



# **Administer a Miva Merchant Store**



***HOW TO  
Set Up & Administer a  
Miva Merchant Domain***

Revision 1.4



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MM1019-05

# HOW TO

## Set Up & Administer a Miva Merchant Domain

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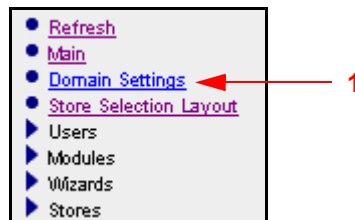
The Miva Merchant environment is categorized into two functional areas:

Domain	The general administration area that is not connected directly to any Miva Merchant store.
Store(s)	As you add stores, each will have its own environment that you will be able to administer separately.


The initial domain settings are configured during the setup of Miva Merchant. After you have completed your domain settings in the Setup Wizard or `setup.mv`, you can update them whenever you like in `admin.mv`. The Domain Settings link is in the Administration Interface menu. Select it to go to the Domain Settings form.

These are the links to information that can be changed in Domain Settings:

- [“Information” on page 2](#)
  - [“Registration” on page 3](#)
  - [“Site Configuration” on page 4](#)
  - [“Timeouts” on page 5](#)
  - [“Upload Settings \(new in 4.1\)” on page 6](#)
  - [“Notification Settings \(new in 4.1\)” on page 7](#)
1. In the Administration Interface menu, select the Domain Settings link.



- The Information form displays.

Domain Settings 	
<b>Information</b>	<a href="#">Registration</a> <a href="#">Site Configuration</a> <a href="#">Timeouts</a> <a href="#">Upload Settings</a>
	<a href="#">Notification Settings</a>
<b>Domain Name:</b>	<input type="text" value="127.0.0.1"/>
<b>License #:</b>	test-CE GF JII II 31
<b>Version:</b>	4.10


**Note:** Each form has an Update button and a Reset button. Click Update to save changes. Click Reset to return to the settings of the prior update.

## Information

- Click the Information tab.

The Information form allows you to change your domain name. This name can be up to 100 alphanumeric characters. The default name is taken from your URL, but this can be changed to anything you want.

You will also find your license number located on this screen as well as the version of Miva Merchant that you are currently running.

Domain Settings 	
<b>Information</b>	<a href="#">Registration</a> <a href="#">Site Configuration</a> <a href="#">Timeouts</a> <a href="#">Upload Settings</a>
	<a href="#">Notification Settings</a>
<b>Domain Name:</b>	<input type="text" value="127.0.0.1"/>
<b>License #:</b>	test-CE GF JII II 31
<b>Version:</b>	4.10

## Registration

1. Click the Registration tab to change your name and address information. The information entered during Setup is the default for these settings. Bold settings identify required fields, the information in these fields may be updated, but they can not be left blank.

Domain Settings 				
<a href="#">Information</a>	<b>Registration</b>	<a href="#">Site Configuration</a>	<a href="#">Timeouts</a>	<a href="#">Upload Settings</a>
<a href="#">Notification Settings</a>				
<b>Owner:</b>	<input type="text" value="Elisha Raymond"/>			
<b>Email Address:</b>	<input type="text" value="elise@miva.com"/>			
Company:	<input type="text" value="Miva Corporation"/>			
<b>Address:</b>	<input type="text" value="5060 Santa Fe Street"/>			
<b>City:</b>	<input type="text" value="San Diego"/>			
<b>State/Province:</b>	<input type="text" value="CA"/>			
<b>Zip/Postal Code:</b>	<input type="text" value="92109"/>			
<b>Country:</b>	<input type="text" value="United States"/>			
<b>Phone:</b>	<input type="text" value="858-490-2570"/>			
Fax:	<input type="text"/>			

## Site Configuration

The site configuration link displays the directories and URL paths for your store site. This is also the screen that you should access if you have changed your mail server, or if you want to change whether or not your Email addresses should use the angle brackets.

URLs in **Bold** are required. They may be changed, but their fields can not be left blank.

<a href="#">Information</a>	<a href="#">Registration</a>	<b>Site Configuration</b>	<a href="#">Timeouts</a>	<a href="#">Upload Settings</a>
<a href="#">Notification Settings</a>				
<b>Non-secure URL to Miva Merchant:</b>	<input type="text" value="http://pcelise:8001/merchant2/merchant.mv"/>			
Secure URL to Miva Merchant:	<input type="text"/>			
Secure URL to Administration:	<input type="text"/>			
<b>Root Directory for Graphics:</b>	<input type="text" value="/merchant2/"/>			
<b>Base URL for Graphics:</b>	<input type="text" value="http://pcelise:8001/merchant2/"/>			
Secure Base URL for Graphics:	<input type="text"/>			
<b>Root Directory for Modules:</b>	<input type="text" value="/merchant2/"/>			
Secure Root Directory for Modules:	<input type="text"/>			
<b>Mail Server:</b>	<input type="text" value="mail.miva.com"/>			
	<input checked="" type="checkbox"/> Add Angle Brackets to Email Addresses			
Mail Method:	<input type="text"/>			
	<input checked="" type="checkbox"/> <b>Use Strict Validation for Codes</b>			

### Mail Server

The Mail Server address is the address of your Internet Hosting Provider's (IHP) mail server. That is the server that sends out email. This is not an email address. You must get this address from your IHP. In some cases the IHP will tell what this is in a FAQ page. If you cannot find the information on the website, contact the IHP directly.

Some email providers require angle brackets at the front a back of the address. This would mean the email address `documentation@miva.com` would look like `<documentation@miva.com>`. Contact your IHP to find if you need angle brackets.

### Mail Method (new in 4.1)

The optional commerce library method to use for email.

**Use Strict Validation for Codes (new in 4.13)**


When checked (which is the default), requires entering only alpha numeric characters, the underscore ( \_ ) and hyphen ( - ) for all codes, such as the product code, category code, etc. Strict Validation is recommended and is the default.

**Caution:** If this is ever unchecked, Miva Merchant will allow other characters. However, symbols and punctuation should generally be avoided, and some symbols (such as the %, &, and #) are never allowed for a code. Also, if after being off, Strict Validation is turned on again, codes which had been valid will become invalid.

## Timeouts

Timeouts for Domain Settings include:


- **Administration Session Timeout**  
The length of time an administrative user can be inactive before the system logs off that user. The default value is 60 minutes.
- **Failed Login Lockout Time**  
The amount of time an administrative user's login is disabled after the allowed number of failed login attempts.
- **Failed Login Attempts Allowed**  
The number of times an administrative user can attempt to log in, before that login name is locked out for the time indicated in Failed Login Lockout Time.

Domain Settings 	
<a href="#">Information</a>	<a href="#">Registration</a>
<a href="#">Notification Settings</a>	<a href="#">Site Configuration</a>
<b>Timeouts</b>	<a href="#">Upload Settings</a>
<b>Administration Session Timeout:</b>	<input type="text" value="60"/>
<b>Failed Login Lockout Time:</b>	<input type="text" value="15"/>
<b>Failed Login Attempts Allowed:</b>	<input type="text" value="3"/>

A message in the Administration Interface Main Data area indicates the number of failed login attempts have occurred since your last login. The number of timeouts is also included in this number.

## Upload Settings (new in 4.1)

Upload Settings lets a domain administrator set the valid extensions for images that can be uploaded using Miva Merchant.

Domain Settings 				
<a href="#">Information</a>	<a href="#">Registration</a>	<a href="#">Site Configuration</a>	<a href="#">Timeouts</a>	<b>Upload Settings</b>
<a href="#">Notification Settings</a>				
Image Extension Types: <input type="text" value="gif,jpg,jpeg,jpe,xbm"/>				

## Notification Settings (new in 4.1)

The Notification Settings tab contains:

- URL To Notification Server  
The location at Miva Corporation.

**Caution:** Do not change this URL, otherwise you will not be properly notified.

- Display  
Check any or all notification types you want to receive.  
**New in 4.13:** Tips & Tricks, Documentation Updates, E-Commerce Newsletter.
- Check for Notification  
Click the button next to the schedule you want for checking for new notifications.

**Domain Settings**

[Information](#)   [Registration](#)   [Site Configuration](#)   [Timeouts](#)   [Upload Settings](#)

**Notification Settings**

**URL To Notification Server:**

**Display:**

- Security Alerts
- Software Updates/Upgrades
- Tips & Tricks
- Documentation Updates
- E-Commerce Newsletter
- Special Offers

**Check for Notifications:**

- At Every Login
- Daily
- Weekly
- Never



***HOW TO***

**Create & Administer a  
Miva Merchant Mall**

Revision 1.3



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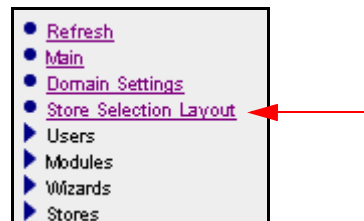
MM1020-04

# HOW TO Create & Administer a Miva Merchant Mall

When you create more than one store within the same domain, a Miva Merchant Mall is automatically created. After you have created the second store, you will notice that a new link (second from left) has been added to the Navigation Bar. The link's default name is Select Store.



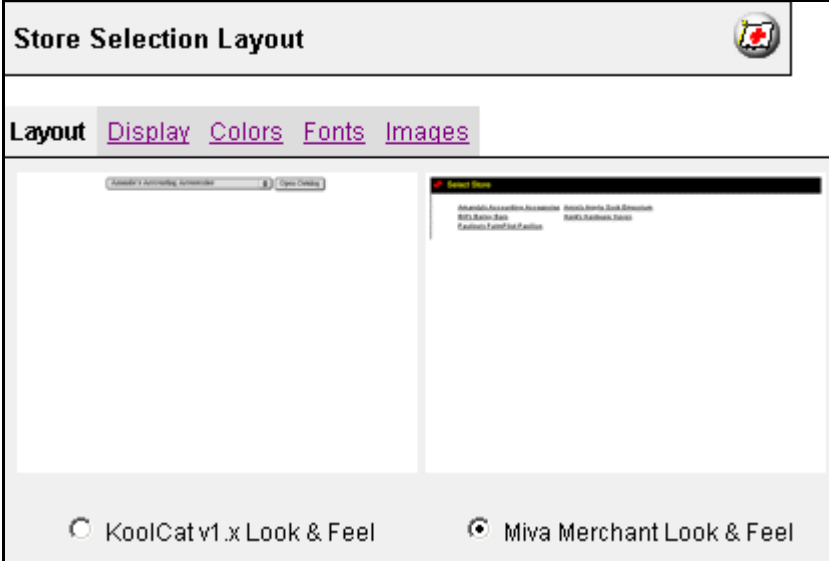
Store Selection Layout is a link in the Administration Interface Menu.



The Mall web page allows your customers to choose which of your stores they want to enter. Design this screen to show off each of your stores.

## Layout

The Layout form allows you to chose between Miva KoolCat v1.x and the Miva Merchant. Make your selection by clicking the radio button below your preferred Look and Feel.



The screenshot shows the 'Store Selection Layout' configuration interface. It features a navigation menu with tabs for 'Layout', 'Display', 'Colors', 'Fonts', and 'Images'. The 'Layout' tab is currently selected. The main area displays a preview of the store selection page, showing a search bar and a list of store links. At the bottom of the interface, there are two radio buttons for selecting the look and feel: 'KoolCat v1.x Look & Feel' (unselected) and 'Miva Merchant Look & Feel' (selected).

## Display

The Display form allows you to define the following areas.

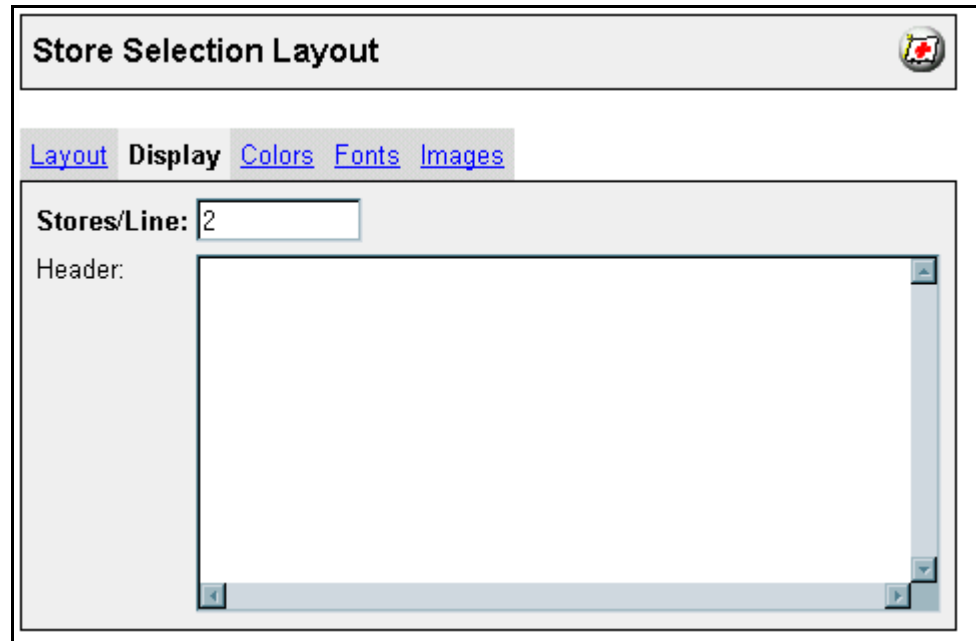
- Define the number of stores that are displayed on a line of the page.
- Change the page header and the display graphics for the stores in the mall.

### Stores/Line

Enter the number of store links you want to be displayed per line. The default is 2 store links per line.

### Header

Enter any combination of text and HTML for your Header.



