

GETTING STARTED

V 1.5
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Welcome to Online Business Console

Hey there!

Welcome to Online Business Console, and thanks for signing up. I'm looking forward to helping you achieve your goals with your online business.

I've written this guide to help you, our new customers who have just started with Online Business Console. The idea is to help you find your way around and get on the road to building and managing your online business even faster.

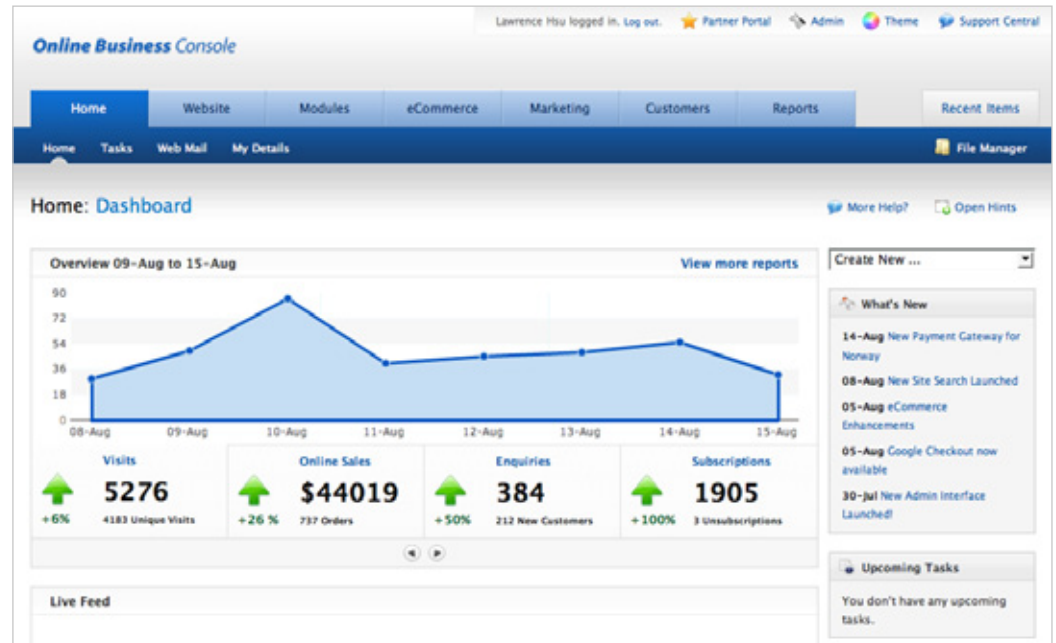
Please note that this guide applies to the All-in-One Solution, and while some parts may differ for other plans, the general workflow and usage will remain the same - so it will still be of help, no matter which plan you signed on. Simply skip to the relevant sections.

I hope this guide helps you!

The Dashboard

Every time you log in, the first thing you'll see your dashboard. Your dashboard gives you a set of key charts that give you a quick overview of exactly how your business is tracking. You can see your visitors, online sales, web enquiries and list subscriptions (Figure 1).

Figure 1
Dashboard,
overview.



Click the arrow underneath the first set of graphs and you'll also see forum activity (Figure 2), bookings made, secure zone logins and affiliate referrals.












Figure 2
Graph of Forum
Activity



The Dashboard

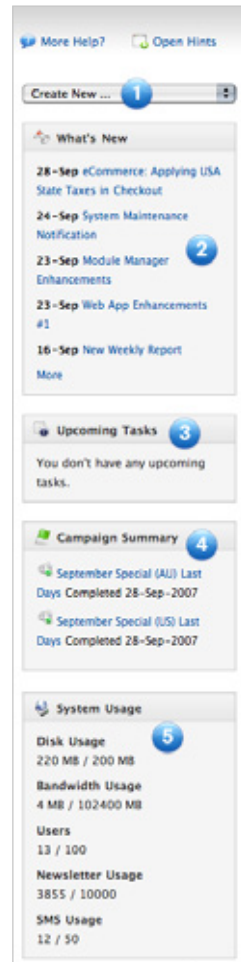
Below the graphs you can see your Live Feed (Figure 3). This is a live account of the interactions your customers are having with your online business. You'll be able to see everything from web form enquiries through to online orders, and even comments, subscriptions and more. This is an important part of your online business, and it's worth keeping an eye on!

Figure 3
Live Feed

Live Feed	
10-Aug	
	Marcus Stadener opened July Newsletter campaign. 10-Aug 10:25 AM
	Michael Blanchard quote for Online Shop 10-Aug-2007 10:05 AM. 10-Aug 10:08 AM
	Jennifer Natale submitted enquiry form Tell a Friend. 10-Aug 09:33 AM
09-Aug	
	Matthew Mousa clicked on July Newsletter campaign Link. 09-Aug 11:55 PM
	Matthew Mousa opened July Newsletter campaign. 09-Aug 11:54 PM
	stephen murphy opted-in. 09-Aug 10:15 PM
	stephen murphy submitted enquiry form Tell a Friend. 09-Aug 10:13 PM
	Sue Parkin submitted enquiry form Contact Us Form. 09-Aug 09:57 PM
	mark redmon opted-in. 09-Aug 09:50 PM
	DAMARIS DE GONZALEZ made a purchase Online Shop 09-Aug-2007 08:35 PM. 09-Aug 09:03 PM
	Alfred Fleming made a purchase Online Shop 09-Aug-2007 07:46 PM. 09-Aug 07:52 PM

The Dashboard

Figure 4
Dashboard Sidebar



1. On the top right of the screen you'll notice our quick action drop down, which you can use to quickly create new items, like blog posts, web pages, products and campaigns.
2. Below that is the news panel. Keep an eye on this one for news and announcements about the system.
3. All the tasks that you've recorded in the contact management side of the system are listed under Upcoming Tasks.
4. The Campaign Summary gives you a quick overview of all the email marketing campaigns that are going out or scheduled to go out.
5. System Usage tells you how close you are to your allocated limits in terms of disk space, bandwidth usage, users and so on.
6. Finally, at the top of the screen you've got dynamic help in the blue box, in case you get stuck - so keep your eye on that.

The Dashboard

Figure 5
System Navigation



See Figure 5 above.

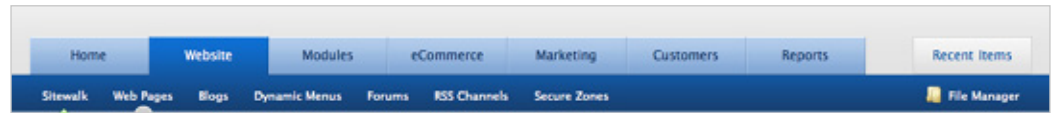
1. The *Website* tab is for managing your website.
2. *Modules* gives you access to content items that you can add to web pages.
3. *eCommerce* gives you access to everything you need to manage your online shop.
4. The *Marketing* tab gives you access to the system's email marketing capabilities.
5. Use the *Customers* tab to navigate through your integrated customer database, including your customer's web enquiries, known as cases, or their online shop orders.
6. The *Reporting* tab gives you a comprehensive view of all the key metrics you need to analyze and improve your online business.

Your Website

Managing your website with Sitewalk

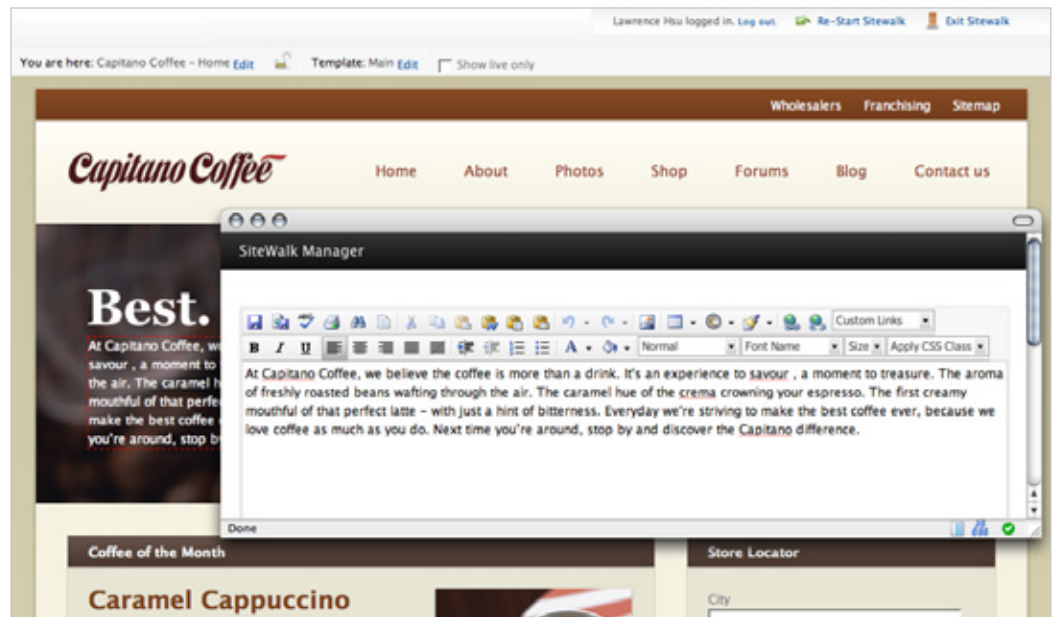
Sitewalk is a quick and easy way to navigate your site like your customers do, making changes as you go.

Figure 6
Sitewalk



You can click on a region to edit it (Figure 7), then make changes using the online editor. Simply click save when you're done.

