



INTEGRATED ECOMMERCE

Configuration Guide

Updated May 22, 2010, Isotope Revision 1111 / 0.1.0 stable

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Introduction

This guide is a handbook for the installation and configuration of Isotope eCommerce, an online store extension for Contao Open Source CMS.

To promote TYPOlight's new name, we will refer to the system as Contao Open Source CMS!

Conditions

To use this extension successfully, you should already be familiar with Contao Open Source CMS. Isotope eCommerce adheres strongly to the Contao framework, such as the use of listing and reader modules for the frontend.

System Requirements

Isotope eCommerce can not be operated with all Contao installations.

The following conditions are required (older versions will not work):

- Contao 2.8.2 or later
- PHP 5.2
- The latest editions of “ajax” and “conditionselectmenu” as found in the extension repository

Database Notes

In principle, Isotope eCommerce was designed to follow the database abstraction used by Contao and thus the different database servers that it supports. However, in practice this has never been tested, so we recommend using MySQL as a database server.

The management interface of the shop and the database can be customized. Users may create additional database fields (columns), but data / fields should never be deleted. Columns need to be removed manually via the install tool.

Installation

Isotope eCommerce - like many other Contao extensions - can be installed from the extension repository with a few clicks. Install the package directly into your system, or download the package from the extension repository at

<http://www.typolight.org/extension-list/view/isotope.html>

Presentation / Templates

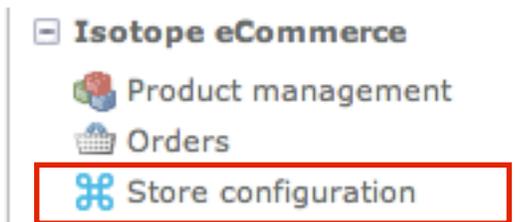
As with the frontend of Contao itself Isotope eCommerce is built using templates. In many places users can choose their own templates to customize the presentation. If you are creating a standard shop, template changes are not necessary. For advanced functionality (such as custom product fields or attributes) this is necessary, however, you should be familiar with template changes within Contao before attempting to do so.

Backend Configuration

Setup of Isotope eCommerce can be boiled down to a few steps:

- Basic configuration of the shop and the product types
- Setting up the ordering processes, (taxes, payment and shipping options)
- Setting up the site structure and the frontend modules
- Adding the products

After installing the system, you should now see the following new menu items:



Store setup can be configured in the “Store Configuration” module, and preferably from the bottom up:

1. Configuration & Email Templates
2. Tax Rates and Tax Classes
3. Shipping Methods
4. Payment Methods
5. Attributes
6. Product Types

Only begin adding products AFTER you have completed the setup process!

Configurations

Different configurations include various settings such as currency, pricing and product image sizes. You can create multiple configurations for different stores within a Contao installation, or to allow switching between several different currencies. Take note of the following for each configuration:

- The primary configuration should be set as the “Default Configuration.” At least one default configuration is required.
- The country in the address of the configuration is used as the primary country for tax calculations and shipping.
- Take careful note of the possible countries/provinces for the allowed shipping and billing settings. Customer addresses can ONLY include those countries, and invalid addresses will not be available in the ordering process.

E-Mail Templates

E-mail templates are used to send order confirmations and other messages to customers and shop owners. You will first need to create at least one email template and fallback language, as you will need this later for the ordering process when setting up the checkout module.

For a list of placeholders for use in text, please click on the "Help Wizard"  located to the right of the field names. Each template can be created in multiple languages, so do not forget to set the main language fallback.

Tax Rates

Tax rates correspond to universal sales taxes, which accrue differently in separate countries/states/regions. In Massachusetts, for example, you must create a sales tax of 6.25% on applicable goods.

Tax rates are the basic formulas for calculating the tax. You can choose for the rate to be valid on particular countries and/or states, and also which address (billing/shipping) and even what order subtotal ranges should be considered.

If you want to define a fixed price rate (\$5.00 as opposed to 5%) first select a shop configuration. Then you will be able to select the configuration currency from the dropdown. However, this is taken into account only on this particular shop configuration and for other currencies you will need to set up separate shop configurations and separate tax rates.

Tax Classes

Several tax rates can be grouped into an individual tax class, sorted and then assigned to each product. If you choose "tax included", it will be deducted from the price of the product (as is common in European stores), and will not be applied on checkout (for example, to a specific country in the billing address).