**4.13 & below:** The HTML code below displays the Mall screen shown on page 4.

**Note: Miva Merchant 4.14 and above:** Substitute the .mv extension, as in merchant.mv, with .mvc.

```
<b><font size="7"> <center> Welcome to the Write Mall<br><br>
<table border="5" cellspacing="2" cellpadding="2" Bordercolor="mednightblue">
  <tr><colgroup width="1000" span="4" valign="bottom">
    <td align="center"><IMG ALT = "store 1 " BORDER = 0
    SRC = "graphics/store1.gif"><br><b><font size="5">
    <a href="merchant.mv?Screen=SFNT&Store_Code=001">Store 1 </a> </td>

    <td align="center"><IMG ALT = "store 2 " BORDER = 0
    SRC = "graphics/store2.gif"><br><b><font size="5">
    <a href="merchant.mv?Screen=SFNT&Store_Code=store2">Store 2 </a> </td>

    <td align="center"><IMG ALT = "store 3 " BORDER = 0
    SRC = "graphics/store3.gif"><br><b><font size="5">
    <a href="merchant.mv?Screen=SFNT&Store_Code=store3">Store 3 </a> </td>

    <td align="center"><IMG ALT = "store 4 " BORDER = 0
    SRC = "graphics/store6.gif"><br><b><font size="5">
    <a href="merchant.mv?Screen=SFNT&Store_Code=store4">Store 4 </a> </td>
  </tr>
<tr>
  <td align="center"><IMG ALT = "store 4-3 " BORDER = 0
  SRC = "graphics/store4-3.gif"><br><b><font size="5">
  <a href="merchant.mv?Screen=SFNT&Store_Code=store4-3">Store 4-3 </a>
  </td>
```

```

<td align="center"><IMG ALT = "store 5 " BORDER = 0
SRC = "graphics/store4.gif"><br><b><font size="5">
<a href="merchant.mv?Screen=SFNT&Store_Code=store5">Store 5 </a> </td>

<td align="center"><IMG ALT = "store 5-2 " BORDER = 0
SRC = "graphics/store5_2.jpg"><br><b><font size="5">
<a href="merchant.mv?Screen=SFNT&Store_Code=5-2">Store 5-2 </a> </td>

<td align="center"><IMG ALT = "store 6" BORDER = 0
SRC = "graphics/store5.gif"><br><b><font size="5">
<a href="merchant.mv?Screen=SFNT&Store_Code=6">Store 6 </a> </td>
</tr>
</table>
Click on a Store Name </center>
</font>

```

Mall

## Welcome to the Write Mall


 <a href="#">Store 1</a>	 <a href="#">Store 2</a>	 <a href="#">Store 3</a>	 <a href="#">Store 4</a>
 <a href="#">Store 4-3</a>	 <a href="#">Store 5</a>	 <a href="#">Store 5-2</a>	 <a href="#">Store 6</a>

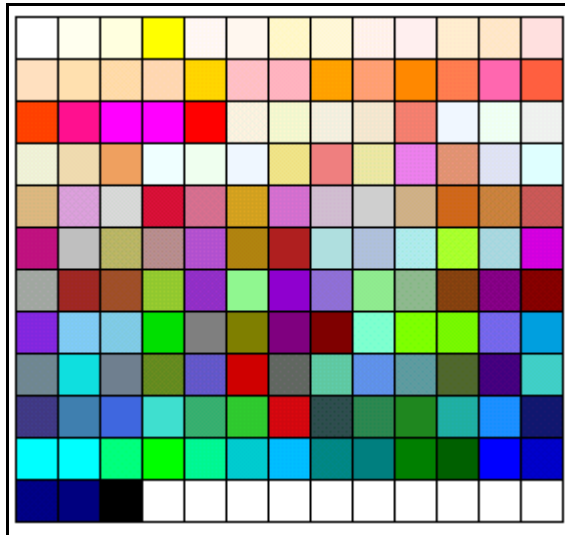
Click on a Store Name

## Colors

The Colors form allows you to change the default colors assigned to backgrounds, text, and links on the Mall window:

There is more than one way to enter the color.

1. Enter the color into the text box  
This is done using the hex code (i.e. #ffffff) or recognized as a literal (i.e. blue).
2. Click the Select Color button , and use the Color Selector.
  - a. Click on a color in the palette at the top of the screen to choose a color.



Remember, nothing is final until you click the Update button.

b. Make your own custom color.

1. Enter the RGB values into the Red, Green, and Blue boxes, or
2. Click the Color box to have the color block to the left display the new color. The hex value will appear in the Color box, or
3. Enter the name or the hex value of the new color in the Color box.
4. Click Save.

The Cancel button will close the Color Selector window without making any changes.

## Fonts

The Fonts link has options for font formatting.

1. Font face type

You can define the font that the mall displays by entering it into the Face text box.

General type fonts:

- |            |   |
|------------|---|
| serif      | the font has serifs, or hooks, on it. Times and Times New Roman are the most prevalent serif fonts. |
| sans-serif | the font has no serifs. The two most prevalent sans-serif fonts are Arial and Helvetica.            |

Enter up to five different fonts if you wish, using commas as delimiters. Enter them in the order you want them to be selected. If the browser does not support the first font listed it will try the second and so forth. If it does not support any of the fonts listed, it uses its own default font.

## 2. Font size

Font size is generally relative to the default set by the browser. Miva Merchant supports relative sizes from -2 to +2. This means that you can make any text either 2 sizes bigger or two sizes smaller than the default text that is being displayed by the browser. Enter the relative size in the Size text box.

## Images

The Images screen allows you to change the default images for the Mall Navigation Bar Logo and the Navigation Bar "Select Store" image. You may also enter a Body Background image on this screen.

**Store Selection Layout**

[Layout](#) [Display](#) [Colors](#) [Fonts](#) **Images**

Body Background:

Navigation Bar Logo:

Navigation Bar "Select Store":

1. Enter the path to your image in the text box, or
2. Click the Upload File button to display the Upload File form.

**Upload File**

**Overwrite**

File:

3. Click Overwrite to replace an existing graphic with the file you select here. When you click Browse, you will open the Choose File window.
4. Select the graphic file and click Open.
5. Click the Update button at the bottom of the Store Selection Layout screen.



# ***HOW TO Administer Users & Groups***

Revision 1.2



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MM1026-03

# HOW TO

## Administer Users & Groups

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### Introduction

Miva Merchant allows a great deal of flexibility in the manner in which you administer a store. There can be more than one administrator, or there can be specific individuals or groups assigned to specific tasks.

The types of users:

Administrator	has global access to all functions of the Miva Merchant system.
Store Manager	has access to all functions of the particular store.
User	has not been assigned as an Administrator or Store Manager and can be assigned to a Group of privileges within a specific store.

Group Privileges cover a number of store administrative functions. Groups are specific to a given store, and multiple groups can be defined within a store. Miva Merchant users can be assigned to a Group (or Groups) that gives them certain operating permissions for a given store. Therefore, a User can be given clearly defined levels of access for each store. A User who belongs to more than one Group is given all the privileges assigned by each Group.

### Administering Users

Individual users are administered outside of a store, within the Miva Merchant domain. Use the following procedure to display the User form.

1. Click the triangle next to Users in the Administration menu.
2. To add a new user, select the Add User link.
3. To edit user information or to delete a user, select the user's name.



## User Tab

- |                                     |  |
|-------------------------------------|--|
| 1. User                             | The tab that displays when the Add User form is first opened.  |
| 2. User Name                        | Login name used to access the Miva Merchant Administration Interface.  |
| 3. Password/Verify Password         | Password and password verification.  |
| 4. Administrator                    | Checking this box, assigns administrator privileges to the new user. An Administrator has global access to all settings in the Miva Merchant system, overriding any other security settings. |
| 5. User May Create Additional Users | Checking this box allows the new user to create other users.   |

The screenshot shows the 'Add User' form. At the top, there is a header 'Add User' with a small icon on the right. Below the header, there are two tabs: 'User' and 'Preferences'. A red arrow labeled '1' points to the 'User' tab. Below the tabs, there are three input fields: 'User Name:', 'Password:', and 'Verify Password:'. A red arrow labeled '2' points to the 'User Name:' field. A red arrow labeled '3' points to the 'Password:' and 'Verify Password:' fields. Below the input fields, there are two checkboxes: 'Administrator' and 'User May Create Additional Users'. A red arrow labeled '4' points to the 'Administrator' checkbox, and a red arrow labeled '5' points to the 'User May Create Additional Users' checkbox.

## Preferences Tab

- Next to Items per Page, enter the default number of items this user will see in lists.
- Click Update.

The screenshot shows the 'Edit User: NotAdmin' form. At the top, there is a header 'Edit User: NotAdmin' with a small icon on the right. Below the header, there are two tabs: 'User' and 'Preferences'. The 'Preferences' tab is selected. Below the tabs, there is one input field: 'Items per Page: 10'.

## Delete a User

1. Under the Users entry in the Administration menu, click the user's name you want to remove.
2. Click the Delete button.

## Administration Groups

A Group contains a set of administration privileges within a store. Any User can be assigned to a group, or to multiple groups.

Use the following procedure to open the Group form.

1. Click the arrow next to Stores to display your Miva Merchant store(s).
2. Click the arrow next to the store you wish to administer.
3. Click the arrow next to Groups.

If you currently have any groups, they are displayed.

4. To change an existing group, select the name of that group.
5. To add a new group, select Add group.



## Group Tab

<b>Group</b> <a href="#">Users</a>																																																																																																																				
<b>Group Name:</b>	<input type="text" value="Group1"/>																																																																																																																			
<b>Privileges:</b>	<table border="1"> <thead> <tr> <th>Name</th> <th>View</th> <th>Add</th> <th>Modify</th> <th>Delete</th> </tr> </thead> <tbody> <tr><td>Affiliate Money</td><td><input type="checkbox"/></td><td><input type="checkbox"/></td><td><input checked="" type="checkbox"/></td><td><input type="checkbox"/></td></tr> <tr><td>Affiliates</td><td><input type="checkbox"/></td><td><input type="checkbox"/></td><td><input checked="" type="checkbox"/></td><td><input type="checkbox"/></td></tr> <tr><td>Attribute Templates</td><td><input type="checkbox"/></td><td><input type="checkbox"/></td><td><input checked="" type="checkbox"/></td><td><input type="checkbox"/></td></tr> <tr><td>Availability Groups</td><td><input type="checkbox"/></td><td><input type="checkbox"/></td><td><input checked="" type="checkbox"/></td><td><input type="checkbox"/></td></tr> <tr><td>Categories</td><td><input type="checkbox"/></td><td><input type="checkbox"/></td><td><input checked="" type="checkbox"/></td><td><input type="checkbox"/></td></tr> <tr><td>Countries</td><td><input type="checkbox"/></td><td><input type="checkbox"/></td><td><input checked="" type="checkbox"/></td><td><input type="checkbox"/></td></tr> <tr><td>Currency Configuration</td><td><input type="checkbox"/></td><td><input type="checkbox"/></td><td><input checked="" type="checkbox"/></td><td><input type="checkbox"/></td></tr> <tr><td>Customer</td><td><input type="checkbox"/></td><td><input type="checkbox"/></td><td><input checked="" type="checkbox"/></td><td><input type="checkbox"/></td></tr> <tr><td>Inventory</td><td><input type="checkbox"/></td><td><input type="checkbox"/></td><td><input checked="" type="checkbox"/></td><td><input type="checkbox"/></td></tr> <tr><td>Logging Configuration</td><td><input type="checkbox"/></td><td><input type="checkbox"/></td><td><input checked="" type="checkbox"/></td><td><input type="checkbox"/></td></tr> <tr><td>Order Fulfillment Configuration</td><td><input 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1. Enter a name to associate with the group of privileges.
2. Check the box for each type of access you want this group to have.

- |      |  |
|------|--|
| View | Allows Users in this Group to view the data in the area that permission was granted. The Group cannot make any changes to the data without additional permissions. |
| Add  | Allows Users in this Group the ability to view and also add new records but not to modify or delete existing records.  |

- Modify Allows Users in this Group the ability to view and edit existing records.
- Delete Allows Users in this Group the ability to delete existing records.

3. Click Update.

**Privileges**

These privileges can be assigned to a group:

<b>Privilege</b>	<b>View/Add/Modify/Delete:</b>
Affiliate Money	The Affiliate's Payouts. (Does not include Affiliate's Commission.)
Affiliates	Affiliates Configuration, and adding Affiliates.
Attribute Templates	Template code and prompt, and Attributes and their attributes.
Availability Groups	Assigning customers, categories, and products to Availability Group.
Categories	Maintain the Categories for the store.
Countries	Countries assignments for each store.
Currency Configuration	Currency formatting tabs.
Customers	Customers' Login and Shipping/Billing information.
Inventory	Inventory settings: tracking, default stock levels and messages.
Logging Configuration	Logging files.
Order Fulfillment Configuration	Email Merchant Notification and Customer Order Confirmation Email.
Order Processing	Batched and unbatched customer orders for the store.
Payment Configuration	Payment modules: COD, check payment, simple validation credit card, and payment vendors/gateways.
Price Groups	Group pricing, assigned and unassigned customers and products.
Products	Product list, and all product tabs.
Sales Tax	Sales and VAT Tax Calculation tabs.
Shipping Configuration	Modules list and all shipping tabs.
States	States list.
Store Settings	Edit Store settings: Sales Tax Calculation and Currency Formatting entries.
Store Utility Configuration	Import, export, delete shopping baskets, and pack data files.

Privilege	View/Add/Modify/Delete:
System Extension Configuration	System files.
Upsold Products	Upsold product threshold, pricing, and any required products.

## Assigning Users to Groups

Administrators and store managers always retain their full privileges regardless of what Group they are assigned.