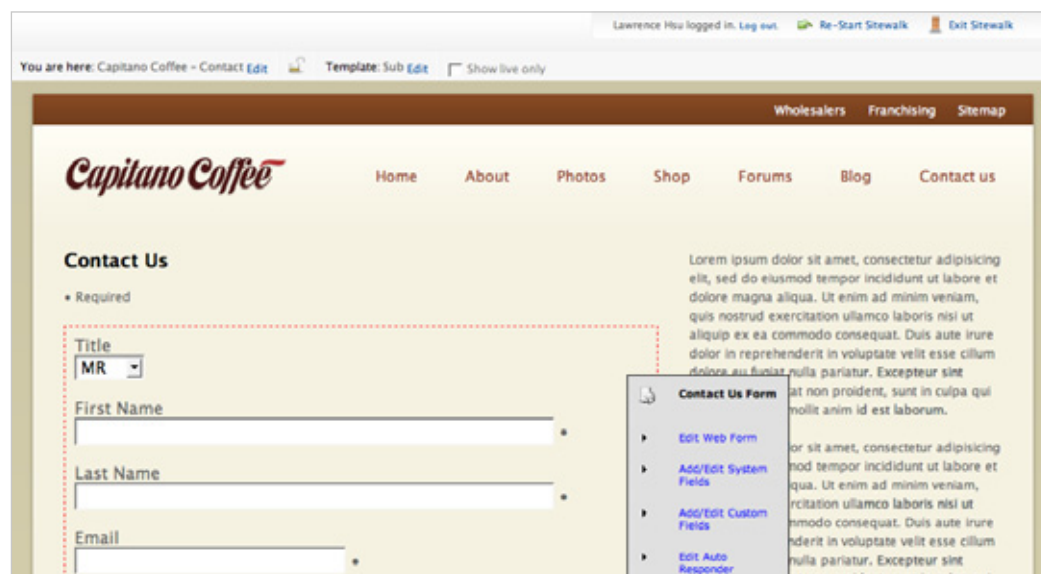
Figure 7
Sitewalk Manager



Sitewalk also recognizes the Modules in your pages so that you can jump straight to edit those Modules (Figure 8).

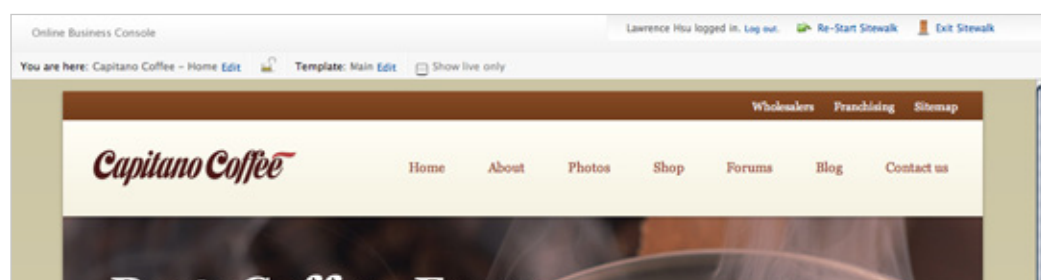
Your Website

Figure 8
Sitewalk recognizes
Modules



In the top right hand corner of the screen, click exit to leave Sitewalk once you're done editing (Figure 9).

Figure 9
Exit Sitewalk

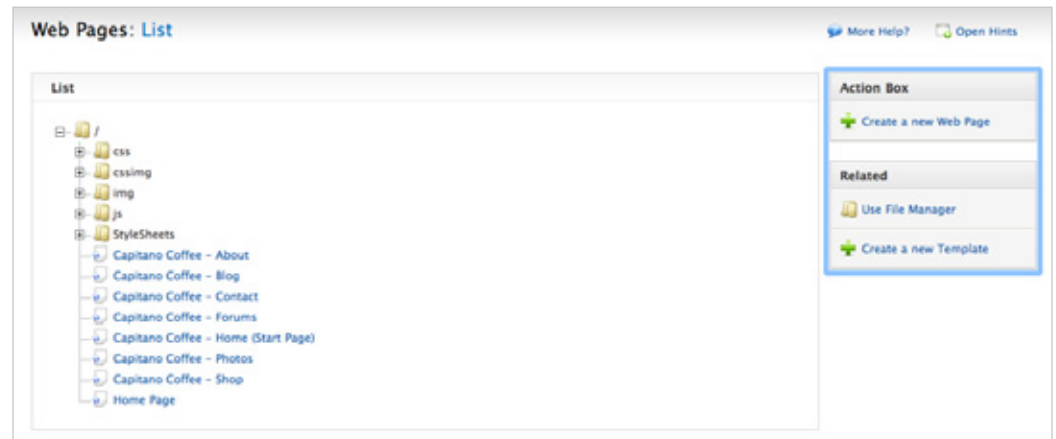


Your Website

Managing Web Pages

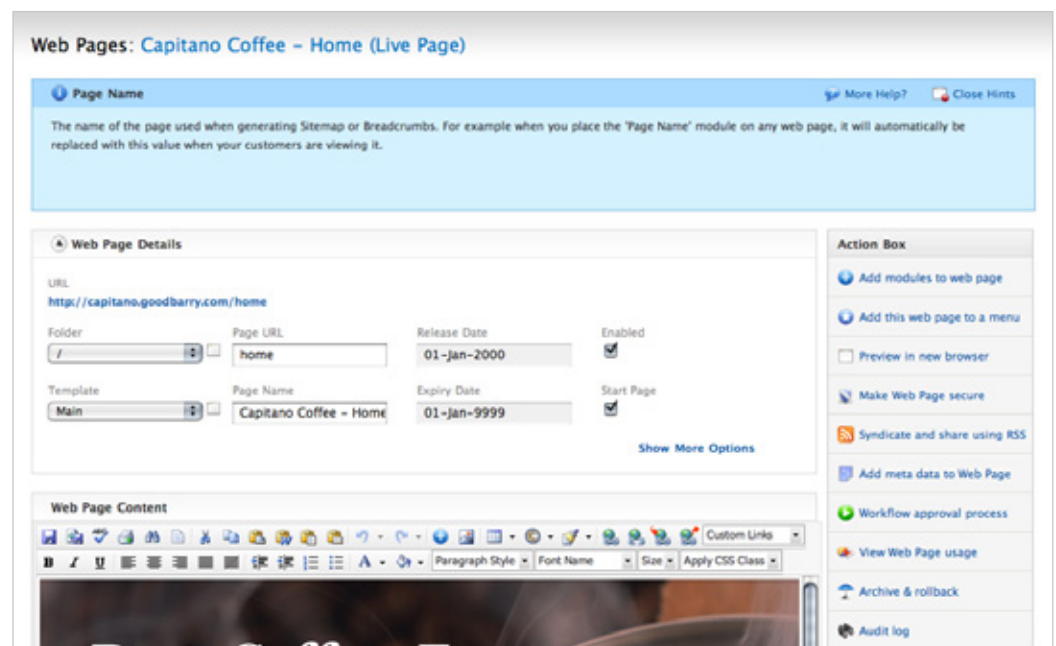
To manage your web pages, go to *Web Pages* under *Website*, where you're shown a list of pages. Simply click on a web page to edit it (Figure 10).

Figure 10
Web Page List



Your page details are above your editor, where you can set the page names, URLs and more. As you move your mouse over each box, the help in the blue hints box will change to help you with relevant tips (Figure 11).

Figure 11
Web Page Details
with blue hint box



Your Website

When you edit a webpage, you've got a word-processor-like editor (Figure 12) to edit your pages. With the editor you can:

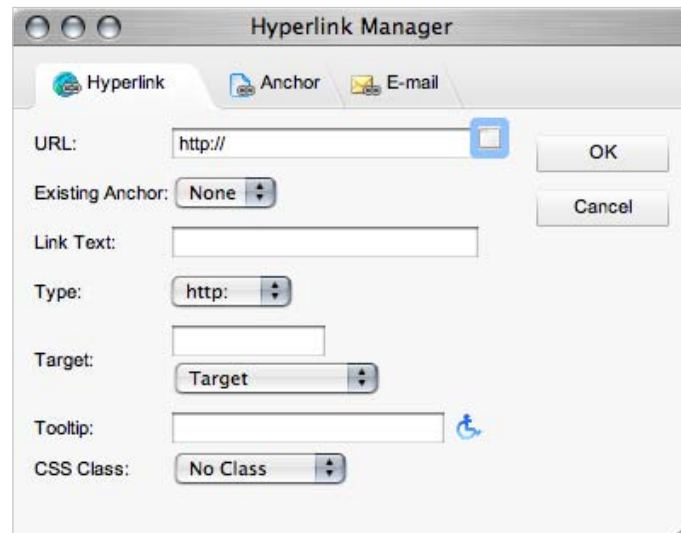
1. Make text bold, italic or underline.
2. Create Bullet points or change indentation
3. Create a table
4. Add images
5. Create links to other pages in your site

Figure 12
Editor Toolbar



You can also add links to other items in your site, like products, catalogues, blogs and forums and more. To do so, after opening the Hyperlink Manager (Figure 13) simply click on the white square next the URL text entry box.

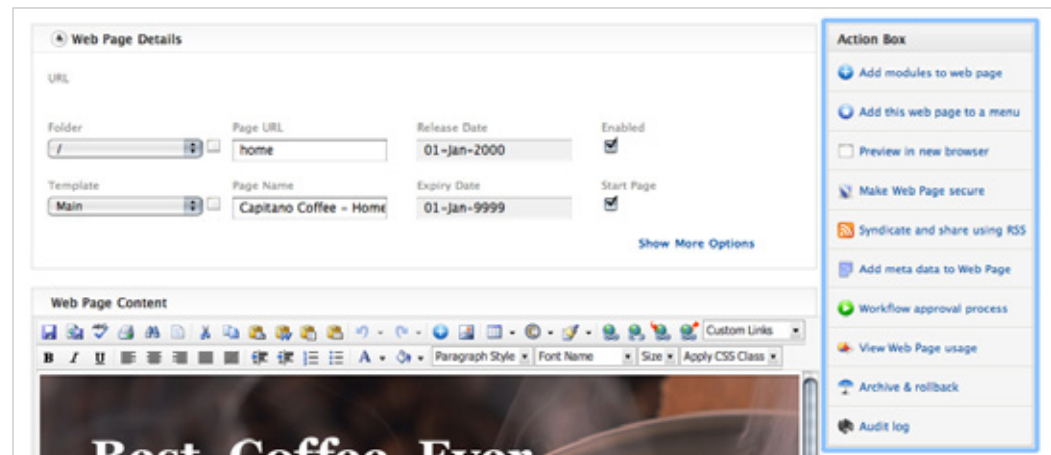
Figure 13
Hyperlink Manager



Your Website

On your right you'll see your action box again (Figure 14), this time with a much wider range of actions to take. Note that you can preview your pages, make pages secure, syndicate the page on RSS, or rollback to previous versions if you've made a mistake. You can also add a range of modules to your page via the Module Manager.

