# USER<sup>I</sup>S GUIDE enDiva ME Advanced Server 1.0

MS Jet<sup>®</sup>(Single Language) Edition



## enDiva ME 1.0 Advanced Server User's Guide

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# Introducing enDiva ME

#### enDiva ME Advanced Server 1.0 MS Jet (Single Language) Edition

enDiva Software, Inc. provides a complete software solution to enable small and medium sized enterprises (SME) to easily access and conduct e-business on the Internet. enDiva ME is a product line of web-based server applications that allow SME to build powerful and professional websites within minutes. It offers remote customization to web site appearances, user interfaces and backend support without any additional IT resources.

enDiva ME Advanced Server 1.0 is a complete enterprise-wide business operation and support system. With all the features inherited from enDiva ME Professional Server Edition, The Advanced Server Edition is supercharged with end-to-end ecommerce system. It is fully integrated with functions such as secure membership management (with configurable membership type, roles, permission policies, and profiles), search engines, reports, customer relation management (with mailing list, message templates and broadcasting), peer groups, personalization services, ecommerce system (with product catalog, search engine, shopping cart, online payment, inventory control, reports, eCoupon manager, and one-to-one direct marketing tools.)

# Table of Contents

# Introducing enDiva ME

# Table of contents

# Part I – Users

- 1.0 Literature
  - 1.1 Adding a Category
  - 1.2 Updating a Category
  - 1.3 Deleting a Category
  - 1.4 Adding a Literature
  - 1.5 Updating a Literature
  - 1.6 Deleting a Literature
  - 1.7 Adding a Literature Content
  - 1.8 Updating a Literature Content
  - 1.9 Deleting a Literature Content

# 2.0 Event

- 2.1 Adding an Event Category
- 2.2 Updating an Event Category
- 2.3 Deleting an Event Category
- 2.4 Adding an Event
- 2.5 Updating an Event
- 2.6 Deleting an Event
- 2.7 Adding an Event Content
- 2.8 Updating an Event Content
- 2.9 Deleting an Event Content
- 2.10 Online Event Registration 2.10.1 Registering an event online
  - 2.10.2 Viewing event registration report
- 2.11 Event Subscription
  - 2.11.1 Steps to personalize my events

# 3.0 News

- 3.1 Adding a News Category
- 3.2 Updating a News Category
- 3.3 Deleting a News Category
- 3.4 Adding a News
- 3.5 Updating a News
- 3.6 Deleting a News
- 3.7 Adding a News Content
- 3.8 Updating a News Content
- 3.9 Deleting a News Content

## 4.0 Resources and Links

- 4.1 Adding a Link Category
- 4.2 Updating a Link Category
- 4.3 Deleting a Link Category
- 4.4 Adding a Link
- 4.5 Updating a Link
- 4.6 Deleting a Link

# 5.0 Uploading Files/Images

- 5.1 About File Uploading
  - 5.1.1 Steps to upload file
- 5.2 About image uploading
  - 5.2.1 Steps to upload image

## 6.0 Member Only

- 6.1 Member Login
- 6.2 Request Login Password
  - 6.2.1 Get password
- 6.3 My Menu
  - 6.3.1 Member change password
  - 6.3.2 Change password
- 6.4 Member Update
  - 6.4.1 Steps to update member profile
- 6.5 News Subscription
  - 6.5.1 Steps to personalize my news
- 6.6 Events Subscription
  - 6.6.1 Steps to personalize my events
- 6.7 Resource Links Subscription
  - 6.7.1 Steps to personalize my resources links
- 6.8 Order Status
  - 6.8.1 Order history list
  - 6.8.2 Order detail
- 6.9 Administrative Tools

## 6.10 Member Directory

- 6.10.1 Searching for a member
- 6.10.2 Member list
- 6.10.3 Member mailing list
- 6.11 Broadcast Message From
  - 6.11.1 Steps to broadcast message

# 7.0 Member Registration

7.1 Sign Up a New Membership

# 8.0 Member Email Message Form

8.1 Compose Member Message Form

## 9.0 Product Catalog

- 9.1 Searching For a Product
- 9.2 Product List (In List View)
- 9.3 Product List (In Thumbnail View)
- 10.0 Shopping Cart
  - 10.1 Shopping Cart List
  - 10.2 Continue Shopping
  - 10.3 Updating Shopping Cart
  - 10.4 Proceed to Checkout

## 11.0 Checkout

- 11.1 Previewing and Modifying Shopping Cart
- 11.2 Billing Information
- 11.3 Shipping Information
- 11.4 Payment Information
- 11.5 Order Information
- 12.0 Index Search
  - 12.1 Search Result

List of Figures

- PART II Administrative Tools
  - 1.0 Administrative Tools

# 2.0 Company Administration

- 2.1 Company Information
- 2.2 Company Logo
  - 2.2.1 Upload company logo
  - 2.2.2 Delete company logo
- 2.3 Company Contact

## 3.0 Web Master

- 3.1 Select a Template
- 3.2 Select a Theme
- 3.3 Edit Styles
- 3.4 About Style Class Editor
  - 3.4.1 Style category and style classes
  - 3.4.2 Style attribute
  - 3.4.3 Editing styles

# 4.0 Web Site Access Options

4.1 Menu Options

- 4.1.1 About menu options
- 4.1.2 Activating/Deactivating a web menu
- 4.1.3 Moving the display order of a web menu
- 4.1.4 Changing the text of menu caption
- 4.1.5 Changing the text of menu option description

# 5.0 Member Group Management

- 5.1 Membership Types
  - 5.1.1 Creating a new membership type
  - 5.1.2 Updating an existing membership type
  - 5.1.3 Deleting an existing membership type
- 5.2 Roles
  - 5.2.1 Creating a new role
  - 5.2.2 Updating a existing role
  - 5.2.3 Deleting an existing role
- 5.3 Permission
  - 5.3.1 Assigning permissions(s) to a role
  - 5.3.2 *Removing permission(s) from a role*

## 6.0 Member Profile

- 6.1 Searching For a Member
- 6.2 Member List
- 6.3 Personal Info
- 6.4 Contact Info
- 6.5 Member Info
  - 6.5.1 Adding a new member
  - 6.5.2 Updating an existing member
  - 6.5.3 Deleting an existing member
  - 6.5.4 Generating a member profile report (HTML Format)
  - 6.5.5 Exporting the existing member profile to an excel spreadsheet
  - 6.5.6 Activating an existing member
  - 6.5.7 Deactivating an existing member
- 6.6 Member Mailing List
- 6.7 Mailing List Form
  - 6.7.1 Different operation in mailing list
  - 6.7.2 Adding a member mailing list
  - 6.7.3 Updating a mailing list
  - 6.7.4 Deleting a mailing list

# 7.0 Storefront Manager

- 7.1 Catalog Admin
  - 7.1.1 Searching for a product in catalog
  - 7.1.2 About category tree navigation
  - 7.1.3 Using category tree navigation to search a product
  - 7.1.4 Product list
  - 7.1.5 Show long list
  - 7.1.6 Show short list

- 7.1.7 Adding a new category
- 7.1.8 Updating an existing catalog
- 7.1.9 Deleting an existing catalog
- 7.1.10 Adding a new product
- 7.1.11 Uploading a product image
- 7.1.12 Updating an existing product
- 7.1.13 Updating a product image
- 7.1.14 Deleting an existing product
- 7.1.15 Generating a product catalog report (HTML format)
- 7.1.16 Exporting the existing product catalog to an Excel spreadsheet
- 7.2 Order Process
  - 7.2.1 Searching for a order received
  - 7.2.2 Order list
  - 7.2.3 Process order

## 7.3 eCoupon Manager

- 7.3.1 Creating a new eCoupons
- 7.3.2 Updating an existing eCoupons
- 7.3.3 Deleting an existing eCoupons
- 7.3.4 Sending an existing eCoupons
- 7.4 Sales Report
  - 7.4.1 About sales report
  - 7.4.2 Generating a sales report

## 8.0 Banner Manager

- 8.1 Upload Company Banner
- 8.2 Delete Company Banner

# 9.0 System Settings

- 9.1 About Systems Settings
- 9.2 Configuring Contact eMail Settings
- 9.3 Configuring Language Settings
- 9.4 Configuring Upload File Sizes
- 9.5 Configuring New Events
- 9.6 Configuring New Links
- 9.7 Configuring Recent News

# 10.0 Dictionary Manager

- 10.1 About Dictionary Manager
- 10.2 Sorting The Words
- 10.3 Updating a Word
- 11.0 Form Editor
  - 11.1 About Form Editor
  - 11.2 Selecting a Field Object
  - 11.3 Editing a Field Name
  - 11.4 Moving The Display Order of a Field
  - 11.5 Activating/Deactivating a Field

- 11.6 Setting a Required Field
- 11.7 Customize Values in Selection Field
- 11.8 Field Value Editor
  - 11.8.1 About field value editor
  - 11.8.2 Adding a field value
  - 11.8.3 Updating a field value
  - 11.8.4 Deleting a field value

# 12.0 Message Template

- 12.1 About Wet Site Default Page
- 12.2 Adding a Message Template
- 12.3 Updating a Message Template
- 12.4 Deleting a Message Template
- **13.0 About Product**

List of Figures

# Part I – Users

## 1. 0 Literature

This page allows you to post content data for a single web page. Please <u>see</u> figure 1-1 to view the web page structure. There are 4 different types of content building blocks in a web page:

Menu:	It locates in the left hand side of the web page.
It defines a group name for sev	veral web pages.
Category Blocks:	It locates in the right hand side of the web page.
It defines a name of a web page.	
Literature Blocks: It locates in the middle of the web page	
It defines a group name for several literatures content in a web page.	
Content Blocks: It locates inside of literature block.	
It is where the literature content data is posted.	

There is a hierarchical relationship among these 4 content building blocks: Menu (Highest) --> Literature Category --> Literature Block--> Content Block (Lowest)

- A web site contains many Web Menus.
- A Web Menu contains many Literature Categories.
- A Literature Categories contains many Literature Blocks.
- A Literature Block contains many Content Blocks

For each building block, the following operations can be performed:

- Click Lto edit.
- Click 🗄 to insert.
- Click to delete.
- Click Ito move up.
- Click Ito move down.

Click Add Category to add a new Category block.

A **Literature Category Form** will pop up on screen to collect category information. To add a category, please <u>see</u> Adding a Literature Category.

Click Add Literature to add a new Literature block.

A Literature Form will pop up on screen to collect literature information.

To add a literature, please see Adding a Literature.

Click Append Content Here to add a new content Block.

A Literature Content Form will pop up on screen to collect content data.

To add a content, please see Adding a Literature Content.

For more information on creating or updating the Web Menu, see Options Menu.

The fields in literature forms can be customized by administrator.

Please <u>see</u> Form Editor for more information.



Figure 1-1 Literature Form Screen

# 1.1 Adding a Category

- 1. Enter Category Name. This field is required.
- 2. Enter Category Description, if any.
- 3. Make the **Category Name** viewable by checking the **"Display Category Title"** checkbox
- 4. Make the category and all its literature content viewable to members only by checking the "Active" checkbox.
- 5. Make the category and all its literature content viewable to public (members & nonmembers) by checking the "**Public viewable**" checkbox.
- 6. Click Save to save the record.
- 7. Click **Close** to exit the dialog box.
- 8. A new category block with no content is now displayed in the browser.

Literature Category Form - [by enDiva] - Microsoft Internet Explorer	
Literature Category Form	*
Use this form to create or update a literature category.	7 Help
• Category Name	
Display Category Title	
Cetegory Description	
Active	
Public viewable	
dose Save	
Copyright © 2001 enDiva Software, Inc. All rights reserve	d.
	×

Figure 1-2 Add a Category Screen

## 1.2 Updating a Category

- 1. Make the necessary change(s) in the Literature Category Form. Fields with an asterisk (\*) are required fields.
- 2. Click Category Title I mage to upload image. See Uploading File/Images.
- 3. Select a position from **Put image**. It defines the position and alignment of an image posted.
- 4. Click **Save** to save the change(s) made.
- 5. Click **Close** to exit the dialog box.
- 6. The updated information in category block is now displayed in the browser.

Literature Category Form - [by enDiva] - Microsoft In	ternet Explorer 📃 🗆 🗶
Literature Category Form	*
ENDIVA Use this form to create or update a literature	re category. 🕐 <u>Help</u>
Put image Below 📃	Category Title Image
<ul> <li>Category Name who we are</li> </ul>	
Display Category Title	
Cetegory Description	
Active	
Public viewable	
Close Save	
Copyright © 2001 enDiva Software, Inc.	All rights reserved.

Figure 1-3 Update a Category Screen

## 1.3 Deleting a Category

- 1. Click  $\widehat{\blacksquare}$  in a category block.
- 2. A delete confirmation window pops up to the screen
- 3. Click Yes to confirm the delete action. Otherwise, click Cancel.
- 4. The category block is deleted from the screen.

