



# User Guide

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# LEGAL AGREEMENT

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# About SalesPro

Welcome to SalesPro!

This is a Joomla extension, and runs seamlessly on top of an existing Joomla installation. You will need Joomla 3.0 or higher to use SalesPro, and you can install it just like any other extension (read up on the installation process [here](#)).

Once installed, SalesPro gives you the tools you need to make a very powerful, interactive online shop.

In this guide, you'll discover how to create a new product, customise the template, manage your sales and much, much more.

SalesPro was designed to be a fantastic user experience. I hope that you find it intuitive, user-friendly and fun to use; and if you have any feedback at all (whether good or bad) please don't hesitate to get in touch.

Please do read this user guide before you use SalesPro, as you will find it very helpful in understanding the different features and power that SalesPro offers.

If you have any questions about any aspect of SalesPro, you can click the help button, which will bring you directly to the correct part of this User Guide. Just look for the help icon:



And finally, if you have any questions, suggestions, or experience an issue that is not addressed in this guide, please contact support at <http://www.sales-pro.co.uk>, where I will be very happy to help you.

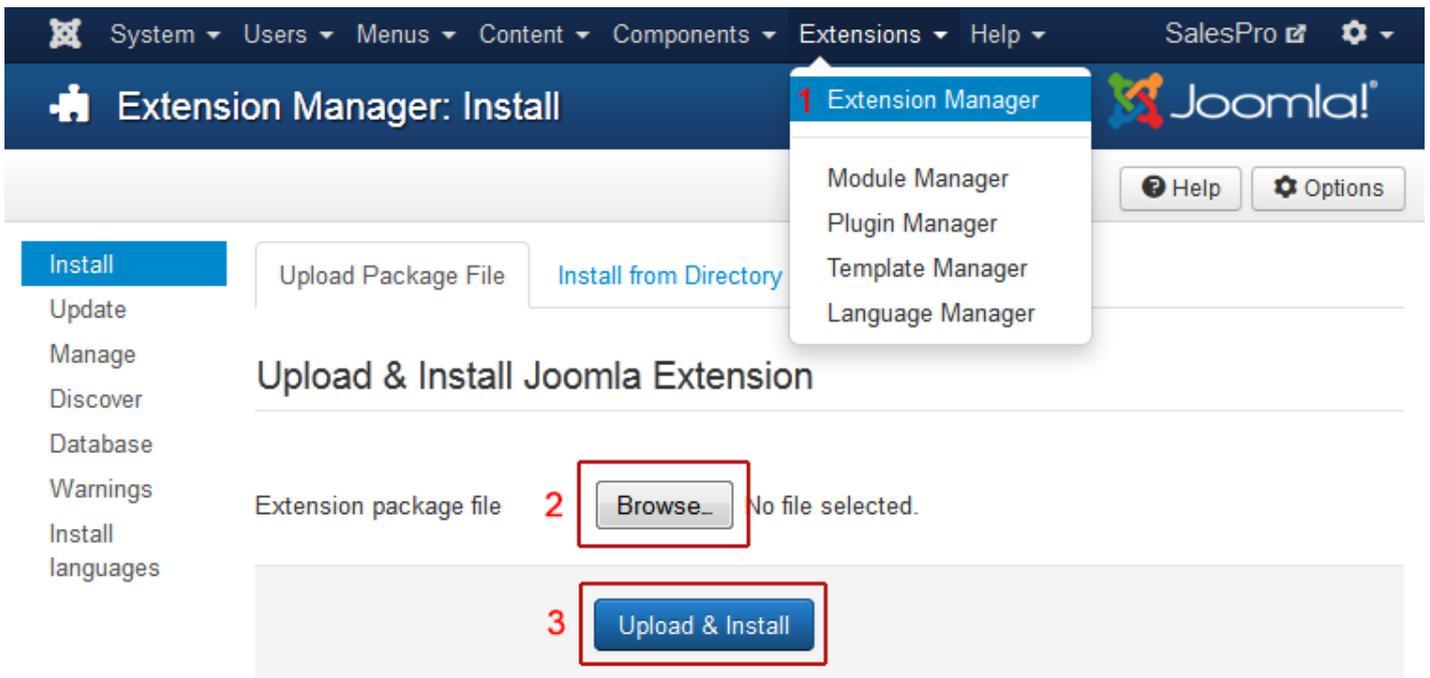
Thank you for choosing SalesPro!

# SalesPro Setup: Installation

To install SalesPro, first log into your administrator area as normal



Open the Extensions Manager, and go to Install > Upload Package File.



Select the SalesPro component package, and then click Upload & Install.

**Message**

Installing package was successful.



**Install**

Update

Manage

Discover

Database

Warnings

Install

languages



## Welcome to SalesPro!

SalesPro is a powerful e-commerce solution for Joomla 3

**Features:**

- Create unlimited product pages!
- Add unlimited currency options!
- Sell to anywhere in the world!
- Full PayPal integration!
- Add product options!
- Fantastic stock management!
- Add videos to your product pages!
- Add FAQs to your product pages!
- Full SEO capabilities - title/keywords/description!
- Define unlimited regions, countries and states!
- Create multiple shipping methods based on rules!
- Easy template creation and integration!

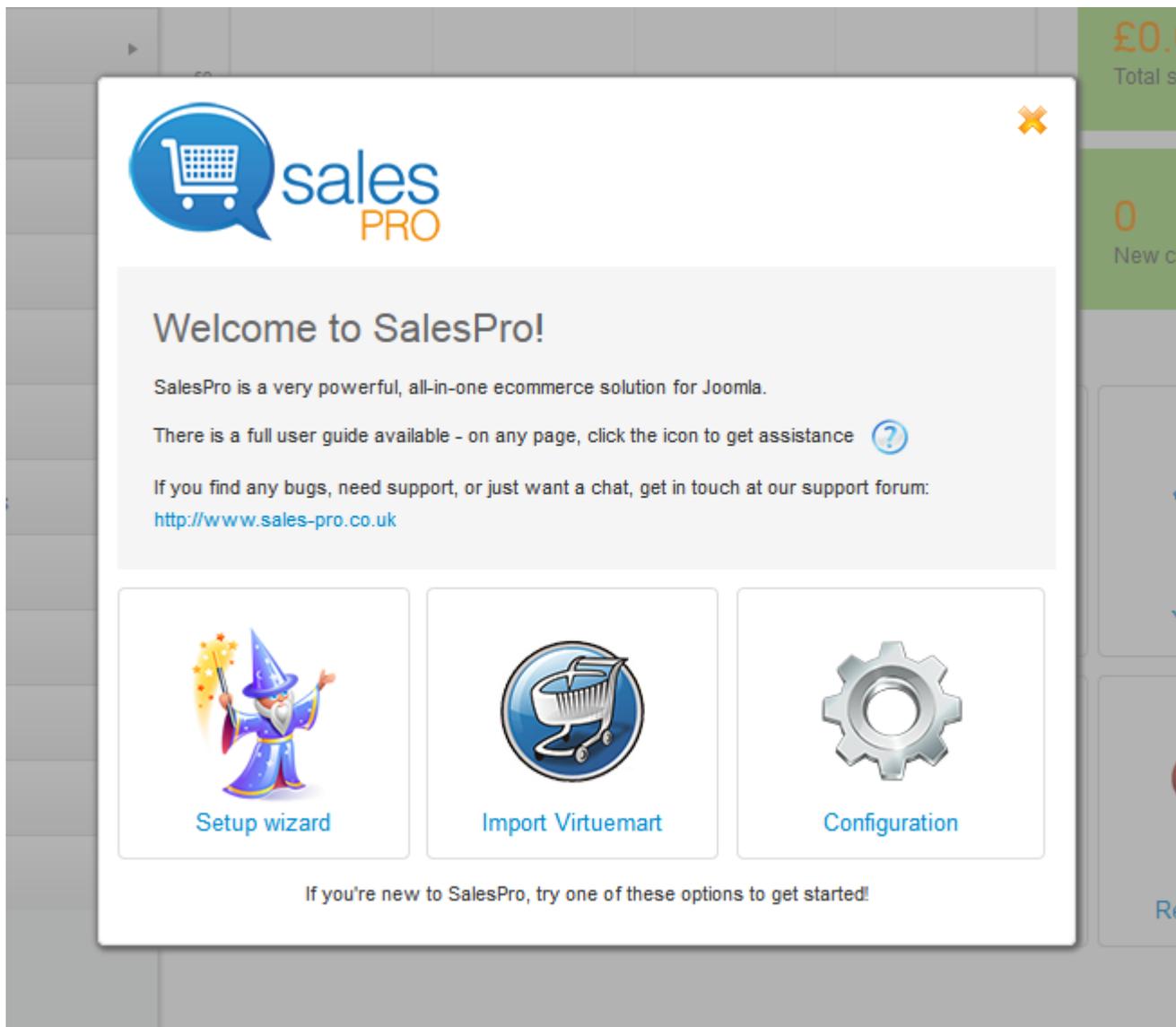
[Start here](#)

Finally, click 'Start Here' to open SalesPro

## SalesPro Setup: Initial setup

After installation, please open the SalesPro component, which you will find in Components > SalesPro

You will see three simple options like this:



**Setup Wizard:** I strongly recommend that if you've never used SalesPro before, you use the Setup Wizard. This option will automatically install a sample shop, so that you can quickly see how everything works.