Shipping Methods

With shipping methods, you can add the cost of shipping within the order process. This allows you to set up multiple shipping methods and rates for different countries/regions at once. For most basic cases you can use "Flat Rate Shipping", although there are other specific modules available for various shipping carriers such as UPS.



If items in the cart do not require shipping (for example, a downloadable product), then the shipping address and shipping options will not appear in the checkout process.

Payment Methods

Payment methods define how people are able to pay for their purchases in the checkout process. Payment types are organized into several modules, each of which has their own characteristics.

Cash

The cash module is used for all payments that are not automated in the system. This includes invoice and payment in advance. This module is useful for times when you want to collect order information and store it for billing at a later date, but not conduct an immediate transaction.



Other Payment Modules

All other payment modules always refer to a provider, known as the Payment Provider. The Payment Provider will define which payment options (eg credit cards) are available. These modules will allow you to enter specific account and technical information such as API passwords / access codes.



Attributes

You can define different attributes for products, and define their database field types. It is similar to Contao's Form Generator module, only here we are creating additional custom fields to be entered on each product. If you want to define product variants such as size and/or color, then you will need to set up custom attributes. These custom attributes will get automatically added to the product DCA, so they do not need to be hard-coded into the application.

Authorize.Net

The most important option in the attributes is "is used for variants". Check this box if this attribute should be applied as a variant option. You can also define your own fields, which are not based on variants, such as a text field for the ISBN number for books.

Keep in mind that new attributes are - apart from variant options - not automatically displayed in the front end! You will need to edit the listing and/or reader template, and add the appropriate variable in the desired position.

Product Types

Product types are meant to be used for categorization, access control and configuration for different products.

Overview

For each product type you can select your own lists and detail templates. In this way, two different item types represent different ways of displaying a product and its information. For example, you may have an attribute for books' such as an ISBN number that you do not necessarily want displaying on T-shirt products.

Languages

You have the ability to define whether multiple languages will be recognized for product attributes. Typically, you will set up a shop with each product type the same language, but it can also be different if you have multiple stores on a single installation. For more information on managing the languages per product, read the chapter "Product Management".

Attributes

The base installation of isotope eCommerce already includes the most important standard attributes that are typically needed for the shop to operate normally. But since not all global attributes are needed for each product, this can be configured in the product type.

The CheckBox Wizard will display all known attributes according to their legend groups. You can add attributes to your product type and sort them within each legend group using the up/down arrows. Some fields are mandatory and will not be able to be deselected as they are required for the system to function properly.

Variants

If your product type has variant attributes, you can enable those in the product type as well. Select the attributes for variants which differ from the base product (eg price). Attributes that are not selected in the variants section are not available for editing on a variant product and will be inherited from the parent product.

Note: In isotope eCommerce a variant is a sub-product, which inherits most of the information (eg description) from the base product, but instead has individual attributes (eg price) which are different.

Downloads

If you want to offer downloads, activate it in the product type. For more information on handling downloaded products, see the chapter "Product Management".

Permissions per Product Type

You can choose to allow individual product types in the user groups preferences and on individual users. Here you can restrict access so that individual users can only manage certain product types, so that if you have several product managers in the backend they can each be assigned their own editable product type so that one cannot see the products of the other.

Frontend Setup

Much like other Contao extensions, Isotope has several modules that are used on the frontend for things like products, shopping cart, checkout, etc. As with other setups we use lister and detail/reader modules for the display of products, and the process of adding the cart and checkout modules is similar.

Your site structure should contain at least some of the following pages:

- Products
 - Category 1
 - Category 2
 - etc...
- Product Details/Reader (hidden from navigation)
- Cart
- Checkout
 - Order Completed (hidden from navigation)

Product Listing Module

The Product List module shows all of the current page (and / or depending on the configuration, its sub-) assigned products. The most important setting in this module is the "Product reader jump to page" where you will select your Product Details page from the site structure. It is best to place this module in a page layout because it will likely be included in all store listing pages. Alternatively, you can always use it in an article/content element.

Product Details Module

This module is required to display the details of a product. Place this module on the "Product Details" page.