Figure 14
Action Box on the right of Web Page Details



Introducing Modules and adding Modules to Pages

Modules are created under the *Modules* tab (Figure 15), and enable you to add functionality to your web pages and your web site.

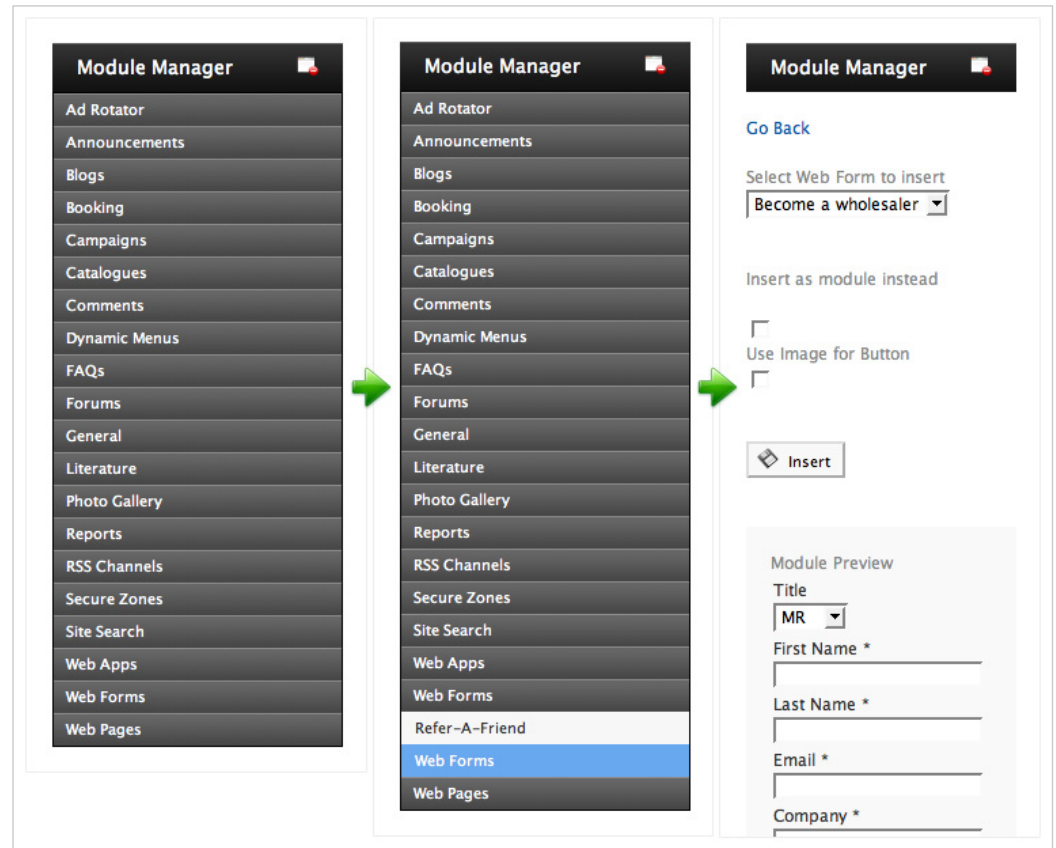
Figure 15
Modules Tab



Let's look at adding a web form to a page using the Module Manager (Figure 16). First click on the module manager, then select the web form we want to use. You're given a quick preview of the form, and if we're happy we choose where to insert it in the editor, then click *insert*.

Your Website

Figure 16
Adding web form
using Module
Manager



Managing Files

Let's look at how you can upload files into the system like images, CSS, flash files and more using the File Manager (Figure 17).

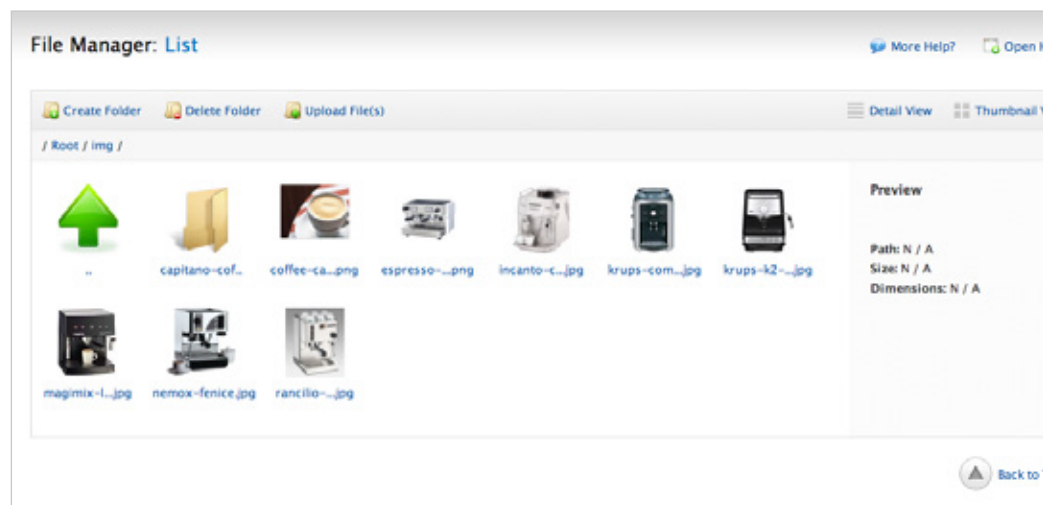
Figure 17
File Manager



You can see your existing files and folders listed, or click on thumbnail view to get a thumbnail view of your files (Figure 18).

Your Website

Figure 18
File Manager
Thumbnail View



You can click on a file for a closer look (Figure 19). Click here to download, resize or delete the file. If you're tech savvy with CSS, you can also edit your CSS files in place by clicking on the file and then clicking *edit*.

Figure 19
Image Preview and
Details

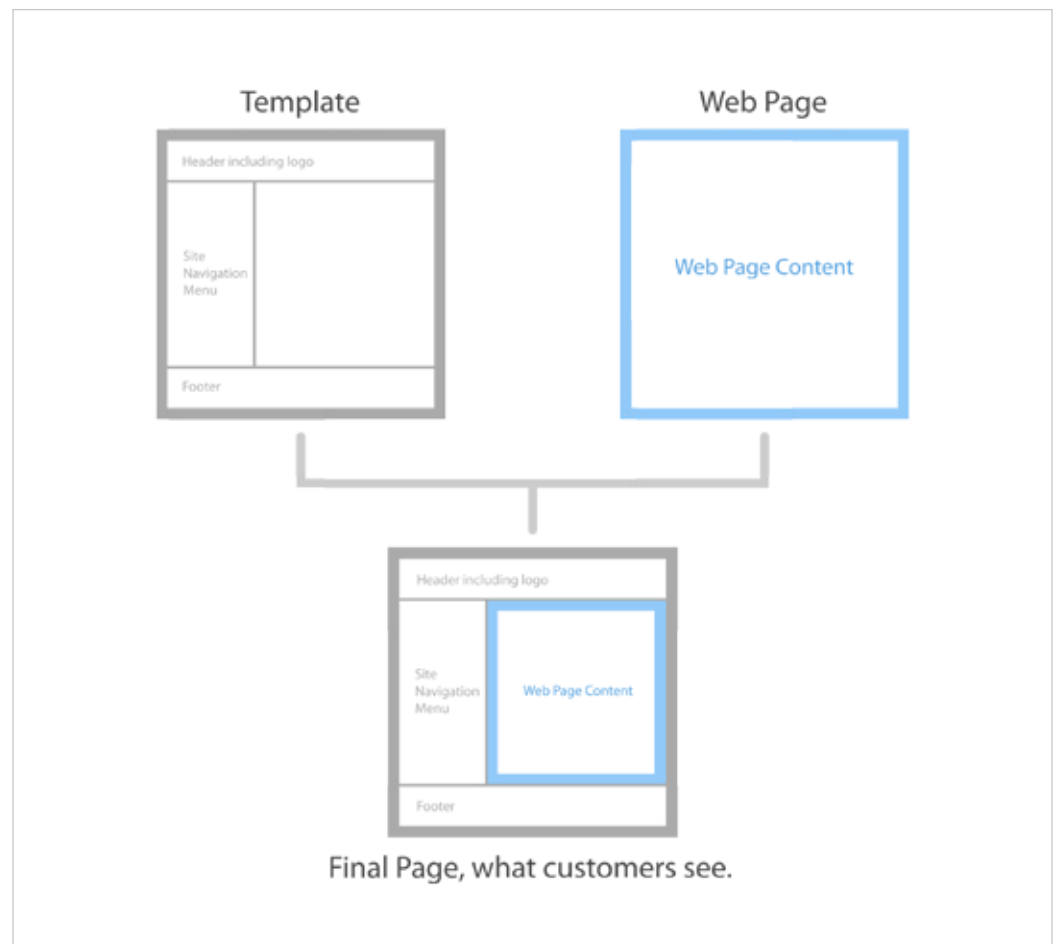


Your Website

Managing Your Site's Look and Feel - Working with Templates

Templates hold the common parts of your site that don't change as you move through your different pages. So your website's headers, footers and navigation elements would usually be in a template. Then, the content that's specific to each page goes in the web page (Figure 20).