**Import Virtuemart:** If you already have a Virtuemart shop, and would like to migrate your data to SalesPro, select this option.

**Configuration:** If you are confident about setting up the new shop, you can start here, and adjust your configuration to suit your needs.

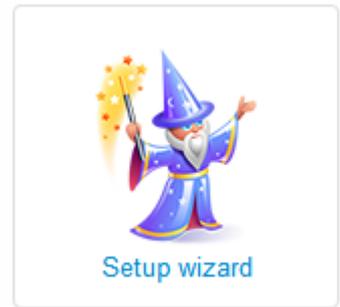
If you decide not to use any of these options, use the X to close this window. If you want to use these options later, you will find the icons located in the SalesPro Dashboard.

## SalesPro Setup: Setup Wizard

The Setup Wizard is a very useful way to quickly build a demo shop. It will configure currencies, regions, products, taxes, shipping methods, and so on, so you can easily see how the SalesPro extension works.

**Please note:** if you use the SalesPro Wizard, it will completely reset your SalesPro system to the original demo data, and will overwrite any changes you have made.

To continue with the wizard, simply click the button as shown:



☰ Welcome to the SalesPro wizard! ?



The setup wizard will install demo data for you.

This wizard will automatically configure sample currencies, regions and products.

These will form a very useful base from which you can quickly create your own products and categories.

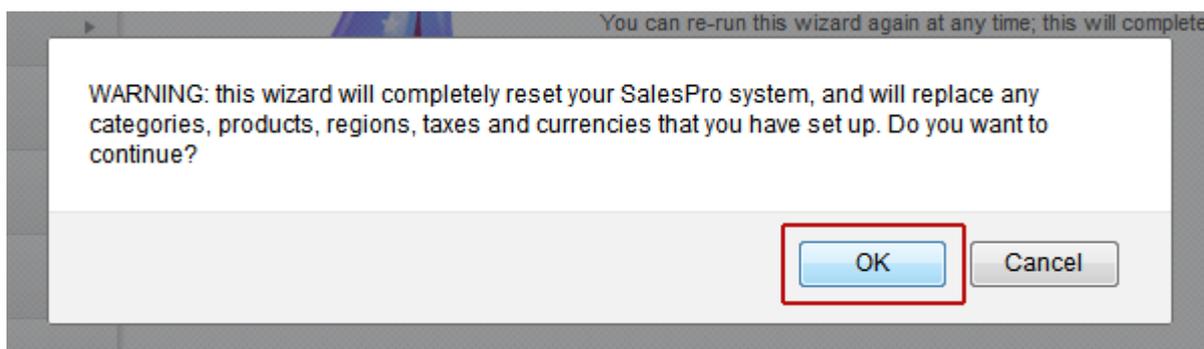
When the wizard is complete, please go through the system and customise the setting.

In particular, please ensure that currencies, regions and taxes match your preferences.

You can re-run this wizard again at any time; this will completely reset your SalesPro system to the original demo data.

CLICK HERE TO INSTALL SAMPLE DATA

You will see a warning that the wizard will overwrite your existing SalesPro data. Click to continue...



The wizard will then download the sample data pack:

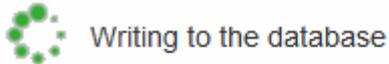


Create your product images:



30% complete

And update your SalesPro data:



60% complete

When the SalesPro Wizard is complete, click the button to continue to the dashboard.

Wizard is complete

100% complete

Continue to the dashboard



You should now have sample categories, products, currencies, regions, taxes, shipping methods, payment methods and emails all set up and ready to use.

You can use the sample data to as examples of how to set up your shop. Please visit the links on the left hand side, and make changes to each section, following this guide.

### Troubleshooting the SalesPro Wizard

If you get a popup message to say Curl is not enabled, please follow the instructions to enable Curl in your PHP configuration.

If the SalesPro Wizard fails for any other reason, please get in touch at our support forum.

## SalesPro Setup: Import Virtuemart

The SalesPro Virtuemart Import Wizard is very powerful, and is able to import all your original Virtuemart products, categories, product variations, and so forth.

You can import either Virtuemart 1, Virtuemart 2, or Virtuemart 3. Other solutions are in development to import data from other ecommerce solutions; if you need to import data from a particular ecommerce import engine, please get in touch.



Import Virtuemart

**Please note:** the import wizard will overwrite all your existing SalesPro data, and will overwrite any changes you have made.

Please check which version of Virtuemart you have. Virtuemart 1 is usually used on Joomla 1.5 systems, while Virtuemart 2 and 3 are used on Joomla 2.5+

☰
SalesPro import wizard ?

---

Welcome
Import Virtuemart 1
Import Virtuemart 2 & 3

---



### Welcome to the SalesPro import wizard

You can use this tool to import data from other ecommerce solutions.

This wizard will overwrite your categories, products, sales and shipping methods. To avoid any data loss, please back up your system before you proceed.

Currently, only Virtuemart can be imported, but we will add capability to migrate data from other ecommerce extensions in the future.

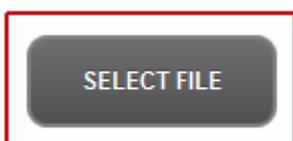
If you would like to migrate data from a different ecommerce solution, please submit a Feature Request at <http://sales-pro.co.uk>.

Please select the version of Virtuemart you need to import...

Welcome
Import Virtuemart 1
Import Virtuemart 2 & 3

And then follow the specific instructions on the page. The instructions for both import types are quite similar:

- 1) Copy your original images to the SalesPro system
- 2) Download the VirtueMart migration plugin
- 3) Install the VirtueMart migration plugin on the Joomla system where you have your Virtuemart data
- 4) Enable and run the plugin, and save the data package it gives you
- 5) Select the data package in the SalesPro VirtueMart Wizard to start the migration:



After migration, simply check that all your data is correct in your SalesPro system, and you'll be ready to go.

## SalesPro Setup: Configuration

The SalesPro Configuration allows you to define how the shop works. It's an important part of the set up process, and you should try to check the configuration every time you create a new shop, to ensure it matches your requirements.

This guide will walk through each of the available options, so you know how it works.

After making changes to the configuration, please click the Save button to store them.



### Configuration - General Settings

☰
Configuration
?

---

General settings
Localisation
Images & File Uploads
Product types
Thank you page

Shop name

Home page title

Add to cart behaviour  ▼

Force SSL  ▼

Terms are required  ▼

Terms page  📄 Select

**Shop Name:** The shop name is used in various places to identify your shop. Enter your shop name here.

**Home page title:** Enter a greeting to be used on the home page. You can enter just a space ' ' to hide it.

**Add to cart behaviour:** When a customer clicks 'Buy Now', you can either send them straight to the checkout, or allow them to continue shopping on the product page. If you allow them to continue shopping, please ensure the SalesPro Basket module is enabled, so your user can get to their basket and complete checkout.

**Force SSL:** This option allows you to force SSL (https://) on every page. Please ensure you have a valid SSL certificate in place before enabling this option, or your users will see a security mismatch error.

**Terms are required:** This is a global setting. If Terms are Required, your customers will need to state they have read and agree to your Terms and Conditions before completing checkout. You can fine tune this behaviour for specific product types in the Product Types tab

**Terms page:** Please select the page that contains your Terms and Conditions.

## Configuration - Localisation

The screenshot shows the 'Configuration - Localisation' settings page. At the top, there is a navigation bar with the following tabs: 'General settings', 'Localisation', 'Images & File Uploads', 'Product types', and 'Thank you page'. The 'Localisation' tab is currently selected. Below the navigation bar, there are three settings, each with a dropdown menu:

- Item prices:** The dropdown menu is set to 'Include taxes (European style)'.
- Unit of size:** The dropdown menu is set to 'mm'.
- Unit of weight:** The dropdown menu is set to 'grams'.

**Item Taxes:** Please select whether your prices already include taxes, as is common in Europe, or do not include taxes, as is common in North America. If your prices include taxes, the tax will be calculated as a percentage of the item prices displayed. But if your prices do not include tax, the sales tax will be calculated and added on during checkout. You can also use the option to exclude taxes if you want to offer business-to-business prices with VAT excluded, for example.

