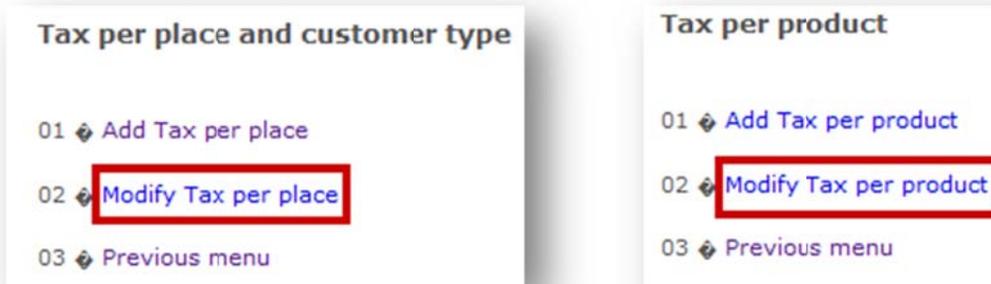
You must set up a separate tax form for each country, province/state and customer type, needed by your storefront.

The following is a brief description of the form fields:

Field	Description
Product	The system automatically populates this field for the product that you have selected to tax.
Tax	Enter the percentage of the purchase to tax. 15.00 would be 15%. Make sure to check the VAT checkbox to activate it.
Zip Code	Define the geographic limitation of this tax by entering a zip code or postal code in addition to a Product tax. Make sure to check the zip equal checkbox to activate it. Take care if you have already set up a zip code tax in another rule.
State Code	To apply a state-wide/province-wide in addition to a product tax, use the drop down to select the state/province. Make sure to check the state code equal checkbox to activate it. Take care if you have already set up a state tax in another rule.
Country	To apply a country-wide in addition to a product tax, use the drop down to select the country. Make sure to check the country code equal checkbox to activate it. Take care if you have already set up a country tax in another rule.

### 1.7.4 Editing or Deleting Taxes

Click on the “taxes” section from the main menu column in Comersus. From here you can select tax per place and customer type or select tax per product and then click the modify tax link.



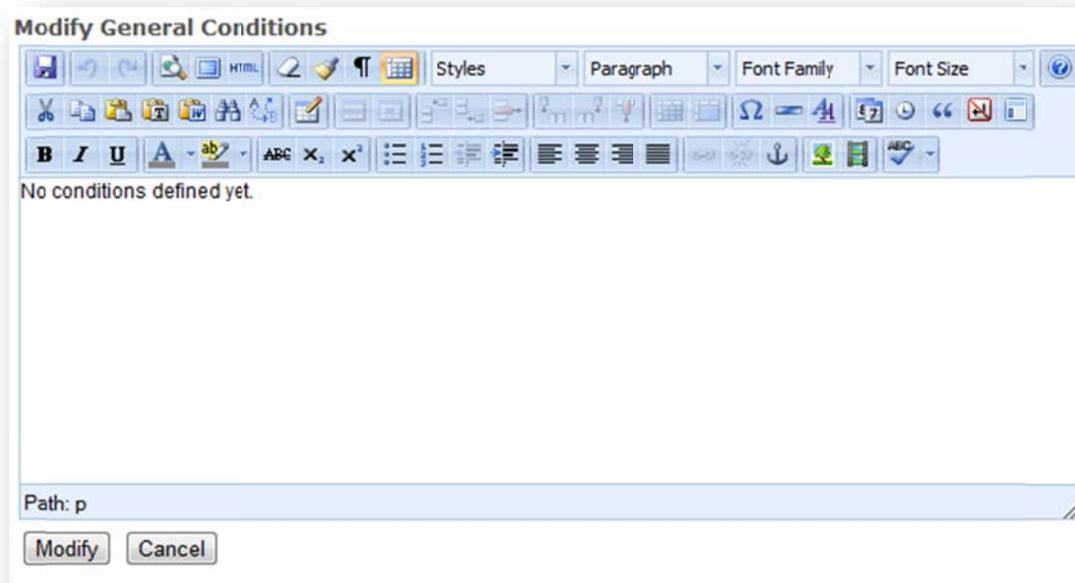
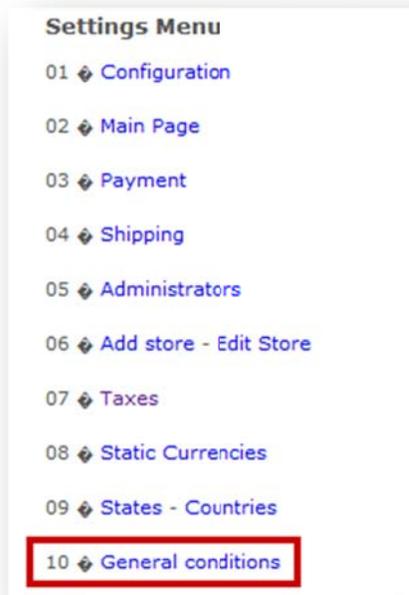
All of the taxes that are active on your storefront in the selected category will be listed. Click the modify link to make your changes and save, or click the delete link to remove the tax.