Figure 20
How Templates
work

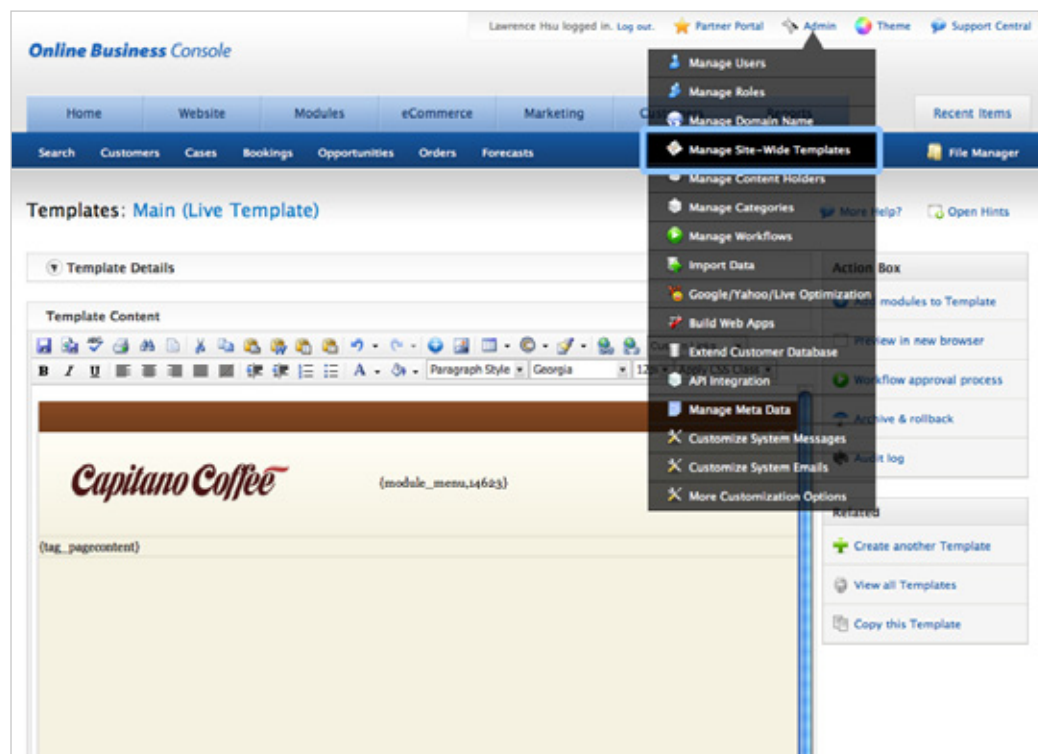


Here's a template (Figure 21), accessed via *Administration->SiteWide Templates*. You can see the header elements and footer elements are here, with a single `{tag_pagecontent}` in the middle of the page. When the system displays a page, it replaces `{tag_pagecontent}` with what's in the web page.

When editing a template you've got a lot of the same options as for web pages.

Your Website

Figure 21
Editing a template

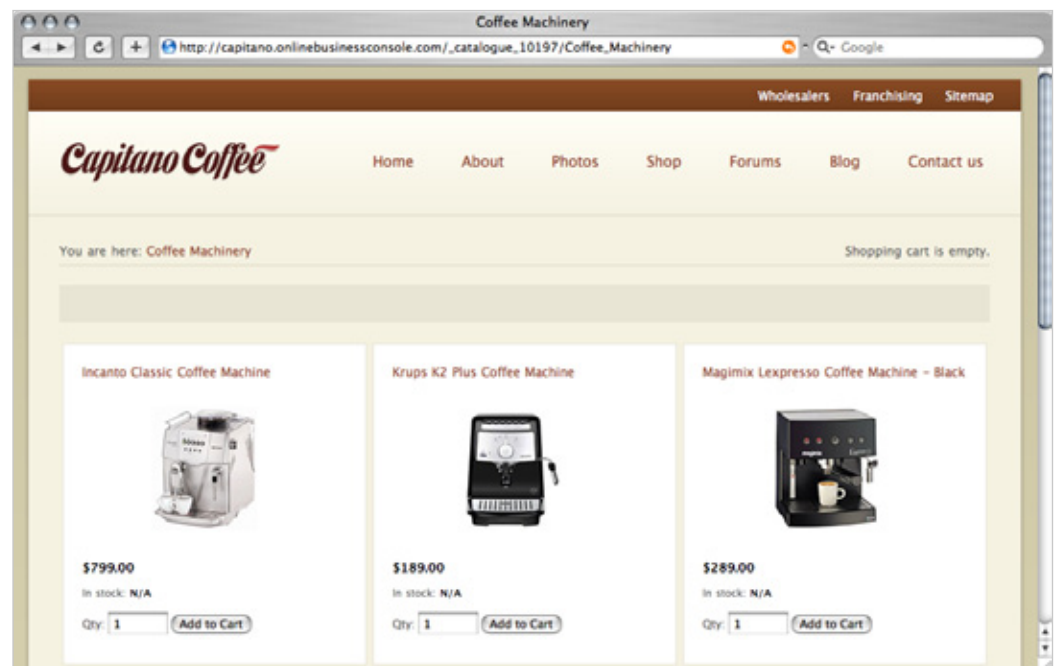


Your Online Shop

You manage your online shop by adding products to catalogues. Catalogues not only help you group and manage your products, they are like special web pages that you can link to that run your online shop.

Note that when you click on a catalogue, you go straight to the catalogue view, which is a special page managed by the system, not a web page in the strict sense (Figure 22).

Figure 22
Coffee Machinery
Catalogue



When editing a catalogue you can choose a template to give a consistent look and feel for each catalogue (Figure 23-A). You can either add products from here in the action box (Figure 23-B), or you can add products to catalogues from the product view.

You can add a link to this catalogue to one of your web pages (Figure 23-C), or you can make the catalogue secure/password only (Figure 23-D).

Your Online Shop

Figure 23
Catalogue Details
Page

The screenshot shows the 'Catalogue Details' page for 'Coffee Machinery'. The page has a header with 'Catalogues: Coffee Machinery' and links for 'More Help?' and 'Open Hints'. The main content area is divided into two sections: 'Catalogue Details' and 'Wizard'. The 'Catalogue Details' section contains fields for 'Catalogue Name' (Coffee Machinery), 'Image' (/img/espresso-machine), 'Release Date' (14-Sep-2007), 'Enabled' (checked), 'Template' (Sub), 'Weighting', 'Expiry Date' (01-Jan-9999), 'Include Products in XML Feed' (checked), 'Parent Catalogue' (Root), and 'Show Product Prices?' (Everyone). There are 'Save', 'Delete', and 'Next' buttons at the bottom. The 'Wizard' section on the right shows a progress bar with '1 Catalogue Details' and '2 Add products to this Catalogue'. Below the wizard is an 'Action Box' with options like 'Preview in new browser', 'Add Catalogue to a web page', 'Add this Catalogue to a menu', and 'Make Catalogue secure'.

Managing Products

Products are the items you actually sell online (Figure 24).

1. Give your product a name
2. Add some images - small image for the thumbnail view, a large image for the detailed view.
3. You can make this an e-product and upload your product.
4. You can set up inventory control, by clicking "show more options".
5. Give your product a detailed description here in the editor.
6. Once you're done, preview the product.
7. You can then add the product to a catalogue, or
8. You can insert this product directly onto a web page.

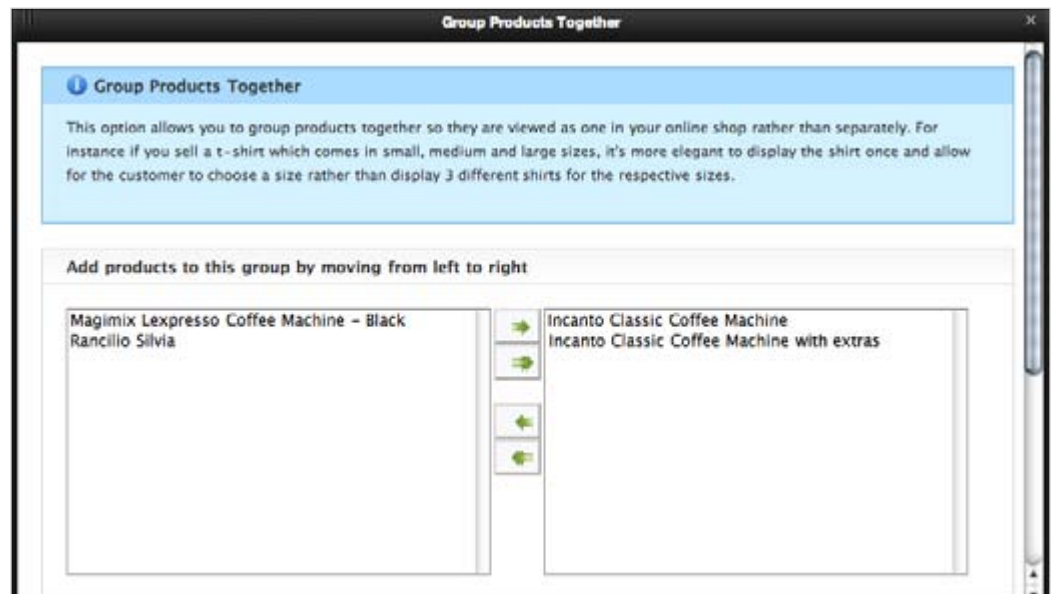
Figure 24
Product Details
Page

The screenshot shows the 'Product Details' page for 'Incanto Classic Coffee Machine'. The page has a header with 'Products: Incanto Classic Coffee Machine' and links for 'More Help?' and 'Open Hints'. The main content area is divided into three sections: 'Product Details', 'Electronic Product', and 'Product Description'. The 'Product Details' section contains fields for 'Product Name' (Incanto Classic Coffee Machine), 'Weighting', 'Release Date' (17-Sep-2007), 'Enabled' (checked), 'Small Image' (/img/incanto-classic-th), 'Large Image' (/img/incanto-classic.jpg), 'Expiry Date' (01-Jan-9999), and 'On Sale?' (unchecked). There is a 'Show More Options' button. The 'Electronic Product' section has a checkbox for 'This is an E-Product'. The 'Product Description' section has a rich text editor with a toolbar and a text area containing a detailed description of the Incanto Rapid Steam S85. The 'Wizard' section on the right shows a progress bar with '1 Product Details', '2 Add Prices to this Product', and '3 Add this Product to a Catalogue'. Below the wizard is an 'Action Box' with options like 'Preview Product', 'Add this Product to a web page', 'Group Products together', 'Create upsell / crosssell', 'Create attribute groups', 'Add Poplet images', 'View Product usage', and 'Audit log'. There is also a 'Related' section with a 'Create another Product' button.