**Unit of size:** Select the unit of measurement you would like to use. This unit is used in product specifications and shipping package sizes.

**Unit of weight:** Select the unit of measurement you would like to use. This unit is used in product specifications and shipping package weights.

## Configuration - Image & File Uploads

☰
Configuration ?

---

General settings
Localisation
Images & File Uploads
Product types
Thank you page

---

### Images

Image cropping

Image background

Valid image extensions

Images directory

### Files

Valid file extensions

File uploads directory

**Important!** This tab contains security settings that restrict the type of files that can be uploaded using SalesPro. If you want to upload specific files, for example while creating a downloadable product, please ensure the extensions are correctly set here.

**Image cropping:** SalesPro has powerful image manipulation functionality. All SalesPro images are in the common 3:2 aspect ratio. Your images can be automatically converted to this size when they are uploaded. Select *Zoom* to crop your images so they completely fill the available image space, *Conservative* to crop to the nearest height & width, and *Off* to avoid cropping your images (this will automatically set images to the full available width, and can result in skewed images). For best results, please upload photos in the 3:2 image ratio, and use the *Zoom* setting

**Image bar colour:** If you set Image Cropping to *Conservative* or *Off* your images might have bars above and below the image, if it doesn't completely fill the available area. You can set the colour of these bars here, or leave the field blank to make the image background fully transparent.

**Valid image extensions:** only images with these extensions can be uploaded using SalesPro

**Images directory:** This is the location where your SalesPro images are stored

**Valid file extensions:** only files with these extensions can be uploaded using SalesPro. If your products are downloadable, please ensure that the extension here is correct, or you won't be able to add your downloadable files.

**File uploads directory:** This is the location where your SalesPro downloadable files are stored. This location is not revealed to your users – your download urls are hashed to prevent automated or unauthorised access.

## Configuration – Product types

☰
Configuration
?

---

General settings
Localisation
Images & File Uploads
Product types
Thank you page

Product types allow you to require a delivery address, make a product downloadable, or require terms & conditions to be accepted during checkout i

+ Add a product type

Name	Delivery required	Downloadable	Show quantity button	Terms required	Action
Standard	✓	✗	✓	-	✎ ✕
Virtual	✗	✗	✓	-	✎ ✕
Downloadable	✗	✓	✓	-	✎ ✕

Product types affect the way products are presented to the customer. Most 'standard' products that are delivered physically will need a delivery address, but Virtual and Downloadable products won't, for example.

You can create as many product types as you like, and they will then be available in your product creation area.

You can also create emails that relate to just one specific type of product. For example, if you want to send a download link when someone buys a downloadable product, create an email that relates to the Downloadable product type in the Email Manager.

If you make a product type 'Downloadable' you will have an additional downloads tab available in the product creation area, where you can upload the files to be given to a customer after purchase.

**Delivery required:** If delivery is required, the customer will be asked for their delivery address during checkout, when they buy an item with this product type.

**Downloadable:** If the product is downloadable, you will be able to add files for download during the product creation process. Your customers can then download files after purchase in the frontend downloads area.

**Show quantity button:** If the quantity button is shown, your customers will be able to increase and decrease the number of a particular item in their cart. If you hide the quantity button, your customers will only be able to buy one of a specific item at a time.

**Terms required:** You can override the global Terms & Conditions Required setting here. If you select 'Yes', your customer will always be required to accept your Terms & Conditions during checkout. This is useful if you want to require Terms & Conditions for only one type of product.

## Configuration – Thank you page

☰
Configuration
?

---

General settings
Localisation
Images & File Uploads
Product types
Thank you page

Thank you page title

Thank you page content

Edit ▾
Insert ▾
View ▾
Format ▾
Table ▾
Tools ▾

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Paragraph ▾
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↶
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🔗
🔗
🖼️
↔
—
📊
x<sub>2</sub>
x<sup>2</sup>
Ω

Please check your email for a full order confirmation.

Thank you for your purchase.

p

📄 Article
🖼️ Image
📄 Page Break
⌵ Read More

👁️ Toggle editor

The Thank You page is displayed to your customers after purchase. You can set up what is displayed here, using the WYSIWYG editor provided.

**Thank you page title:** This is displayed at the top of the page

**Thank you page content:** This is displayed below the page title. You can style it any way you like, including with images – just like a normal Joomla article.

## SalesPro Dashboard

The dashboard is the initial screen for SalesPro – it has a quick overview of your current sales, and a few useful links.

The dashboard features a header with a menu icon, the title "Dashboard", and a help icon. Below the header is a large area with a line graph on the left and summary statistics on the right. The graph shows sales data from Jan 29 to Feb 6, with a y-axis ranging from £0 to £1. The summary statistics are:

- Sales this week: 0 Items sold
- Total sales: £0.00
- New customers: 0

Below the graph and statistics is a grid of eight navigation links, each with an icon and a label:

- Setup wizard (Wizard icon)
- Import Virtuemart (Shopping cart icon)
- Configuration (Gear icon)
- Your products (Shopping basket icon)
- Get updates (Refresh icon)
- Get extensions (Tools icon)
- User guide (Question mark icon)
- Report a problem (Red button icon)

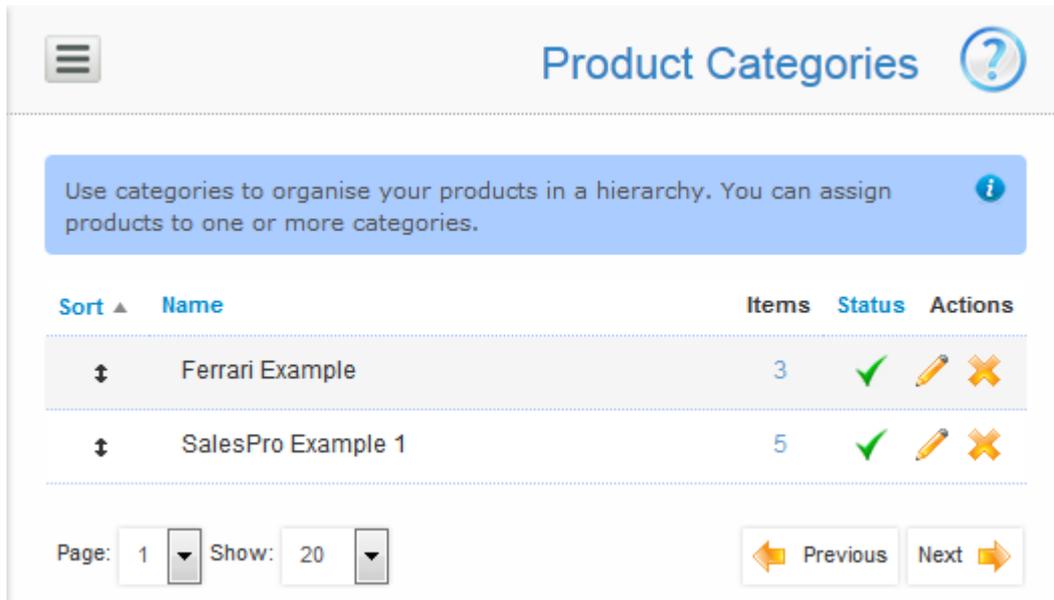
Click any of the links to get started – or change the graph drop down to load a different range of sales data

A close-up of the "Sales this week" dropdown menu, showing the following options:

- Sales this week
- Sales last week
- Sales this month
- Sales last month
- Sales this year
- Sales last year

## SalesPro Categories: overview

Product Categories are used to organise your products. You can create assign products to as many categories as you like, so they're very useful for cross-selling, and for helping your users 'discover' new products, or navigate through your shop. The category hierarchy is visibly displayed in the Product Categories page.



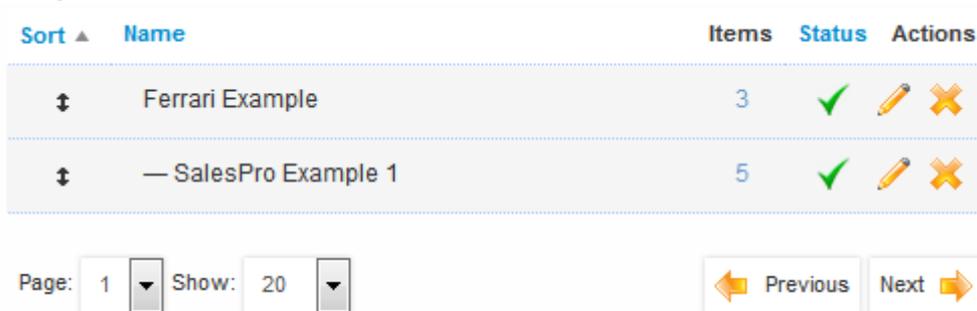
Product Categories

Use categories to organise your products in a hierarchy. You can assign products to one or more categories.