#### Notes:

All deletions are irreversible.

When a category block is deleted, all literature blocks and content blocks under this category will be deleted as well.

## 1.4 Adding a Literature

- 1. Enter Literature Heading. This field is required.
- 2. Enter Literature Sub Heading, if any.
- 3. Make the Literature Heading viewable by checking the "Display Heading" checkbox
- 4. Make the Literature and its content viewable to the public by checking the "Active" checkbox.
- 5. Enter **Effective Date** and **Expire Date**. The literature and its content will be posted in the web site within this date range.
- 6. Enter **Content Column**. It defines the column setting for contents under this literature. It can be set from 1 to 3. If nothing is entered, the default setting is 1.
- 7. Click **Save** to save the record.
- 8. Click **Close** to exit the dialog box.
- 9. A new literature block with no content is now displayed in the browser.

🕘 Literature Form - [by enDiva] - Microsoft Internet Explorer	
Literature Form	*
ENDIVA' Use this form to create or update a literature item.	1 Help
Literature Categroy : Who we are	
Literature Heading	
P Display Heading	
Literature Sub Heading	
P Active	
<ul> <li>Effective Date 080592001 MM/DD/YYYY</li> </ul>	
*Expire Date MM/DD/YYYY	
Content Columns 1 💌	
Gcce Sere • indicates required field.	
Copyright © 2001 enDiva Software, Inc. All rights reserved.	×

Figure 1-5 Add a Literature Screen

#### 1.5 Updating a Literature

- 1. Make the necessary change(s) in the Literature Form. Fields with an asterisk (\*) are required fields.
- 2. Click Literature Title Image to upload title image. <u>See</u> Uploading Files/Images.
- 3. Select a position from **Put image**. It defines the position and alignment of an image posted.
- 4. Click **Save** to save the change(s) made.
- 5. Click **Close** to exit the dialog box.
- 6. The updated information in literature block is now displayed in the browser.

di Likenakure	Form - (by enDive) - Microsoft Internet Digitorer	
-	Literature Form	14
ENDIVA	Use this form to create or update a literature item.	Telo 1
	Literature Categroy : Who we are	
	Put image to the Left Title Image	
	Literature Heading Overview	
	P Display Heading	
	Literature Sub Heading	
	P Active	
	Effective Date Ducest MM/DD/YYYY	
	*Expire Date MIG100 MM/DD/YYYY	
	Content Columns	
	indicates required field.	
	Copyright © 2001 enDiva Software, Inc. All rights reserved.	-

Figure 1-6 Update a Literature Screen

#### 1.6 Deleting a Literature

- 1. Click in a literature block.
- 2. A delete confirmation window pops up to the screen.
- 3. Click **Yes** to confirm the delete action. Otherwise click **Cancel**.
- 4. The literature block is deleted from the screen.

#### Notes:

All deletions are irreversible.

When a literature block is deleted, all content blocks under this literature will be deleted as well.

#### 1.7 Adding a Literature Content

- 1. Enter text in **Content Text**. HTML tags are allowed in this field.
- 2. Check the **Contain HTML Code** checkbox if the text contains HTML tags.
- 3. Enter a web site URL in **Make content text a link to URL** if the context text is a link to URL.
- 4. Click **Save** to save the record.
- 5. Click **Close** to exit the dialog box.
- 6. A new content block with content is now displayed in the browser.

Literature	Content Form - [by enDiva] - Microsoft Internet Explorer	
	Literature Content Form	*
ENDIVA	Use this form to create or update content of a literature.	7 Help
	Content text Contain HTML Code	
	Copyright © 2001 enDiva Software, Inc. All rights reserved.	*

Figure 1-8 Add a Literature Content Screen

## 1.8 Updating a Literature Content

- 1. Make the necessary change(s) in the Literature Content Form.
- 2. Click **Content Image** to upload content image. <u>See</u> Uploading Files/Images.
- 3. Select a position from **Put image**. It defines the position and alignment of an image posted.
- 4. Click Attach a File... to upload title file. See Uploading Files/Images.

- 5. Enter a web site URL in Make image a link to URL if the image is a link to URL.
- 6. Enter **Caption for Attachment** if a file attachment is available for end users to download. If not entered, the default caption is **View Attached File**.
- 7. Click Save to save the change(s) made.
- 8. Click **Close** to exit the dialog box.
- 9. The updated information in content block is now displayed in the browser.

Literature	Content Form - [by enDiva] - Microsoft Internet Explorer	리미즈
	Literature Content Form	*
ENDIVA	Use this form to create or update content of a literature.	2 Heb
	Content text       Contain HTML Code         Influx Software, hr. (i.e., enflux) is an infernet application software company of teing a web-based activere active in the infernet south of the south of	
	Copyright $\diamondsuit$ 2001 enDiva Software, Inc. All rights reserved.	•

Figure 1-9 Update a Literature Content Screen

## 1.9 Deleting a Literature

- 1. Click  $\widehat{\blacksquare}$  in a content block.
- 2. A delete confirmation window pops up to the screen.
- 3. Click Yes to confirm the delete action. Otherwise click Cancel.
- 4. The content block is deleted from the screen.

Note:

All deletions are irreversible.

## 2.0 Events

This page allows you to post events and schedules on a web site. Please <u>see</u> Figure 2-1 to view the event page structure. There are 3 different types of content building blocks in an event page:

Event Category Blocks:	It locates in the right hand side of the event page.	
It defines a group name of several	event pages.	
Event Literature Blocks: It locates in the middle of the event page		
It defines an event title, event date, event location and other event information.		
Event Content Blocks: It locates inside of the Event literature block.		
It is where the event content data is posted.		

There is a hierarchical relationship among these 3 content building blocks: Event Category (Highest) --> Event Literature --> Event Content (Lowest)

- An Event page contains many Event Categories.
- An Event Category contains many Event Literature Blocks.
- An Event Literature Block contains many Event Content Blocks

A category named **Recent Events** is also displayed in the browser to group and indicate most recent events.

To set the number of recent events to be displayed, please <u>see</u> System Settings to configure recent events.

For each building block, the following operations can be performed:

- Click *L*to edit.
- Click 🗄 to insert.
- Click 🗐 to delete.
- Click **1** to move up.
- Click I to move down.

Click Add Category to add a new event Category block.

An **Event Category Form** will pop up in the screen to collect event category information. To add a category, please <u>see</u> Adding an Event Category.

Click Add Event to add a new event Literature block.

An Event Form will pop up in the screen to collect event literature information.

To add an event, please see Adding an Event.

Click Append Content Here to add a new event Content Block.

An Event Content Form will pop up in the screen to collect event content data.

To add a content, please see Adding an Event Content.

Click List Events to redirect to an Event Title List page.

Click Sign me up to register an event.

An **Event Registration Form** will pop up in the screen to collect event registration information.

#### Click View Report

An **Event Registration Report** will pop up in the screen to display name lists of people who registered for this event.

The fields in **Event Form** and **Event Registration Form** can be customized by administrator.

Please see Form Editor for more information.



Figure 2-1 Event Literature Form Screen

# 2.1 Adding an Event Category

- 1. Enter Event Category. This field is required.
- 2. Enter Event Category Description, if any.
- 3. Make Event Category Heading viewable by checking the "Display Category Title" checkbox.
- 4. Make the event category and all its event content viewable to members only by checking the "Active" checkbox.
- 5. Make the event category and all its event content viewable to public (member & nonmember) by checking "Public viewable" checkbox.
- 6. Click Save to save the record.
- 7. Click **Close** to exit the dialog box.
- 8. A new event category block is now displayed in the browser.

🖉 Event Cate	gory Form - [by enDiva] - Microsoft Internet Explorer	
-	Event Category Form	1
ENDIVA	Use this form to create or update an event category.	Melo
Event Ca	Event Category     Display Category Title      tegory Description     Active     Public viewable     Come     Sine	
Co	pyright © 2000 - 2001 enDiva Software, Inc. All rights reserved.	×

Figure 2-2 Add a Event Category Form Screen

#### 2.2 Updating an Event Category

- Make the necessary change(s) in the Event Category Form. Fields with an asterisk
   (\*) are required fields.
- 2. Click Category Title I mage to upload image. See Uploading Files/Images.
- 3. Select a position from **Put image**. It defines the position and alignment of an image posted.
- 4. Make the **Category Name** viewable by checking "**Display Category Title**" checkbox.
- 5. Make the event category and all its event content viewable to members only by checking the "Active" checkbox.
- 6. Make the event category and all its event content viewable to public (members & non-members) by checking the "Public viewable" checkbox.
- 7. Click **Save** to save the change(s) made.
- 8. Click **Close** to exit the dialog box.
- 9. The updated information in an event category block is now displayed in the browser.

🚳 Event Cate	gory Form - [by enDiva] - Microsoft Internet Explorer	_ 🗆 🗵
	Event Category Form	*
ENDIVA	Use this form to create or update an event category.	Help
Event Ca	Put image to the left with text wrap Category Title Image • Event Category Community  Display Category Title  tegory Description	
	Active     Public viewable     Cose     Save	
C0	opyright © 2000 - 2001 enDiva Software, Inc. All rights reserved.	×

Figure 2-3 Update an Event Category Form Screen

## 2.3 Deleting an Event Category

- 1. Click in an event category block.
- 2. A delete confirmation window pops up to the screen
- 3. Click Yes to confirm the delete action. Otherwise, click Cancel.
- 4. The event category block is now deleted from the screen.

#### Notes:

All deletions are irreversible.

When an event category block is deleted, all event literature blocks and event content blocks under this event category will be deleted as well.

#### 2.4 Adding an Event

- 1. Enter **Event Title**. This field is required.
- 2. Enter Event Subtitle, if any.
- 3. Enter Subtitle Link To URL, if the subtitle is a link points to URL.
- 4. Make the **Event Title** viewable by checking the **"Display Title"** checkbox
- 5. Make the event and its contents viewable to public by checking the "Active" checkbox.
- 6. Enter **Start Date** (required) and **End Date**. This is the event start and end date.
- 7. Enter **Location** and **Contact info**, if any.
- 8. Enter **Effective Date** and **Expire Date**. The event and its contents will be posted on the web site within this date range.
- 9. Check **Require Registration** checkbox. It allows members to register this event online.
- 10. Enter **Content Column**. It defines the column setting for contents under this event. It can be set from 1 to 3. If not entered, the default setting is 1.
- 11. Click Save to save the record.
- 12. Click **Close** to exit the dialog box.
- 13. A new Event Title Link and Event Date are now displayed in the browser.

🚰 Event Form - [by enDiva] - Microsoft B	nternet Explorer	_DX
Event Form		-
Use this form to create or u	pdate an event.	7 Help
	ent Category : Community	
•Event Title		
	P Display Title	
Event Subtitle		
Subtitle Link To URL		
Start Date	MM/DO/YOY	
End Date	MM/DD/YYYY	
• Time		
Location		
Contact Info		
	P Artive	
• Effective Date	08/23/0301 NM/DD/YYYY	
Expire Date		
	Require Registration	
Content Columns		
	Cloze Save	_
		*

Figure 2-5 Add an Event Screen

## 2.5 Updating an Event

- 1. Make the necessary change(s) in the **Event Form**. Fields with an asterisk (\*) are required fields.
- 2. Click **Title Image** to upload a new title image. <u>See</u> Uploading Files/Images.
- 3. Select a position from **Put image**. It defines the position and alignment of an image posted.
- 4. Click **Save** to save the change(s) made.
- 5. Click **Close** to exit the dialog box.
- 6. The updated information in event literature block is now displayed in the browser.

🎒 Event Form	- [by enDiva] - Microsoft Internet Explorer	_ 🗆 ×
	Event Form	-
ENDIVA	Use this form to create or update an event.	7 Help
	Event Category : Community	
	Put image to the left with text wrop 💌 Title Image	
	Event Title Family Dance is Coming!	
	P Display Title	
	Event Subtitle	
	Subtitle Link To URL	
	<ul> <li>Start Date 2001/3/24 MM/DD/YYYY</li> </ul>	
	End Date 2001/3/24 MM/DD/YYYY	
	<ul> <li>Time 6:00 pn to 9:30 pn</li> </ul>	
	Location All Purpose room in Fallsmead E. S.	
	Contact Info Please Cal John Lee 301-222-1234	
	Active Active	
	<ul> <li>Effective Date 2001/019 MM/DD/YYYY</li> </ul>	
	Expire Date 2100012 MM/DD/YYYY	
	Require Registration	
	Content Columns 1 X	
	Cose Save • indicates required field.	1

Figure 2-6 Update an Event Screen

## 2.6 Deleting an Event

- 1. Click in an event literature block.
- 2. A delete confirmation window pops up to the screen.
- 3. Click Yes to confirm the delete action. Otherwise click Cancel.
- 4. The event literature block is deleted from the screen.

#### Notes:

All deletions are irreversible.