- When training someone to administer your Miva Merchant system, assign them to a Group that has view only privileges. The trainee will become familiar with the system by viewing aspects of administration without potentially causing problems for your storefront.
- Assigning Users to different Groups can allow one person in your organization to process orders and another to maintain the product data.

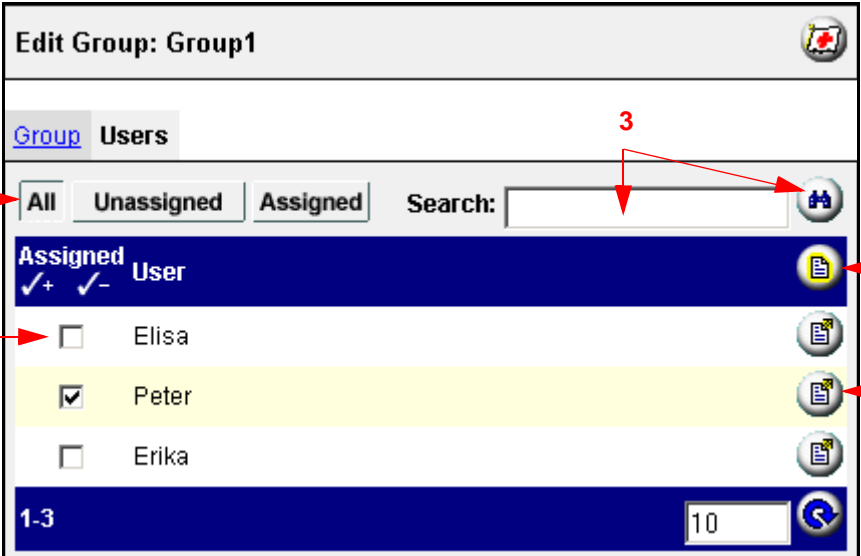
1. Select the method for displaying the users.

All	Displays all users.
Unassigned	Displays only those that have not been assigned to this group.
Assigned	Displays only those that are assigned to this group.


2. Check the box next to the user you want to assign to this group, or click + to check all displayed users. Or uncheck the box next to the user you want to remove from this group.

3. To find a user, enter a name or part of a name to search in the Search text box, then click the Search button.

4. To add a new user, click the New User  button.



The screenshot shows the 'Edit Group: Group1' interface. At the top, there are tabs for 'Group' and 'Users'. Below the tabs, there are three buttons: 'All', 'Unassigned', and 'Assigned'. A search box is located to the right of these buttons, with a search icon to its right. Below the search box, there is a table of users. The table has a header row with 'Assigned' and 'User'. The first row is 'Elisa' with an unchecked checkbox. The second row is 'Peter' with a checked checkbox. The third row is 'Erika' with an unchecked checkbox. At the bottom of the table, there is a pagination bar showing '1-3' and a page number '10'.

5. To edit a listed user, click the Edit  button.
6. If necessary, click the yellow triangle in the bottom right corner to go to the next page of users.
7. Click Update.

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**Note:** The number (shown as 1-3 in lower left hand corner) is not displayed on the Unassigned and Assigned options. This number tells you which users you are reviewing.

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# ***HOW TO Administer Order Processing***

Revision 1.3



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MM1053-04 (Rev. 1.3) Miva Merchant 4.14 and above

# *HOW TO*

## Administer Order Processing

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### Introduction

Customer orders should be processed on a regular basis. You can create batches of orders and then download them for tracking and accounting purposes. How often you will create a batch of orders to be downloaded depends on the volume of your store. It could be weekly for a small, low-volume store, or it may be daily for a higher volume store. This decision should be made after careful consideration of your order volume and should be checked regularly.

### Set Up Order Processing

By now, you have already set up several items that are associated with an order, such as the ones listed below.

- Order Fulfillment, with Email Merchant Notification, Customer Order Confirmation Email, or both. (Order Fulfillment is not required, but is helpful.)
- Customer Information, including the Ship To and Bill To data.
- Payment Configuration, with a payment gateway, simple credit card validation, COD, or other payment selection. (Required.)
- Shipping Configuration (unless your store provides a service or electronic distribution.)
- Miva Mailer to allow your customer to subscribe to your mailing lists, such as a newsletter or special promotions. (Optional)

Customer Information, Order Information (products, prices, quantities shipping charge, sales tax and totals) and Payment Information are included in each order.

You may also want to set up additional security for your customers payment information. The payment data of an order may be encrypted. In order for you to activate Encryption, your Internet Host Provider must have SSL running and available to your store.

### Encryption (new in 4.14)

Activating Encryption secures the payment data within your customer's order. The Checkout process and the Order Information screens that your customers see in the Store are the same with and without Encryption activated. However, you might want to add in the Header of an Order Information page that the payment data is secure and encrypted (if you decide to activate it).

When Encryption is activated, the data passed from the payment module (selected in Payment Configuration) to the order will be encrypted. (The actual data varies, depending upon the payment configuration, but usually includes the credit card account number, name on card, transaction number, and other module-related data.) Encryption converts the data into unreadable text (ciphertext), and secures the payment data so that it can be viewed only by entering a pass phrase.

## Activate Encryption (new in 4.14)

**Note:** Your host must have SSL running and available to your store to activate Encryption.

Only new orders are affected by the changes you make to encryption. Activating encryption or changing the pass phrase will not affect existing orders.

1. Click the triangle next to Stores.
2. Click the triangle next to your store's name.
3. Click the triangle next to Order Processing.
4. Select the Encryption link.



The Encryption form displays.

 A screenshot of the 'Encryption' settings form. The form has a title bar with the word 'Encryption' and a globe icon. Below the title bar is a 'Settings' section. In this section, there is a checkbox labeled 'Activate Encryption' which is currently unchecked. Below the checkbox are three text input fields: 'Encryption Prompt:', 'Encryption Pass Phrase:', and 'Verify Encryption Pass Phrase:'. At the bottom right of the form are two buttons: 'Update' and 'Reset'.

5. Check the box next to Activate Encryption.
6. Enter an Encryption Prompt.  
The prompt is a private clue to help you remember your Encryption Pass Phrase. If nothing is entered, it will default to "Enter Pass Phrase #1", for example.
7. Enter the Encryption Pass Phrase. This should be fairly long for the best security.  
You might enter a quote, the names of your favorite teachers, or even your favorite dog breed(s), with some symbol characters tacked on; as long as it is something that you will remember! It must be at least eight characters.
8. Reenter the phrase in the box next to *Verify Encryption Pass Phrase*.

**Caution:** **Lost Pass Phrases cannot ever be recovered.**  
**Encrypted order information can be viewed only with the Pass Phrase.**

**Retain your pass phrase. You might save it in a secure area on your local system, or print it and file it.**

9. Click Update.

Orders that are placed from this point forward will be encrypted with the pass phrase you just entered. Previously placed orders are not affected: existing orders that were not encrypted, will still not be encrypted; existing orders that have a different pass phrase will retain the pass phrase they were given.

When Encryption has been activated, you must enter the proper pass phrase to perform any of the following activities:

- edit an order
- batch order processing
- run batch reports

If you want to change the pass phrase (which should be done on a regular basis, similar to changing passwords on a network), make sure all orders are batched first. This way you will have only one pass phrase to remember for each batch of encrypted orders.

## Un-batched Orders

Each order a customer places is initially listed under Un-batched orders, with the following information:

- order number
- date
- name (Ship To)
- total order amount

Un-batched orders looks like this:



Use the following procedure to view the Un-batched orders list.

1. Click the triangle next to Order Processing.
2. Click the triangle next to Un-batched Orders.
3. Select an order to view or edit information.

## Edit Order

The data in the Customer and Order Information tabs are editable. Some data in the Payment Information form are also editable; it depends on the payment module you selected in Payment Configuration. The Edit Order form contains the following items:

### Customer Information Tab

View the customer information and verify that the data entered is valid. You may also edit this information, for example, if a customer notifies you of a change of address or a typo.

- **Edit Customer button**

If you want to permanently change customer information, click the Edit Customer button. (Any changes you make within the Edit Order forms, apply only to the selected Order, and not the Customer record.)

- **Printable button**

If you want to print the combined Customer, Order, and Payment Information, the Printable form is designed for printing. See [“Printable Order”](#) [“Printable Order”](#) on page 5.

**Edit Order: #1005**

Customer Information [Order Information](#) [Check Payment](#)

Ship To:	Bill To:
First Name: <input type="text" value="Lisa"/>	First Name: <input type="text" value="Lisa"/>
Last Name: <input type="text" value="Rachal"/>	Last Name: <input type="text" value="Rachal"/>
Email Address: <input type="text" value="elise@miva.com"/>	Email Address: <input type="text" value="elise@miva.com"/>
Phone Number: <input type="text" value="858-731-4200"/>	Phone Number: <input type="text" value="858-731-4200"/>
Fax Number: <input type="text"/>	Fax Number: <input type="text"/>
Company: <input type="text"/>	Company: <input type="text"/>
Address: <input type="text" value="5060 Sante Fe Street"/>	Address: <input type="text" value="5060 Sante Fe Street"/>
City: <input type="text" value="San Diego"/>	City: <input type="text" value="San Diego"/>
State: <input type="text" value="CA"/>	State: <input type="text" value="CA"/>
Zip/Postal Code: <input type="text" value="92109"/>	Zip/Postal Code: <input type="text" value="92109"/>
Country: <input type="text" value="US"/>	Country: <input type="text" value="US"/>

Printable Edit Customer

**Printable Order**

You might want to print each order as a backup for your files. It contains all the fields of your customer's order. However, if the order is encrypted, you must enter the pass phrase before the Payment Information will be visible and printable.

<b>Order #2002</b>			
<b>Date Of Order: 08/12/2002</b>			
<b>Time Of Order: 10:48:54 Pacific Daylight Time</b>			
<b>Ship To:</b>		<b>Bill To:</b>	
james bjourling		james bjourling	
JBjourling@miva.com		JBjourling@miva.com	
858-321-4321		858-321-4321	
Sound Stereo		Sound Stereo	
1 somewhere street		1 somewhere street	
Toronto, Ontario M4B 2C3		Toronto, Ontario M4B 2C3	
CA		CA	
<b>Shipping Information:</b>		<b>Payment Information:</b>	
Shipping Method: Domestic		Authorize.Net	
		Name On Card: James Bjourling	
		Card Number: 4111111111111111	
		Expiration Date: 6/2004	
		Transaction ID: 0	
		Authorization Code: 000000	
		AVS Code: P	
		Time: 08/12/2002 - 10:48:53 Pacific Daylight Time	
<b>Code</b>	<b>Product</b>	<b>Quantity</b>	<b>Price/Ea. Total</b>
NP-NP2	Daffodil Note Paper	1	10.00 10.00
NP-NP3	Daisy Note Paper	1	14.00 14.00
PH-03	Yellow Daisy Pen & Pencil Cup	1	35.00 35.00
ODI-23	Flowery Note Paper Box	1	47.00 47.00
			<i>Shipping: Domestic:</i> 8.00
			<i>Sales Tax:</i> 0.00
			<b>Total: 114.00</b>

**Order Information Tab**

View what products or services the customer has ordered. The form also displays the shipping, tax, and total order amounts, which are editable.

<b>Edit Order: #2008</b> 				
<a href="#">Customer Information</a> <b>Order Information</b> <a href="#">Authorize.Net Payment Services v3.0</a>				
Code	Product	Quantity	Price/Ea.	Total
I-02	Cut Glass Inkwell	1	75.00	75.00
NP-NP4	Pastel Note Paper	2	12.50	25.00
			Shipping: Domestic:	<input type="text" value="8.00"/>
			Sales Tax:	<input type="text" value="7.50"/>
<b>Total:</b>				<input type="text" value="115.50"/>

**Payment-Type Tab**

The name of this tab is the actual name of the payment type that you selected in Payment Configuration.

The actual data, and whether or not it is editable, also varies, and depends on the payment type.

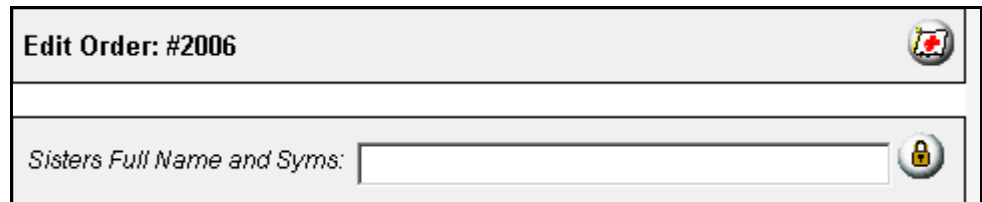
<b>Edit Order: #2008</b> 	
<a href="#">Customer Information</a> <a href="#">Order Information</a> <b>Authorize.Net Payment Services v3.0</b>	
<b>Method:</b>	CC
<b>Name on Card:</b>	John Eastman
<b>Card Number:</b>	4111111111111111
<b>Expiration:</b>	5/2004
<b>AVS Code:</b>	P
<b>Transaction ID:</b>	0
<b>Response Reason Text:</b>	This transaction has been approved.
<b>Authorization Code:</b>	000000
<b>Authorization Date &amp; Time:</b>	08/23/2002 11:47:17 Pacific Daylight Time

If you activated encryption before this order was placed, you will usually not see the Payment tab. (It displays if you use Credit Card Payment With Simple Validation, for example.) See [“View Encrypted Orders”](#) on page 7.



## Unlock Encrypted Order

When an order contains encrypted payment information, you see your encryption prompt, a text box for the pass phrase, and a lock near the top of the form.



The screenshot shows a web form titled "Edit Order: #2006". Below the title bar, there is a text input field with the placeholder text "Sisters Full Name and Syms:". To the right of the input field is a circular lock icon. The form is enclosed in a border.