Sort ▲	Name	Items	Status	Actions
↕	Ferrari Example	3	✓	
↕	SalesPro Example 1	5	✓	

Page: 1 Show: 20 Previous Next

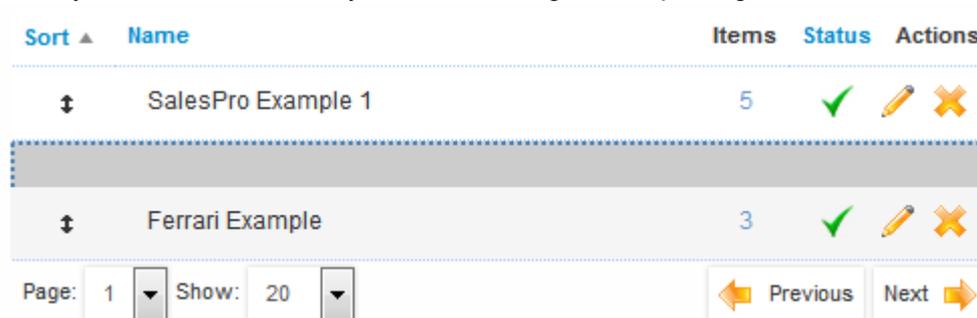
Categories can be nested inside each other...



Sort ▲	Name	Items	Status	Actions
↕	Ferrari Example	3	✓	
↕	— SalesPro Example 1	5	✓	

Page: 1 Show: 20 Previous Next

And if you click the 'Sort' tab, you can then drag and drop categories to re-order them...



Sort ▲	Name	Items	Status	Actions
↕	SalesPro Example 1	5	✓	
↕	Ferrari Example	3	✓	

Page: 1 Show: 20 Previous Next

To create a new category, click the New button at the top...



Or click the Edit icon to edit an existing category...



You can also click the Delete icon to delete a category...



And click the Status button to quickly enable or disable a category...



## SalesPro Categories: edit

Open a product category to edit its settings

### Category Edit: Details

Menu icon | Edit this category | ?

Details | Design | Metatags

Category title: SalesPro Example 1

Category alias: sales-pro

Category parent: -- Top level category --

Category status: Published

Category image: Browse... No file selected.

Category description: This category demonstrates the 'list' view. Check out each product to see the different ways you can present and develop the product view.

These details relate to the basic category settings

**Category title:** Enter the name of your category. Please keep it quite short, as this is used on the frontend in the category view, the homepage view, the breadcrumbs and shop navigation.

**Category alias:** This setting will be used for SEO. You can leave it blank to allow it to be automatically created

**Category parent:** If you want to nest this category inside another 'parent' category, select the parent here.

**Category status:** If you want to disable the category temporarily, do so here.

**Category image:** Upload an image to illustrate your category. This image will be used on the frontend.

**Category description:** Describe your category in a few words. This description will be used on the frontend.

## SalesPro Categories: Design

☰
Edit this category ?

---

Details
Design
Metatags

---

Category layout	<input type="text" value="List View"/>
Show title	<input type="text" value="Yes"/>
Show description	<input type="text" value="Yes"/>
Show image	<input type="text" value="Yes"/>
Show sort bar	<input type="text" value="Yes"/>
Show page bar	<input type="text" value="Always"/>
Show subcategories	<input type="text" value="Link to subcategories"/>
Items per page	<input type="text" value="6"/>
Boxes per row	<input type="text" value="3"/>
Subcategory depth	<input type="text" value="2"/>

The category design is very powerful, and with these few options you can dramatically change the category layout.

**Category layout:** Select *List View* (items are laid out in a list, with plenty of detail) or *Boxes* (items are nicely organised into boxes, with a simple image, product name, price and details button)

**Show title:** Show (or hide) the category title in the Category View

**Show description:** Show (or hide) the category description in the Category View

**Show image:** Show (or hide) the category image in the Category View

**Show sort bar:** Show (or hide) the sort bar in the category view – which allows your customers to sort items within a category by a number of predetermined criteria.

**Show page bar:** Show (or hide) the pagination buttons in the category view

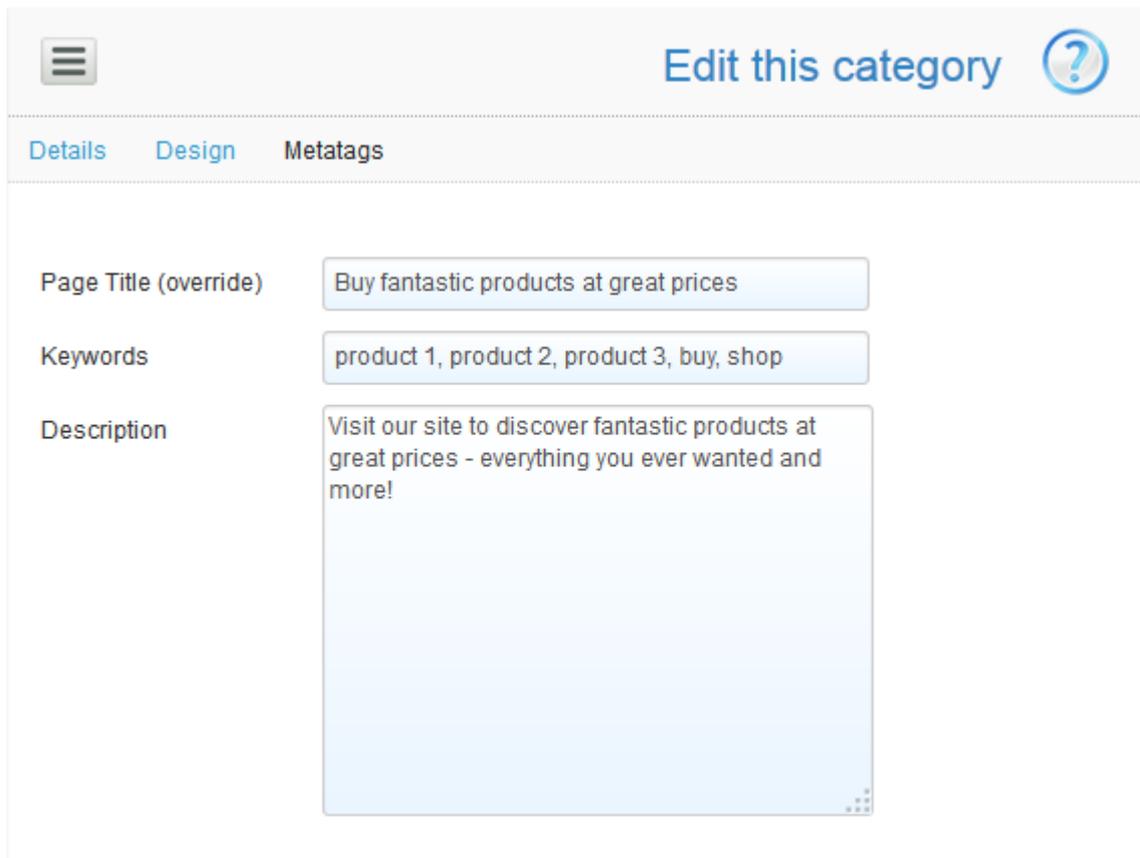
**Show subcategories:** If the category contains subcategories, should the category show the subcategories, or all items in the subcategories, or both?

**Items per page:** How many items do you want to display on your category page?

**Boxes per row:** If you have selected the *Boxes* category layout, how many boxes would you like in a row?

**Subcategory depth:** You can show subcategories and subcategory items – decide here how many levels of subcategories you would like to display

## SalesPro Categories: Metatags



The screenshot shows the 'Edit this category' interface. At the top, there is a navigation menu with three items: 'Details', 'Design', and 'Metatags'. The 'Metatags' tab is selected. The main content area is titled 'Edit this category' and includes a help icon (a question mark in a circle). Below the title, there are three input fields:

- Page Title (override):** Buy fantastic products at great prices
- Keywords:** product 1, product 2, product 3, buy, shop
- Description:** Visit our site to discover fantastic products at great prices - everything you ever wanted and more!

Metatags give you control over how your pages appear in a search engine. The values you enter here will override any other automatic values from other extensions, plugins and so forth.

**Page Title (override):** If you enter a title here, it will show up in (most) search engines when you search for your page

**Keywords:** Any keywords you enter here will help your SEO – select a few keywords for best results.

**Description:** The page description you enter here will show up in (most) search engines when you search for your page.







Before you use SalesPro, please check that your system is compatible.

In 99% of cases, your server's default settings will work correctly with SalesPro, but if something doesn't seem to be working, check that the compatibility checks do not show an error.

To access the Compatibility Checks, open the SalesPro Dashboard, and find the compatibility checks.

If you have an error, use the following guide to correct it:

### **Safe mode ON**

This is a security vulnerability, and should be immediately corrected. It will prevent SalesPro (and many other Joomla extensions) from working correctly.