When an event literature block is deleted, all event content blocks under this event literature will be deleted as well.

## 2.7 Adding an Event Content

- 1. Enter text in **Content Text**. HTML tags are allowed in this field.
- 2. Check the **Contain HTML Code** checkbox if the text contains HTML tags.
- 3. Enter a web site URL in **Make content text a link to URL** if the context text is a link to URL.
- 4. Click **Save** to save the record.
- 5. Click **Close** to exit the dialog box.
- 6. A new event content block with content is now displayed in the browser.

Event Cont	ent Form - [by enDiva] - Microsoft Internet Explorer	
ENDIVA	Event Content Form	_
ENDIVA	Use this form to create or update content of an event.	7 Help
	Content text Contain HTML Code	
	Make content text a link to URL	
	Close Save	
0	opyright © 2000 - 2001 enDiva Software, Inc. All rights reserved.	*

Figure 2-8 an Event Content Screen

#### 2.8 Updating an Event Content

- 1. Make the necessary change(s) in the Event Content Form.
- 2. Click **Content Image** to upload content image. <u>See</u> Uploading Files/Images.
- 3. Select a position from **Put image**. It defines the position and alignment of an image posted.
- 4. Click Attach a File... to upload title file. See Uploading Files/Images.
- 5. Enter a web site URL in Make image a link to URL if the image is a link to URL.
- 6. Enter **Caption for Attachment** if a file attachment is available for end users to download. If not entered, the default caption is **View Attached File**.
- 7. Click **Save** to save the change(s) made.
- 8. Click **Close** to exit the dialog box.
- 9. The updated information in event content block is now displayed in the browser.

🖉 Event Form	- [by enDiva] - Microsoft Internet Explorer	
	Event Form	-
ENDIVA	Use this form to create or update an event.	7 Help
	Event Category : Community	
	Put image to the left with text wrap 💌 Title Image	
	<ul> <li>Event Title Family Dence is Coning!</li> </ul>	
	P Display Title	
	Event Subtitle	
	Subtitle Link To URL	
	<ul> <li>Start Date 2001/3/24 MM/DD/YYYY</li> </ul>	
	End Date 2001/3/24 MM/DD/YYYY	
	<ul> <li>Time 8.00 pm to 9.30 pm</li> </ul>	
	Location All Purpose room in Pataneed E. S.	
	Contact Info Please Call John Lee 301-222-1234	
	✓ Active	
	<ul> <li>Effective Date 2001/3/19 MM/DD/YYYY</li> </ul>	
	Expire Date 21003/12 MM/DD/YYYY	
	Require Registration	
	Content Columns 1 💌	_
	indicates required field.	-

Figure 2-9 Update an Event Screen

#### 2.9 Deleting an Event Content

- 1. Click in an event content block.
- 2. A delete confirmation window pops up to the screen.
- 3. Click Yes to confirm the delete action. Otherwise click Cancel.
- 4. The event content block is deleted from the screen.

#### Note:

All deletions are irreversible.

## 2.10 Online Event Registration

Event Registration Form allows end users to sign up an event online.

## 2.10.1 Registering an Event Online

- 1. Enter all necessary information. Fields with an asterisk (\*) are required.
- 2. Check **I'm a member** if you have already signed up as member and have created an account with userid and password.
- 3. Click Submit to submit the Form.
- 4. Click **Close** to close the Form.
- 5. After registration, the user's name and contact information should be on the name list when clicking on **View Report**.

🕘 Event Registration Form - [by enDiva] - Microsoft Internet Explorer	
Event Registration Form	-
ENDIVA' Use this form to sign-up for an event.	7 Help
It's time for registrating swimming team!	
It's time for registrating swimming team! Date 2001;~3×616×6 to 2001;~7×63×6	
Time 3:00pm to 5:00Pm	
Location Rockville Community Center	
Contact Info Please call Sue Lin for more detail informatin. 301-315-2642	
First Name	
*Last Name	
Chinese Name	
* E-Mail	
Day Phone	
Night Phone	
Fax	
🗖 I am a member	
Comments	
<u>×</u>	
Submit	
<ul> <li>indicates required field.</li> </ul>	
Copyright © 2000 - 2001 enDiva Software, Inc. All rights reserved.	•

Figure 2-11 Event Registration Form Screen

#### 2.10.2 Viewing Event Registration Report

Event Registration Report allows end users to access the event registrant's name and contact information.

Click [Print] to print out this report.

2	Event	Re	gistratic	n Report - [	by enl	liva] - Micros	oft Interne	t Explore	7				
J	Ble	Edit	Sew	Fgvoribes	Took	Help							12
æ	rint]												*
Ŀ					Ε	vent Re			еро	rt			
ι.							2001/6/29	9					
	First Nam	-	Last Name	Chinese Name		E-Mail	Day Phone	Night Phone	Fax	1 am a member	Comments	Register Date	
ľ	Vivian	5	Smith	Vivian Smith	vanith	@hotnail.com	703 1234567					2001/6/29 PM 06:34:39	
L							Total : 1						
ι.													
L													+

Figure 2-12 Event Registration Report Screen

#### 3.0 News

This page allows you to post news and announcements for a web site. Please <u>see</u> figure 3-1 to view the news page structure. There are 3 different types of content building blocks in a pows page:

There are 3 different types of content building blocks in a news page:

News Category Blocks:	It locates in the right hand side of the news page.		
It defines a group name of several news pages.			
News Literature Blocks: It locates in the middle of the news page			
It defines a News title and News date.			
Content Blocks: It locates inside of News literature block.			
It is where the news content data is posted.			

There is a hierarchical relationship among these 3 content building blocks:

News Category (Highest) --> News Literature --> News Content (Lowest)

- A News page contains many News Categories.
- A News Category contains many News Literature Blocks.
- A News Literature Block contains many News Content Blocks

A category named **Recent News** is also displayed on the browser to group and indicate most recent news.

To set the number of recent news to be displayed, please <u>see</u> System Settings to configure recent news.

For each building block, the following operations can be performed:

- Click *L*to edit.
- Click 🗄 to insert.
- Click 🗐 to delete.
- Click **1** to move up.
- Click I to move down.

Click News Title Link to view news's literature block.

Click Add Category to add a new news Category block.

A News Category Form will pop up on screen to collect news category information.

To add a category, please see Adding a News Category.

Click Add News to add a new news Literature block.

A News Form will pop up on screen to collect news literature information.

To add a news, please see Adding a News.

Click Append Content Here to add a new news content Block.

A News Content Form will pop up on screen to collect news content data.

To add a content, please see Adding a News Content.

Click List News to redirect to a News Title List page.

The fields in **News Form** can be customized by administrator.

Please see Form Editor for more information.



Figure 3-1 News Screen

#### 3.1 Adding a News Category

- 1. Enter News Category. This field is required.
- 2. Enter News Category Description, if any.
- 3. Make the **News Category Heading** viewable by checking the **"Display Category Title"** checkbox
- 4. Make the news category and all its news literature content viewable to members only by checking the "Active" checkbox.
- 5. Make the news category and all its news literature content viewable to public (member & non-member) by checking the "Public viewable" checkbox.
- 6. Click Save to save the record.
- 7. Click Close to exit the dialog box.
- 8. A new news category block is displayed on the browser.

News Cate	gory Form - [by enDiva] - Microsoft Internet Explorer	_O×
	News Category Form	*
ENDIVA	Use this form to create or update a news category.	1 Help
	•News Category	
	P Display Category Title	
News Cate	egory Description	
	R Active	
	Public viewable	
	Close Save	8
Copy	yright © 2000 - 2001 enDiva Software, Inc. All rights reserved.	
		Ŧ

Figure 3-2 Add a News Category Screen

## 3.2 Updating a News Category

- Make the necessary change(s) in the News Category Form. Fields with an asterisk
   (\*) are required fields.
- 2. Click Category Title I mage to upload image. See Uploading Files/Images.
- 3. Select a position from **Put image**. It defines the position and alignment of an image posted.
- 4. Click **Save** to save the change(s) made.
- 5. Click **Close** to exit the dialog box.
- 6. The updated information in a news category block is displayed on the browser.

🖉 News Cate	gory Form - [by enDiva] - Microsoft Internet Explorer	_O×
	News Category Form	*
ENDIVA	Use this form to create or update a news category.	? Help
	Put image Below Category Title Ima News Category Business Display Category Title gory Description Business	109
	Active	
	Public viewable	
	Close Save	
Copyri	ight © 2000 - 2001 enDiva Software, Inc. All rights reserve	d. 🗾

Figure 3-3 Update a News Category Screen

#### 3.3 Deleting a News Category

- 1. Click  $\widehat{\blacksquare}$  in a news category block.
- 2. A delete confirmation window pops up to the screen
- 3. Click Yes to confirm the delete action. Otherwise, click Cancel.
- 4. The news category block is deleted from the screen.

#### Notes:

All deletions are irreversible.

When a news category block is deleted, all news literature blocks and news content blocks under this news category will be deleted as well.

#### 3.4 Adding a News

- 1. Enter News Title. This field is required.
- 2. Enter News Subtitle, if any.
- 3. Enter Subtitle Link To URL, if the subtitle is a link points to URL.
- 4. Make the **News Title** viewable by checking the "**Display Title**" checkbox
- 5. Make the news and its content viewable to the public by checking the "Active" checkbox.
- 6. Enter **News Date**. This is the news posted date.
- 7. Enter **Effective Date** and **Expire Date**. The news and its content will be posted in the web site within this date range.
- 8. Enter **Content Column**. It defines the column setting for contents under this news. It can be set from 1 to 3. If nothing is entered, the default setting is 1.
- 9. Click **Save** to save the record.
- 10. Click Close to exit the dialog box.
- 11. A new News Title Link and News Date are displayed on the browser.

News Form	- (by cnDive) - Microsoft Internet Explorer	-101×
0	News Form	*
ENDIVA	Use this form to create or up date a news article.	2 Help
	News Category : Business	
	News Title	
	🖉 Display Title	
	News Subtitle	
	Subtitle Link To URL	
	*News Date ps/20200 MM//DD/YYYY	
	Active Active	
	<ul> <li>Effective Date pugagoon MM/DD/YYYYY</li> </ul>	
	Expire Date MM/DD/YYYY	
	Content Columns 1 💌	
	<ul> <li>Close Save indicates required field.     </li> </ul>	
	Copyright © 2000 - 2001, enDive Software, Inc. All rights reserved	4. <u>–</u>

Figure 3-5 Add a News Screen

#### 3.5 Updating a News

- 1. Make the necessary change(s) in the **News Form**. Fields with an asterisk (\*) are required fields.
- 2. Click **Title Image** to upload news title image. <u>See</u> Uploading Files/Images.
- 3. Select a position from **Put image**. It defines the position and alignment of an image posted.
- 4. Click **Save** to save the change(s) made.
- 5. Click **Close** to exit the dialog box.
- 6. The updated information in news literature block is displayed on the browser.

News Form	- [by enDiva] - Microsoft Internet Explorer	_DX
	News Form	*
ENDIVA	Use this form to create or update a news article.	🕈 Help
	News Category : Business	
	Put image to the left with text wrap 💌 Title Image	
	News Title Octothe Business	
	P Display Title	
	News Subtitle Business	
	Subtitle Link To URL http://www.santoc.com/serve/COM_Front.exp	
	News Date 200.019 MM/DD/YYYY	
	Active V	
	Effective Date 200.0/19 MM//DD//YYYY	
	<ul> <li>Expire Date 2100/012 MM/DD/YYYY</li> </ul>	
	Content Columns 1 .	
	• indicates required field.	
	Copyright © 2000 - 2001 enDiva Software, Inc. All rights reserved.	×

Figure 3-6 Update a News Screen

#### 3.6 Deleting a News

- 1. Click In a news literature block.
- 2. A delete confirmation window pops up to the screen.
- 3. Click Yes to confirm the delete action. Otherwise click Cancel.
- 4. The news literature block is deleted from the screen.

#### Notes:

All deletions are irreversible.

When a news literature block is deleted, all news content blocks under this news literature will be deleted as well.

#### 3.7 Adding a News Content

- 1. Enter text in **Content Text**. HTML tags are allowed in this field.
- 2. Check Contain HTML Code checkbox if the text contains HTML tags.

- 3. Enter a web site URL in Make content text a link to URL if the context text is a link to URL.
- 4. Click **Save** to save the record.
- 5. Click **Close** to exit the dialog box.
- 6. A new news content block with content is displayed on the browser.