The payment information will not display until you enter the pass phrase.

1. Enter the pass phrase in the text box next to your encryption prompt.
2. Click the lock button, or click Update (if you have made changes), otherwise click Reset.

The assigned payment module's Payment Information can now be viewed.

---

**Caution:** **Remember your Pass Phrase. Lost Pass Phrases cannot be recovered. Encrypted order information can be viewed only with the Pass Phrase.**

---

3. Select the Payment Information tab.

The encrypted payment information will be viewable after you enter your pass phrase, and remains viewable until you do one of the following to lock it again:

- click the unlocked button
- click a link outside this order

If you go back to the same order form, you must enter the pass phrase again to view the encrypted payment information.

## Create Batch

If you selected “Authorize only” (the actual wording may vary in your payment module) in the Payment Configuration, the credit or debit card will be charged when you Process Orders. But, first you need to batch the orders.

Creating a batch of orders provides a way for you to manage them, grouping them together in order to process orders, run reports, export data, and delete orders by batch.

When you create a batch, all the Un-batched Orders will be placed in the batch. Use the following procedure to make a batch of orders from the Un-batched list.

1. Select the Create Batch link.



2. Enter the name you want for the batch.

Enter a name that is meaningful in the way you process or handle your batched orders. (The batches are automatically ordered by date.)

 A screenshot of a web form titled 'Create Batch: 8 new orders'. The title is displayed in a grey header bar with a small icon on the right. Below the header, there is a text input field labeled 'Batch Name:' with a cursor inside the field.

If no orders have been placed since the last batch, a message displays indicating there are no new orders.

3. Click the Create button.

When the batch has completed, the Run Batch Report form automatically displays. (See “Run Report” on page 10.)

## Run Report

After a batch is created, you will be able to run a report on the batch of orders at any time.

**Note:** If you just created a batch, the Run Batch Report form automatically displays.

1. If the Run Batch Report form is not displayed, click the triangle next to the batch you want.
2. Select the Run Report link in the Administration Interface menu.



3. If you have encrypted payment information, you will see a form with your encryption prompt. Enter your pass phrase in the box next to your encryption prompt.

A screenshot of the 'Run Batch Report: Week3' form. The form has a title bar with a red cross icon. Below the title bar, there is a text input field labeled 'Sisters Full Name and Syms:' with a red arrow pointing to it from the left, labeled 'Encryption Prompt'. Below this field is a dropdown menu labeled 'Report:' with the text '<Select One>' and a downward arrow.

If you do not have encrypted orders, you will see a form similar to the following.

A screenshot of the 'Run Batch Report: 11-7-2000' form. The form has a title bar with a red cross icon. Below the title bar, there is a dropdown menu labeled 'Report:' with 'Standard Batch Report' selected. At the bottom of the form, there is a status message 'Batch '11-7-2000' created' and two buttons: 'Run Report' and 'Reset'.

4. Select the report you want to run from the Report list. (Miva Merchant comes with only the Standard Batch Report. You may see other reports if you have 3rd party order processing modules installed.)
5. Click the Run Report button.

The Standard Batch Report shows the order information for each order in the batch. Each order has similar information to that shown in the order below.

Order #Z003				
Ship To:		Bill To:		
<b>Name:</b>	Dot Comley	<b>Name:</b>	Dot Comley	
<b>Email Address:</b>	Doteeee4@miva.com	<b>Email Address:</b>	Doteeee4@miva.com	
<b>Phone Number:</b>	716-245-0000	<b>Phone Number:</b>	716-245-0000	
<b>Fax Number:</b>		<b>Fax Number:</b>		
<b>Company:</b>		<b>Company:</b>		
<b>Address:</b>	194 Cypress St Rochester, NY 14620 US	<b>Address:</b>	194 Cypress St Rochester, NY 14620 US	
Shipping Information:		Payment Information:		
<b>Shipping Method:</b> Domestic		<b>ICS2</b>		
	<b>Card Holder:</b>	Dot Comley		
	<b>Card Number:</b>	411111		
	<b>Expiration Date:</b>	6/2004		
	<b>Authorization Request ID:</b>	10299537355712886805552		
	<b>Amount Authorized:</b>	122.00		
	<b>AVS Code:</b>	Y		
	<b>Authorization Code:</b>	123456		
	<b>Authorization Date/Time:</b>	2002-08-21T180857Z		
Code	Product	Quantity	Price/Ea.	Total
ODI-23	Flowery Note Paper Box	2	\$47.00	\$94.00
NP-NP2	Daffodil Note Paper	2	\$10.00	\$20.00
			<i>Shipping: Domestic:</i>	\$8.00
			<i>Sales Tax:</i>	\$0.00
			<b>Total:</b>	<b>\$122.00</b>

The Payment Information section details will vary, depending upon which Payment module is reporting the information.

**Note:** If you deactivated any payment modules, the payment information area will be blank. Activate the payment module, then rerun the report.

## Process Orders

If you set up the Payment Configuration to “Authorize Only” (verifies, but does not charge the card when the customer’s order is placed), Process Orders will “Capture” the funds (notify the payment gateway to charge or debit the card).

If you use the Credit Card Payment with Simple Validation, COD, Check Payment, or a payment module that does not have an Authorize Only option, the selections Process and Mark Processed simply mark the order as processed and do not send any information to a gateway.

1. Click the triangle next to the batch you want to process.



2. Select Process Orders.
3. If the batch contains encrypted payment information, your Encryption Prompt and text box display at the top of the form. Enter the pass phrase(s).







If you attempt to process or mark as processed any of the orders before entering the pass phrase, an error message displays at the bottom of the form, and the checked orders will not be processed, or marked as processed.

<b>Process Orders: 08/21/2002: Week3</b>		
<i>Sisters Full Name and Syms:</i> <input type="text"/>		

4. Click the box next to the fields you want to display, then click the Refresh button.

<b>Display:</b>	<input checked="" type="checkbox"/> ID	<input checked="" type="checkbox"/> Date	<input type="checkbox"/> Ship. First Name	<input type="checkbox"/> Ship. Last Name
	<input type="checkbox"/> Ship. Email	<input type="checkbox"/> Ship. Phone	<input type="checkbox"/> Ship. Fax	<input type="checkbox"/> Ship. Company
	<input type="checkbox"/> Ship. Address	<input type="checkbox"/> Ship. City	<input type="checkbox"/> Ship. State	<input type="checkbox"/> Ship. Zip
	<input type="checkbox"/> Ship. Country	<input type="checkbox"/> Bill. First Name	<input type="checkbox"/> Bill. Last Name	<input type="checkbox"/> Bill. Email
	<input type="checkbox"/> Bill. Phone	<input type="checkbox"/> Bill. Fax	<input type="checkbox"/> Bill. Company	<input type="checkbox"/> Bill. Address
	<input type="checkbox"/> Bill. City	<input type="checkbox"/> Bill. State	<input type="checkbox"/> Bill. Zip	<input type="checkbox"/> Bill. Country
	<input checked="" type="checkbox"/> Total	<input checked="" type="checkbox"/> Method	<input type="checkbox"/> Card Type	<input type="checkbox"/> Name on Card
	<input type="checkbox"/> Card Number	<input type="checkbox"/> Expiration Date	<input type="checkbox"/> Expiration	<input type="checkbox"/> Reference Number

5. If you want to edit an order, click the Edit Order button. (See [“Edit Order”](#) on page 4.)

Process		Order Module	Method	Amount	
✓+	✓-				
<input type="checkbox"/>		2001 Innovative Gateway Solutions	Innovative Gateway Solutions	67.00	 <b>Edit Order</b>
<input type="checkbox"/>		2002 CyberSource ICsv2 Payment Services	ICS2	115.50	
<input type="checkbox"/>		2003 CyberSource ICsv2 Payment Services	ICS2	188.00	
<input type="checkbox"/>		2005 CyberSource ICsv2 Payment Services	ICS2	122.00	
<input type="checkbox"/>		2006 CyberSource ICsv2 Payment Services	ICS2	80.56	
<input type="checkbox"/>		2007 CyberSource ICsv2 Payment Services	ICS2	65.00	

6. Check the box next to each order you want to process or mark as processed. Or, click **+** to check all orders.
7. Click either the Process or Mark Processed button.
- Depending on which payment module(s) your store is using, the system will do different things with the information in each order that it processes for you. (See the **“Process Orders”** sections below)
- After processing finishes, the orders that were processed are removed from the Process Orders list.

#### **Process Orders: with no Payment Processing Service**

If your store does not use a payment processing service (a payment gateway, for example), but instead uses one or both of the Credit Card Payment With Simple Validation or Check Payment modules, there is no difference between what happens by clicking either Process or Mark Processed. The system is only making a mark on the order and not actually sending information to bill a credit card or debit an account.

#### **Process Orders: with Payment Processing Service**

The payment processing modules that interface with remote processing servers perform a credit or debit card validation (Authorization) at the time your customer's order is placed.

If you set up your payment module in Payment Configuration to “Authorize Only” (the actual wording may vary in your payment module), the credit or debit card is not charged or deducted until you process those orders.

- Clicking the Process button notifies the payment gateway that it is time to bill the credit card or debit the account.
- Clicking the Mark Processed, marks the orders, in the cases where you have already processed the order using another method (such as phone or terminal).

## Delete Batch

Before deleting a batch, you might want to archive your orders. You can

- Print specific Customer Orders
- Print the Standard Batch Report
- Export the Order data

Refer to the guide, *HOW TO Export Data to an Outside File*.

1. Under Order Processing, click the triangle next to the Batch of orders you want to delete.



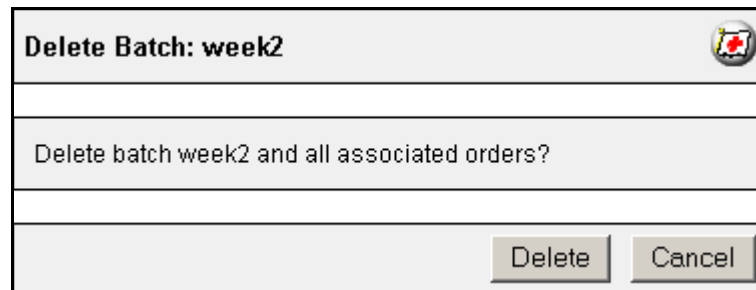
**Caution:** Before deleting your batched orders, you may want to archive the orders. You can print your orders for a hard copy, and you can export them.

See [“Printable Order” on page 5](#) if you want to retain a printout of an individual order. If you want to export your batched orders, see the guide *“Export Data to an Outside File.”*

2. Select Delete Batch.

This will remove the batch with all its orders completely from the system.

The following warning displays.



3. Click Delete to permanently remove the batch, or click cancel to retain the batch.



# ***HOW TO Export Data to an Outside File***

Revision 1.3



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MM1052-04

# HOW TO

## Export Data to an Outside File

---

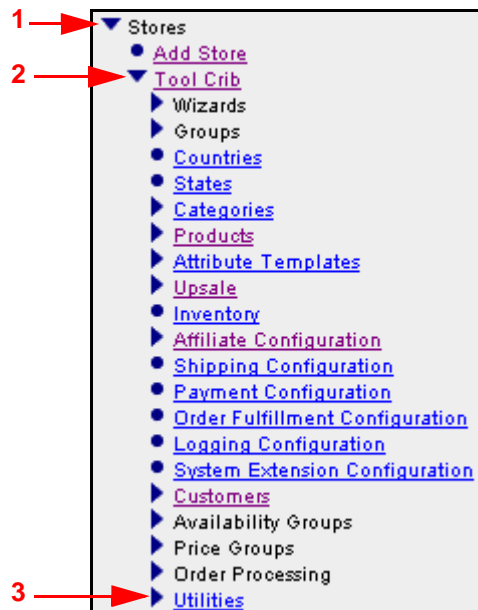
### Introduction

Miva Merchant allows you to perform these types of data export for external processing or storage:

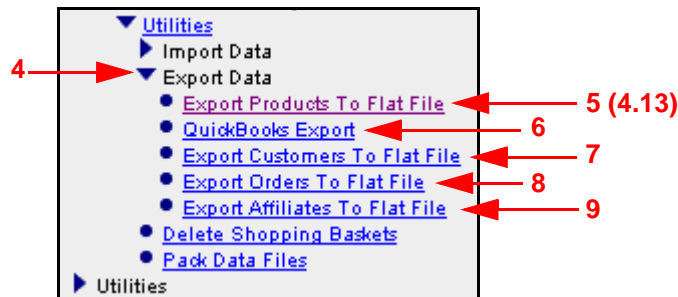
- Export batched orders to QuickBooks® format.
- Export Customer records to a text file.
- Export customer batched order information to a text file.
- Export affiliate data to a text file.
- **(new in 4.13)** Export product data to a flat file (in Miva Marketplace Mass-Listing Wizard, Miva Merchant Import, and Miva Merchant provisioning formats).

Use the following procedure to export data to external files.

1. Click the triangle next to Stores.
2. Click the triangle next to the store's name.
3. Click the triangle next to Utilities.



4. Click the triangle next to Export Data.
5. **4.13:** Refer to “[Export Products to Flat File \(new in 4.13\)](#)” on page 2 for a description of this procedure.
6. Refer to “[Export to QuickBooks](#)” on page 5 for a description of this procedure.
7. Refer to “[Export Customers to Flat File](#)” on page 7 for a description of this procedure.
8. Refer to “[Export Orders to a Flat File](#)” on page 8 for a description of this procedure.
9. Refer to “[Export Affiliates to a Flat File](#)” on page 9 for a description of this procedure.