To correct this, please ask your server to set Safe Mode to 'Off' in your PHP configuration.

If you have access to your php.ini file, you can also do this yourself. Just find the safe\_mode setting, and change it to 'Off'

### **Curl OFF**

Curl is used to install sample data and SalesPro add-ons, with just one click. If you want to install sample data or add-ons, you will need to ensure Curl is turned on.

Most servers have Curl turned on by default, but if it is not, you will need to ask your server admins to recompile PHP with Curl enabled.

On localhost server, such as WAMP or XAMP, you can usually enable Curl in PHP settings > PHP extensions > Curl.

### **Available memory**

SalesPro is not particularly resource hungry, but for best performance we recommend at least 128Mb of memory. If you experience timeouts, random errors or blank pages, please try increasing your PHP memory.

To do this, please set the PHP configuration setting 'memory\_limit' to '128M', or ask your server admins to do this for you, and then if necessary, restart PHP.

### **PHP timeout**

SalesPro does not require a particularly long timeout limit. The default on most servers is 30 seconds, and this is usually plenty. You would normally only experience timeouts while running an intensive process, such as a backup, or while installing SalesPro sample data. However, if you do regularly experience timeouts, white pages, or strange errors such as HTTP 500, try increasing your PHP timeout level.

To do this, set the PHP configuration setting 'max\_execution\_time' to '30' or higher, until timeouts are not an issue.

### **AJAX not enabled**

This is very unusual, but usually it means that you are not logged in. Please refresh the page to check.

If the error continues, it could indicate a deeper problem with your server or Joomla system. Please contact the SalesPro support team for assistance.

## Getting started with SalesPro: setup wizard

Before you make any changes to SalesPro, we recommend that you use the SalesPro Wizard to install some sample data.

This will install sample data, which you can then use as the basis for a shop. The wizard will build example currencies, regions, tax rules, shipping rules, categories and products.

First, open the SalesPro wizard screen...

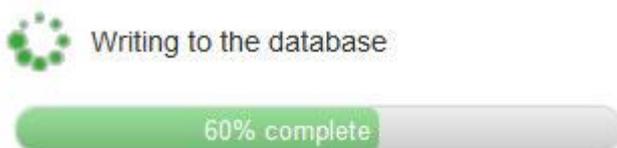


A screenshot of a Joomla! administrator interface. The top navigation bar includes "System", "Users", "Menus", "Content", "Components", "Extensions", and "Help". The page title is "SalesPro: setup wizard". On the left is a sidebar menu with items like "Dashboard", "Categories", "Products", "Sales", "Customers", "Currencies", "Regions", "Taxes", "Shipping Methods", "Payment Methods", "Templates", and "Configuration". The main content area features the "SALES PRO" logo and a "Setup wizard" button. Below the logo, a wizard character is shown next to the text: "Welcome to the SalesPro wizard! Before you use SalesPro... we recommend that you run this step. The setup wizard will install demo data for you. We highly recommend that you use this feature, as it will automatically configure sample currencies, regions and products. These will form a very useful base from which you can quickly create your own products and categories, and allow you to see how different products are set up. WARNING: the wizard will replace any existing categories, products, regions, taxes and currencies." A green button labeled "CLICK HERE TO INSTALL SAMPLE DATA" is positioned at the bottom right of the wizard's message.

And click the wizard button...



Let the wizard run...



When it is complete, you will have some categories, products, and other data set up and ready to use.

You can use the sample data to as examples of how to set up your shop. Please visit the links on the left hand side, and make changes to each section, following this guide.

## SalesPro Categories

SalesPro categories work in a very similar way to standard Joomla categories.

To get started, open the Categories screen

Edit an existing category, or create a new one. You will then see a screen like this:

### Category details

Fill out all details as needed, and save.

### Category design

Layout: either boxes or list format

Show title: either show or hide the category title

Show description: show or hide

Show image: show or hide category image

Items per page: restrict the number of products displayed per category page

### Category metatags

You can set page title, meta keywords and meta description.

Any options set here will override the Joomla default for the SalesPro category view, and this allows you to target particular phrases for optimal SEO performance.

## SalesPro Products

SalesPro products are designed to be very easy to set up, and easy to manage. The SalesPro product manager offers some very powerful features, but tries to ensure each feature is easy to understand and accessible.

Each feature will be described here, along with guidelines on how they can be set up.

### Product Manager

To begin, click the 'Products' link on the left hand side, to open the Product Manager.

Sort ▲	Name	Category	Product type	ID	Status	Featured	Price	Action
↕	Downloadable product	SalesPro Example 1	Downloadable	2	✓	✓	£10.00	
↕	A more interesting product	SalesPro Example 1	Standard	3	✓	✓	£25.00	
↕	Do you have a video for your product?	SalesPro Example 1	Standard	4	✓	✓	£50.00	
↕	This item uses STOCK MANAGEMENT	SalesPro Example 1	Standard	5	✓	✓	£30.00	
↕	Discover Item OPTIONS	SalesPro Example 1	Standard	6	✓	✓	£20.00	
↕	Ferrari FF	Ferrari Example	Standard	7	✓	✓	£10,000.00	
↕	La Ferrari	Ferrari Example	Standard	8	✓	✓	£20,000.00	
↕	Ferrari F12 Berlinetta	Ferrari Example	Standard	9	✓	✓	£30,000.00	

Page: 1 Show: 20 Previous Next

Here, you will see all the products that are available.

You can reorder each product with a simple drag-drop, and refresh the page to see the new order confirmed. The order you select will be reflected on the frontend of the site.

You can quickly disable or enable products by clicking the 'status' button. This will hide or show the product on the frontend.



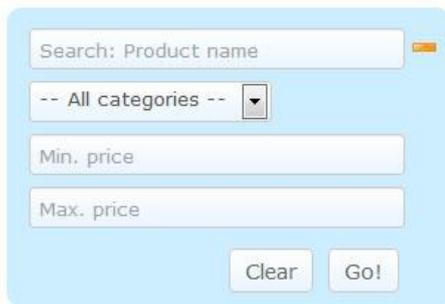
The 'featured' button is similar, and sets a product to be featured. This does not currently change in the frontend, but in the future we plan to release modules that can use the 'featured' status of each product.



To find one particular product, you can use the provided search box. Just enter the product name, and press ENTER.

Search: Product name

You can also do a more advanced search – click the  to reveal the larger search tool:



Search: Product name 

-- All categories -- 

Min. price

Max. price

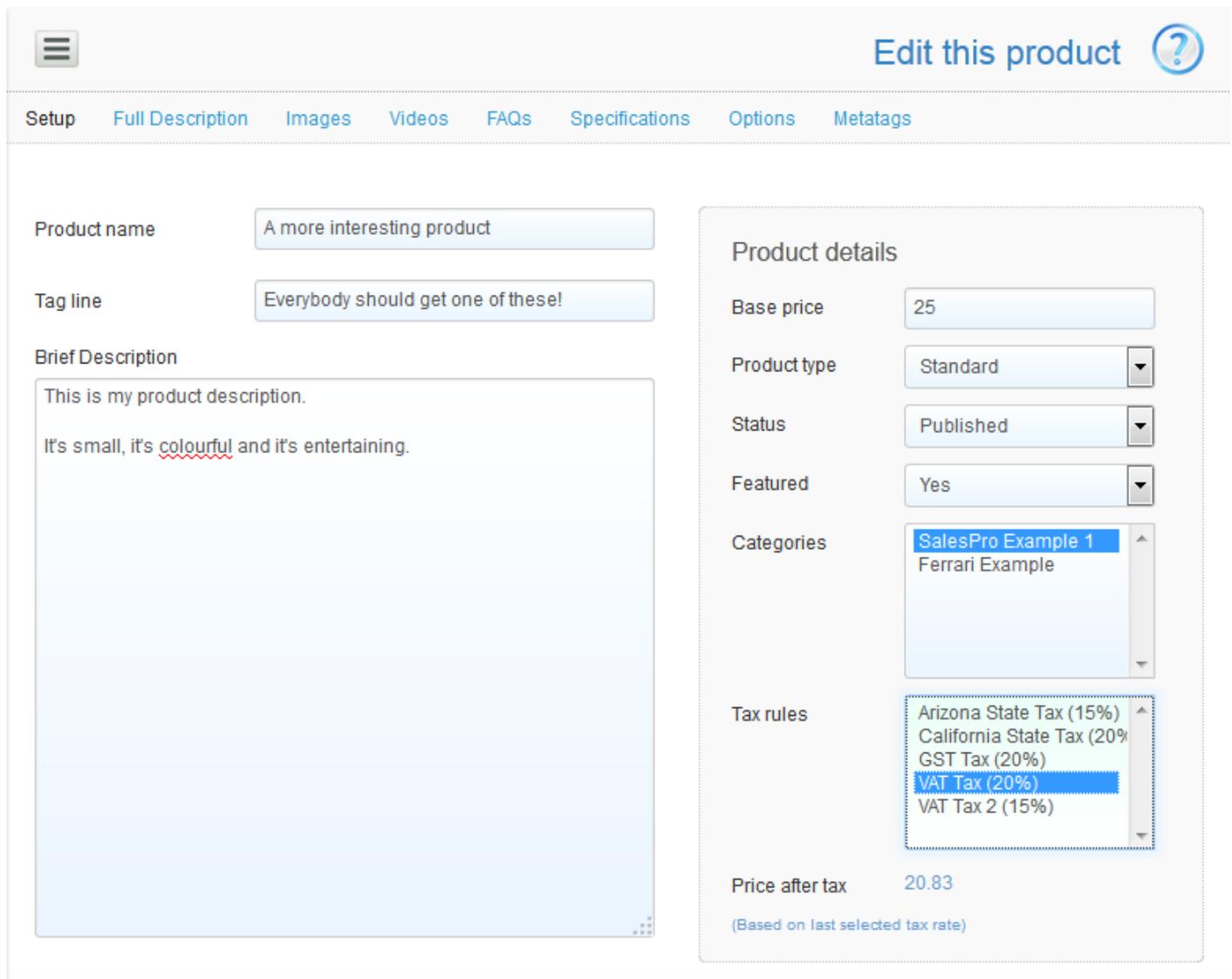
Clear Go!