The screenshot shows the Comersus storefront interface. At the top, there are navigation links: settings, storefront, sales, utilities, and logoff. Below these is a search bar with the text "List products by first letter: A-B-C-D-E-F-G-H-I-J-K-L-M-N-O-P-Q-R-S-T-U-V-W-X-Y-Z". The main content area is titled "Tax per place" and contains a table with the following data:

Tax	Zip	State	Country	Customer Type	Actions
5.00	All	All	CA	Non Member	<a href="#">Modify</a> <a href="#">Delete</a>
8.00	All	ON	All	Non Member	<a href="#">Modify</a> <a href="#">Delete</a>
5.00	All	All	All	Non Member	<a href="#">Modify</a> <a href="#">Delete</a>

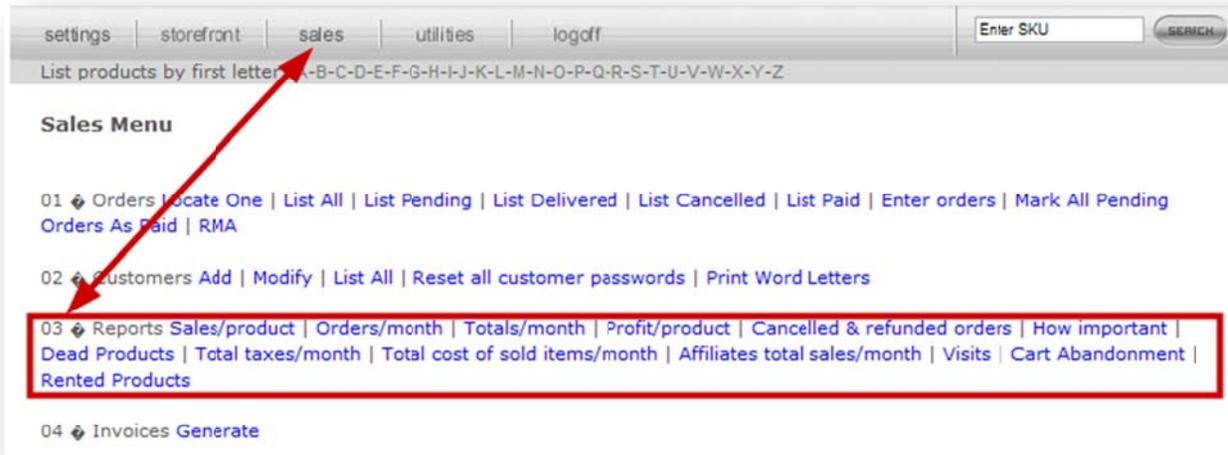
## 1.7.5 Sales Terms and Conditions

To set up the terms and conditions for your store, click the settings menu and then click 10 General conditions. You may only enter this area rarely, if ever since the setup is completed when your system goes live. However, you may find that you want to update or change some things. This is another area where you would likely want to involve your accounting department or even legal department. The conditions are seen as a link by the customer on the final receipt screen of a customer's check out. They will get a screen listing their purchases, taxes, payment option and pricing that they must confirm. This confirmation also agrees them to the terms and conditions. This will open a publishing window where you can create how you want your terms and conditions to look. You can even use a bit of HTML on this screen when creating the content.



## 1.8 Comersus Reports

In addition to the reports that can be run within Informetica, Comersus itself also has several reports available. To view Comersus sales reports for your store, click the sales link, and then select a report under 03 Reports by clicking the name of the report.



### Report Errors

Some Comersus reports only get data from paid or delivered orders and that is why you can get an error message "not enough information to create

Comersus allows you to filter per date or per product depending on the report. Some reports will show charts using Java technology (included with most modern web browsers). You can also export sales data from utilities menu in Microsoft Excel format. For more details on these reports, please see the Comersus manual.