**Note:** The data directory, data/Merchant2/[Your Store Number]/export, mentioned in the following procedures, is the directory for your exported file(s), which might be called mivadata, htldata, or data. If you can not find it, check with your Internet Host Provider.

## Export Products to Flat File (new in 4.13)

Export product data in a format for Importing Product data (back) into Miva Merchant, into Miva Marketplace, and also in Miva Merchant provisioning format (provisioning is used by hosts.)

Perhaps, you have made changes to the product fields within Miva Merchant Administration Interface and you want to replace your old spreadsheet or database file with updated product data. Or, maybe you do not currently have your products in a separate file, but would like to do so. You might want to export product fields to edit them, then import the edited data back into Miva Merchant using the Import Products From Flat File function.

### Exported Fields

Export Products to Flat File (except the Miva Marketplace Mass-Listing Wizard export file format) exports these core product fields, delimited by tabs (for Import Products from Flat File) or pipes (for Miva Merchant Provisioning):

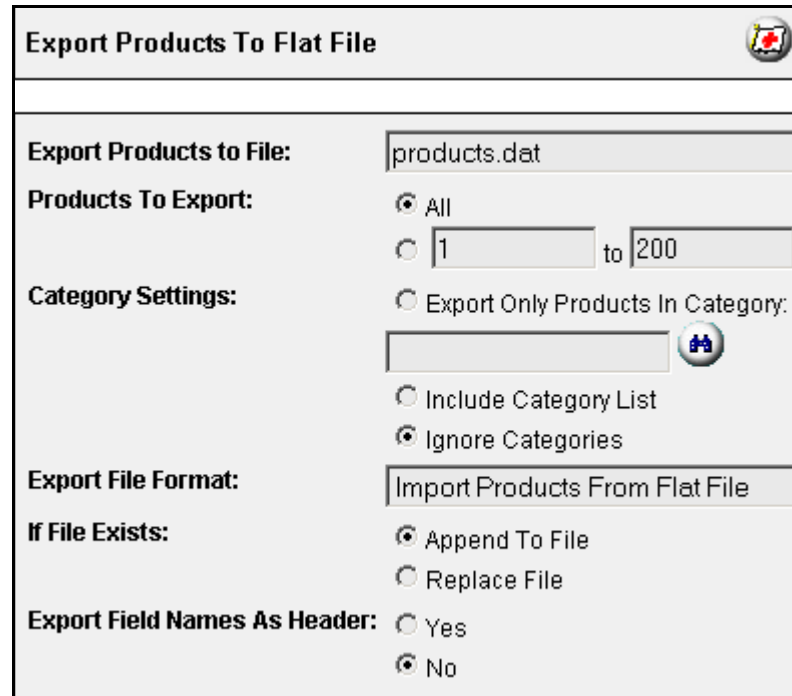
product code, product name, price, cost, weight, description, if taxable, if active, thumbnail path, full image path.

If you select *Include Category List* setting, the file will also export the category code(s), delimited by commas, to which the products are assigned.

The Miva Marketplace Mass-Listing Wizard format exports the product code and delimiters that identify placeholders for the Miva Marketplace data that you will enter.

## Export Selections


When you click the Export Products to Flat File link, the following form displays.



**Export Products To Flat File**

**Export Products to File:** products.dat

**Products To Export:**  All  
 1 to 200

**Category Settings:**  Export Only Products In Category:  
   
 Include Category List  
 Ignore Categories

**Export File Format:** Import Products From Flat File

**If File Exists:**  Append To File  
 Replace File

**Export Field Names As Header:**  Yes  
 No

- 1. Export Products to File:** Accept the default name or edit the current one. Keep the same name if you want to append to the previous file, or if you want to replace the previous file. Be sure to select the applicable option next to "If File Exists." (See step "5." on page 4)
- 2. Products to Export:** By default, data for all products in your store will be exported. If you want to export the data in a series of files, enter the beginning and ending number of products.

**Note:** If you have a large number of products and are exporting all of them, you should divide the export into a series of files. This will help avoid server timeouts that can occur with large files.

### 3. Category Settings:

- **Export Only Products in Category:** enter the category code or click the Lookup button to locate the category code.

Only the data of those products assigned to the entered category will be exported, and not the category code. The exported file contains a placeholder for category codes, which you can edit in a spreadsheet or database to add new category code(s). Then, when you import product data from the flat file, these products will be assigned to the new category or categories, while also retaining the original category assignment.

## HOW TO Export Data to an Outside File

Export Products to Flat File (new in 4.13)

- **Include Category List:** click this option if you want the category code(s) to which the products are assigned included in the file, separated by commas (comma delimited).
  - **Ignore Categories:** click this option if you do not want category code(s) included in the file. **Choose this option for Miva Marketplace export.**
4. **Export File Format:** The format you select depends on how you will be using the data.
- **Import Products From Flat File:** click this option if you will be importing the data back into Miva Merchant or want tab delimited product data.
  - **Miva Marketplace Mass-Listing Wizard:** click this option if you will be listing your products with Miva Marketplace. (See “[Export Format: Miva Marketplace Mass-Listing Wizard](#)” below.)
  - **Miva Merchant Provisioning:** click this option if you will be setting up Miva Merchant Provisioning.
5. **If File Exists:**
- **Append to File:** click this option if you want to add to the end of an existing file. Be sure the file name is correct and the file exists. (You could choose this if you also chose a limited number in the Products to Export option.
  - **Replace File:** click this option if you want to overwrite the previous file.
6. **Export Field Names As Header:** If you want the first row of data to include the name of the product fields, select Yes.

The file is saved in the export directory, under your store number directory. The path would look like the following:

```
mivadata/Merchant2/00000001/export/products.dat
```

### Export Format: Miva Marketplace Mass-Listing Wizard

1. Perform the steps listed under “[Export Selections](#)” on page 3, noting that you might want to select Yes for “Export Field Names As Header,” since much of the file will look blank, being tab delimited.

	A	B	C	D	E	F	G	H
1	PRODUCT_CODE	CATEGORIES	CLICKPRICE	DESC	MANUFACTURER	PARTNUM	UPC	ISBN
2	I-01							
3	I-02							
4	PH-01							
5	NP-NP1							
6	NP-NP2							
7	NP-NP3							
8	NP-NP4							
9	NP-NP5							
10	PH-02							
11	PH-03							
12	ODI-23							

2. Enter the data into the applicable fields.
3. Use the Miva Marketplace Mass-Listing Wizard to upload the file.

See the publication *Miva Marketplace User Guide* for additional information, including correlating this exported file and the Miva Marketplace categories Listing.

## Export to QuickBooks

When you click the QuickBooks Export link the following form displays.

The screenshot shows the 'QuickBooks Export' form with the 'File' tab selected. The 'Export to File' field contains the text 'quickbatch.iif'. Below it, the 'If File Exists' section has two radio buttons: 'Append To File' (which is selected) and 'Replace File'. Two red arrows on the left side of the form point to the 'Export to File' field and the 'Append To File' radio button respectively.

The tabs for this form are described below.

### File

The File tab allows you to define the file name and the manner the data is written to the file.

1. Export to File  
Enter the file name that the batched order data is to be written to.
2. If File Exists  
Click the radio button for Append To File or Replace File.

### Customers

This tab allows you to define if customer data is exported, and if so what customer data is transferred. This is exported in QuickBooks format.

The screenshot shows the 'QuickBooks Export' form with the 'Customers' tab selected. The 'Export Customers' checkbox is checked. Below it, the 'Export Customer Information' section has six checkboxes, all of which are checked: 'First Name', 'Last Name', 'Phone', 'Fax', 'Company', and 'Address'. A red arrow on the left side of the form points to the 'Export Customers' checkbox.

1. The Export Customers check box must be checked for customer data to be exported.  
If there are no customers in the store, the Export Customers button is unchecked by default.
2. Click all fields that you want to export.
3. Click Update.

## Orders

This tab allows you to define the batched orders to be exported in QuickBooks format.

1. The Export Orders check box must be checked for order data to be exported. If there are no orders in the store, the Export Orders button is unchecked by default.
2. Click the drop down list and select a batches to be exported.
3. Click Export.
4. A notice is displayed telling what was successfully exported.

The file is located in the *data/Merchant2/(store number)/export* directory on your domain.

Therefore, for your first store, the file is saved to *data/Merchant2/00000001/export/quickbatch.iif*.

If you have a problem finding the directory, contact your hosting service and ask where the *data* directory is located.

---

**Note:** The file is created for QuickBooks Version 7.0D Release R3.

---

## Export Customers to Flat File

When you click on the Export Customers to Flat File link, the following form is displayed.

The screenshot shows a web form titled "Export Customers To Flat File". It contains the following elements:

- 1** → **Export Customer to File:** A text input field containing "customers.dat".
- 2** → **Export:** A group of checkboxes for selecting data fields to export, including Login, Pass. Recovery Email, Ship. First Name, Ship. Last Name, Ship. Email, Ship. Phone, Ship. Fax, Ship. Company, Ship. Address, Ship. City, Ship. State, Ship. Zip, Ship. Country, Bill. First Name, Bill. Last Name, Bill. Phone, Bill. Fax, Bill. Email, Bill. Company, Bill. Address, Bill. City, Bill. State, Bill. Zip, and Bill. Country.
- 3** → **Delimiter:** Radio buttons for "Tab" (selected) and "Other:" followed by a text input field.
- 4** → **If File Exists:** Radio buttons for "Append To File" (selected) and "Replace File".
- 5** → **Export** button.

1. Export Customer to File  
Enter the name of the file that is to hold the data. *customers.dat* is the default name.
2. Export  
Click each check box for the data fields you want to export.
3. Delimiter  
Choose one of the radio buttons you want as your delimiter. To use a delimiter other than a tab, select the Other radio button and enter the delimiter you want used (e.g. "|")
4. If File Exists  
When the file exists you must define how the new data is to be written to the file.
 

Append To File	Appends the new data to the end of the existing data in the file.
Replace File	Replaces the existing data with the new data. All existing data is lost.
5. Click Export.

The file is located in the *data/Merchant2/(store number)/export* directory on your domain.

Therefore, for your first store, the file is saved to *data/Merchant2/00000001/export/customers.dat*.

If you have a problem finding the directory, contact your hosting service and ask where the *data* directory is located.

## Export Orders to a Flat File

Batched orders can be exported to a text file, with a name and delimiter you choose. You can also choose if you want the current batched orders to append to or replace the existing file (if you previously exported orders). By default, the fields are separated (delimited) with a tab, however you can choose a different delimiter.

The exported order data does not include any payment information. The exported fields from the batched orders are:

- **Order process data:** ORDER\_ID; PROCESSED; ORDER\_DATE; ORDER\_TIME
- **Customer Shipping and Billing data:** SHIP\_FNAME; SHIP\_LNAME; SHIP\_EMAIL; SHIP\_COMP; SHIP\_PHONE; SHIP\_FAX; SHIP\_ADDR; SHIP\_CITY; SHIP\_STATE; SHIP\_ZIP; SHIP\_CNTRY; BILL\_FNAME; BILL\_LNAME; BILL\_EMAIL; BILL\_COMP; BILL\_PHONE; BILL\_FAX; BILL\_ADDR; BILL\_CITY; BILL\_STATE; BILL\_ZIP; BILL\_CNTRY
- **Order data:** PROD\_CODE; PROD\_NAME; PROD\_UPSLD; PROD\_PRICE; PROD\_QUANT; PROD\_ATTR; PROD\_OPT; OPT\_PRICE; ORDER\_TAX; ORDER\_SHIP; ORDER\_TOTL

When you click the Export Orders To Flat File link, the following form is displayed.

The screenshot shows a web form titled "Export Orders To Flat File". The form contains the following fields and options:

- 1** → **Batch to Export:** A drop-down menu showing the date range "09/11/2000:09/07/2000".
- 2** → **Export Orders to File:** A text input field containing "orders.dat".
- 3** → **Delimiter:** Radio buttons for "Tab" (selected) and "Other:" followed by an empty text input field.
- 4** → **If File Exists:** Radio buttons for "Append To File" (selected) and "Replace File".
- 5** → **Export** button.

1. **Batch to Export**  
From the drop-down menu, select the batch to export.

#### 2. Export Orders to File

Enter the name of the file to which you want the data exported. *orders.dat* is the default.

#### 3. Delimiter

Choose one of the radio buttons you want as your delimiter. To use a delimiter other than a tab, select the Other radio button and enter the delimiter you want used (e.g. "|")

#### 4. If File Exists

When the file exists you must define how the new data is to be written to the file.

Append To File	Appends the new data to the end of the existing data in the file.
Replace File	Replaces the existing data with the new data. All existing data is lost.

#### 5. Click Export.

The file is located in the *data/Merchant2/(store number)/export* directory on your domain.

Therefore, for your first store, the file is saved to *data/Merchant2/00000001/export/orders.dat*.

If you have a problem finding the directory, contact your hosting service and ask where the *data* directory is located.

## Export Affiliates to a Flat File

When you select the Export Affiliates To Flat File link, the following form is displayed.

### Export Affiliates To Flat File

**File** [Affiliates](#) [Earnings](#) [Payouts](#)

**Export Affiliates to File:**

**Delimiter:**

Tab

Other:

**If File Exists:**

Append To File

Replace File

**Data to Export:**

Affiliates

Affiliate Earnings

Affiliate Payouts

---

## File Tab

### 1. Export Affiliates to File

Enter the name of the file that is to hold the data. *affiliates.dat* is the default name.

### 2. Delimiter

Tab is selected as the default delimiter (separator). To use a delimiter other than a tab, select the Other radio button and enter the delimiter you want to use. (e.g. "|")

### 3. If File Exists

When the file already exists you must define how the new data is to be written.

Append To File      Appends the new data to the end of the existing data in the file.

Replace File        Replaces the existing data with the new data. All existing data is lost.