Your Online Shop

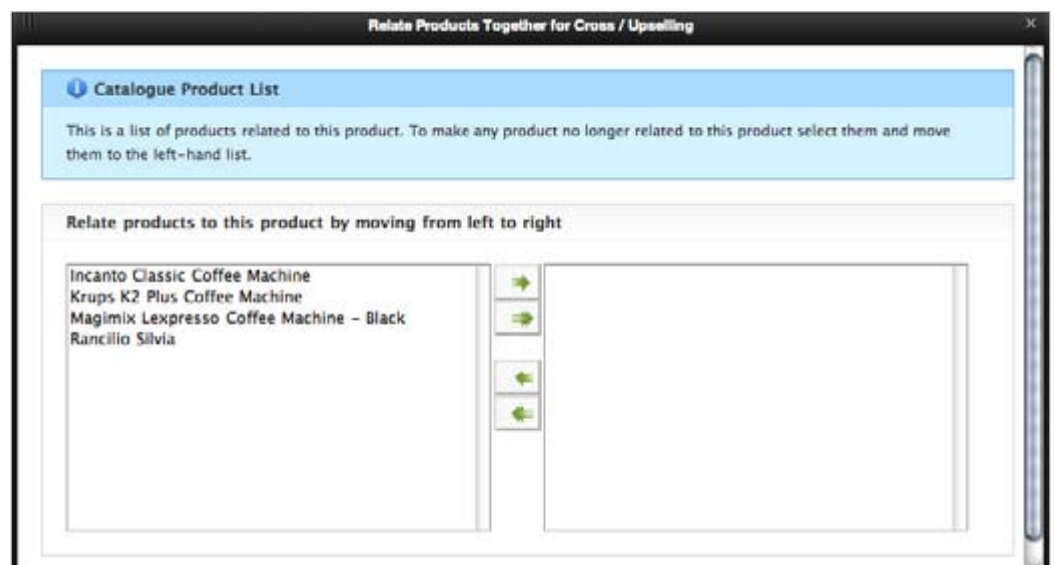
9. You can group the product with other products (Figure 25). Grouping is used to link products that are almost the same, but differ in small ways - for example, for a t-shirt you would group the Large shirt with the small size and medium size. Then people could choose which size they want when viewing the product.

Figure 25
Grouping products



Create related products via Upsell/cross-selling relationships (Figure 26). This allows you to suggest or upsell related products to your customers.

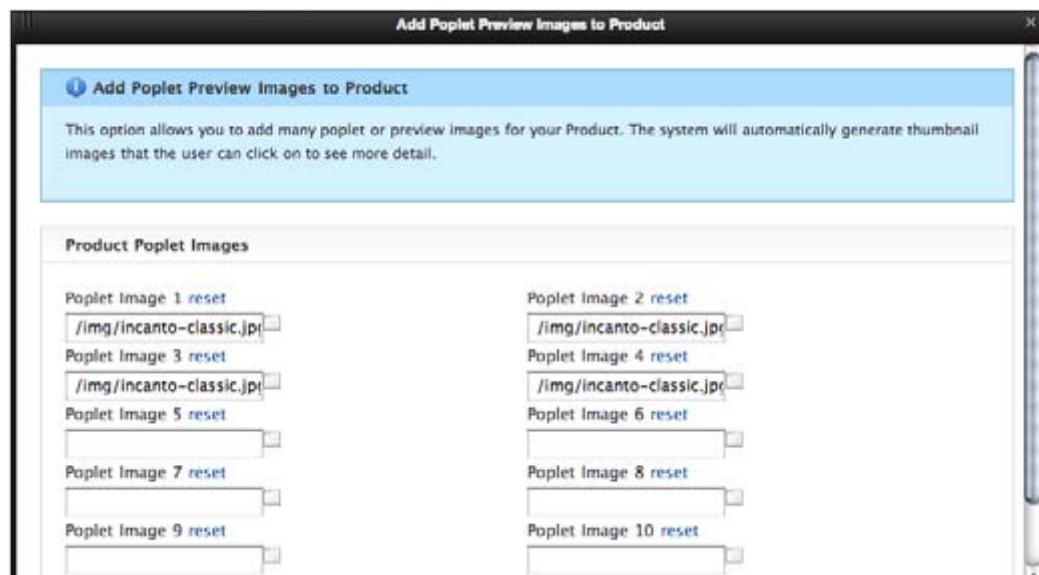
Figure 26
Relating Products
for Cross/Upselling



Your Online Shop

You can also create a mini photo gallery for each product, using poplets (Figure 27).

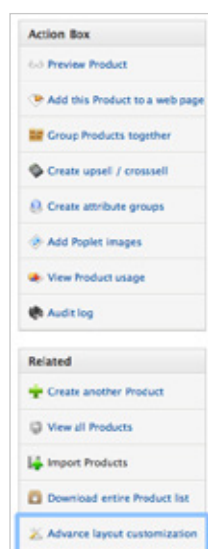
Figure 27
Product Poplet
Images



Customizing Your Shop

Your shop has already been set up and is ready to go with our default layouts. However, simply click on *Advanced Layout Customization* and you can customize those layouts to make it look exactly how you want it to (Figure 28).

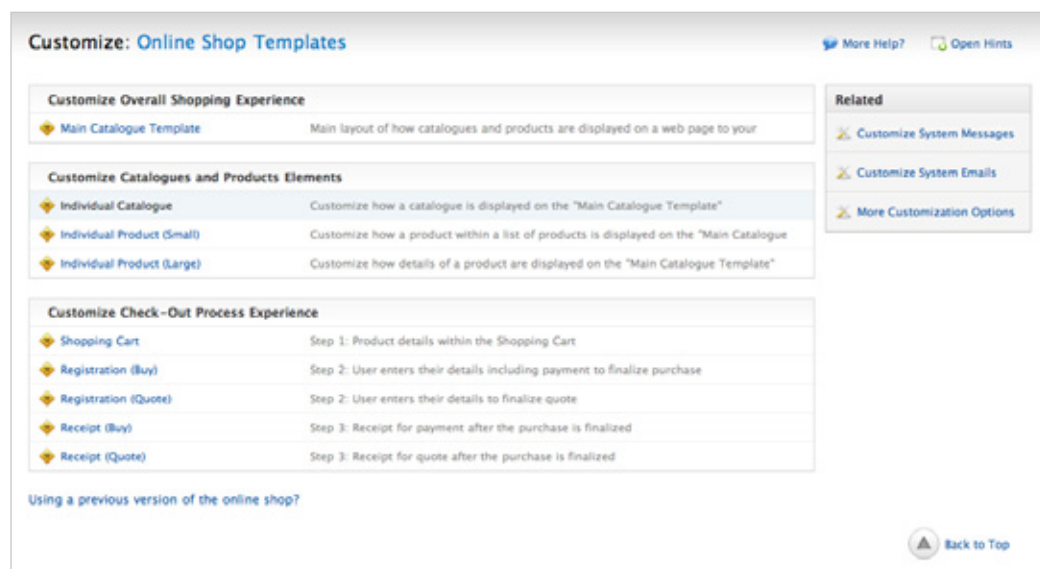
Figure 28
Click on
*Advanced Layout
Customization*



Your Online Shop

Now you've got access the complete range of your catalogue layouts, product layouts, checkout steps and more.

Figure 27
Online Shop
Templates

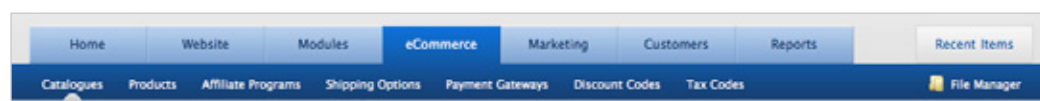


Setting up Your Online Shop for Business

Finally, you need to set up the admin side of your online shop.

Under the *eCommerce* tab (Figure 28) you'll find *affiliate programs* to drive traffic and track results, *shipping options* for shipping and handling charges, *payment gateways* to collect real-time payments, *discount codes* for promotions and *tax codes* to charge the right amounts of tax to your customers!

Figure 28
eCommerce tab



Email Marketing

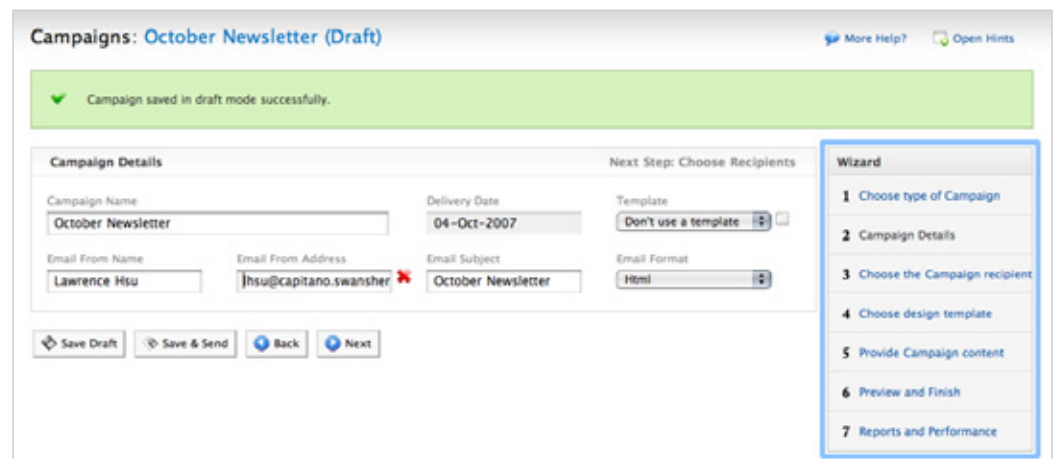
Let's take a quick look at email marketing with Online Business Console. First off we get started by creating some lists (Figure 29). You create lists to define the audience for your marketing. Since we've got an integrated customer database, your lists are simply a way to create sub groups within your main database. By the way, if you delete a list, you don't delete the people in the list!

Figure 29
Lists



Now let's create some email marketing campaigns. Click on campaigns and you'll see a list of all your campaigns. Whenever you create a campaign you get an easy 7 step wizard which takes you through every step of setting up your campaign (Figure 30).