🏂 News Conb	ent Form - [by enDiva] - Microsoft Internet Explorer	
	News Content Form	*
ENDIVA	Use this form to create or update content of a news article.	7 Help
	Content text Contain HTML Code	
	Make content text a link to URL	
	pyright © 2000 - 2001 enDiva Software, Inc. All rights reserved.	×

Figure 3-8 Add a News Content Screen

#### 3.8 Updating a News Content

- 1. Make the necessary change(s) in the News Content Form.
- 2. Click **Content Image** to upload content image. <u>See</u> Uploading Files/Images.
- 3. Select a position from **Put image**. It defines the position and alignment of an image posted.
- 4. Click Attach a File... to upload title file. See Uploading Files/Images.
- 5. Enter a web site URL in Make image a link to URL if the image is a link to URL.
- 6. Enter **Caption for Attachment** if a file attachment is available for end users to download. If not entered, the default caption is **View Attached File**.
- 7. Click **Save** to save the change(s) made.
- 8. Click **Close** to exit the dialog box.
- 9. The updated information in news content block is displayed on the browser.

News Form	- [by enDiva] - Microsoft Internet Explorer	
	News Form	-
ENDIVA	Use this form to create or update a news article.	🝸 Help
	News Category : Business	
	Put image to the left with test wrap 💌 Title Image	
	News Title Get to the Dusiness	
	🕞 Display Title	
	News Subtitle Dusiness	
	Subtitle Link To URL http://www.manbc.com/news/COM_Front.app	
	News Date 2001/3/19 MM/DO/11111	
	P Active	
	Effective Date 2001/3/19 MM/DD/YYYY	
	*Expire Date 21003/12 MM/DO/YYYY	
	Content Columns	
	indicates required field.	
	Copyright © 2000 - 2001 enDiva Software, IncAll rights reserved	н. 🗾

Figure 3-9 Update a News Content Screen

# 3.9 Deleting a News Content

- 1. Click in a news content block.
- 2. A delete confirmation window pops up to the screen.
- 3. Click Yes to confirm the delete action. Otherwise click Cancel.
- 4. The news content block is deleted from the screen.

Note:

All deletions are irreversible.

#### 4.0 Resource Links

This page allows you to post resource links on a web site. Please <u>see</u> figure 4-1 to view the link page structure. There are 2 different types of content building blocks in a link page:

Link Category Blocks:	It locates in the right hand side of the link page.	
It defines a group name of several resource links.		
Link Content Blocks: It locates in the middle of the link page		
It defines a link title, link URL and link description.		

There is a hierarchical relationship between these 2 content building blocks: Link Category (Highest) --> Link Content (Lowest)

- A Link Page contains many Link Categories.
- A Link Category contains many Link Content Blocks

A category named **New Links** is also displayed in the browser to group and indicate most recent links.

To set the number of recent links to be displayed, please see System Settings to configure recent links.

For each building block, the following operations can be performed:

- Click Lto edit.
- Click 🗄 to insert.
- Click nto delete.
- Click 1 to move up.
- Click I to move down.

Click Add Category to add a new link Category block.

A **Resource Link Category Form** will pop up on screen to collect link category information.

To add a category, please see Adding a Link Category.

Click Append Content Here to add a new link Content block.

A Resource Link I tem Form will pop up on screen to collect link content data.

To add a link and its content, please see Adding a Link.

The fields in forms can be customized by administrator.

Please see Form Editor for more information.



Figure 4-1 Links Screen

## 4.1 Adding a Link Category

- 1. Enter Link Category Name. This field is required.
- 2. Enter Link Category Description, if any.
- 3. Make the Link Category Name viewable by checking the "Display Category Title" checkbox
- 4. Make the Link category and all its link content viewable to members only by checking the "Active" checkbox.
- 5. Make the Links category and all its Link content viewable to public (member & nonmember) by checking the "**Public viewable**" checkbox.
- 6. Click Save to save the record.
- 7. Click **Close** to exit the dialog box.
- 8. A new link category block is now displayed in the browser.

Resource Link Category Form - [by enDiva] - Microsoft Internet Explored	arer 📃 🗆 🗙
Resource Link Category Form	*
ENDIVA Use this form to create or update a resource link category.	🕈 Help
Link Category Name     Display Category Title     Link Category Description     Active     Public viewable     Cose     Save	
Copyright © 2000 - 2001 enDiva Software, Inc. All rights	reserved.

Figure 4-2 Add a Link Category Screen

#### 4.2 Updating a Link Category

- 1. Make the necessary change(s) in the Resource Link Category Form. Fields with an asterisk (\*) are required fields.
- 2. Click Category Title I mage to upload image. See Uploading Files/Images.
- 3. Select a position from **Put image**. It defines the position and alignment of an image posted.
- 4. Click **Save** to save the change(s) made.
- 5. Click **Close** to exit the dialog box.
- 6. The updated information in a link category block is now displayed in the browser.

Resource Link Category Form	- [by enDiva] - Microsoft Internet Explorer	_ 🗆 🗵
	Category Form	*
Use this form to a	reate or update a resource link category.	? Help
◆Link Category Name	the left with text wrap  Category Title Image earch Engines Display Category Title	
Link Category Description		
	Active Public viewable	
	Close Save	
Copyright © 2000 - 20	001 enDiva Software, Inc. All rights reserved	d. 💌

Figure 4-3 Update a Link Category Screen

#### 4.3 Deleting a Link Category
- 1. Click In a link category block.
- 2. A delete confirmation window pops up to the screen
- 3. Click Yes to confirm the delete action. Otherwise, click Cancel.
- 4. The link category block is deleted from the screen.

### Notes:

All deletions are irreversible.

When a link category block is deleted, all link content blocks under this link category will be deleted as well.

### 4.4 Adding a Link

- 1. Enter Link Title. This is a required field.
- 2. Enter a web site URL in Link title to URL. This is a required field.
- 3. Enter text in Link Description. This field allows HTML tags.
- 4. Check Contain HTML Code checkbox if the text contains HTML tags.
- 5. Click Save to save the record.
- 6. Click **Close** to exit the dialog box.
- 7. A new link content block with content is now displayed in the browser.

🐴 Resource L	ink Item Form - [by enDiva] - Microsoft Internet Explorer	_ 🗆 🗵
	Resource Link Item Form	-
ENDIVA	Use this form to create or update a resource link.	7 Help
	Link Title     Link title to URL     Description     Contain HTML Code    Coce     Save	
	Copyright © 2000 - 2001 enDiva Software, Inc. All rights reserved.	•

Figure 4-5 Add a Link Screen

### 4.5 Updating a Link

- 1. Make the necessary change(s) in the **Resource Link Item Form**.
- 2. Click Content Image to upload content image. See Uploading Files/Images.
- 3. Select a position from **Put image**. It defines the position and alignment of an image posted.
- 4. Click Attach a File... to upload title file. See Uploading Files/Images.
- 5. Enter a web site URL in Make image a link to URL if the image is a link to URL.
- 6. Enter **Caption for Attachment** if a file attachment is available for end users to download. If not entered, the default caption is **View Attached File**.

- 7. Click **Save** to save the change(s) made.
- 8. Click **Close** to exit the dialog box.
- 9. The updated information in links content block is now displayed in the browser.

Resource L	ink Item Form - [by enDiva] - Microsoft Internet Explorer	ad X
	Resource Link Item Form	*
ENDIVA	Use this form to create or update a resource link.	7 Help
	Link Title  Verywe wrok con  Link title to URL  Itig dwww wrok cons  Link Description  Contain HTML Code	
	Put image	
	to the left with text wrap 💌 Content Image	
	Make image a link to URL	
	Caption for Attachment Attach a file	
	Close Save	
	Copyright © 2000 - 2001 enDiva Software, Inc. All rights reserved.	*

Figure 4-6 Update a Link Screen

## 4.6 Deleting a Link

- 1. Click In a link content block.
- 2. A delete confirmation window pops up to the screen.
- 3. Click Yes to confirm the delete action. Otherwise click Cancel.
- 4. The link content block is deleted from the screen.

Note:

All deletions are irreversible.

## 5.0 Uploading File/Images

## 5.1 About File Uploading

**File Upload Form** allows file attachments to be posted on the web site. A hyperlink to this file is displayed on the browser and the end users can download it by clicking on it. If a file exists, the message "file attached" is displayed in the form. Otherwise, the message "No file available at this time." is displayed. You may delete the existing file by clicking Delete File.

#### Notes:

Make sure the file has a valid extension and the file size is under **150 KB**. File with extensions: .exe, .bat, .com, .vbs, and .js will not be allowed to upload. If the file size is bigger than 150 KB, please <u>see</u> System Settings upload to adjust the maximum file upload size.

## 5.1.1 Steps To Upload File

- 1. Click **Browse** to explore the local drive and locate the file.
- 2. Select the file by clicking on it. Click **Open** when the file name is displayed in the **File name** field.
- 3. After clicking **Open**, the file is selected and its file name appears on **Image File** text field.
- 4. Click Upload Image to start the upload.
- 5. After the upload succeeds, the message "View Attached File" will be displayed in the Upload Form.
- 6. Click **Close** to exit
- 7. A hyperlink to download the file is displayed in the browser.

🖻 Literatuer (	Content File Upload Form - [by enDiva] - Microsoft Internet Explorer	_O×
	Literatuer Content File Upload Form	*
ENDIVA	Use this form to upload an attachment file for the content of a literature item.	🛛 Help
(The	No file available at this time. Content File Browse Coze Upload File e following file types will not be accespted: ewe,bat,com,cmd,asp,vbs,js,cgi)	
	Copyright © 2000 - 2001 enDiva Software, Inc. All rights reserved.	×

Figure 5-1 Upload File Screen

## 5.2 About Image Uploading

**Image Upload Form** allows graphics and images to be posted on the web site. If an image exists, it is displayed in the form. Otherwise, **"No image available at this time."** is displayed. You may delete the existing image by clicking **Delete Image**.

#### Notes:

Make sure the file has a valid extension and the file size is under **150 KB**. File with extensions: .exe, .bat, .com, .vbs, and .js will not be allowed to upload. If the file size is bigger than 150 KB, please <u>see</u> System Settings upload to adjust the maximum file upload size.

## 5.2.1 Steps To Upload Image

- 1. Click **Browse** to explore the local drive and locate the image file.
- 2. Select the image file by clicking on it. Click **Open** when the file name is displayed in **File name** field.
- 3. After clicking **Open**, the image file is selected and its file name appears on **Image File** text field.
- 4. Click Upload Image to start the upload.
- 5. After the upload succeeds, the image will be displayed in the Upload Form.
- 6. Click Close to exit
- 7. The image is displayed in the browser.

🍯 Literature	Category Title Image Upload Form - [by enDiva] - Microsoft Internet Explorer	_ 🗆 🗵
	Literature Category Title Image Upload Form	*
ENDIVA	Use this form to upload a literature category title image.	7 Help
	No image available at this time. Image File Browne. Close Upload Image	
	Copyright () 2000 - 2001 enDiva Software, Inc. All rights reserved.	×

Figure 5-2 Upload I mage Screen

## 6.0 Member Only

## 6.1 Member Login

This page allows existing members to sign in.

- Enter Member ID.
- Enter **Password**.
- Click Login to sign in.
- You will be directed to My Menu in Member Only after sign in successfully.
- You will see an error message on the screen if the sign in attempt fails.

If you have a problem to sign in such as forget the Member ID or Password, click on **Get My Password** to retrieve the sign in information.

### 6.2 Request Login Password

This page allows members to retrieve their login password.

## 6.2.1 Get Password

- 1. Enter Email Address.
- 2. The email address entered must be the one registered with the web site.
- 3. Click **Submit** to submit the request.

The password will be sent to the email address shortly.

### 6.3 My Menu

This page is directed to a member once he/she signs in. It contains the following links:

- Click **Change my password** to change sign in password.
- Click Administrative Tools to go to the administration menu screen. Not all members have this privilege.

### 6.3.1 Member Change Password

This page allows members to change password.

### 6.3.2 Change Password

- 1. Member ID is not editable.
- 2. Enter Old Password.
- 3. Enter New Password.
- 4. Enter new password again in **Confirm Password**.
- 5. Click **OK** to submit the password change request.
- 6. After the update succeeds, you will be directed to login screen in Member Only Page.

You should login with your new password.



Figure 6-1 Member only –My Menu Screen

### 6.4 Member Update

This page allows members to update their profiles and contact information.

### 6.4.1 Steps To Update Member Profile

- 1. Fill in My personal information. Fields with an asterisk (\*) are required.
- 2. Fill in My billing/contact information. Fields with an asterisk (\*) are required.
- 3. Click **OK** to submit the form.

After the update succeeds, you will be directed to menu screen in the Member Only Page.

Mtp://localhost/advancem/ - Mic	record internet ingineer	
Ble Edit New Figurates Task	94b	1
+tet + + + @ 3 3 3 0	Seach @ Ferrates @ History 12 - 20 - 21 - 20	
Agames () http://ocahost/advanver/		* (2ta
Links @ Oustomics Links @ Presi Hote		-
		-
ENDIVA encivo software, inc.	We Horizon en Dit	
Ettel   FAQ:   Signite   Sign Off	Cart   Hone   Tanaday, July	17,2041
About Us Services Where We Are Careers Certact Us Catalog Events	Update My Profile      Vy personal information:     Salutation : Salest :      Salutation : Salest :      Salutation : Salest :      Salutation :	
Member Only	+ Stato new Jersey	- 1
News	• Zip Code proso	
Member Registration	*C-Mail pargle.com	
Resource Links	Day Phone 204987980	
	Night Phone possosos	
Powered by enDiva **	Fax 4545544434	
Dure	Local Intra	net ,

Figure 6-2 Update Profile Screen

#### 6.5 News Subscription

This page allows members to select and subscribe to certain news groups. They will be able to view the news to which they subscribed on the web site.