Shopping Cart Module

The shopping cart module serves two purposes. By selecting the cart-mini template you can create a tiny cart for products on the side column on every page. You will need the cart-full template for the primary "Shopping Cart" page in your site structure. Again, you should define the redirect pages according to your page structure.

Checkout Module

The Checkout Module is used for the entire ordering process. Here you choose which payment and shipping modules are available to the customer, whether a member must be registered and which e-mail template should be sent on a completed order. Place this module on the appropriate "Checkout" page.

Other Modules

The four frontend modules described above are sufficient in principle for creating a basic Isotope eCommerce shop. Of course, depending on customer requirements there may be a need for more modules. For example, managing a registered member's addresses with the "Address Book" module, or referencing a customer's "Order History" with their previous orders.

Product Management

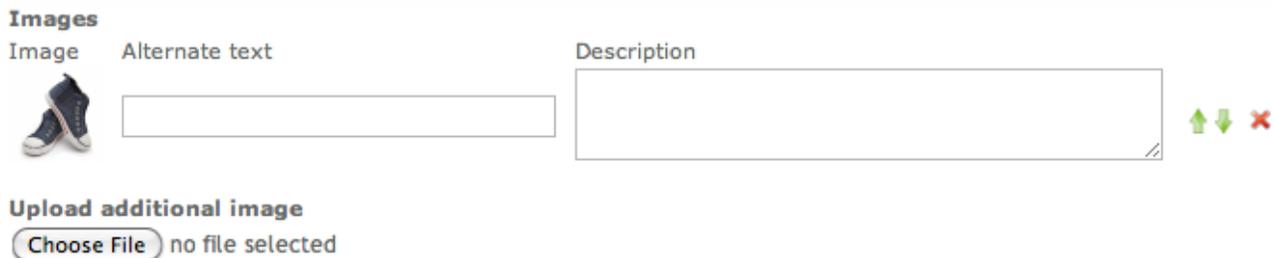
After you've done the basic setup of the pages and modules, you can focus on the products. Depending on the product type you choose, different attribute fields will be offered for editing.

Each product can be assigned to several categories, and categories correspond to the site structure. For example you can define that a product is displayed both on the "T-shirts" and on the Home Page. The attributes that are displayed in the front end will depend on which list and detail template you are using. Only the default attributes are displayed automatically.

Product Photos

Isotope eCommerce has its own image management system, which does not correspond to the Contao standard. Product images are not uploaded through the file manager, but directly within the product itself. The main reason for this special method is that if you had 1000 products with 5 images each, there would be over 5000 pictures in the file management. This would make standard file management almost useless.

Files are stored in the root directory /isotope/. If you upload a file, it is copied into the appropriate directory. If you upload the same image for multiple products, it will be stored only once, provided they have each used the same filename. Different files with the same file names are automatically detected and uniquely named.



The screenshot shows a user interface for managing product images. It features a table with three columns: 'Image', 'Alternate text', and 'Description'. The 'Image' column contains a small thumbnail of a pair of sneakers. The 'Alternate text' and 'Description' columns are empty text input fields. To the right of the 'Description' field are three icons: a green up arrow, a green down arrow, and a red X. Below the table, there is a section titled 'Upload additional image' with a 'Choose File' button and the text 'no file selected'.

To upload a new picture, select the file and save the product. After successfully uploading, a preview of the image is displayed directly in the product, and next to it you can enter its alternative text and a description. For more pictures, you can click on the arrows to the right and change their order, and the top image is used as the main image of each product.