### 4. Data to Export

Check each box for the type of data fields that are to be exported. Select the specific data to be exported under each of the corresponding tabs.

- Affiliates (See "[Affiliates Tab](#)" on page 11.)
- Affiliate Earnings (See "[Earnings Tab](#)" on page 12.)
- Affiliate Payouts (See "[Payouts Tab](#)" on page 12.)

### 5. Click Export.


The file is located in the *data/Merchant2/(store number)/export* directory on your domain.

Therefore, for your first store, the file is saved to *data/Merchant2/00000001/export/customers.dat*.

If you have a problem finding the directory, contact your hosting service and ask where your Miva *data* directory is located.

## Affiliates Tab

When you select the Affiliates tab, the following form is displayed:

**Export Affiliates To Flat File** 

---

[File](#) **[Affiliates](#)** [Earnings](#) [Payouts](#)

---

**Export:**

<input checked="" type="checkbox"/> Login	<input checked="" type="checkbox"/> Pass. Recovery Email	<input type="checkbox"/> Site Name
<input type="checkbox"/> Site Url	<input type="checkbox"/> Contact Name	<input type="checkbox"/> Email Address
<input type="checkbox"/> Company	<input type="checkbox"/> Phone Number	<input type="checkbox"/> Fax Number
<input type="checkbox"/> Address	<input type="checkbox"/> City	<input type="checkbox"/> State
<input type="checkbox"/> Zip	<input type="checkbox"/> Country	<input type="checkbox"/> Hits
<input type="checkbox"/> Percent	<input type="checkbox"/> Flat	<input type="checkbox"/> Balance
<input type="checkbox"/> Status	<input type="checkbox"/> Status Date	<input type="checkbox"/> Status By

The Affiliate Tab includes the affiliates information, such as Contact Name and address, and commission information, for example:


- Pass. Recovery Email: is the Lost Password Email from Edit Affiliate–Identification tab
- Status: is the Application Status from Edit Affiliate–Identification tab.
- Hits: is the Commission Per Referral from Edit Affiliate–Commission tab.
- Percent: is the Commission Percent of Order from Edit Affiliate–Commission tab.
- Flat: is the Commission Flat Fee per Order from Edit Affiliate–Commission tab.

**To export this data:**

1. Check the boxes next to the data you want to export.
2. Click one of the other tabs to continue selecting data to export, or click Export.

## Earnings Tab

When you select the Affiliates tab, the following form is displayed:

Export Affiliates To Flat File 			
<a href="#">File</a>	<a href="#">Affiliates</a>	<b>Earnings</b>	<a href="#">Payouts</a>
<b>Export:</b>	<input checked="" type="checkbox"/> Date	<input checked="" type="checkbox"/> Time	<input type="checkbox"/> Type
	<input type="checkbox"/> Order ID	<input type="checkbox"/> Order Amount	<input type="checkbox"/> Earned
	<input type="checkbox"/> Void	<input type="checkbox"/> Void Reason	<input type="checkbox"/> Voided By


The Earnings tab includes the information from Edit Affiliate–Earnings tab.

**To export this data:**

1. Check the boxes next to the data you want to export.
2. Click one of the other tabs to continue selecting data to export, or click Export.

## Payouts Tab

When you select the Payouts tab, the following form is displayed:

Export Affiliates To Flat File 			
<a href="#">File</a>	<a href="#">Affiliates</a>	<a href="#">Earnings</a>	<b>Payouts</b>
<b>Export:</b>	<input checked="" type="checkbox"/> Date	<input checked="" type="checkbox"/> Time	<input type="checkbox"/> Count
	<input type="checkbox"/> Amount	<input type="checkbox"/> Created By	<input type="checkbox"/> Processed

The Payouts tab includes the information from Edit Affiliate–Payouts tab.

**To export this data:**

1. Check the boxes next to the data you want to export.
2. Click one of the other tabs to continue selecting data to export, or click Export.



***HOW TO***  
**Import Product Data**  
**From a Flat File**

Revision 1.3



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MM1014-04

# HOW TO

## Import Product Data From a Flat File

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Miva Merchant gives you the option of importing your products from a flat text file, as opposed to entering them one at a time using the Add Product form. The file may be created with a text editor, word processor, spreadsheet, or database editor that has the ability of creating a flat file.

Refer to the following steps for the process of importing products using a flat file:

1. [“Set up Your Store” on page 1](#)
2. [“Create a Product Data Flat File” on page 2](#)
3. [“Enter the Product Data into the File” on page 5](#)
4. [“Upload Product Data Flat File” on page 5](#)
5. [“Select the Fields and Import the Data” on page 7](#)
6. [“Upload the Graphic Files into the Proper Miva Merchant Directory” on page 9](#)

### Set up Your Store

Before creating your product data flat file and importing it, you may want to complete a few tasks in the following areas:

- **Create Categories**  
If you want to assign the imported products to categories during import, you must create the categories first. For help in defining categories, refer to *HOW TO Set Up Categories*.
- **Create Attribute Templates**  
If you want to apply Attribute Templates to any of your products during import, you must create the template(s) first. For help in creating Attribute Templates, refer to *HOW TO Create Attribute Templates*.
- **Track Inventory**  
If you want to track the inventory and identify inventory data while importing any of your products, you must turn on Track Inventory and identify the Inventory levels you want to track. For additional information, refer to *HOW TO Set Up Store Inventory*.

## Create a Product Data Flat File

The first step is to create a product list, or file. Each product record (line in a text file) can contain the following fields.

	<b>Field Name</b>	<b>Field Description</b>
1.	Product Code	A product code is simply a unique identifier used to refer to each product. You may use any text you wish (including spaces) and/or numbers up to 50 characters and it must be unique. Do not use HTML.
2.	Product Name	Enter the name of your product using any text (including spaces) and/or numbers. You may use HTML, but you are limited to a total of 100 characters (including spaces) in the Product Name field.
3.	Category Code	<p>Enter the category code(s) that you previously defined in Miva Merchant. You must create the categories before you upload the flat file, and you must use the exact category code(s). It is a good idea to make the category code different from the category name (they can be they same) - an abbreviation would be a good idea.</p> <p>If the category code in the product record exists, that product will be added to the category as the record is imported. If the category specified by its code in the product record does not exist at the time when the file is imported, the product will be added to the store uncategorized.</p> <p><b>New in 4.13:</b> If you want to assign products to multiple categories, separate the category codes with a comma. <b>(And, therefore, be sure you do not choose the comma to delimit the other fields.)</b></p>
4.	Price	Enter the retail price of the product. Use decimal numeric data only. Do not use any currency, punctuation or text.
5.	Cost	Enter the cost of the product. Use decimal numeric data only. Do not use any currency, punctuation or text.
6.	Weight	Enter the weight of the product in the unit of measurement you entered for your store. Use decimal numeric data only. Do not use text.
7.	Description	Enter the product description using text and HTML (or any code understood by a browser, i.e., JavaScript, etc.).
8.	Taxable	“Yes,” “True,” (case insensitive) and positive numbers all mean that the item is taxable. Any other string, null (nothing), zero, and any numbers other than positive whole numbers will mean that the item is not taxable.
9.	Active	“Yes,” “True,” (case insensitive) and positive numbers all mean that the item is an active product. Any other string, null (nothing), zero, and any numbers other than positive whole numbers will mean that the item is not an active product, and is not to be displayed to your customers.

	<b>Field Name</b>	<b>Field Description</b>
10.	Thumbnail URL	Enter the URL for the graphic file you want to use as the thumbnail picture of the product. This is a pointer only and you must upload your graphic files using one of the methods described in <a href="#">"Upload the Graphic Files into the Proper Miva Merchant Directory"</a> on page 9
11.	Image URL	Enter the URL for the graphic file you want to use as the full-size picture of the product. This is a pointer only and you must upload your graphic files using one of the methods described in <a href="#">"Upload the Graphic Files into the Proper Miva Merchant Directory"</a> on page 9
12.	Attribute Template Code	Enter the code for the Attribute Template you previously created, and want to assign or copy to this product.
		<b>Note:</b> For All Inventory Fields, except "Track Product Inventory," entering nothing will use the default set in the Store's Inventory.
13.	Adjust Stock By	Enter the positive or negative whole number by which you want to add to or subtract from the current inventory stock level.
14.	Track Product Inventory	"Yes," "True," (case insensitive) and positive numbers all mean "yes." Any other string, null (nothing), zero, and any numbers other than positive whole numbers mean "no."
15.	In Stock Message (Short)	Enter the short message you want displayed to indicate this product is available.
16.	In Stock Message (Long)	Enter the long message you want displayed to indicate this product is available.
17.	Track Low Stock Level	"Yes," "True," (case insensitive) and positive numbers all mean "yes." Any other string or numbers other than positive whole numbers mean "no."
18.	Low Stock Level	Enter a positive, whole number that identifies low stock.
19.	Low Stock Message (Short)	Enter the short message you want displayed to indicate this product's inventory is low.
20.	Low Stock Message (Long)	Enter the long message you want displayed to indicate this product's inventory is low.
21.	Track Out of Stock Level	"Yes," "True," (case insensitive) and positive numbers all mean "yes." Any other string or numbers other than positive whole numbers mean "no."
22.	Out of Stock Level	Enter a positive, whole number that identifies when this product is out of stock.

	Field Name	Field Description
23.	Hide Out of Stock Products	“Yes,” “True,” (case insensitive) and positive numbers all mean “yes.” Any other string or numbers other than positive whole numbers mean “no.”
24.	Out of Stock Message (Short)	Enter the short message you want displayed to indicate this product’s inventory is out.
25.	Out of Stock Message (Long)	Enter the long message you want displayed to indicate this product’s inventory is out.
26.	Limited Stock Message	Enter the message you want displayed to indicate this product’s inventory is not sufficient for the quantity entered in the Order.

The flat file does not have to contain all of the product fields, and a database file can contain more fields than are used in Miva Merchant. These additional fields can be skipped when field names are selected as shown in [“Select the Fields and Import the Data” on page 7.](#)

You can simply type the data into a text editor using a selected character as the field separator. The following list is an example of product data entered with a tab as the field delimiter. This list shows the: Product Code, Name, Category Codes (delimited by comma), Price, Cost, Weight, Description, Taxable, Active, Attribute Template for P001 only, Adjust Stock By, Track Product Inventory, In Stock Message (Short) for P001 only, Low Stock Level, Out of Stock Level.

P001	Finish Hammer	ht,tl	12	8.5	1.1	Professional Finish Hammer	Yes	Yes	F01	50	Yes	While Supplies last	10	5
P002	Screwdriver set	ht,tl	9.99	3.5	0.5	Economical screwdriver set	Yes	Yes		100	Yes			10 5
P003	200# Sandpaper	ac, tl	3.95	2	.05	Assorted Fine Grades	Yes	Yes		50	yes			10 5
P004	Tape Measure	ac	5.95	2	.2	25-foot Tape Measure	Yes	Yes		50	yes			10 5
P005	Wrench Set	ht, tl	150	100	8	Wrench Set	Yes	Yes		50	Yes			10 5

---

**Caution:** Always check the flat file using a simple text editor such as Microsoft’s Notepad for formatting characters. There can be no spaces before or after the field delimiter. If there is a field separator before or after the attribute template code field, Miva Merchant will not recognize the name in that field as being the same as the defined category code.

---

**Note:** If you use a comma in any field (such as the Description), do not use the comma as the field delimiter.

---

## Enter the Product Data into the File

Use the following steps to enter the data into the flat file.

1. List all of your products on a spreadsheet, or in a table in a text editor or word processor. You could also create a database for the products.

Your store's products will probably fall naturally into categories. The preceding flat file is for a store that sells woodworking tools. The products are placed into hand tools (ht), and accessories (ac) categories.

You must create the categories in Miva Merchant before you import the product data. In your flat file, be sure the category code matches the defined category code exactly. For additional information on creating categories, refer to *HOW TO Set Up Categories*.

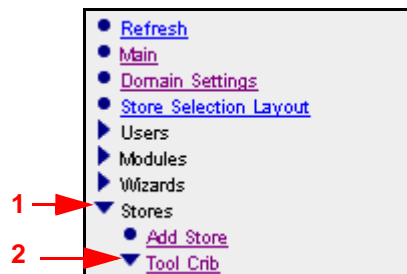
You do not have to put the data fields in the sequence previously shown. Miva Merchant allows you to select the name of each of the fields after you upload the file (see the example in "[Select the Fields and Import the Data](#)" on page 7).

2. Before you go through the import process, open the flat file in a plain text editor that does not format the text, and check the file to make sure there are no formatting characters in the file. This could save you a great deal of time in the importing process.

## Upload Product Data Flat File

Use the following steps to upload the flat file.

1. Click the triangle next to Stores.
2. Click the triangle next to the store name.




3. Click the triangle next to Utilities (under your Store name).
4. Click the triangle next to Import Data.
5. Select the Import Products From Flat File link.



Miva Merchant prompts you for the path to your import file.

By default, Miva Merchant looks for a tab character (ASCII 9) as the delimiting character between fields in each record. If your import file uses a different delimiter between fields, select Other and enter that character, or string of characters, in the text field provided.

**Note:** The file name cannot have spaces in it. If you use a multi-word name, the spaces between the words must be removed.

6. Enter the complete path to your flat file, or click the Upload  button to display the Upload File form.

7. To locate the file on your computer, click the browse button.  
If you have uploaded the file before, you must check the Overwrite checkbox.
8. Click Upload.