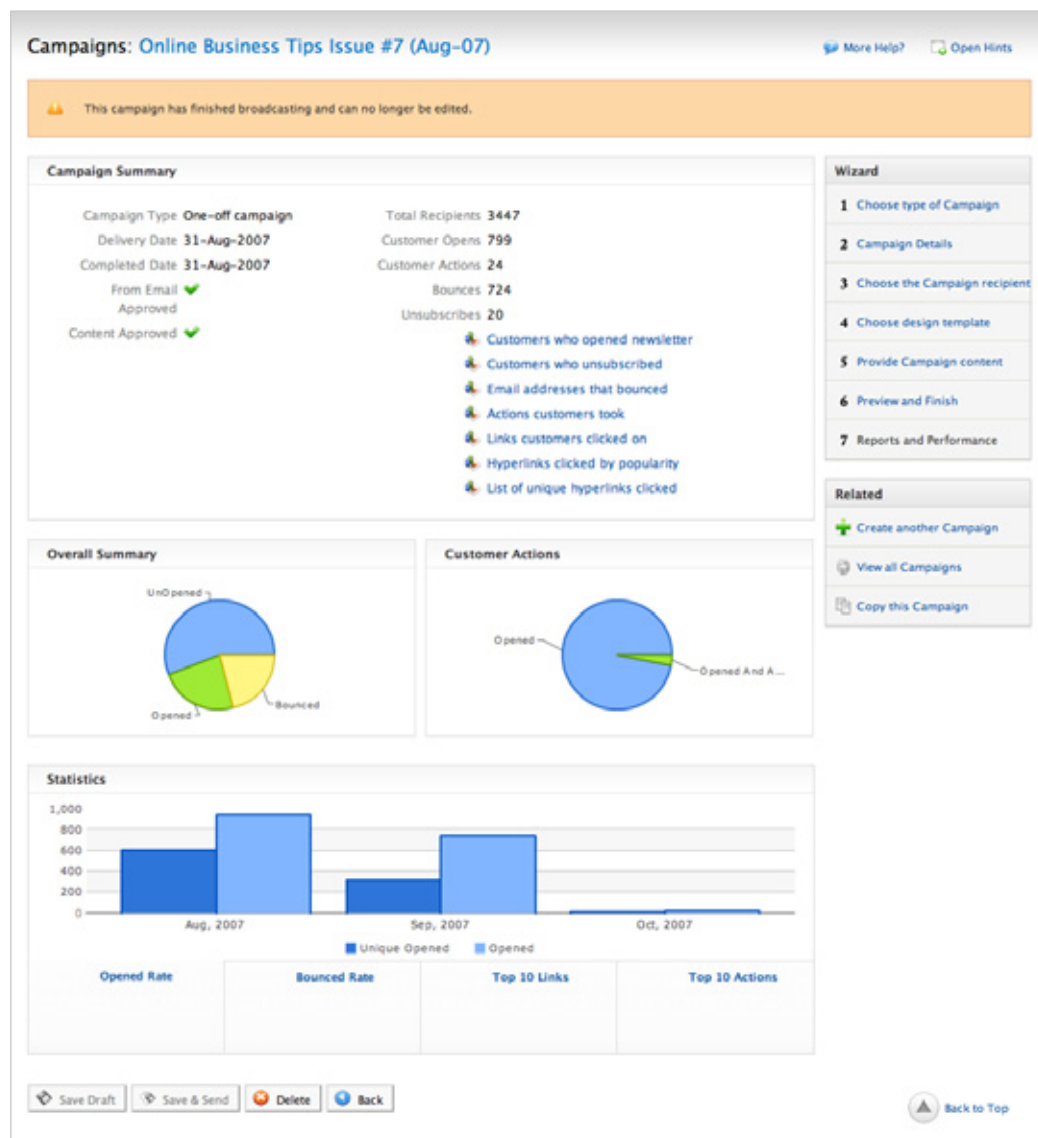
Figure 30
Creating a Campaign



Once you've set up your campaign you've got access to a range of in depth reports (Figure 31) to help you track and improve your email marketing!

Email Marketing

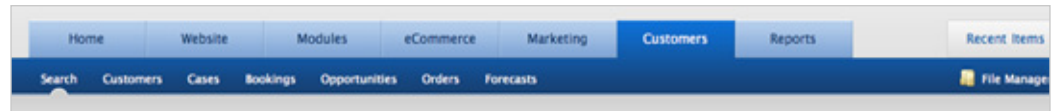
Figure 31
Campaign Report



Contact Management

The *Customers* tab gives us access to our complete customer database which is automatically growing as your customers interact with your website (Figure 32).

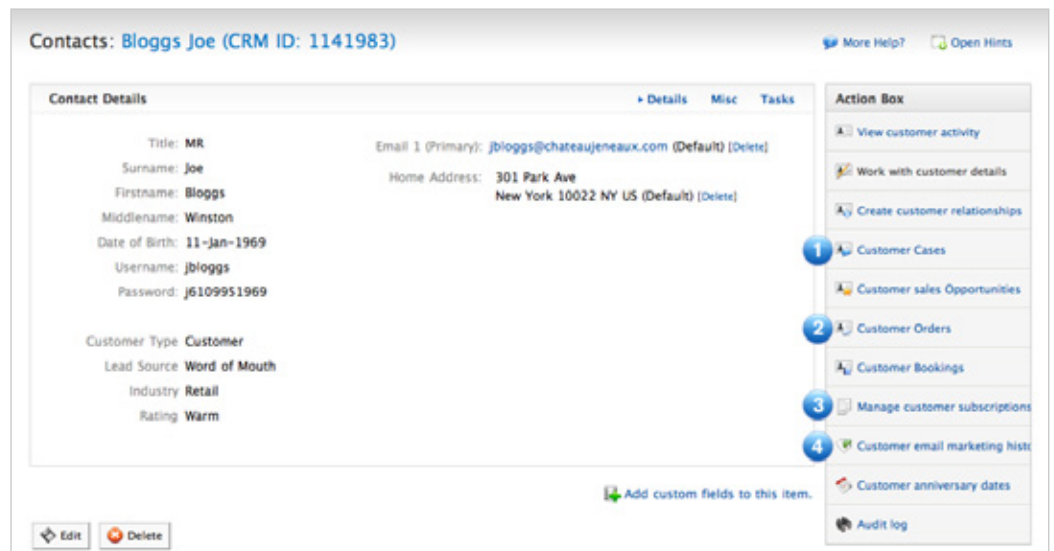
Figure 32
Customers tab



Just for fun, why not add yourself to your database to see how it works (Figure 33)?

1. You can see all past web form enquiries, called Cases.
2. Previous orders are linked to the customer record too.
3. *Subscriptions* tells you what the customer is subscribed to.
4. *Email Marketing History* to see what campaigns have been read and actioned.

Figure 33
Contact Details page



Subscriptions (Figure 34) shows the lists that the customer is in, the secure zones that they've got access to, the individualized online shop discounts they have, and affiliate programs that they're involved in.

Contact Management

Figure 34
Subscriptions

Customers: Bloggs Joe (CRM ID: 1141983) [More Help?](#) [Open Hints](#)

Subscription Type	Status
Campaign List Subscriptions	This customer is not subscribed to any campaign lists.
Secure Zone Subscriptions	This contact is not subscribed to any secure zones.
Catalogue Discount Subscriptions	This customer is not subscribed to any catalogue discounts.
Affiliate Program Subscriptions	

Action Box

- View customer activity
- Work with customer details
- Create customer relationships
- Customer Cases
- Customer sales Opportunities
- Customer Orders
- Customer Bookings
- Manage customer subscriptions
- Customer email marketing history
- Customer anniversary dates

Related

- Create a new Contact

You can drill down to see the customers email marketing history and see what newsletters have received and how the customer has reacted to them (Figure 35).

Figure 35
Email Marketing History

Broadcasts: Smith John (CRM ID: 339084) [More Help?](#) [Open Hints](#)

List	Sent on
Online Business Tips Issue #1	Sent on 31-Jan-2007 01:34:03 PM
Online Business Tips Issue #2 (Feb-07)	Sent on 28-Feb-2007 05:07:02 PM
Online Business Tips Issue #3 (Mar-07)	Sent on 30-Mar-2007 12:29:05 PM
Online Business Tips Issue #4 (Apr-07)	Sent on 02-May-2007 09:43:45 AM
Online Business Tips Issue #5 (May-07)	Sent on 31-May-2007 04:58:24 PM
Online Business Tips Issue #6 (Jun-07)	Sent on 02-Jul-2007 01:22:54 PM
Online Business Tips Issue #7 (Jul-07)	Sent on 01-Aug-2007 12:56:50 PM
Online Business Tips Issue #7 (Aug-07)	Sent on 31-Aug-2007 11:50:28 AM
Online Business Tips Issue #7 (Sep-07)	Sent on 02-Oct-2007 10:18:05 AM
Issue #007 (112 Days) Follow-Up	Sent on 12-Feb-2007 02:46:09 AM

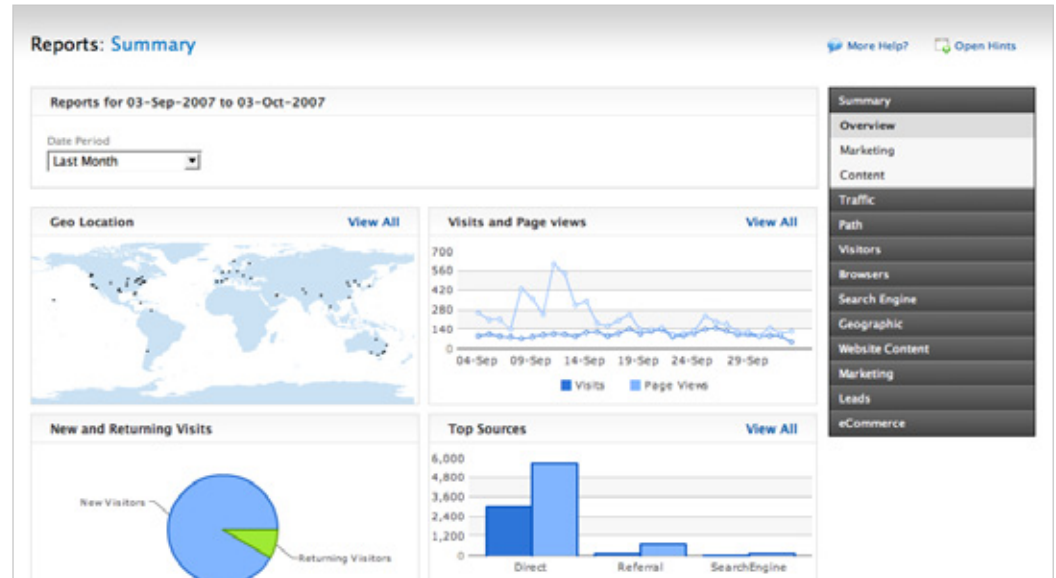
Action Box

- View customer activity
- Work with customer details
- Create customer relationships
- Customer Cases
- Customer sales Opportunities
- Customer Orders
- Customer Bookings
- Manage customer subscriptions