#### 6.5.1 Steps To Personalize My News

- View different news categories and their descriptions from the table.
- Subscribe to a news group by putting a check mark in **Subscribe** Checkbox.
- Click **Subscribe** to submit the subscription.
- Subscribing to more than one news group is allowed.
- After the subscription succeeds, you will be directed to Menu screen in Member Only Page.
- To Unsubscribe from a news group, just uncheck the **Subscribe** Checkbox for a selected news group.
- Unsubscribe from more than one news group is allowed.
- Click **Subscribe** to submit the subscription.

http://localhost/adventure/~M	Icrosoft internet ligitare	
Blo Edit You Proventoo Inc	a tap	12
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Figure 6-3 News Subscription Screen

### 6.6 Events Subscription

This page allows members to select and subscribe to certain event groups. They will be able to view and register the events to which they subscribed on the web site.

#### 6.6.1 Steps To Personalize My Events

- View different event categories and their descriptions from the table.
- Subscribe to an event group by putting a check mark in the **Subscribe** Checkbox.
- Subscribing to more than one event group is allowed.
- Click **Subscribe** to submit the subscription.
- After the subscription succeeds, you will be directed to the Menu screen in Only Page.
- To Unsubscribe from an event group, just uncheck the **Subscribe** Checkbox for a selected event group.
- Unsubscribe from more than one event group is allowed.
- Click **Subscribe** to submit the subscription.



Figure 6-4 Events Subscription Screen

### 6.7 Resource Links Subscription

This page allows members to select and subscribe to certain resource link groups. They will be able to view the resource links to which they subscribed on the web site.

### 6.7.1 Steps To Personalize My Resource Links

- View different resource link categories and their descriptions from the table.
- Subscribe to a resource link group by putting a check mark in the **Subscribe** Checkbox.
- Click **Subscribe** to submit the subscription.
- Subscribing to more than one resource link group is allowed.
- After the subscription succeeds, you will be directed to the Menu screen in the Member Only page.
- To Unsubscribe from a resource link group, just uncheck the **Subscribe** Checkbox for a selected resource link group.
- Unsubscribe from more than one resource link group is allowed.

Click **Subscribe** to submit the subscription.

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Figure 6-5 Links Subscription Screen

## 6.8 Order Status

This page allows members to view their order history and the detail information of current and previous orders.

#### 6.8.1 Order History List

- A list of previous and current orders is displayed.
- Click the order number link to view the order detail information.

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Figure 6-6 Order History List Screen

### 6.8.2 Order Detail

• Order detail and status information is displayed.

Click My other order history to go back to the order history list.



Figure 6-7 Order Detail Screen

### 6.9 Administrative Tools

Please see Part II Administrative Tools.

### 6.10 Member Directory

This page allows members to look for member's personal and contact information. It has a search engine with filtering and sorting functions to assist members to search information easily. It also provides an interface for members to compose and send email message to other members. For certain members, they are granted privileges to generate mailing lists.

### 6.10.1 Searching For a Member

- 1. Search filter(s) and/or a search keyword can be defined before doing a search.
- 2. To define a search filter, select an item from a filter drop down box. If not selected, the default setting is **ANY**
- 3. Selecting from more than one filter drop down box is allowed.
- 4. Enter a keyword in **Search Keyword** and select a search criteria for the keyword entered. If not selected, the default setting is **ALL**.
- 5. Select a number from the **Show results per page** to define how many records to be displayed on each page.
- 6. Click Search.

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Figure 6-8 Member Directory Screen

## 6.10.2 Member List

- 1. A list of search results on members will be displayed underneath.
- 2. Click on Tabs: **Personal Info**, **Contact Info**, **and Mailing List** for a corresponding view.
- 3. Select a page number from the **Page Index** drop down box to jump to a page selected.
- 4. Click **Next** to go to next page. Click on **Previous** to go to previous page.
- 5. Click on a column title in the result table to sort the records based on the column selected.
- 6. Icon ▲indicates ascending order.
- 7. Icon **v**indicates descending order.

## 6.10.3 Member Mailing List

- 1. Select a mailing list if you wish to see who is in the list.
- 2. Click the checkbox for a particular member to receive the email. You may select more than one member to receive the email.
- 3. Click Check All Box for all members in the list to receive the email.
- 4. Click **Compose Message** and you will be directed to **Compose Member Message Form**.

Related Resources: See help on <u>Compose Email Message</u> See Help on <u>Mailing List</u>

### 6.11 Broadcast Message Form

This page allows a member to broadcast messages for members in selected mailing list.

### 6.11.1 Steps to Broadcast Message

- 1. The sender's email address is listed in Send From.
- 2. Select **Mailing List** from the drop down box. All members in the mailing list will receive the message.
- 3. Select a Message Template that is applicable for this message.
- 4. Enter Subject and Message.
- 5. Click Send when done.
- 6. A message: "Your email message has been sent" appears after the message is sent.
- 7. Click **Close** to close the dialog box.

Related Resources: See help on <u>Mailing List</u>. See help on <u>Message Template</u>.



Figure 6-10 Broadcast Message Screen

### 7.0 Member Registration

This page allows end user to sign up new membership, create login ID and password.

#### 7.1 Sign up a New Membership

- 1. Select Membership Type.
- 2. Click **Continue** to proceed to next step.
- 3. Fill in My personal information. Fields with an asterisk (\*) are required.
- 4. Fill in My billing/contact information. Fields with an asterisk (\*) are required.
- 5. Fill in My Login Information. Fields with an asterisk (\*) are required.
- 6. Click Join to submit the form.
- 7. After the registration succeeds, you will be directed to Welcome screen in the Member Only Page.



Figure 7-1 Member Registration Screen

### 8.0 Member Email Message Form

This page allows a member to compose email message for selected members

### 8.1 Compose Member Message Form

- The sender's email address is in **Send From**.
- The receipt's email addresses are in **Send To**.
- Select a **Message Template** that is applicable for this message.
- Enter Subject and Message.
- Click **Send** when done.
- A message: " Your email message has been sent." appears after the message is sent.
- Click Close to close the dialog box.

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Figure 8-1 Member Message Form Screen

Please see Message Template for more information on creating the form.

## 9.0 Product Catalog

This page allows members to look for product information and to place online orders. It has a search engine with filtering and sorting functions to assist members to search for products easily.

## 9.1 Searching For a Product

- 1. Select a product category from the **Category** drop down box. If nothing is selected, the default setting is **ANY**
- 2. Enter a keyword in **Search Keyword** and select a search criteria for the keyword entered. If not selected, the default setting is **ALL**.
- 3. Select a number from **Show results per page** to define how many records to be displayed on each page.
- 4. Click Search.

## 9.2 Product List (In List View)

- 1. A list of search results on products will be displayed underneath.
- 2. Select a page number from the **Page Index** drop down box to jump to a page selected.
- 3. Click **Next** to go to next page. Click **Previous** to go to previous page.
- 4. Click on a column title in the result table to sort the records based on the column selected.
- 5. Icon ▲indicates ascending order.
- 6. Icon **▼**indicates descending order.
- 7. Click on a product name link to view product detail and image.
- 8. Click on Add to cart to place an order and to put this product in shopping cart.

## 9.3 Product List (In Thumbnail View)

- 1. A list of search results on products will be displayed underneath.
- 2. Select a page number from the **Page Index** drop down box to jump to a page selected.
- 3. Click Next to go to next page. Click Previous to go to previous page.
- 4. Click on a product name link or thumbnail to view product detail and image.
- 5. Click Add to cart to place an order and to put this product to shopping cart.

Related Resources: See help on <u>Shopping Cart</u>.

## 10.0 Shopping Cart

When members are shopping online, they can place the merchandise they wish to purchase to the shopping cart. The shopping cart displays the merchandise, order quantity, the extended price, tax, shipping cost, and the order total. It also allows members to review and make change(s) if necessary before checkout.

## 10.1 Shopping Cart List

- A text: Your shopping cart is empty is displayed when there is no merchandise placed in the cart.
- Click Add to Cart in Catalog to place a merchandise in the Shopping Cart.
- Item Number, Product name, Unit Price, Quantity, and Extended Price are displayed in the cart.

## 10.2 Continue Shopping

• Click Continue Shopping to continue shopping and order more merchandises.

## **10.3 Updating Shopping Cart**

- The quantity of merchandise placed in the cart can be changed.
- Edit number in **QTY** to adjust the quantity of merchandise you wish to order.
- Click Update Shopping Cart when the edit finished.
- The shopping cart is refreshed. Notice the quantity of merchandise is updated and the order total is adjusted.
- Check **Remove** checkbox to remove merchandise from the cart, or
- Enter "O" in Qty to remove merchandise from the cart.
- Click Update Shopping Cart when the edit finished.
- The shopping cart is refreshed. Notice the merchandise deleted is removed from the cart and the order total is adjusted.

## 10.4 Proceed to Checkout

• Click **Checkout** to proceed to submit payment and shipping information when the shopping is done.

## 11.0 Checkout

This page allows members to make a final review of the shopping cart, to make change(s) if necessary, and to submit shipping and payment information.

## 11.1 Reviewing and Modifying Shopping Cart

- A list of merchandise on order is displayed. Please review if the order total is correct.
- Click Modify Shopping Cart to make change(s) and update the shopping cart.

## 11.2 Billing Information

- Billing information must be the same address as shown on your credit card statement.
- Click **Update My Billing Address** to make change(s) and update credit card billing information.

## 11.3 Shipping Information

- Check the **Same as Billing** checkbox if the merchandise ordered will be sent to the billing address.
- Leave the **Same as Billing** checkbox empty and enter the shipping address information underneath if the merchandise is sent to an address other than the billing address.
- Fields with an asterisk (\*) are required.

## 11.4 Payment Information

- Submit credit card payment information.
- Fields with an asterisk (\*) are required.
- Click **Confirm Order** to confirm and submit the order.

## 11.5 Order Confirmation

• An email of order confirmation will be sent to a customer's email account.

## 12.0 Index Search

This page displays the search results from a web site index search and provides link navigations directly to the results found.

### 12.1 Search Result

- A list of results that match the search keyword is displayed.
- Select a page number from the **Page Index** drop down box to jump to a page selected.
- Click on description link to jump to the page with matching result.

# Part II – Administrative Tools

## **1.0 Administrative Tools**

Control Panel for building and administrating the web site.

• Click on the Administrative Tools link at My Menu in Member Only page.

### Administrative Tools containing the following Menu and each Menu has different operations:

Go Home	Go to the default page of the web site. The web page will be in editing environment.
<ul> <li>To post literature co</li> <li>To post news.</li> <li>To post events.</li> <li>To post resource lin</li> </ul>	
Company Administration	Manage Company Information.
<ul> <li>Post Company Info</li> <li>Upload Company L</li> <li>Post Company's Ac</li> </ul>	
Web Master	Control look-and-feel of the web site.
	or page layout. e to personalize the web site. butes for web site contents. Configure web site menu options.
Options	
<ul><li>Define web site me</li><li>Define a default page</li></ul>	
Member Group Management	Manage membership types, user role, and permission.
<ul> <li>Define membership</li> <li>Define user role for</li> <li>Assign permissions</li> </ul>	
Member Profile	Member management and communication for the web site.
<ul> <li>Manage member pr</li> <li>Generate member r</li> <li>Generate member r</li> <li>Broadcast email me</li> </ul>	report. mailing list. essage to member.
Banner Manager	Manage banner for the web site.
Upload banner to the second seco	
System Settings  Configure contact e Configure language Configure maximum Configure support p Configure new ever Configure new links	e setting. n upload file size. prepaid membership license. nts.

Configure recent news.		
Dictionary Manager	Customize/translate system wording which were predefined on the web site.	
<ul> <li>Customize the wording of all predefined words in the web site.</li> <li>Translate the predefined words to different languages.</li> </ul>		
Form Editor	Customize field properties for the entry forms.	
Customize the form	field properties in the user entry forms.	
About Product	Display web site's system information.	
Contain the web server's license information, product information, host and IP information.		
Sign Off	Logoff and terminate the current user's session.	

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Figure 1-1 Administrative Tools Menu Screen

### 2.0 Company Administration

### 2.1 Company Information

This page manages the company's information such as address, phone number, business type. etc.

- 1. Enter necessary information. Fields with an asterisk (\*) are required.
- 2. Click **Save** to save the information.

