



Aardsma Technology Services
EasyAdmin for ClickCartPro

User Documentation

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0.1 Legal Notices

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Liability

You are solely responsible for how you use the information in this manual, including any loss of revenue or other damages that might result from your use or misuse of the information.

Chapter 1

User Documentation

The ATS EasyAdmin for ClickCartPro is for intuitive and efficient management of your ClickCartPro site. It is designed to be modular, that is, separate parts of the EasyAdmin handle separate administrative tasks.

The EasyAdmin Modules are sold on the ATS website at <http://www.aatechservices.com>. If you have any trouble with the installation process, or have any questions contact ATS Support at support@aatechservices.com. If you are not comfortable with the installation process ATS can install the module for you for a nominal charge.

As of this writing (May 10, 2005) the available EasyAdmin modules are the Catalog Manager, the DataPort, and the Order Followup module.

1.1 Installation

Each of the EasyAdmin modules are installed using the same procedure.

1. Use a zip utility such as WinZip to extract the installation files from the zip file you received with your purchase.
2. Transfer the files (using an FTP program) from the media-images-admin folder to the media/images/admin folder on your web server. These files may already exist if you have previously installed an EasyAdmin module. If so it is ok (but not necessary) to overwrite them.
3. Transfer the files and folder from the library-modules folder to the library/modules folder on your web server. The `ste_ats.pl` and `adm_exec.pl` files may already exist on your server. If so, overwrite them with the new versions from the ZIP file, except in the *very* unlikely case that you have customized `adm_exec.pl`.
4. If you have previously installed an EasyAdmin module you can skip this step. Otherwise, in your web browser, enter the URL to your ClickCartPro `cp-app.cgi` (or `cp-app.pl`) script,

followed by `pg=ste_easetup_proc`. For example `http://www.yourdomain.com/ccp51/cgi-bin/cp-app.cgi?pg=ste_easetup_proc` or `http://www.yourdomain.com/cgi-bin/ccp51/cp-app.cgi?pg=ste_easetup_proc`. You should see a simple message ending in “Done.”;

5. Go to your ClickCartPro admin area and login to start using the EasyAdmin!
6. New buttons will appear in the EasyAdmin for the modules you have installed.

1.2 Upgrades

ATS makes EasyAdmin upgrades available via downloadable zip files. To install an upgrade:

1. Use a zip utility such as WinZip to extract the installation files from the ATSEasyAdmin.zip file you received with your purchase.
2. Transfer the files (using an FTP program) from the `library-modules/easyadmin` folder to the `library/modules/easyadmin` folder on your web server.
3. That’s it!

1.3 How to Use the EasyAdmin

To access the EasyAdmin, login to the standard ClickCartPro admin area with your usual username and password. Once you login you’ll see a button on the top menu bar that says “EasyAdmin Mode”. Click that button to switch into EasyAdmin mode. When you are in EasyAdmin mode you’ll see a link in the top-right corner for “Standard Mode”. Click that link at any time to return to the standard admin.

1.4 EasyAdmin Catalog Manager

The Catalog Manager is for working with the categories and products on your site. Major features include:

- Easily locate products and categories when you want to make changes to them.
- Efficiently enter new products and categories.
- Intuitively create subcategories of other categories.
- Intuitively place a new product into an existing category, or even a new category without leaving the product screen.
- Upload images right on the product or category screens.
- Work with product options directly on the product screen.

1.5 EasyAdmin DataPort

The EasyAdmin DataPort module provides generic and flexible import and export capabilities to or from any ClickCartPro database table.

1.5.1 How the DataPort Export Works

1. Choose a table to export from (example, the Orders table)
2. Choose which columns to export, or all columns (example, order date, customer name, customer email, and total amount only)
3. Choose a filter, or export all rows (example, filter to export only orders over \$150)
4. Click to download the exported data as a CSV file (opens in Excel and many other programs). In this example you might use the data to send an email newsletter to all customers who had placed an order for more than \$150 in the past.

1.5.2 How the DataPort Import Works

1. Upload a comma delimited, tab delimited, or pipe delimited file from your computer (example, updated product.csv)
2. Choose which table to import the data to (auto-detected based on column labels when possible).
3. Choose which columns in your data go with which columns in the ClickCartPro table (auto-detected when column names match).
4. Click to run the import.