To edit, or delete, a product, click one of the buttons at the end:  

## Edit a product: introduction

You can create a new product directly from the Product Manager, or else to edit an existing product, click the 

You will then see a screen like this:



**Edit this product** 

Setup Full Description Images Videos FAQs Specifications Options Metatags

Product name: A more interesting product

Tag line: Everybody should get one of these!

Brief Description: This is my product description. It's small, it's colourful and it's entertaining.

**Product details**

Base price: 25

Product type: Standard

Status: Published

Featured: Yes

Categories: SalesPro Example 1, Ferrari Example

Tax rules: Arizona State Tax (15%), California State Tax (20%), GST Tax (20%), VAT Tax (20%), VAT Tax 2 (15%)

Price after tax: 20.83  
(Based on last selected tax rate)

Click each tab, and familiarise yourself with the features that are offered.

## Edit a product: Setup tab

Enter your basic product details here.

**Product Name:** this is used as your product name, and is displayed on the frontend. Try to make it descriptive, but not too long.

**Tag line:** This is a short one-line description of your product, and is displayed on the frontend, under the Name.

**Brief description:** this is a short introduction to your product. It is also used at the top of your product information page, as well as in the 'list' category view.

**Base price:** Please enter the basic price you will sell your product for. You can add product options, which increase or decrease the price, in the Options tab (please see Products – options for more information on this).

**Product type:** Select a product type. This will determine the options available for setting up the product. For example, if your product is Downloadable, you will be able to upload files for download after your users have completed a purchase. Please see the information in Configuration - Product Types to check how to set them up.

**Status:** set to 'published' to show the product on the frontend, or set to 'unpublished' to hide it from the frontend.

**Featured:** set to Yes to feature the product. Featured products are displayed in the Featured and Showcase widgets, and the Featured Items module.

**Categories:** You can add this product to one or more categories. Select as many categories as you like, to help your customers find your products more easily.

**Tax rules:** Before using this option, please ensure you have set up Taxes (see Taxes). Then select all the tax rules that relate to this product.

**Price after tax:** This is a representative (estimated) price after tax. In your configuration (see Configuration – Taxes) you can set whether taxes are included in your prices, as is done in Europe, or if they are added at checkout, as is done in the USA. The price here will reflect your Tax Configuration, the Base Price, and the Tax Rules selected.

## Edit product: Full description tab

**Full item description:** Enter HTML content that will be used on the main product page.

You can enter content just like you would for a Joomla article.

### Front end settings:

If you want to display your full description on the product page, you must set 'Display this tab' to 'Yes', and enter a 'Public tab name'.

**Important: you must enter a tab name, and set 'Display this tab' to Yes, if you want the description to be visible on the frontend.**

The screenshot shows the Joomla! product edit interface. At the top, there is a navigation bar with tabs: Setup, Full Description (active), Images, Videos, FAQs, Specifications, Options, and Metatags. On the right, there is a link 'Edit this product' with a help icon. The main content area is titled 'Full item description' and contains a rich text editor with a toolbar (Bold, Italic, Underline, Strikethrough, Paragraph, Bulleted List, Numbered List, Undo, Redo, Link, Unlink, Table, Table of Contents, Source, and Insert). The editor content includes:

**WHAT ARE PRODUCT TABS?**  
Product tabs are used to quickly arrange information about your product, and help your customer find what they need.  
You can enable and disable product tabs in the administrator interface.

To enable the 'description' tab, you need to select 'Display this tab', and give the tab a name.  
I have called this tab 'description'. You can call it anything you like.

**How do images work?**  
You can upload as many images as you like.  
Your images will be arranged in the quick-view images box above.  
If you enable the 'Images' tab, your images will also be displayed there.  
I have enabled the 'Images' tab on this product, and you can see the images in there.

At the bottom of the editor, there is a 'Toggle editor' button. On the right side of the editor, there is a 'Front end settings' panel with two fields: 'Tab active' set to 'Yes' and 'Tab name' set to 'DESCRIPTION'.

## Edit product: Images tab

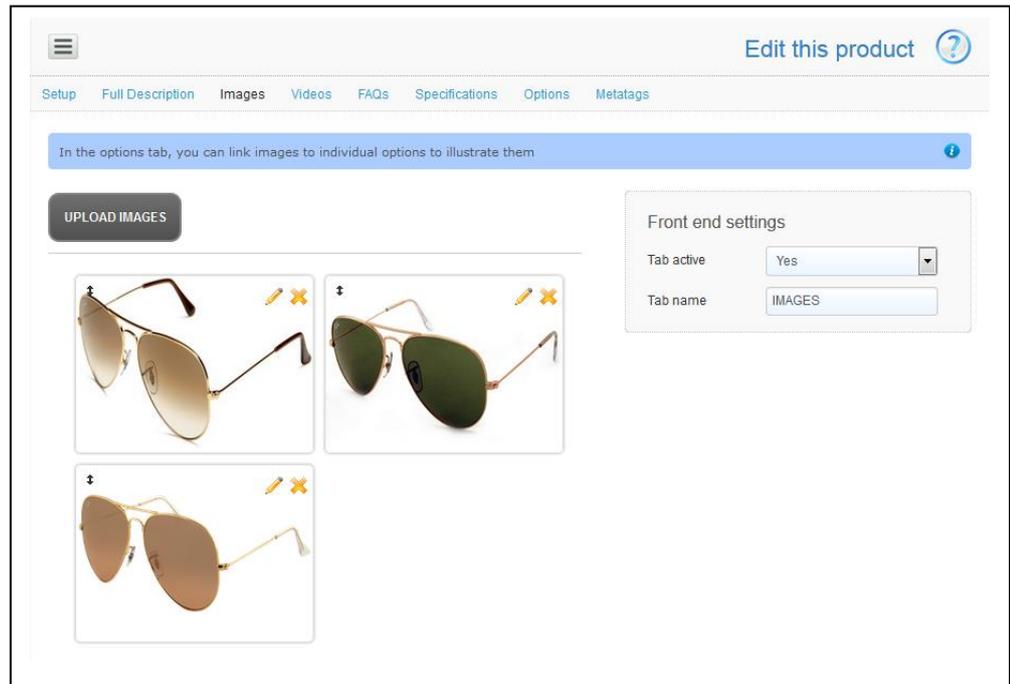
The images tab allows you to quickly upload and arrange images.

The images you upload will be used in the product page.

The first image is also used as the main image for the category view

**Upload Images:** Click and select as many images as you like to begin upload. Hold down CTRL to select multiple images.

**Reorder images:** drag and drop images to reorder them.



**Front end settings:** If you want to display an 'images' tab on the product page, you must set 'Display this tab' to 'Yes', and create the 'Public tab name'.

If you do not define the images tab, the images will still be displayed at the top of your product page, but you will not have an additional images tab available.

## Edit product: Videos tab

The videos tab allows you to include videos on your product page.