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Figure 2-1 Company Information Screen

### 2.2 Company Logo

This page manages the company's logo image.

#### Notes:

Make sure the file has a valid extension and the file size is under **150 KB**. File with extensions: **.exe**, **.bat**, **.com**, **.vbs**, **and .js** will not be allowed to upload. If the file size is bigger than 150 KB, click here.

### 2.2.1 Upload Company Logo

- 1. Click Upload Image to upload logo image.
- 2. Click **Browse** to explore the local drive and locate the image file.
- 3. Select the image file by clicking on it. Click **Open** when the file name is displayed in the **File name** field.
- 4. After clicking **Open**, the image file is selected and its file name appears in the **Image File** text field.
- 5. Click Upload Image to start the upload.
- 6. After the upload succeeds, the logo image will be displayed in the Logo Upload Form.

### 2.2.2 Delete Company Logo

- 1. The existing company logo is displayed in the upload form.
- 2. Click **Delete Image** to delete existing company logo.

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Figure 2-2 Company Logo Screen

### 2.3 Company Contact

This page manages the company's administrative contact person.

- 1. Enter necessary information. Fields with an asterisk (\*) are required.
- 2. Click **Save** to save the information.



Figure 2-3 Company Contact Screen

### 3.0 Web Master

## 3.1 Selecting a Template

Select a template for page layout on the web site.

- 1. Click Select Template tab.
- 2. Thumbnails of all template and the template names are displayed in the top frame.

Click on a thumbnail to select a template.

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Figure 3-1 Select a Template Screen

## 3.2 Selecting a Theme

Select a theme to personalize the web site.

- 1. Click Select Theme tab.
- 2. Thumbnails of all color themes of a selected template and the theme names are displayed in the top frame.
- 3. Select a theme by clicking on a color theme thumbnail.
- 4. The preview of the web page with the template and theme selected is displayed in the **Style Preview** located at the bottom frame.
- 5. Click **Save Theme** to save the template and theme.
- 6. The template and theme of the web site are updated.

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Figure 3-2 Select a Theme Screen

## 3.3 Editing styles

Customize font attributes for contents in the web site.

- 1. Click Edit Style tab.
- 2. Select a Style Category from a drop down box.
- 3. Style classes under a selected category are displayed in Style Class drop down box.
- 4. Select a style class to be edited from the drop down box.
- 5. The style attributes of a selected style class are displayed in the corresponding attribute drop down box.
- 6. The style attributes include: font size, font style, font face, font weight, color, background color, and text decoration.
- 7. Make necessary changes by selecting a value in each attribute drop down box.
- 8. Click **Preview** to preview the web site content with the style selected.
- 9. Click **Save Style** to save the style selected.
- 10. The web site content style is updated.

## 3.4 About Style Class Editor

- About Style Category and Style Classes
- <u>About Style Attributes</u>
- Edit Style

## 3.4.1 Style Category and Style Classes

There are **8 Style Categories** and each of the category contains the corresponding **Style Classes**.

Style Category	Description
Admin Tools	To customize content styles in <u>Administrative Page</u> , <u>Report Page</u> , <u>Product</u> <u>Catalog Category page</u> .
Catalog	To customize content styles in Product Catalog Page.
Events	To customize content styles in Events Page.
General	To customize general web site styles such as <u>MouseOver Hover</u> , <u>URL Link</u> , <u>Field Label</u> , <u>Button</u> , etc.
Resource Links	To customize content styles in Resources Links Page.
Literature	To customize content styles in Literature Pages.
News	To customize content styles in <u>News Page</u> .
Shopping	To customize content styles in <u>Shopping Page</u> and <u>Ordering Page</u> .

## 3.4.2 Style Attribute

For each style class, it contains **7 Style Attributes** and each attribute can be customized and updated.

Style Attribute	Description
Font Face	To change the font type of the text, click a font type name in the Font Face box
Font Style	To change the font style of the text, click a style name in the Font Style box
Font Size	To change the font size of the text, click a number in the Font Size box
Font Weight	To change the font weight of the text, click a weight name in the Font Weight box
Color	To change the font color of the text, click a color name in the Font Color box
Background Color	To change the background color of the text, click a color name in the Background Color box
Text Decoration	To change the line style of an anchor link, click a decoration name in the Text Decoration box

## 3.4.3 Editing styles

Customize font attributes for contents in the web site.

- Click Edit Style tab.
- Select a **Style Category** from a drop down box.
- Style classes under a selected category are displayed in **Style Class** drop down box.
- Select a style class to be edited from the drop down box.
- The style attributes of a selected style class are displayed in the corresponding attribute drop down box.

- The style attributes include: font size, font style, font face, font weight, color, background color, and text decoration.
- To make changes, click on an arrow of an attribute drop down box and select a value.
- If not selected, the default setting for the attribute drop down box is default.
- Click **Preview** to preview the web site content with the style selected.
- Click Save Style to save the style selected.
- The browser is refreshed and the web site content style is updated.



Figure 3-3 Edit Styles Screen

### 4.0 Web Site Access Options

### 4.1 Menu Options

Configure menu options for the web site.

### 4.1.1. About Menu Options

The menu options define the web menu to be displayed in the web site. They include the following settings that can be configured by administrator.

Active	To activate or deactivate a web menu with all of its literature content.
Display Order	To define a display order of a web menu.
Menu Caption	To define the name of a web menu.
Menu Option Description	To define the description of a web menu

### 4.1.2. Activating/Deactivating a Web Menu

- 1. Place a check mark on Active checkbox to activate a Web Menu.
- 2. Alternatively, un-check the **Active** checkbox to deactivate a Web Menu.
- 3. Click **Save** to save the settings.
- 4. Web Menu that is activated will be displayed in the web site.

### 4.1.3 Moving the Display Order of a Web Menu

- 1. Current display order for each Web Menu is listed in ascending order.
- 2. Click on an arrow button in **Display Order** list box and select a number from the box.
- 3. The number selected is a new display order for the web page.
- 4. The browser is refreshed and the display order for each Web Menu is changed.
- 5. Click **Save** to save the settings.

### 4.1.4 Changing the text of Menu Caption

- 1. Select a Web Menu and click on 🕮 to edit a Menu Caption.
- 2. A Dictionary Editor Form screen pops up to the screen.
- 3. Edit the text value. Field with an asterisk (\*) is required.
- 4. The text value can be reset to a default setting by clicking on **Reset to Default Value**.
- 5. Click **Save** to save the change made.
- 6. Click Close to close the Dictionary Editor Form screen.
- 7. The browser is refreshed and the Menu Caption setting is updated.

## 4.1.5 Changing the text of Menu Option Description

- 1. Select a Web Menu Description and click on the dit a Menu Option Description.
- 2. A Dictionary Editor Form screen pops up to the screen.

- 3. Edit the text value. Field with an asterisk (\*) is required.
- 4. The text value can be reset to a default setting by clicking on **Reset to Default Value**.
- 5. Click **Save** to save the change made.
- 6. Click Close to close the Dictionary Editor Form screen.
- 7. The browser is refreshed and the Menu Option Description setting is updated.



Figure 4-1 Menu Options Screen

### 4.2 Web Site Default Page

Configure default page for the web site.

### 4.2.1 About Web site Default Page

The Web Site Default Page defines the web site's default page. Default page can be the home page or an index page containing a site navigation listing.

### 4.2.2 Enabling a Default Page

- 1. Click on **Default Page** tag.
- 2. A list of Web Menu for the web site are displayed in the order in which defined in **Menu Options**.
- 3. Click on a Web Menu to set it as a default page.

- 4. Click **Save** to save the settings.
- 5. A Web Menu that is defined as default page is highlighted.



Figure 4-2 Default Page Screen

## 5.0 Member Group Management

Member Group Management allows the administrator to manage

- the types of membership,
- the roles for the member groups
- and permissions allowed for each member group.

## 5.1 Membership Types

Manage membership types

- 1. Click Membership Type tab.
- 2. The existing membership types for the web site are displayed in **Membership Type** selection box.

## 5.1.1 Creating a New Membership Type

- 1. Click **New** in the membership types form.
- 2. Enter necessary information. Fields with an asterisk (\*) are required fields.
- 3. Click **Save** to save the new membership type.
- 4. The membership type form is refreshed and the new membership type is displayed in **Membership Type** selection box.

## 5.1.2 Updating an Existing Membership Type

- 1. Select an existing membership type from the **Membership Type** selection box.
- 2. The record for a selected membership type is displayed in the form.
- 3. Edit or modify information. Fields with an asterisk (\*) are required fields.
- 4. Click **Save** to save the change(s) made.

## 5.1.3 Deleting an Existing Membership Type

- 1. Select an existing membership type from the **Membership Type** selection box.
- 2. The record for a selected membership type is displayed in the form.
- 3. Click Delete to delete the selected membership type.
- 4. Click **OK** to confirm the deletion. Otherwise, click **Cancel**.
- 5. In the event that the existing membership type has associated members for the membership type, click **OK** to continue the deletion.

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Figure 5-1 Member Group Management – Membership Type Screen

#### 5.2 Roles

Manage roles for member groups on the web site.

- 1. Click on the Roles tab.
- 2. The existing member roles for the web site are displayed in the Roles selection box.

#### 5.2.1 Creating a New Role

- 1. Click New in the roles form
- 2. Enter the role name.
- 3. Click Save to save the new role.
- 4. The roles form is refreshed and the new role is displayed in the **Roles** selection box.

### 5.2.2 Updating an Existing Role

- 1. Select an existing role from the **Roles** list box.
- 2. The role name for the selected role type is displayed in the form.
- 3. Edit the role name.
- 4. Click **Save** to save the change(s) made.
- 5. The roles form is refreshed and the updated role name is displayed in the **Roles** selection box.

### 5.2.3 Deleting an Existing Role

- 1. Select an existing role from the **Roles** selection box.
- 2. The role name for the selected role type is displayed in the form.
- 3. Click Delete to delete the selected role.
- 4. Click **OK** to confirm the deletion. Otherwise, click on **Cancel**.
- 5. In the event that the existing role has associated members for the role, click on **OK** to continue the deletion.



Figure 5-2 Member Group Management – Roles Screen

### 5.3 Permission

Manage permissions for member groups on your web site.

- 1. Click Permissions tab.
- 2. The existing member roles for the web site are displayed in **Roles** selection box.
- 3. The existing permissions for all roles are displayed in **Permissions** selection box.

## 5.3.1 Assigning Permissions(s) to a Role

1. Select an existing role from **Role** selection box.

- 2. The permission form is refreshed and a list of permissions assigned for a selected role is displayed in the **Permission** selection box.
- 3. Permissions assigned to a selected role are highlighted in the selection box.
- 4. To assign a new permission, press down the **CTRL** key and use mouse to **left click** on the permission that is <u>not highlighted</u>.
- 5. To assign multiple permissions, press down the **CTRL** key and use mouse to **left click** on the additional permissions that are <u>not highlighted</u>.
- 6. Click Save to save the updated permissions.
- 7. In case of making a mistake, click **Reset** to restore the permissions to default setting.

## 5.3.2 Removing Permission(s) from a Role

- 1. Select an existing role from **Role** selection box.
- 2. The permission form is refreshed and a list of permissions assigned for a selected role is displayed in the **Permission** selection box.
- 3. Permissions assigned to a selected role are highlighted in the selection box.
- 4. To remove a permission, press down the **CTRL** key and use mouse to **left click** on the permission that is <u>highlighted</u>.
- 5. To remove multiple permissions, press down the **CTRL** key and use mouse to **left click** on the additional permissions that are <u>highlighted</u>.
- 6. Click **Save** to save the updated permissions.
- 7. In case of making a mistake, click **Reset** to restore the permissions to default setting.



Figure 5-3 Member Group Management – Permissions Screen
#### 6.0 Member Profile

Member management and communication for the web site.

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Figure 6-1 Member Profile Screen

#### 6.1 Searching For a Member

- 1. A search filter(s) and/or a search keyword can be defined before doing a search.
- 2. To define a search filter, select an item from the filter drop down box. If not selected, the default setting is **ANY**
- 3. Selecting from more than one filter drop down box is allowed.
- 4. Enter a keyword in **Search Keyword** and select a search criteria for the keyword entered. If not selected, the default setting is **ALL**.
- 5. Select a number from **Show results per page** to define how many records are to be displayed on each page.
- 6. Click Search.

## 6.2 Member List

- 1. A list of search results on members will be displayed underneath.
- 2. Click on Tabs: **Personal Info**, **Contact Info**, **Membership Info**, **and Mailing List** for a corresponding view.
- 3. Select a page number from the **Page Index** drop down box to jump to a page selected.
- 4. Click Next to go to next page. Click on Previous to go to previous page.

- 5. Click on a column title in the result table to sort the records based on the column selected.
- 6. Icon ▲indicates ascending order.
- 7. Icon **▼**indicates descending order.