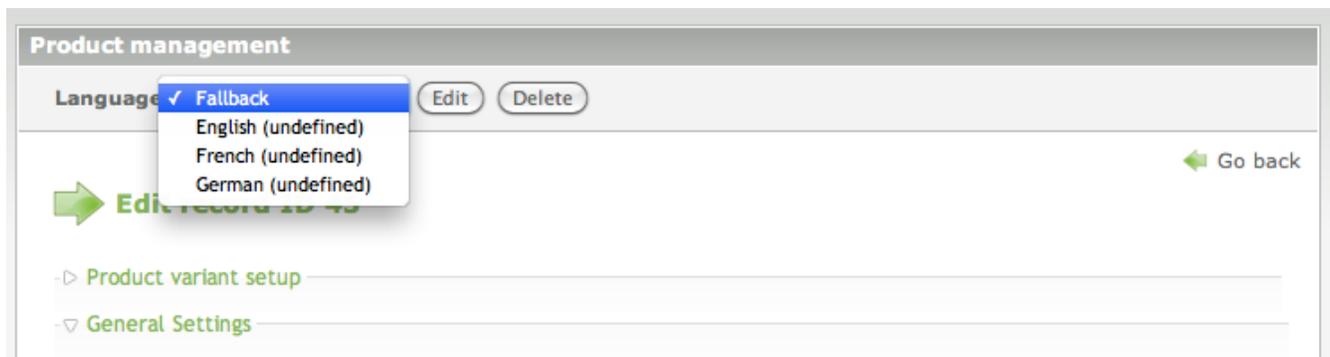
Importing assets

In the main product management area, you will see a Tools menu, where you can select "Import assets". Using this function, you can store images which are already on the system (for example, have been uploaded via FTP) and assign them to the corresponding products. The file name must either begin with the SKU/Item Number of the product, or else be located in an appropriately named subfolder.

Note that this feature is still in the testing phase and has not been sufficiently tested. It will not delete any data, but you may find that not all images are properly assigned.

Languages

Unfortunately, the standard method for using multiple languages in Contao - creating multiple versions of content/products - is not possible in the case of products. Products could have a stock number which is identical across all languages, and would require a lot of duplicate content. For this reason we have developed a different solution. If you have activated multiple languages in your product type you will now see the following options:



When you edit a product the selection of language is offered in the upper left corner. Choose a specific language, Contao shows only those attributes which can be translated. The front end output automatically detects this and loads the translations of the corresponding fields in the display of a product.

Creating Variants

Product variants are available for appropriate product types and are added by selecting "Add Variant". With this method you can create variant products for suitable products.

Variant Generator

To simplify create the many variations, you can use the variant generator. Click on the magic wand icon and in the submenu that appears on the appropriate option. In the next screen, you can choose which option combinations are to be generated. Naturally, already existing combinations are not produced again.

Quick Edit

Immediately after generating the variants appear in the Quick Edit mode. You can also access this via the magic wand icon. The Quick-Edit mode allows basic editing options, and in each case you can configure the SKU, price and the publishing status.

Inherited Attributes

Variants may contain attributes other than those that are available in the Quick Edit mode, such as a variant product description. Since some fields are empty (and perhaps mandatory) upon generation of these variant products, there is the option "Use default value". If this hook is active, the value is automatically inherited from the parent element. The Quick Edit attributes (SKU, published and price,) cannot be inherited!

Other Features

Related Products

You can a list of products which relate to the current product for visitors to view on the frontend. Related products need to be categorized. You will first need to set up a related product category in the shop configuration, and then the related products option will be available from the magic wand menu when editing a product. Each category can only be used once per product.

To ensure clarity when a large number of products are loaded, we do not list all of the products, instead, you can search for products. In the search you can use any of the known standard fields such as item number, name and description. Then in the search results use the checkbox to add the product to list of related products.

You can then create and add the appropriate Related products module to the product detail page.

Downloads

Isotope eCommerce offers you the ability to offer paid downloads to your customers. You can add downloads on a per-product basis if the corresponding option is set in the product type. At present it is not possible to offer different downloads for product variants.

Downloadable items are available to the user after a successful order through the order history / order details modules are available on the frontend. Downloads can only be downloaded if the order status is "complete" or a "paid" date is available.

Make absolutely sure that you protect your download file in the file manager! Otherwise, users can go straight to the URL of the file and download without paying. Contao provides the ability to protect entire directories (lock icon) in the File Manager. Checking this is essential but you should also check whether it functions correctly.

Orders

All orders received will be stored in Isotope eCommerce's database and clearly displayed in the backend:

April 2010						
5	2010-04-27 13:45	Fred Bliss	\$35.00	Complete	/	   
3	2010-04-24 12:57	Winans Creative	\$12.02	Processing	/	   
2	2010-04-24 11:45	New Company	\$12.02	Pending	/	   

Item editing

Items within orders cannot be changed at this time. When editing an order, you can only change basic order details such as order status and payment and shipping date.

Permissions

Every order is saved depending on which store configuration was active during the ordering process. Backend users can only see the orders which they have access to within the appropriate store configuration.