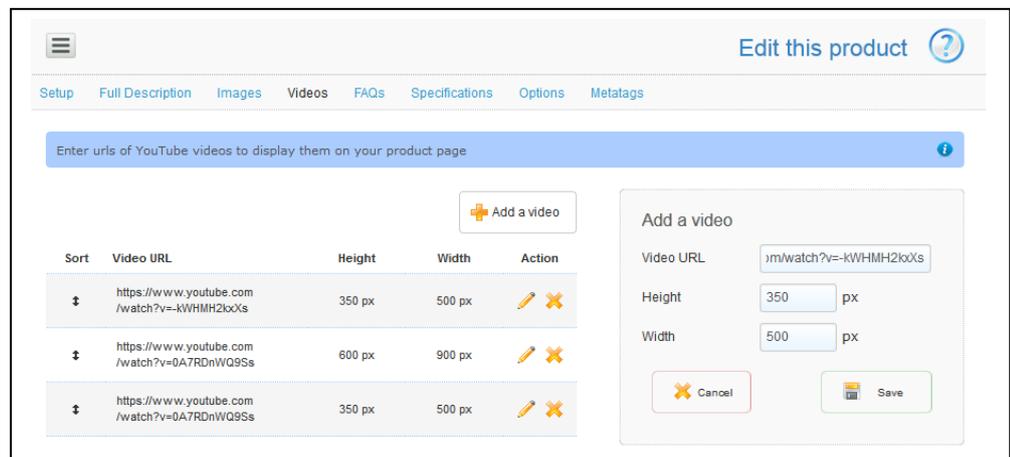
You can enter the URL of any video (so long as it can be played in an iframe). Simply enter the url of a video, such as your favourite YouTube video.

Then, set the *height* and *width* of the video, and save it.

**Reorder videos:** you can drag and drop videos to re-order them.

**Front end settings:** If you want to display a 'videos' tab on the product page, you must set 'Display this tab' to 'Yes', and create the 'Public tab name'.

If you do not define the videos tab, the videos will not be displayed on the product page.



## Edit product: FAQs tab

You can quickly add questions & answers that relate to this product.

In the FAQs tab, enter your question and an answer, and save it.

**Reorder FAQs:** As normal, you can drag and drop FAQs to re-order them.

**Front end settings:** If you want to display a FAQs tab on the product page, you must set 'Display this tab' to 'Yes', and enter a 'Public tab name'.

The screenshot shows the 'Edit this product' interface with the 'FAQs' tab selected. The main content area contains a table of existing FAQs:

Sort	Question	Answer	Action
↓	What colour options are available?	You can select either Royal Red or Summer Yellow.	
↓	I am 95 years old. Can I drive one of these?	For many of our customers, owning a Ferrari is a life-long dream. You are very welcome to buy a Ferrari, but you might like to ask your doctor	

An 'Add a FAQ' modal is open, showing input fields for 'Question' and 'Answer', and 'Cancel' and 'Save' buttons.

## Edit product: Specifications

Any attribute you enter will be automatically displayed on the product information page.

The weight, height, width and depth can also be used to create highly customised shipping rules – see Shipping Methods: setup for details

If you leave an attribute blank, it will not be displayed on the frontend.

The 'Additional specification' section allows you to enter HTML, so you can add 'beautified' specifications.

The weight attribute is important, because it can be used by advanced shipping methods. If you use an advanced shipping method, set the weight attribute carefully – but if not, you can safely ignore it.

### Front end settings:

If you want to display a Specifications tab on the product page, you must set 'Display this tab' to 'Yes', and enter a 'Public tab name'.

The screenshot shows the 'Edit this product' interface with the 'Specifications' tab selected. The main content area contains input fields for various attributes:

- Primary color: Red
- Manufacturer: Ferrari
- SKU:
- Country of origin: Italy
- Weight (grams): 2400
- Height (mm): 0
- Width (mm): 0
- Depth (mm): 0

A 'Front end settings' box is visible on the right:

- Tab active: Yes
- Tab name: SPECIFICATION

Below the input fields is a rich text editor with a toolbar and a table of specifications:

DIMENSIONS AND WEIGHT	
Length	181,8 in (4618 mm)
Width	76,5 in (1942 mm)
Height	50,1 in (1273 mm)
Wheelbase	107,1 in (2720 mm)
Front track	65,6 in (1665 mm)
Rear track	63,7 in (1618 mm)
Dry weight*	3362,0 lb (1525 kg)
Kerb weight*	3593,5 lb (1630 Kg)
Weight distribution	46% front, 54% rear
Fuel tank	24.3 US gal - 20.2 UK/gal (92 l)
TYRES AND RIMS	
Front	255/35 ZR 20 9.5J
Rear	315/35 ZR 20 11.5J
Front (winter)	255/35 ZR 20 9.5J
Rear (winter, can be used with chains)	305/35 ZR 20 11.5J
ENGINE	
Type	65

## Edit product: Stock management

**\*N.B. this feature is currently disabled while the functionality is being refined.**

Stock management allows you to manage your stock.

This is useful if you have a certain number of items to sell.

**Enable stock management:** turns stock management on or off for this product. If stock management is turned off, the product will always be available for sale.

**Items in stock:** enter the available quantity. If stock management is enabled, this quantity will reduce whenever the product is purchased.

**Item out of stock:** If the item is out of stock, you can choose to 'display with "Out of Stock notice"', or to 'Allow Purchase'. If you choose "Use default behaviour" the item will use the global setting set in the SalesPro Configuration.

**Item in stock from:** Allows you to determine the earliest date a product can be purchased

**Item in stock until:** Allows you to determine when the product will be removed from sale

The screenshot shows the 'Edit this product' interface for 'La Ferrari'. The 'Stock Management' tab is selected. The 'Enable stock management' dropdown is set to 'No'. The 'Number of items in stock' is 0. The 'If item is out of stock' dropdown is set to '-- Use default behaviour --'. The 'Item in stock from' and 'Item in available until' dates are both set to '1970-01-01'.

## Edit product: Options

Product options are very powerful, and they can be stacked – so you can easily create lots of variants very fast, each with its own price and SKU.

You can set up individual options for each product – so you can easily sell small variants of each item without the need to set up a whole new product.

Product option setup is in two stages. First, create your product option

groups. For example, if you wanted a dropdown that allowed your customers to select a specific colour, create an option group called 'Colour'. Then, add your product options (say, Red, Green and Blue) and assign them to the Colour option group that you just made.

For each option, you can add a SKU suffix, which will be added to your main item SKU. So, if your product SKU is 'myproduct' and your option SKU is 'red', the resulting product SKU will be myproductred.

You can also adjust the price as each option is selected. For example, if you have Gift Wrapping as an option, this might add \$5 to the product price. Price adjustments are stackable for each Option Group, so as your customers add or remove options, the price can be increased or decreased accordingly.

**Reorder:** You can drag and drop options and option groups to re-order them.

### Add an Option Group

You need to add an option group before adding any options.

**Name:** Enter the name of the option group (e.g. Colour). This will be displayed on the product page.

**Type:** Select how you want the options to be presented. The only option currently is a dropdown selection box.

### Add a Product Option

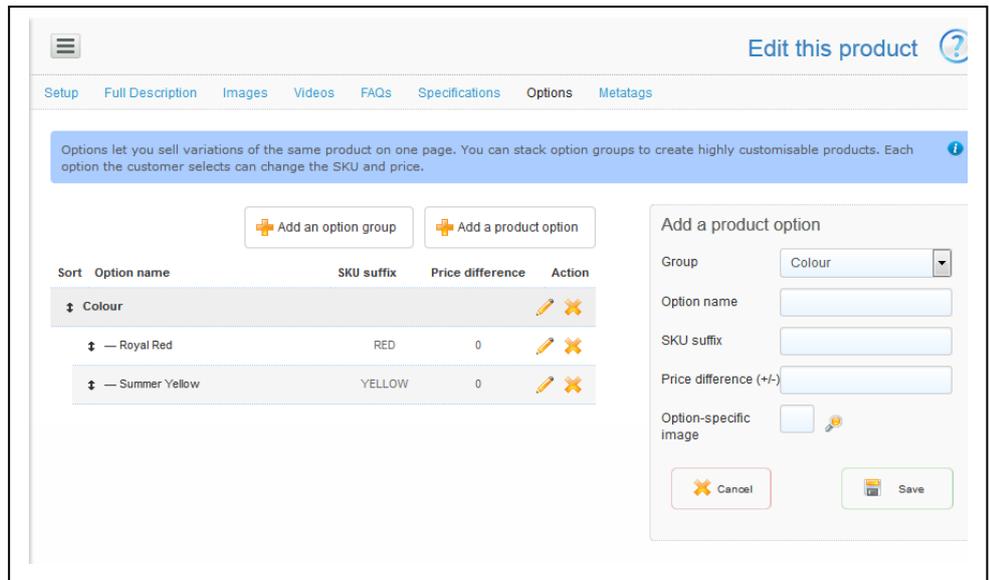
**Group:** Select the option group this option belongs to

**Option name:** Enter the name of the option (e.g. Red).

**SKU suffix:** The SKU that will be added to the main product SKU (e.g. RED)

**Price difference:** The increase, or decrease, in price if the user selects this option (leave blank for no change)

**Option-specific image:** First, upload your product images in the Images tab. Then, you can relate this option to a specific image. If your user selects the option, the associated image will automatically be displayed.