Reporting

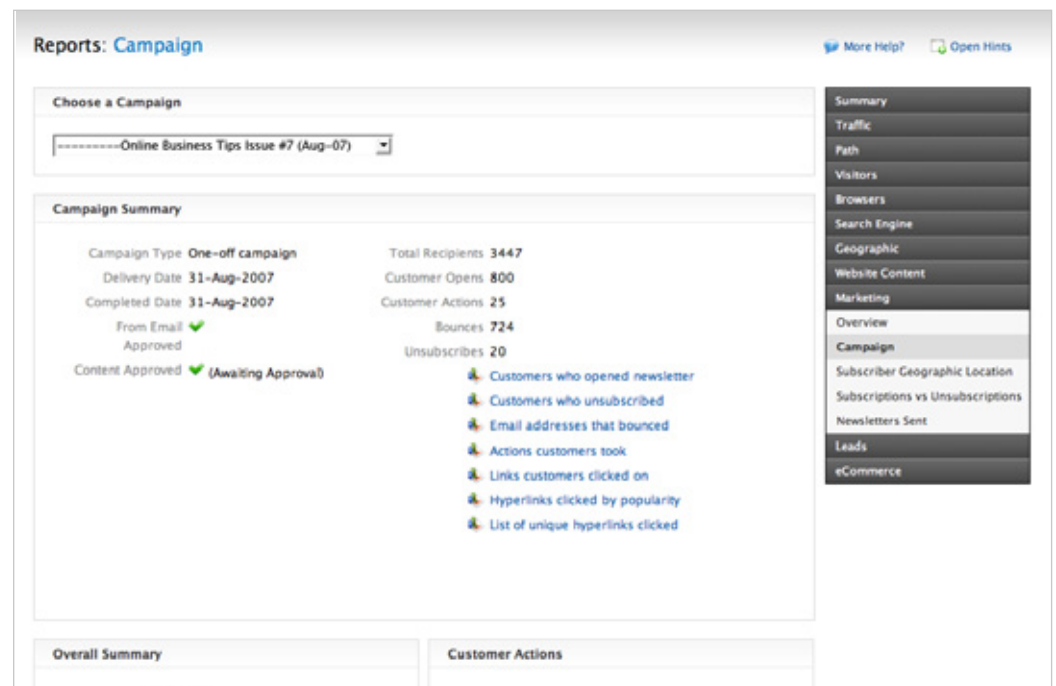
First stop - the summary screen (Figure 36). From the summary screen you can see all your reports, then drill down into more detailed reports on traffic, customer paths, visitors, browsers and so on.

Figure 36
Report Summary



But this isn't just about the usual analytics - you can view email marketing statistics and drill down to specific campaigns (Figure 37).

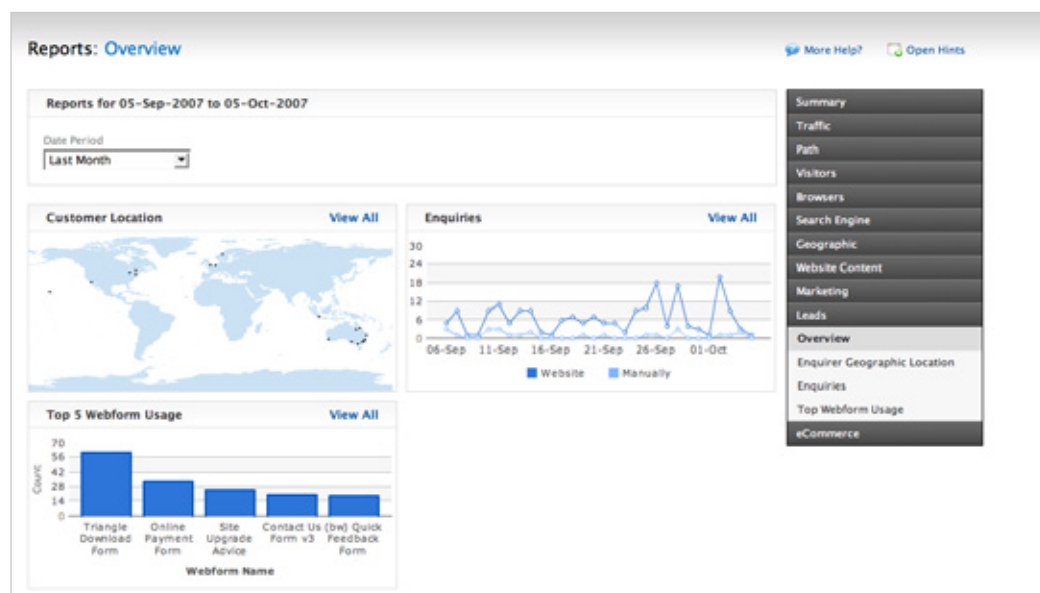
Figure 37
Email Marketing Report



Reporting

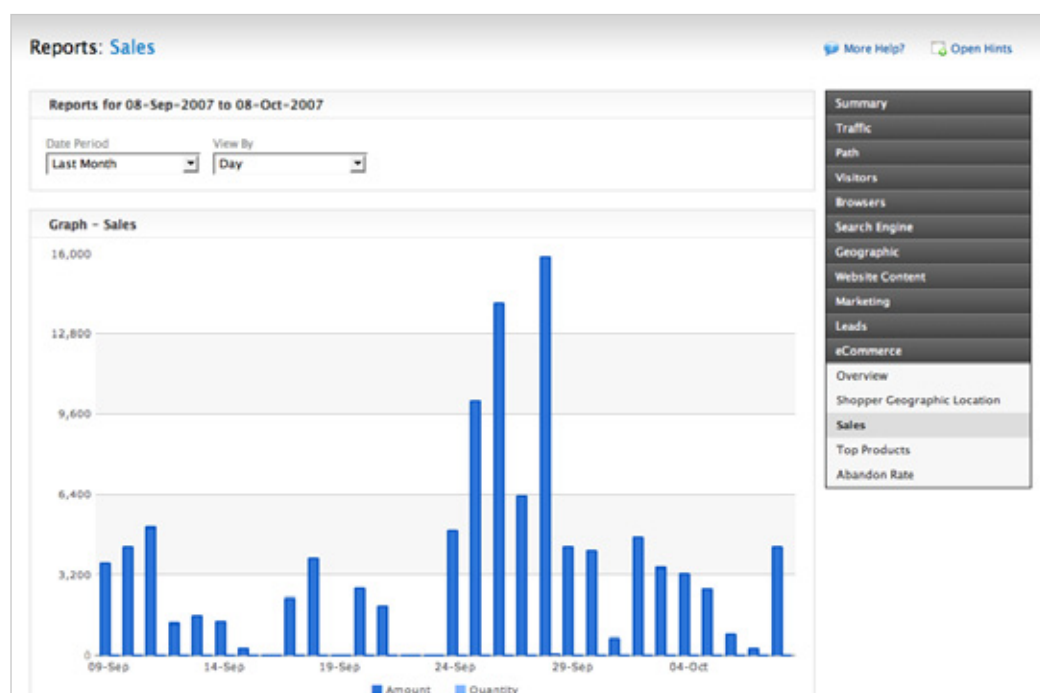
You can measure how your contact forms are performing under Leads (Figure 38).

Figure 38
Leads Report



And check out how well your Online Shop is going, and where you can improve. And this is all from your central reporting console (Figure 39).

Figure 39
Online Shop Report

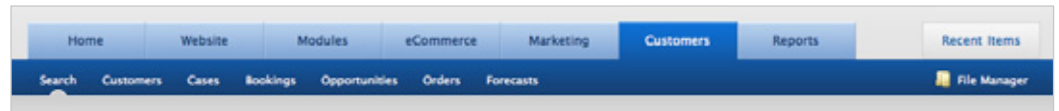


Reporting

Customer Reports

You can slice, dice and filter your data with our custom report generators - to find out exactly what you want to know. Create your own customer reports, websites reports and ecommerce reports.

Figure 40
Reports tab



Let's take a quick look at the Customer Report Generator (Figure 41). Use the simple, 5 step wizard to filter people out of your database by setting criteria and filters.

Figure 41
Customer Report Generator

 A screenshot of the 'New Customer Report' wizard. It features a 'Filter by Fields' section with dropdowns for field selection and comparison operators. A 'Wizard' sidebar on the right lists five steps: 1. Choose type of Report, 2. Choose Fields to Display, 3. Set Filter Criteria, 4. View Report Results, and 5. Save Report. A 'Related' section at the bottom right offers a link to 'Create a new Customer Report'.

You can save your reports to come back to them later, and you can add the results of the report (Figure 42) to a marketing list or secure zone!

Figure 42
Generated Customer Report

Title	Firstname	Lastname	Create Date	Contact Create By	Email 1 (Primary)	View
MR	Bohan	Zhang	20-Aug-2007		bohan@mail.com	View
	Taku	Takahashi	20-Aug-2007		taku@mail.com	View
	Eric	Nakagawa	20-Aug-2007		eric@mail.com	View
	Brett	Weich	20-Aug-2007		bweich@mail.com	View
	Amanda	Man	20-Aug-2007		aman@mail.com	View
MRS	Cate	Fisher	20-Aug-2007		cate@mail.com	View
	Naomi	Wong	20-Aug-2007		Naomi@mail.com	View
	Colin	Frost	20-Aug-2007		cfrost@mail.com	View
	Sun	Park	20-Aug-2007		sun@mail.com	View
	Richard	Smith	20-Aug-2007		richard@mail.com	View
	John	Citizen	20-Aug-2007		John@mail.com	View

Change page: < 1 2 > | Displaying page 1 of 2, Items 1 to 20 of 27.