1.5.3 Some Potential Uses

- Export the product ID's, names and prices for one category to Excel. Use Excel to increase all the prices by 7
- Export the categories and products from one ClickCartPro store. Import to another store to bring it up to date.
- Export order amounts from the last month, then create a chart in Excel.
- Export your entire products table as a backup before making major changes.
- Import a large number of discount codes for a current promotion.
- Import new customer accounts from another customer database.

- Export stats on product pages hits and sales and create charts in Excel.
- Export a backup of your settings tables before making changes.
- Many, many more possibilities.

1.5.4 Key Features

- Works with all databases supported by ClickCartPro, including CSV tables and MySQL tables.
- Imports are uploaded via the browser, and exports are downloaded via the browser. FTP transfers not required.
- Very fast import and export when using a relational database such as MySQL. Import or update thousands of rows in seconds - ideal for large databases that can no longer be converted to CSV mode.
- The import is very flexible. Column counts and labels need not match the ClickCartPro columns. You can choose to ignore certain columns in the import data while updating other columns. You can set default values for columns present in the ClickCartPro database but not present in your import data.
- Exports in CSV format. Imports from tab-delimited, comma-delimited (CSV), and pipe delimited files. Excel can be used to transform data to/from these formats if necessary.
- There is an option to empty the destination table before importing, in other words, to replace all rows in the table with the data from the import. Useful for restoring backed-up table data, or when you want to upload a fresh copy of a table without keeping any of the old contents.
- User-defined table columns and even custom tables work with the import and the export.

1.6 EasyAdmin Order Followup

The Customer Followup module makes it easy to be proactive in sending follow-up emails to your customers. This is a great way to strengthen your relationship with them, make sure they remember you, and show you care about their satisfaction after they make a purchase.

1.6.1 How the Order Followup Works

- Click the 'CRM' button in the EasyAdmin.
- Choose which orders to list based on the order status and number of days since the order.
- The module displays those orders in a list with summary info about each order.

- Check the orders you want to send a followup to, or click check all.
- Enter an optional personal note on each order.
- Optionally check the box to have a copy of the emails sent to yourself.
- Optionally check the box to test only. This will only send emails to you and will not remove the orders from the followup screen.
- Click ‘Send Followups Now’ and the followup emails are sent to the customers.
- You can check ‘Never Send’ on orders that you don’t want to send a followup to and they will be removed from the list when you click ‘Send Followups Now’. The ‘Never Send’ box has no effect when the test only box is selected.

Chapter 2

Software Revision History

2.1 EasyAdmin Framework

- 2005-06-09A: Changed `ste_ats_date_diff` function to autodetect UK-format date strings.
- 2005-05-10A: Added various utility functions to support the DataPort module
- 2005-03-23A: Fixed handling of doublequotes in textarea fields.
- 2005-03-01A: Added full modularity support.
- 2005-02-28A: Added about page with version list and embedded news from ATS website.

2.2 EasyAdmin Catalog Manager

- 2005-05-24A: Fixed case sensitivity and sort order of category browse.
- 2005-05-24A: Fixed problem with volume pricing fields.
- 2005-04-20A: Added weight field to custom shipping fields.
- 2005-04-20A: Fixed custom shipping script field to show current selection.
- 2005-04-20A: Fixed file permissions on uploaded files.
- 2005-04-20A: Set product browsing to sort alphabetically.
- 2005-03-01A: Added full modularity support.
- 2005-03-01A: Added delete links for products and categories.
- 2005-03-01A: Consolidated product results display to `easyadmin_prod_result_disp` function
- 2005-02-21A: Fixed browseMode searching and linking on related products and related categories

2.3 EasyAdmin DataPort

- 2005-06-07A: Included keyfield in updates so changes in case will be applied to keyfields.
- 2005-05-20A: Fixed mkdir error after initial install.
- 2005-05-12B: Fixed handling of DOS/UNIX/MAC newlines and mid-record newlines in quoted strings.
- 2005-05-12A: Fixed handling of multiple double quotation marks in export data.
- 2005-05-11B: Fixed stylesheet for pop-down layers in new skin.
- 2005-05-11A: Fixed progress indicator output on large imports.
- 2005-05-10A: Initial release

2.4 EasyAdmin Order Followup

- 2005-06-15A: Changed sorting method for orders list to straight tracking_date sort.
- 2005-06-09A: Initial release

Chapter 3

Technical Support and Feedback

ATS provides full technical support for our modules. Contact us at support@atechservices.com or 815-686-2705 if you need assistance.

Sincerely,
Mark A. Aardsma — Owner
Aardsma Technology Services