## 6.3 Personal Info

- 1. **Personal Info** displays the personal profile of a member.
- 2. This includes member id, salutation, last name, first name, and employer.

## 6.4 Contact Info

- 1. **Contact Info** displays the contact information of a member.
- 2. This includes member id, address, phone, fax, and email address.

#### 6.5 Membership Info

- 1. Membership Info displays the membership information of a member.
- 2. This includes member id, membership type, role, membership status, payment status, register date, and last visit date.

## 6.5.1 Adding a New Member

- 1. A blank **Member Editor Form** pops up on the screen to collect membership information.
- 2. Select a **Membership Type** and a **Role** for the new member.
- 3. Place a check mark in **Paid** checkbox if the member already paid the membership fee.
- 4. Enter login information, personal profile, and contact information. Fields with an asterisk (\*) are required fields.
- 5. Click Save to save the new member record.
- 6. Click Close to close the form.
- 7. The browser is refreshed and the new member is added.

## 6.5.2 Updating an Existing Member

- 1. A **Member Editor Form** with a record of selected member pops up on the screen.
- 2. Change the **Membership Type** and a **Role** if necessary.
- 3. Place a check mark in **Paid** checkbox if the member already paid the membership fee.
- 4. Make necessary change(s) in the form. Fields with an asterisk (\*) are required fields.
- 5. Click **Save** to save the updated member record.
- 6. Click Close to close the form.

## 6.5.3 Deleting an Existing Member

1. Click **Delete** to delete a record of a selected member.

- 2. A delete confirmation screen pops up.
- 3. Click **OK** to confirm the deletion. Otherwise, click **Cancel**.
- 4. The member list is refreshed and the deleted record has been removed from the list.

# 6.5.4 Generating a Member Profile Report (HTML Format)

- 1. Click **Report** to generate a member profile report.
- 2. A Member Profile Report pops up to the screen.
- 3. The report contains the personal info, contact info, and membership info for all members.
- 4. Click [Print] to print the report.

# 6.5.5 Exporting the Existing Member Profile to an Excel Spreadsheet

- 1. Click **Export to Excel** to generate an excel report.
- 2. An Excel Spreadsheet pops up to a screen.
- 3. The spreadsheet contains the personal info, contact info, and membership info for all members.
- 4. Click **File** and then **Print** from the tool bar to print the report.
- 5. Click **File** and then **Save As** from the tool bar to save a copy of the report to local computer.

#### 6.5.6 Activating an Existing Member (Only applicable to Membership Info view)

- 1. Select a member to be activated by checking the checkbox.
- 2. Click Activate to activate a selected member.
- 3. The member list is refreshed and indicates the member has been activated.

## 6.5.7 Deactivating an Existing Member (Only applicable to Membership Info view)

- 1. Select a member to be deactivated by checking the checkbox.
- 2. Click **Deactivate** to deactivate a selected member.
- 3. The member list is refreshed and indicates the member has been deactivated.

## 6.6 Member Mailing List

- 1. Select a mailing list if to find out who are in the list.
- 2. Click the checkbox for a particular member to receive the email. You may select more than one member to receive the email.
- 3. Click Check All Box for all members in the list to receive the email.
- 4. Click 0Compose Message and you will be directed to Compose Member Message Form.

Related Resources: See Help on <u>Membership Types</u> See Help on <u>Roles</u> See help on <u>Compose Email Message</u>

## 6.7 Mailing List Form

This page allows a member to create and update the member mailing list if he/she is granted the privilege to do so.

## 6.7.1 Different Operations in Mailing List:

- Refresh Refresh the mailing list.
- Save As Add a mailing list.
- Save Edit a mailing list.
- Delete Delete a mailing list.

## 6.7.2 Adding a Member Mailing List

- 1. Select member(s) to be added to the mailing list by checking the checkbox in the result table.
- 2. Click Save As and a Member Mailing List Form will pop up on the screen.
- 3. Enter Mailing List Title. This is a required field.
- 4. Enter Mailing List Description, if any.
- 5. Check on Active to activate the mailing list.
- 6. Check on **Shared** to allow other members to use the mailing list.
- 7. Click Save to save when done.
- 8. Click **Close** to close the dialog box after the save succeeds.
- 9. Click **Refresh** to refresh the browser.
- 10. The newly created mailing list should be in the drop down box.
- 11. A list of members is displayed when the new mailing list is selected.

## 6.7.3 Updating a Mailing List

- 1. Select different or same member(s) that to be added to the mailing list by checking the checkbox in the result table.
- 2. Select a Mailing List to be updated from the drop down box.
- 3. Click Save As and a Member Mailing List Form will pop up on the screen.
- 4. Make necessary changes, and the fields with an asterisk (\*) are required.
- 5. Click **Save** to save when done.
- 6. Click **Close** to close the dialog box after the save succeeds.
- 7. Click **Refresh** to refresh the browser and the newly created mailing list should be in the **Mailing List** drop down box.
- 8. A list of members is displayed when the updated mailing list is selected.

## 6.7.4 Deleting a Mailing List

- 1. Select a Mailing List to be deleted from the drop down box.
- 2. Click Delete.
- 3. Click OK to confirm the delete action. Otherwise, click Cancel.
- 4. The deleted mailing list is removed from the drop down box.

# 7.0 Storefront Manager

# 7.1 Catalog Admin

Product catalog management for the web site.

# 7.1.1 Searching For a Product in Catalog

- 1. A category search filter and/or a search keyword can be defined before doing a search.
- 2. To define a search category filter, select a category from the **Category** drop down box. If not selected, the default setting is **ANY**
- 3. Enter a keyword in **Search Keyword** and select a search criteria for the keyword entered. If not selected, the default setting is **ALL**.
- 4. Select a number from **Show results per page** to define how many records are to be displayed on each page.
- 5. Click Search.
- 6. A list of search results on products will be displayed underneath.

## 7.1.2 About Category Tree Navigation

- A tree navigation of all existing product categories is displayed.
- A category can contain many subcategories
- A subcategory itself can contain many subcategories.
- Before product can be added, a category or subcategory must be created first.
- A text: My Catalog > [Some Category] > [Some Subcategory] shown to indicate the current category where the products belong to.

## 7.1.3 Using Category Tree Navigation to search a product

- 1. Click on Category Name Link or is ubcategories.
- 2. Click on a category or subcategory and all the products inside the selected category or subcategory are displayed in the list.
- 3. An icon: in the navigation tree also shown to indicate the current category where the products belong to.

# 7.1.4 Product List

- 1. Select a page number from the **Page Index** drop down box to jump to a page selected.
- 2. Click **Next** to go to next page. Click on **Previous** to go to previous page.
- 3. Click on a column title in the result table to sort the records based on the column selected.
- 4. Icon ▲indicates ascending order.
- 5. Icon **T**indicates descending order.

## 7.1.5 Show Long List

1. Click on to display the detailed product list.

# 7.1.6 Show Short List

1. Click on to display the short product list.

# 7.1.7 Adding a New Category

- 1. A blank **Product Category Editor Form** pops up on the screen to collect information.
- 2. To add a new category, Enter Category Name. This field is required.
- 3. Enter description for the new category, if any.
- 4. Check **Active** checkbox to allow this category is viewable in web site.
- 5. Click **Save** to save the new catalog.
- 6. Click **Close** to close the form.
- 7. The browser is refreshed and the new category is created.

# 7.1.8 Updating an Existing Catalog

- 1. A **Product Category Editor Form** with a record of selected category pops up on the screen.
- 2. To update a category, make the change in the Category Name.
- 3. Check Active checkbox to allow this category is viewable in web site.
- 4. Click **Save** to save the change.
- 5. The browser is refreshed and the category has is updated.

## 7.1.9 Deleting an Existing Catalog

- 1. Select a category to be deleted by clicking on category name in navigation tree.
- 2. Click **Delete Category** to update a record of a selected category.
- 3. Click **OK** to confirm the deletion. Otherwise, click **Cancel**.
- 4. The browser is refreshed and the deleted category has been removed from the navigation tree.

## 7.1.10 Adding a New Product

- 1. A blank **Product Data Editor Form** pops up on the screen to collect product information.
- 2. To add a new product, enter the product information, inventory information, and shipping information. Fields with an asterisk (\*) are required fields.
- 3. Place a check mark in Active checkbox to put the product to storefront.
- 4. Place a check mark in **Use inventory control** to activate inventory control for the product.
- 5. Place a check mark in **Allow back order** to allow back order for the product.
- 6. Click **Save** to save the new product record.
- 7. Click **Close** to close the form.
- 8. The browser is refreshed and the new product is added.

## 7.1.11 Uploading a Product Image

- 1. Click **Product Name link** to upload an image for the newly added product.
- 2. A Product Image Upload Form pops up on the screen.
- 3. Click here for "How to Upload Image".

## 7.1.12 Updating an Existing Product

- 1. A **Product Data Edit Form** with a record of selected product pops up on the screen.
- 2. To update product information, make necessary change(s) in the form. Fields with an asterisk (\*) are required fields.
- 3. Place a check mark in Active checkbox to put the product to storefront.
- 4. Place a check mark in **Use inventory control** to activate inventory control for the product.
- 5. Place a check mark in **Allow back order** to allow back order for the product.
- 6. Click **Save** to save the updated record.
- 7. Click Close to close the form.

## 7.1.13 Updating a Product Image

- 1. Click **Product Name link** to upload an image for the selected product.
- 2. A Product I mage Upload Form pops up on the screen.
- 3. The existing product image is displayed in the Upload Form.
- 4. Click **Delete Image** to delete the existing product image.

Follow steps in <u>"How to Upload Image"</u> to upload a product image.

## 7.1.14 Deleting an Existing Product

- 1. Click **Delete** link to update a record of a selected product.
- 2. A **Product Data Edit Form** with the record of a selected product pops up on the screen.
- 3. Make necessary change(s) in the form. Fields with an asterisk (\*) are required fields.
- 4. Click **Save** to save the updated record.
- 5. Click Close to close the form.
- 6. The browser is refreshed and the updated product is displayed in product list.

## 7.1.15 Generating a Product Catalog Report (HTML Format)

- 1. Click **Report** to generate a product detail report.
- 2. A Catalog Report pops up to the screen.
- 3. The report contains the product detail information.
- 4. Click [Print] to print the report.

## 7.1.16 Exporting the Existing Product Catalog Report to an Excel Spreadsheet

- 1. Click **Export to Excel** to generate an excel report.
- 2. An Excel Spreadsheet pops up to a screen.

- 3. The spreadsheet contains the product detail information.
- 4. Click File and then Print from the tool bar to print the report.
- 5. Click **File** and then **Save As** from the tool bar to save a copy of the report to local computer.

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Figure 7-1 Storefront Manager – Catalog Admin Screen

#### 7.2 Order Process

Process online order fulfillment.

## 7.2.1 Searching For a Order Received

- 1. A search filter and/or a search keyword can be defined before doing a search.
- 2. To define a search filter, select a status from the **Order Status** drop down box. If not selected, the default setting is **ANY**
- 3. Enter a value in Order Number and/or in Member ID to search an order.
- 4. Select a number from **Show results per page** to define how many records are to be displayed on each page.
- 5. Click Search.
- 6. A list of search results on orders received will be displayed underneath.

## 7.2.2 Order List

- 1. Select a page number from the **Page Index** drop down box to jump to a page selected.
- 2. Click **Next** to go to next page. Click on **Previous** to go to previous page.
- 3. Order information including Order Number, Order Date, Order Status, Member ID, Total Amount, Process Date is displayed in the list.

#### 7.2.3 Process Order

- 1. Click on Order Number Link to process a selected order.
- 2. An Order Process Form with the record of a selected order up on the screen.
- 3. To process an order, click on arrow button in **Order Status** for down box and select a status for the selected order.
- 4. Click **OK** to save the record.
- 5. The updated status and process date are displayed in the order list.



Figure 7-2 Storefront Manager – Order Process Screen

# 7.3 eCoupon Manager

Manage e-coupon and customize distribution for customers of the web site.

- 1. Click on the eCoupons tab.
- 2. The existing eCoupons for the storefront are displayed in the eCoupons selection box.

There are three types of eCoupon:

By Percentage	To set the discount by the percentage, e.g. 5 % off.
By Amount	To set the discount by the amount, e.g. \$5 off.
Product Reward	To get a product reward by presenting the coupon.

## 7.3.1 Creating a New eCoupons

- 1. Click **New** in the eCoupon form.
- Select an eCoupon type and enter necessary information. Fields with an asterisk (\*) are required.
- 3. Place a check mark in **Active** checkbox to activate the eCoupon.
- 4. Place a check mark in **Allow Combined Discount** to allow the eCoupon can be used with other eCoupon (???).
- 5. Click **Save** to save the new eCoupon.
- 6. The eCoupon form is refreshed and the new eCoupon is displayed in the **eCoupons** selection box.