## Select the Fields and Import the Data

1. Click Next on the Import Products From Flat File form and the screen shown below displays.

<b>Existing Products:</b>				
<input checked="" type="radio"/> Keep Existing Products				
<input type="radio"/> Update Existing Products				
<input type="radio"/> Replace Existing Products				
<b>Attribute Templates:</b>				
<input checked="" type="radio"/> Use				
<input type="radio"/> Copy				
<b>Fields:</b>	<b>Row</b>	<b>Product Code</b>	<b>Name</b>	<b>Catego</b>
	1	P001	Finish Hammer	ht
	2	P002	Screwdriver Set	ht
	3	P003	200# Sandpaper	ac
	4	P004	Tape Measure	ac
	5	P005	Wrench Set	ht

2. Next to “Existing Products” select the way you want to import the data. The choices are displayed as radio buttons. While the choices reflect the way existing products are handled, the first choice, “Keep Existing Products,” is the selection the first time you import any products and also when you import new products.

### *Keep Existing Products (Importing New Products)*

Select this option if you are importing a file that contains the same product records that already exist in your store plus new records that do not, or if you are importing all new products. Miva Merchant adds the new records that were not in your store previously – leaving the existing product records in the store untouched.

### *Replace Existing Products (for matching Products)*

To replace product records with new information from the import file, select this option. All product records in the store which contain product codes that match those found in the records of the import file will be overwritten with the new information from the imported records.

### *Update Existing Products (Update certain Product Fields)*

Updating is slightly different from replacement. Where selected fields in selected product records need updating with new information, and all other information in the given record needs to be left untouched and intact, use the update option.

For example, your store may have 20 different product records, and the price fields in records 1, 5, 12, and 17 need updating. In such a case select the Update option. All the records that perfectly match those being imported (2 through 4, 6 through 11, 13 through 16, and 18 through 20) will be left untouched.

All of the records on the form with information (in the specified fields) that differs from information in matching imported records will be overwritten with the new imported information.

3. If you want to apply one or more attribute templates to product(s), next to "Attribute Templates," select one of the following:
  - Use  
Select Use when you want to assign an existing attribute template to a product.
  - Copy  
Select Copy when you want to copy an attribute template to a product, and make changes for that specific product only. (The attribute data will be copied to the product's record.)
4. Next to "Fields," click the drop-down list (default is <Skip>) to select the field names.

The form displays a table of the first 5 records in your file. A drop-down list of the different Miva Merchant product record fields allows you to assign your data to these fields.


Each field in the product record is listed in a column and you can select that field on this screen. Click the drop-down list and the product field list displays.


<b>Existing Products:</b>		<input checked="" type="radio"/> Keep Existing Products																																																	
		<input type="radio"/> Update Existing Products																																																	
		<input type="radio"/> Replace Existing Products																																																	
<b>Attribute Templates:</b>		<input checked="" type="radio"/> Use																																																	
		<input type="radio"/> Copy																																																	
<b>Fields:</b>	<table border="1"> <thead> <tr> <th>Row</th> <th>Product Code</th> <th></th> <th></th> </tr> </thead> <tbody> <tr> <td>1</td> <td>P001</td> <td>&lt;Skip&gt;</td> <td>&lt;Skip&gt;</td> </tr> <tr> <td>2</td> <td>P002</td> <td>&lt;Skip&gt;</td> <td>ht</td> </tr> <tr> <td>3</td> <td>P003</td> <td>Name</td> <td>ht</td> </tr> <tr> <td>4</td> <td>P004</td> <td>Category Code</td> <td>ac</td> </tr> <tr> <td>5</td> <td>P005</td> <td>Price</td> <td>ac</td> </tr> <tr> <td></td> <td></td> <td>Cost</td> <td>ht</td> </tr> <tr> <td></td> <td></td> <td>Weight</td> <td></td> </tr> <tr> <td></td> <td></td> <td>Description</td> <td></td> </tr> <tr> <td></td> <td></td> <td>Taxable</td> <td></td> </tr> <tr> <td></td> <td></td> <td>Active</td> <td></td> </tr> <tr> <td></td> <td></td> <td>Thumbnail URL</td> <td></td> </tr> </tbody> </table>	Row	Product Code			1	P001	<Skip>	<Skip>	2	P002	<Skip>	ht	3	P003	Name	ht	4	P004	Category Code	ac	5	P005	Price	ac			Cost	ht			Weight				Description				Taxable				Active				Thumbnail URL		<div style="border: 1px solid gray; padding: 2px;">                 &lt;Skip&gt;             </div> <ul style="list-style-type: none"> <li>&lt;Skip&gt;</li> <li>Product Code</li> <li style="background-color: #000080; color: white;">Name</li> <li>Category Code</li> <li>Price</li> <li>Cost</li> <li>Weight</li> <li>Description</li> <li>Taxable</li> <li>Active</li> <li>Thumbnail URL</li> </ul>	<div style="border: 1px solid gray; padding: 2px; text-align: center;">                 &lt;Skip&gt;             </div> <div style="border: 1px solid gray; padding: 2px; text-align: center;">                 ht             </div> <div style="border: 1px solid gray; padding: 2px; text-align: center;">                 ht             </div> <div style="border: 1px solid gray; padding: 2px; text-align: center;">                 ac             </div> <div style="border: 1px solid gray; padding: 2px; text-align: center;">                 ac             </div> <div style="border: 1px solid gray; padding: 2px; text-align: center;">                 ht             </div> <div style="border: 1px solid gray; padding: 2px; text-align: center; margin-top: 10px;">                 Reset             </div>
Row	Product Code																																																		
1	P001	<Skip>	<Skip>																																																
2	P002	<Skip>	ht																																																
3	P003	Name	ht																																																
4	P004	Category Code	ac																																																
5	P005	Price	ac																																																
		Cost	ht																																																
		Weight																																																	
		Description																																																	
		Taxable																																																	
		Active																																																	
		Thumbnail URL																																																	

If you have imported a file that contains fields that are not to be used in Miva Merchant, leave the name as <Skip> and the field will be ignored by Miva Merchant. This means that you can import an existing file that contains fields that are not applicable to Miva Merchant. This saves you from having to reenter the data into a new file.

5. After you have selected the fields in the product record, click Import.  
Be sure you designate one field that contains the Product Code, because that is what Miva Merchant uses to find the correct records to update.
6. When Miva Merchant completes the import process the following screen is displayed.

This screen displays the number of products and how many were created, replaced, updated, and/or skipped.

**Import Products From Flat File** 

**Data File:**  

**Delimiter:**  Tab  
 Other:

13 products, 0 created, 13 replaced, 0 updated, 0 skipped

## Upload the Graphic Files into the Proper Miva Merchant Directory

When you created your flat file, you put in the URLs for the images files. This information is only the address of the location for the files and does not upload the files into the directory. You must upload the graphic files into the proper directory so Miva Merchant can display them.

The task at hand is to upload the graphics files into the directory that you have defined in the product data flat file. This can be done using the following methods:

- FTP the files into the directory.
- Use the Miva Merchant Administration Interface and an inactive product to upload your graphic files. See [“Adding Image Files Using an Inactive Product” on page 10.](#)

### Upload Images Using FTP

If you have the expertise to FTP the files, this section identifies the graphic directory to which you need to upload the graphic files. If you do not know how to FTP the files, you can create an Inactive Product(s) to upload the graphic files. See [“Adding Image Files Using an Inactive Product” on page 10.](#)

The default directory for the graphic files is: `graphics/(store number)/file name.`

- The graphics directory is located under your script directory. The script directory may be named `html`, `htmlscript`, `mivascript` or some other name. And your merchant directory may be `merchant2` or `mm`. For example:
  - `html/mm/graphics/00000002`
  - `mivascript/merchant2/graphics/00000002`

For your first store, the store number is “00000001.” This means that the graphics are for the first store you created in your domain. Each store that is created has its own directory within the graphics directory numbered in the sequence they were created. The graphic files for the fifth store created would be “00000005.”

## Adding Image Files Using an Inactive Product

This method is a little trick to make the upload process easier. To upload the product image files you need to create a product and make it “Inactive.”

### Adding a Temporary Product

Use the following procedure to create a temporary product called “Upload” for the upload process.

1. In the Administration Interface menu:
  - a. Click the triangle next to Stores.
  - b. Click the triangle next to the store name.
  - c. Click the triangle next to Products.
  - d. Select the Add Product link.
2. In the Add Product form, enter a product code.
3. Enter a product name.
4. Uncheck the Active checkbox.

This product is not really a product, so you do not want your customers to see it.
5. Click Add.

### Add Product

**Product** [Images](#) [Related Products](#) [Headers & Footers](#) [Price Table](#) [Shipping Charges](#)

**Product Code:**  ← 2

**Product Name:**  ← 3

**Price:**

**Cost:**

**Weight:**

Description:


Taxable

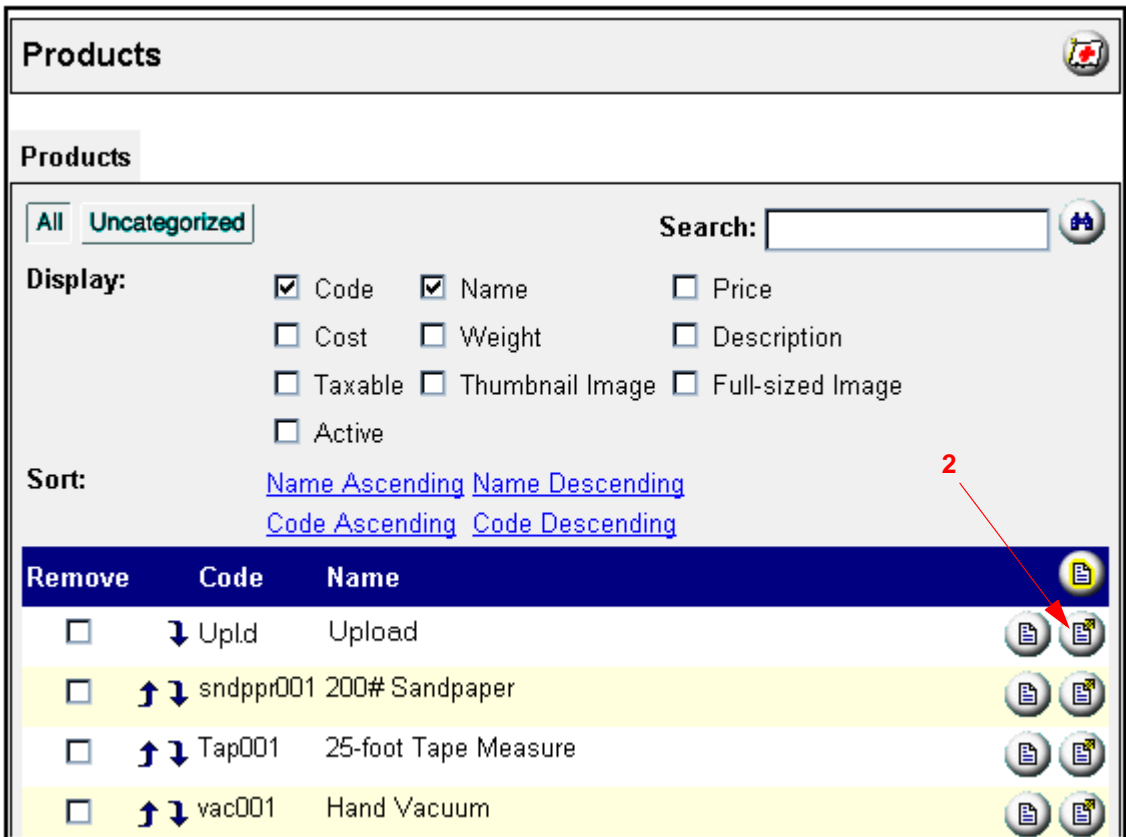
4 →  Active

### Upload the Product Image Files

You can use either the Thumbnail Image or Full-sized Image text box to upload your image files. The text boxes are normally used to associate an image file with a product, but in this case all you are going to do is upload the image file. It does not matter that the files are associated with the product Upload, because Upload will not exist after you finish uploading all of the product image files.

Use the following procedure to upload the image files.

1. In the Administration menu, select Products link.
2. In the Products List, click the Edit  button for the product you have created for uploading images.