[Add Customers To](#)
[Export Report](#)
[Back](#)
[Next](#)

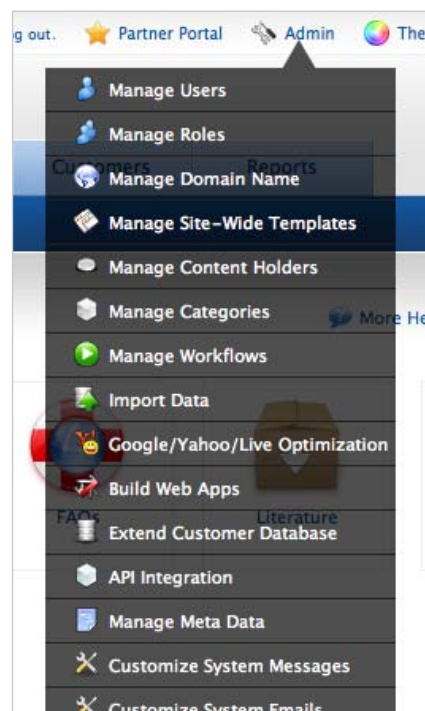
Some Final Words

We've seen how to set up an online shop, how to create email marketing lists and campaigns, and how to track and measure the success of our online shop. Now just a few more things....

The Administration Menu

Firstly, here's the Administration Menu. When you want to add new users, define user permissions, add a URL to your site, and more, you can do that from the Administration Menu - so check it out (Figure 43).

Figure 43
The Administration Menu

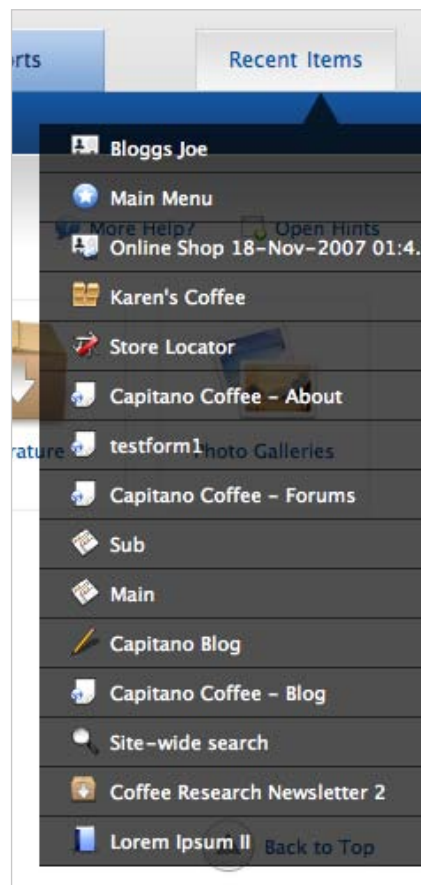


Recent Items

Secondly you've got your recent items button. Click on it to quickly jump back to the items you were looking at or working on (Figure 44).

Some Final Words

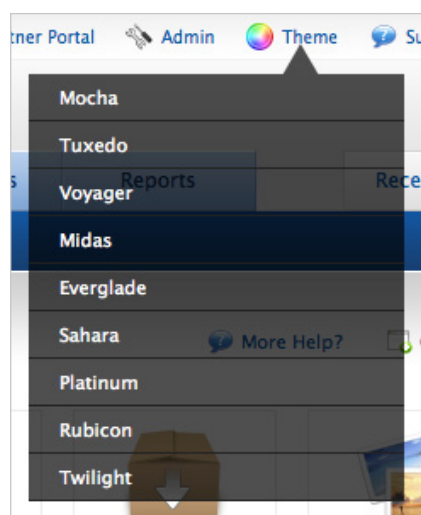
Figure 44
Recent Items



Themes

Thirdly, have a bit of fun. You can use the themes to spice up the interface to suit you (Figure 45).

Figure 45
Themes

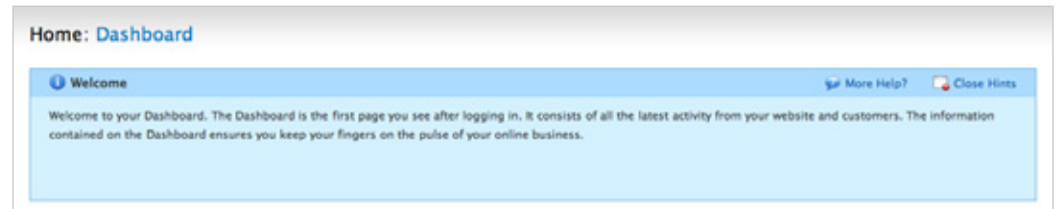


Some Final Words

Getting More Help

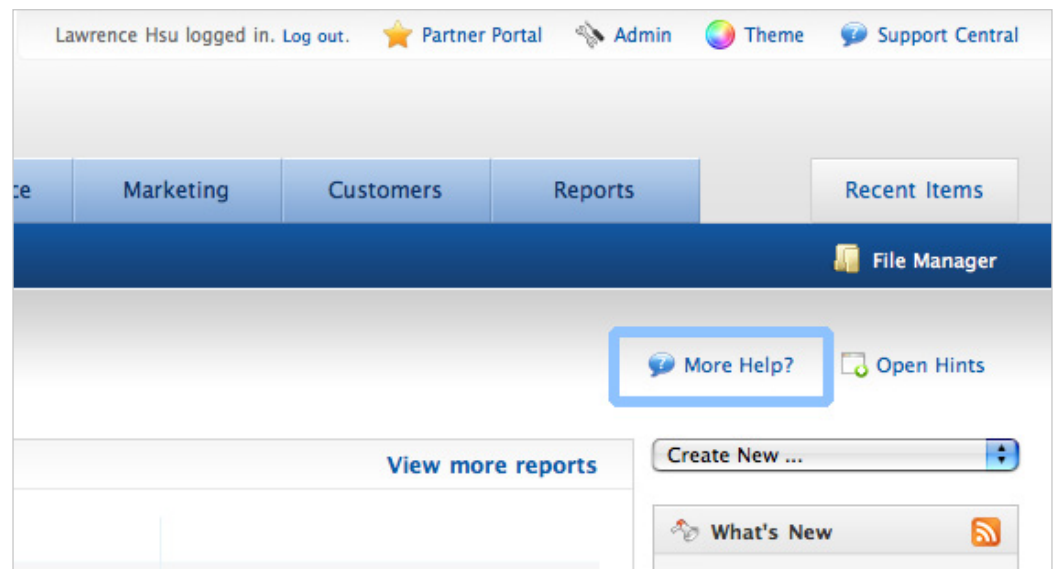
What can you do if you need some help? Don't forget your hints box at the top of the screen (Figure 46).

Figure 46
Hint Box



If you need more help, check out our Contextual Help Panel for relevant tips (Figure 47).

Figure 47
Click *More Help* to
open Contextual
Help Panel



Next stop, Support Central. Click on Support Central (Figure 48) and you'll be able to search our forums, watch our video tutorials, and get answers on-demand from our comprehensive Online Business Wiki. If you still can't find a solution, lodge a Support Request from the user friendly interface and we'll get back to you within our 8 business-hour SLA.

Some Final Words

Figure 48
Support Central

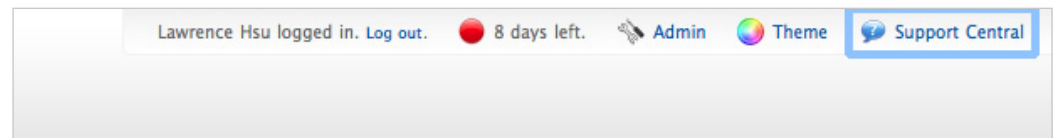
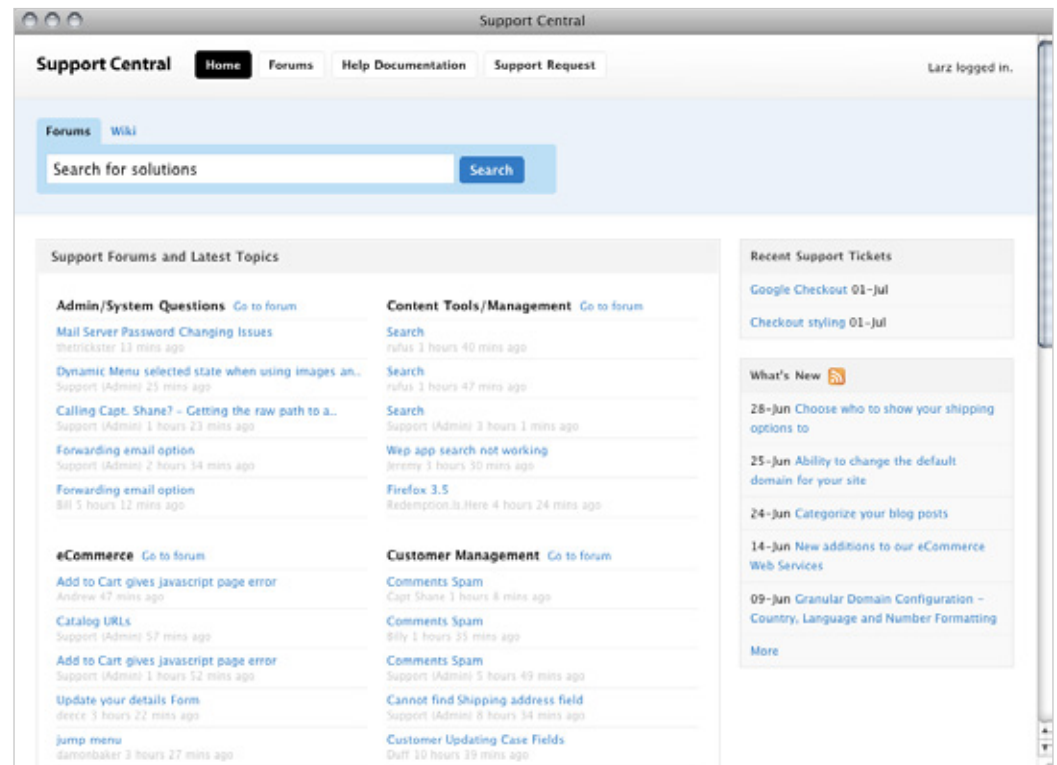


Figure 49
Support Central



The End

So that's it!

I hope this has helped you get started with the system.

Thanks again for signing up and best wishes for your online business!