## 7.3.2 Updating an Existing eCoupons

- 1. Select an existing eCoupon from the eCoupons selection box.
- 2. The record for the eCoupon selected is displayed in the form.
- 3. Make necessary change(s). Fields with an asterisk (\*) are required.
- 4. Click Save to save the change(s) made.
- 5. The eCoupon form is refreshed and the updated eCoupon is displayed in the eCoupons selection box.

## 7.3.3 Deleting an Existing eCoupons

- 1. Select an existing eCoupon from the eCoupons selection box.
- 2. The record for the eCoupon selected is displayed in the form.
- 3. Click **Delete** to delete the selected eCoupon.
- 4. Click **OK** to confirm the deletion. Otherwise, click on **Cancel**.

## 7.3.4 Sending an Existing eCoupons

- 1. Select an existing eCoupon from the eCoupons selection box.
- 2. The record for the eCoupon selected is displayed in the form.
- 3. Click **Send** to send the eCoupon selected to email accounts of all registered members.

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Figure 7-3 Storefront Manager – eCoupon Manager Screen

#### 7.4 Sales Report

Generate quick reports for sales and marketing

- Click on the Sales Report tab.
- The existing report selections for the storefront are displayed in the **Report** Selections selection box.

#### 7.4.1 About Sales Report

The sales reports provide information for conducting marketing, product promotion, and inventory control.

There are five types of Sales Report:

Best Sellers	Report on top sales merchandises.
Worst Sellers	Report on worst sales merchandises.
Top Customer By Purchase Frequency	Report on top customers who shop very often.
Customer By Purchase Amount	Report on top customers who spend the most.
Infrequent Customer	Report on customers who don't shop very often.

## 7.4.2 Generating a Sales Report

- 1. Select a Sales Report by clicking a sales report type from **Sales Report** selection box.
- 2. The sales report selected will be highlighted.
- 3. To define a **Date Range** for the sales report selected, select a number value in each of the following drop down boxes: **From [Month]**, **From [Year]**, **To [Month]**, **To [Year]**.
- 4. Select a number range from **Retrieve Results** to define how many records are to be displayed in the sales report.
- 5. Click **OK** to generate the sales report.
- 6. A sales report will pop up to the screen.
- 7. Click [Print] to print the report.

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Figure 7-4 Storefront Manager – Sales Reports Screen

#### 8.0 Banner Manager

The Banner Manager sets up and manages the company's advertising banner.

Notes:

Make sure the image file has a valid extension and the file size is under 150 KB. File with extensions: .exe, .bat, .com, .vbs, and .js will not be allowed to upload. If the file size is bigger than 150 KB, please <u>see</u> System Settings upload to adjust the maximum file upload size.

#### 8.1 Upload Company Banner

- 1. Click Upload Image to upload banner image.
- 2. Click Browse to explore the local drive and locate the image file.
- 3. Select the image file by clicking on it. Click Open when the file name is displayed in the File name field.
- 4. After clicking Open, the image file is selected and its file name appears in the Image File text field.
- 5. Click Upload Image to start the upload.
- 6. After the upload succeeds, the image will be displayed in the Banner Upload Form.

#### 8.2 Delete Company Banner

1. The existing company banner is displayed in the banner upload form.

Click **Delete Image** to delete existing company banner.

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Sign Off		

Figure 8-1 Banner Manager Screen

# 9.0 System Settings

Configure system settings for your web site.

## 9.1 About System Settings

The web site system settings contain the following settings and allow administrator to configure each setting.

Contact Email	To define a contact email for the web site.
Language	To define the language for the web site.
Maximum Upload File Size	To define the maximum upload file size for uploading image and attachment file to the web site.
New Events	To define maximum number of new events displayed in New Events category on event page.
New Links	To define maximum number of new links displayed in <b>New</b> <b>links</b> category on resource links page.
Recent News	To define maximum number of new events displayed in New Events category on news page.

# 9.2 Configuring Contact Email Settings

- 1. Select Contact Email from System Settings Selection box.
- 2. The value for settings is displayed in the Value field.
- 3. Enter email address in the Value field.
- 4. Click Save to save the setting.

## 9.3 Configuring Language Settings

- 1. Select Language from System Settings Selection box.
- 2. The value for settings is displayed in the Value list box.
- 3. Select a language from the Value list box.
- 4. Click **Save** to save the setting.

## 9.4 Configuring Upload File Size

- 1. Select Maximum Upload File Size from System Settings Selection box.
- 2. The value for settings in <u>bytes</u> is displayed in the **Value** field.
- 3. Enter the maximum upload file size in the Value field.
- 4. Click Save to save the setting.

## 9.5 Configuring New Events

- 1. Select New Events from System Settings Selection box.
- 2. The value for settings is displayed in the Value list box.
- 3. Select a number ranged 0-15 from the Value list box.
- 4. Click **Save** to save the setting.

## 9.6 Configuring New Links

- 1. Select New Links from System Settings Selection box.
- 2. The value for settings is displayed in the **Value** list box.
- 3. Select a number ranged 0-15 from the Value list box.
- 4. Click Save to save the setting.

#### 9.7 Configuring Recent News

- 1. Select Recent News from System Settings Selection box.
- 2. The value for settings is displayed in the **Value** list box.
- 3. Select a number ranged 0-15 from the Value list box.
- 4. Click **Save** to save the setting.

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Figure 9-1 System Settings Screen

## **10.0 Dictionary Manager**

Customize/translate languages that are predefined on the web site.

## 10.1 About Dictionary Manager

The **Dictionary Manager** allows the administrator to customize the wording of all predefined words in the web site.

It also allows the administrator to translate the predefined words to different languages. The predefined word has the following settings:

To display the original text value for a predefined word. All predefined words can be reset to their original text value.
To allows the editing of text value for a predefined word. The local language depends on the language settings of enDiva Server. It can be English, Chinese, Japanese, Spanish, etc. <u>See</u> System Settings Language for more on Language Settings

## 10.2 Sorting the Words

- 1. Click on Original Value link to sort the original text value in ascending order.
- 2. Click on Value in [Language] link to sort the customized text value in ascending order.

## 10.3 Updating a Word

- 1. Select a word to be updated by clicking on a word link under Value in [Local Language] column.
- 2. A Dictionary Editor Form pops up to the screen.
- 3. The text value of a word is displayed in Value in [Local Language] field.
- 4. Edit the text value in local language. This field is required.
- 5. The text value can be reset to a default setting by clicking on **Reset to Default Value**.
- 6. Click **Save** to save the change(s) made.
- 7. Click Close to close Dictionary Editor Form.
- 8. The browser is refreshed and the word setting is updated.

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Web Master Web Site Access	(Please enter the number exactly as given.)	(Please enter the number exactly as given.)	
Options Member Group	A record with the same category name already exist.	A record with the same category name already exist.	
Management Member Profile	A record with the same membership type name already exist.	A record with the same membership type name already exist.	
Storefront Manager	A record with the same name already exist in this category. Please change	A record with the same name already exist in this category. Please change the title.	
Banner Manager	the title.		
System Settings	A record with the same role name already exist.	A record with the same role name already exist.	
Dictionary Manager	A record with the same title already	A record with the same title already	
Form Editor	exist in this category. Please change	exist in this category. Please change	
Message Template	the title.	the title.	
About Product	About	About	
Sign Off	About	About Product	
	About Us	About Us	
Powered by enDiva **	About your web site's system information.	About your web site's system	
		<b>&gt;</b>	

Figure 10-1 Dictionary Manager Screen

## 11.0 Form Editor

Customize field properties for the entry forms.

# 11.1 About Form Editor

Form Editor allows administrator to customize the form field properties in the user entry forms.

The following Form Objects can be customized by using Form Editor:

Address Form	Form that collects member's contact information.
Event Form	Form that collects post event information.
Event Registration	Form that collects event registration information.
Form	
Literature Form	Form that collects web site literature content.
News Form	Form that collects post news information.
Person Form	Form that collects member's personal profile.
Product Form	Form that collect online store product information.

For each **Form Object**, the form field has the following settings:

Field Name	To define a name for the message template.
Display Order	To define the field's display order.
Active	To activate/deactivate a field.
Required Field	To set the field as required field.
Edit Field Value 🛃	To define the value inside a selection field. (Not all fields have this setting.)

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Figure 11-1 Form Editor Screen

#### 11.2 Selecting a Field Object

- 1. Click on an arrow button in **Form Object** list box and select a form from the box.
- 2. All the fields of the form selected are displayed underneath.
- 3. There are also few user defined fields in each form. These fields and their properties can be customized by users.

## 11.3 Editing a Field Name

- 1. Click on **New** to add a message template.
- 2. A Dictionary Editor Form screen pops up to the screen.
- 3. Edit the text value. This field is required.
- 4. The text value can be reset to a default setting by clicking on **Reset to Default Value**.
- 5. Click **Save** to save the change made.
- 6. Click Close to close the Dictionary Editor Form screen.
- 7. The browser is refreshed and the Field Name setting is updated.

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Figure 11-2 Field Value Screen

# 11.4 Moving the Display Order of a Field

- 1. Current display order for each field of a form is listed in ascending order.
- 2. Click on an arrow button in **Display Order** list box and select a number from the box.
- 3. The number selected is a new display order for the Field.
- 4. The browser is refreshed and the display order for each Field is changed.
- 5. Click **Save** to save the settings.

## 11.5 Activating/Deactivating a Field

- 1. Place a check mark on **Active** checkbox to activate a Field.
- 2. Alternatively, un-check the Active checkbox to deactivate a Field.
- 3. Click **Save** to save the settings.
- 4. Field that is activated will appear in the form to collect information.

## 11.6 Setting a Required Field

- 1. Place a check mark on **Required** checkbox to turn an Optional Field into Required Field.
- 2. Alternatively, un-check the **Required** checkbox to turn a Required into an Optional Field.
- 3. Click **Save** to save the settings.
- 4. In the form, each Required Field has an asterisk (\*) next to it.

## 11.7 Customize Values in Selection Field

- A field such as selection field has multiple values. For example, a field Marital Status has values of "Single" and "Married".
- Field Value Editor provides interface to customize a selection field's values.

- Click on 🖆 to edit the field values.
- A Field Value Editor Form pops up to the screen to collect the information.

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Figure 11-3 Field Properties Screen

# 11.8 Field Value Editor

Create or update selected field values of a form.

## 11.8.1 About Field Value Editor

A field such as selection field has multiple values. For example, a field Marital Status has values of "Single" and "Married".

**Field Value Editor** provides interface to customize a selection field's values. A list of available values for the field selected is displayed in **Available Values** list box.

## 11.8.2 Adding a Field Value

- 1. Click **New** to add a new value.
- 2. Enter a text value in Field Value. This field is required.
- 3. Click **Save** to save the value.

4. The new value added is displayed in Available Values list box.

## 11.8.3 Updating a Field Value

- 1. To update a field value, select a field value by click on a value in **Available Values** list box.
- 2. The text value for the field value selected is displayed in the Field Value.
- 3. Make necessary change to text value.
- 4. Click **Save** to save the change made.
- 5. The browser is refreshed and the updated value is displayed in the **Available Values** list box.

## 11.8.4 Deleting a Field Value

- 1. To delete a field value, select a field value by click on a value in **Available Values** list box.
- 2. The text value for the field value selected is displayed in the Field Value.
- 3. Click **Delete** to delete the field value selected.
- 4. The browser is refreshed and the value deleted is removed from the **Available Values** list box.

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Figure 11-4 Field Value Editor Screen

## 12.0 Message Template

Customize message header and footer

# 12.1 About Web site Default Page

Message Template Form allows administrator to create template and customize email message header and footer for the template.

Each Message Template contains the following settings:

Message Template Name	To define a name for the message template.	
Message Template Subject	To define the message subject.	
Message Header	To define the message header.	
Message Footer	To define the message footer.	

#### 12.2 Adding a message template

- 1. Click **New** to add a message template.
- 2. Enter necessary setting information. Field with an asterisk (\*) is required.
- 3. Click **Save** to save the record.
- 4. The new message template added is displayed in Message Template list box.

## 12.3 Updating a message template

- 1. A list of existing message template is displayed in Message Template list box.
- 2. To select a message template, click on a message template from **Message Template** list box.
- 3. The settings for the message template selected are displayed in the setting fields.
- 4. Make necessary change(s) on settings. Field with an asterisk (\*) is required.
- 5. Click **Save** to save the change(s) made.

## 12.4 Deleting a message template

- 1. A list of existing message template is displayed in Message Template list box.
- 2. To select a message template, click on a message template from **Message Template** list box.
- 3. The settings for the message template selected are displayed in the setting fields.
- 4. Click **Delete** to delete the message template selected.
- 5. The message template deleted is removed from Message Template list box.

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Member Profile	Welcome new user signup	Message Header	
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Figure 12-1 Message Template Screen

#### **13.0 About Product**

• The About Product Main Menu pops up to the screen.

It contains the web server's license information, component information, product information, host and IP information.



Figure 13-1 About Product Screen