**Products**

Products

All **Uncategorized** Search:


**Display:**  Code  Name  Price  
 Cost  Weight  Description  
 Taxable  Thumbnail Image  Full-sized Image  
 Active

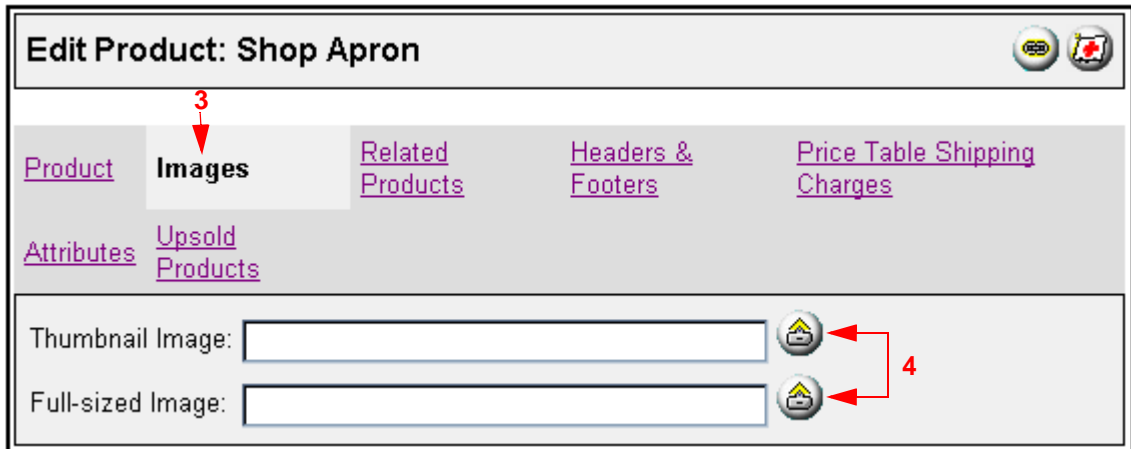
**Sort:** [Name Ascending](#) [Name Descending](#)  
[Code Ascending](#) [Code Descending](#)

Remove	Code	Name	
<input type="checkbox"/>	Upld	Upload	
<input type="checkbox"/>	↑ ↓ sndppr001	200# Sandpaper	 
<input type="checkbox"/>	↑ ↓ Tap001	25-foot Tape Measure	 
<input type="checkbox"/>	↑ ↓ vac001	Hand Vacuum	 

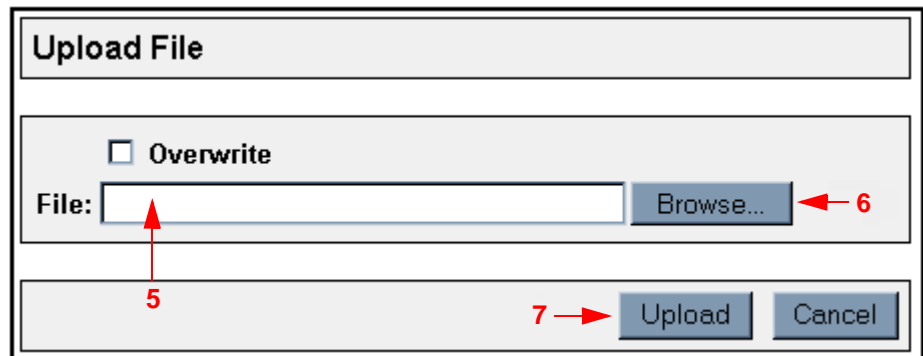
3. In the Edit Product form, click the Images tab.

The two text input boxes are used to upload your product images. Use the following procedure to upload the product files.

4. Click the Upload File  button.



5. Enter the path of the file in the File text input box.
  6. If you do not know the path, press the Browse button to find the file.
  7. Click the Upload button when the file name is in the File text input box.
- Repeat steps 1 through 8 until all image files are uploaded.



**Note:** Make sure that all of the products that you have uploaded are Active. Inactive products will not show in your store.

8. After all of the files are uploaded, display your store.
9. When all of the image files display properly, delete the product "Upload. " This ends the process.



***HOW TO  
Import Miva Order  
Products into Your  
Store***

Revision 1.1



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MM1058-02

# HOW TO Import Miva Order Products into Your New Store

You can upgrade from Miva Order to Miva Merchant and import the products into the new store.

## To display the Import Products From Miva Order form:

1. In the Administration Interface, under your store name, click the triangle next to Utilities.
2. Click the triangle next to Import Data.
3. Select the Import Products from Miva Order link.



The following form displays.

A screenshot of the 'Import Products From Miva Order' form. The form has a title bar with the text 'Import Products From Miva Order' and a small icon. Below the title bar, there are three main sections: 'Path to products in Miva Order:' with a text input field containing '/Order/'; 'Category Code:' with a text input field and a small icon; and 'Existing Products:' with two radio button options: 'Keep Existing Products' (selected) and 'Replace Existing Products'.

## To import Miva Order products:

1. Enter the path to the Miva Order products file. The default path is /Order/. This is where Miva Order is installed by default. If you have changed the directory name you will need to change the path to match your directory structure.
2. Enter the Category Code for the products. All products are imported into a single category.

3. Define how you want the products that are now in the Miva Merchant database handled. You have two options:
  - Keep Existing Products      Keep the products in the Miva Merchant file as they are.
  - Replace Existing Products      Replace the products in the Miva Merchant file with the ones being imported from Miva Order.
4. Click Import.



# HOW TO Import Miva Merchant v1.x Products

Revision 1.1



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MM1059-02

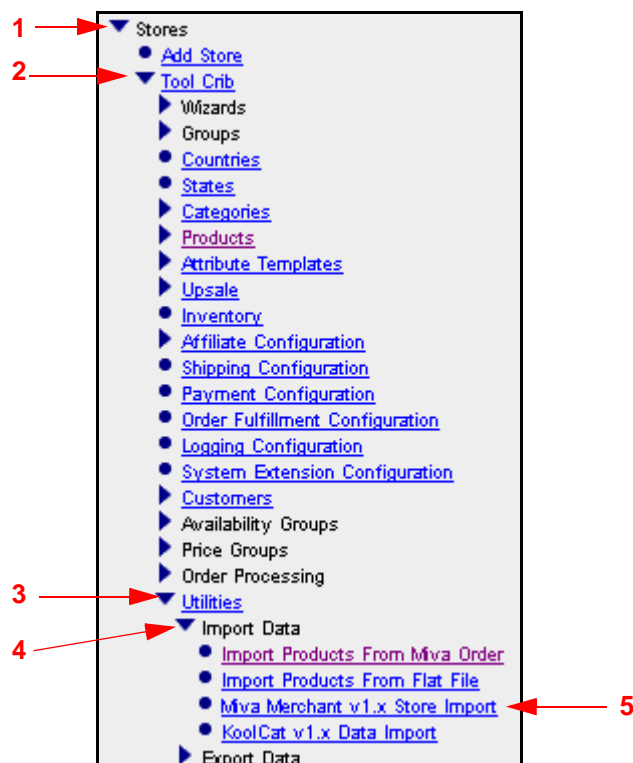
# HOW TO Import Miva Merchant v1.x Products

## Introduction

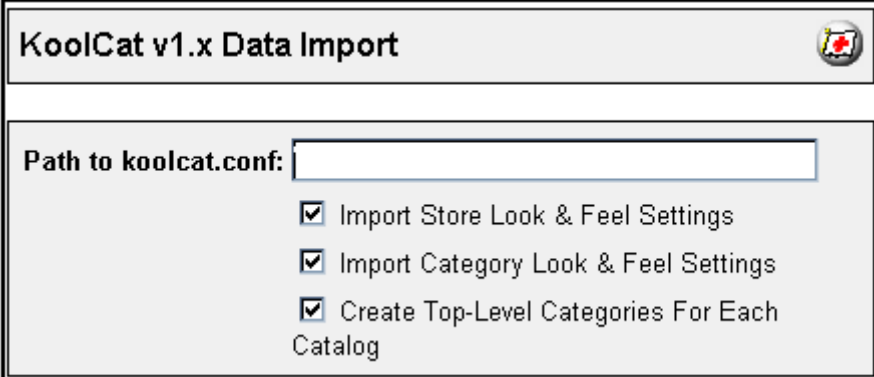
When upgrading to the latest version of Miva Merchant, you can import your store products from your v1.x data. Use the following procedure to accomplish this task. First, you need to add a store in the new version of Miva Merchant. Refer to *HOW TO Start Using Miva Merchant, Wizards, & Maintain Your Store* or *HOW TO Create a New Store Using the Administration Interface*.

## Import v1.x Products

1. Click the triangle next to Stores.
2. Click the triangle next to the store's name.
3. Click the triangle next to Utilities.
4. Click the triangle next to Import Data.
5. Select the Miva Merchant v1.x Store Import link.



The Miva Merchant v1.x Store Import screen is displayed.



**KoolCat v1.x Data Import**

Path to koolcat.conf:

- Import Store Look & Feel Settings
- Import Category Look & Feel Settings
- Create Top-Level Categories For Each Catalog

1. Path to koolcat.conf:
  - a. Enter the path to your 1.x data files.
  - b. Click the components that you want to import.
    - Import Store Look & Feel Settings
    - Import Category Look & Feel Setting
    - Create Top-Level Categories For Each Catalog
  - c. Click Import.  
The next store import screen will appear.
2. Store
  - a. Select from the drop-down list the name of the store that you want to import the data from.
3. Items/Page Load
  - a. Enter the Items/Page Load. The default value is set to 100. The import will proceed until the load limit is reached and will then refresh. This is to avoid timing out during the import process.
4. Click Import.

**Importing Store: Hank's Hardware Haven**

Category: Hank's Hardware Haven

Category: **Bolts, Nuts, Fittings**

Category: **Hand Tools**

Category: **Outdoor Tools**

Category: **Power Tools**

Product: Rubbish Blower by Heissluft Corp.

Product: Hex Bolt and Nut Set

Product: Lag Bolt

Product: Shoulder Bolt - Allen Head

Product: Assorted Bolt Pak (Allen Wrench Style)

Product: Orbital Buffer By Gateway Limited

Product: Precision Caliper By Micro AG.

Product: Steel C - Clamp

Product: Channellocks

Product: All Purpose Chisel

Product: 5000 RPM Reversible Drill

A list of the categories, products, modules, etc. that were imported are shown. At the end of the list, you should see the statement: Import Complete.

The import of your 1.x store is now complete. To import another store, just repeat the process.



# ***HOW TO Use Miva Merchant Utilities***

Revision 1.4



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MM1060-05

# HOW TO

## *Use Miva Merchant Utilities*

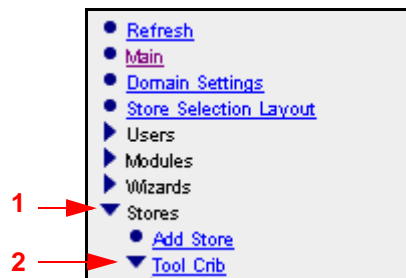
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There are Miva Merchant store utilities and a domain utility that you must use on a regular basis to keep your store operating efficiently. These utilities are:

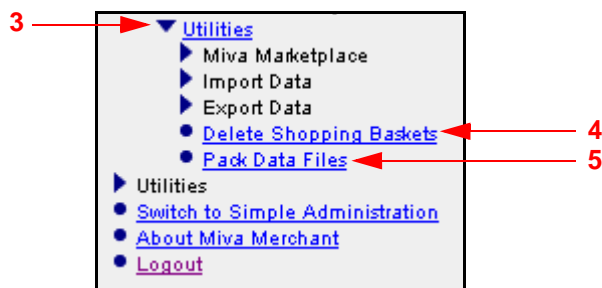
- Delete Shopping Baskets  
Deleting expired shopping baskets will recover your order numbers.
- Pack Data Files (for a store)
- Pack Data Files (for the domain)  
Packing data files will clean up previously removed data to keep your store and domain files from becoming overburdened with old data.

### Store Utilities

1. In the Administration menu, click the arrow next to Stores.
2. Click the arrow next to your store.



3. Under your store, click the arrow next to Utilities.
4. Select the Delete Shopping Baskets link to delete baskets. See “Delete Shopping Baskets” on page 2.
5. To clean up your store files, and keep it running efficiently, select the Pack Data Files link. See “Pack Data Files (for a store)” on page 3.



## Delete Shopping Baskets

When you delete Shopping Baskets, you have the option of recovering unused Order numbers.

1. Select the type of baskets to delete.

- a. Expired - Click to remove expired shopping baskets only.

If a customer enters your storefront and begins to place an order, they are assigned an order number. If they decide not to complete the order, the order number will not be used until it is made available again.

When this happens, you may see your order numbers skipping one or two numbers. To make the order numbers available again, you need to delete the expired shopping baskets.

- b. All - Click to remove all shopping baskets

There may be times when you wish to delete all shopping baskets, such as during maintenance.

---

**Caution:** Before deleting all shopping baskets, put your store in Maintenance Mode.

---

2. Recover Order Numbers

Click Yes to recover the order numbers assigned to the shopping baskets and use them for future orders.

Click No to leave the order numbers unused.

---

**Note:** When a shopper leaves your store without buying anything — after having started the order process, that order number is skipped. (That is why you will see skipped numbers when you process orders.) Typically, you do not want to recover these order numbers. If you do not recover these numbers, then you can easily see the number of shoppers who left during checkout.

So, select **No** to Recover Order Numbers when you delete the expired shopping baskets.

---

3. Click Delete.
4. Pack your store's Data Files. See the next section.

**Delete Shopping Baskets: Tool Crib**

Delete:  Expired ← 1a  
 All ← 1b

Recover Order Numbers:  Yes  No ← 2

3 →

## Pack Data Files (for a store)

When you delete records (products, customers, etc.), you are not deleting them entirely. You are “marking” the records for deletion. If you have removed several records, your database may become overburdened with these old records. To delete all the records that have been “marked” for deletion, use the Pack Data Files utility.

To pack your data files, simply click the Pack Data Files link under your stores utilities. There is also a Pack Data Files utility under the domain.

Packing data files writes the contents of the database to a temporary file of those records that have not been marked for deletion. It then erases the original database and renames the temporary file to the original name. It then rebuilds the indexes to match the new database (with presumably fewer records). This can take some time if there are several records.

Because of the time it may take to pack your database, you may also want to perform this task during a non-peak time for your store, after putting your store into Maintenance Mode.

## Domain Selections

### Pack Data Files (for the domain)

Packing data files for the domain rebuilds the databases and indexes used at the domain level only.

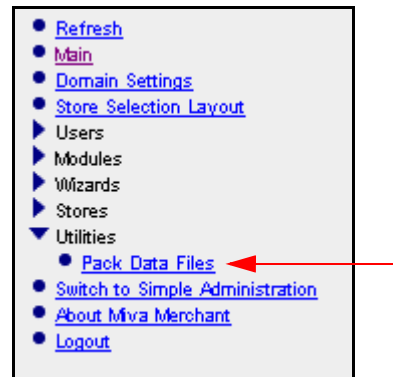
---

**Caution:** The domain level Pack Data Files does not rebuild store files.

---

1. Click the arrow next to Utilities, which is located at the top level of the Administration Interface menu.

A message confirms that the files have been packed.



### About Miva Merchant

Located toward the bottom of the Administration Interface menu, this link displays information about the version of Miva Merchant you are running.