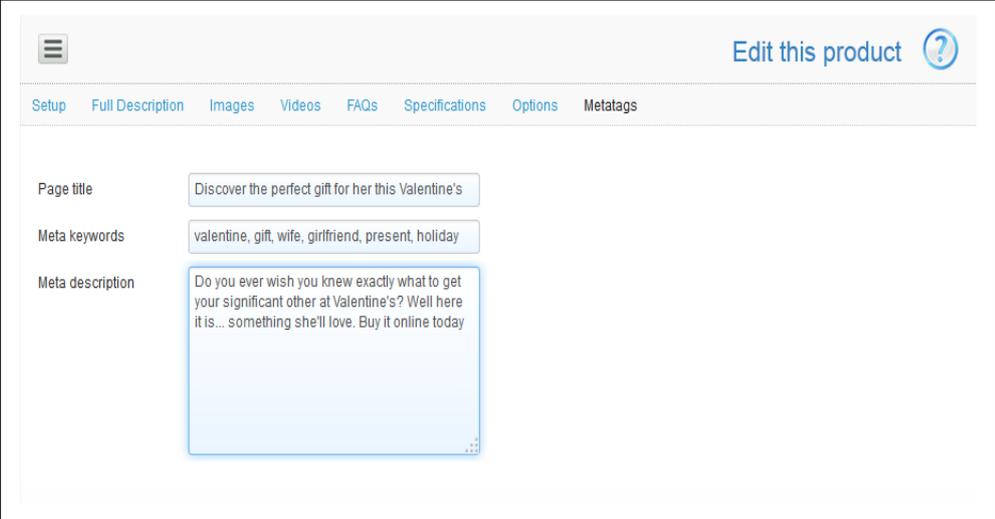


## Edit product: Metatags tab

Here you can set the item page metatags. These will override the default ones set by Joomla, or any other plugin or extension.

This allows you to optimize your SEO performance for individual products.

You can leave the metatags blank if you would prefer to use the standard Joomla metatags.



The screenshot shows the Joomla! product edit interface, specifically the Metatags tab. The interface has a top navigation bar with a hamburger menu icon on the left and a link labeled "Edit this product" with a question mark icon on the right. Below the navigation bar is a horizontal menu with tabs: Setup, Full Description, Images, Videos, FAQs, Specifications, Options, and Metatags. The Metatags tab is active. The main content area contains three input fields: "Page title" with the text "Discover the perfect gift for her this Valentine's", "Meta keywords" with the text "valentine, gift, wife, girlfriend, present, holiday", and "Meta description" with the text "Do you ever wish you knew exactly what to get your significant other at Valentine's? Well here it is... something she'll love. Buy it online today".

## Saving your product

Once you have finished making all changes to the product, please ensure you click Save to save all your changes



You can then check the frontend to see the changes that have been made. If you have a Joomla cache enabled, or your changes don't show up, ensure you refresh (purge) your cache to see the changes you have made.

## SalesPro Currencies

SalesPro Currencies allows you to set up an unlimited number of currencies, along with an exchange rate mechanism.

**Please note: if you would like your customers to be able to select a different currency, you will need to enable the SalesPro Menu module in the Modules Manager.**

☰
Currencies ?

If you change the default currency, ensure you change its exchange rate to 1, and update the exchange rates for other currencies accordingly. i

Currency	Code	Symbol	Exchange rate	Accepted	Default	Actions
Euro	EUR	€	1.265	✓	★	✎ ✕
Canadian Dollar	CAD	\$	1.8	✓	★	✎ ✕
British Pound	GBP	£	1	✓	★	✎ ✕
Australian Dollar	AUD	\$	1.78	✓	★	✎ ✕
US Dollar	USD	\$	1.66	✓	★	✎ ✕
Lesotho Loti	LSL		1	✕	★	✎ ✕
Papua New Guinea Kina	PGK		1	✕	★	✎ ✕
Peruvian Nuevo Sol	PEN		1	✕	★	✎ ✕
Panamanian Balboa	PAB		1	✕	★	✎ ✕
Omani Rial	OMR		1	✕	★	✎ ✕
Philippine Peso	PHP		1	✕	★	✎ ✕

Currencies are automatically ordered with the active currencies at the top, and disabled currencies below this.

If you want to block payments in a specific currency, click the 'Accepted' icon to disable it.



**Important: in order for currencies to work correctly, you need to have set one of your currencies as the default currency. Click the Default icon to set the default currency.**



**Important note: if you change your default currency, this will automatically set its exchange rate to 1. Please ensure that you update the exchange rates of other currencies so that they are correct, relative to your main, default currency. For example, if your default currency is 1, the exchange rate for US Dollars will be around 1.5.**

Please check <http://www.xe.com> for the latest currency exchange rates.

## Currencies: Edit currency

Fill out the currency details, and save them to create a new currency. This currency will then be available on the frontend. Please install the SalesPro Menu module to enable the currency drop-down selector.

**Currency Name:** The name of your currency

**Exchange rate:** The exchange rate is relative to your base currency. In this example, the Euro is currently at €1.265 to the £1. My base currency is the Pound Sterling, so the 'Exchange rate' is 1.265

You can obtain the latest exchange rates at <http://www.xe.com>

**Accepted:** You can enable or disable this currency

**Currency code:** Please use an internationally correct 3-digit currency code. You can check the correct codes at <http://www.xe.com/iso4217.php>

The code needs to be correct for the currency to work as expected with PayPal and other payment gateways. Please ensure the currency is accepted by your payment gateway

**Currency symbol:** Enter an easily recognisable symbol. This symbol will be used on the frontend to display prices.

**Decimal places:** How many decimal places does your currency use (usually 2)

**Thousands separator:** Enter a character used to separate thousands (e.g. \$1,000,000 or €1.000.000)

**Decimal separator:** Enter a character used to separate the decimals (e.g. \$15.00 or €15,00)

Once you have finished making all changes to the currency, please ensure you click Save to save all your changes

The screenshot shows the 'Edit this currency' interface. At the top right, there is a title 'Edit this currency' and a help icon. Below this is a blue information banner that reads: 'If you enable the SalesPro Menu Bar Module, your customers can change currencies'. The form contains the following fields:

- Currency Name:** Euro
- Exchange rate:** 1.265
- Accepted:** Yes (with a dropdown arrow)
- Currency setup section:**
  - Currency code:** EUR
  - Currency symbol:** €
  - Decimal places:** 2
  - Thousands separator:** .
  - Decimal separator:** ,

The screenshot shows two buttons: 'Save' (with a green checkmark icon) and 'Cancel' (with a red 'X' icon). The 'Save' button is highlighted with a red rectangular box.

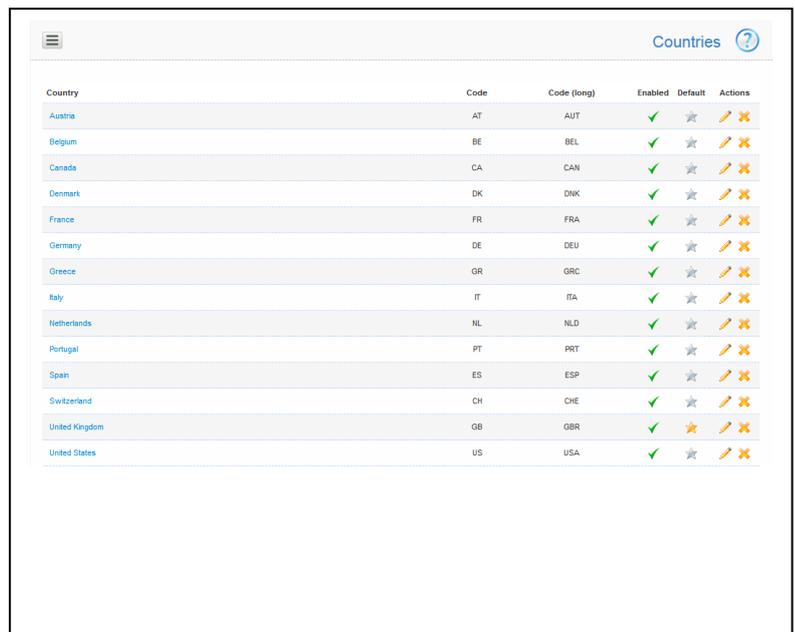
## SalesPro Countries & States

Countries & states are used during checkout to calculate the correct shipping price and method, and to calculate taxes.

You can define new countries and states in the Regions Manager.

In the Regions Manager, you can quickly enable or disable countries by clicking the 'visible' icon.

Regions are automatically sorted, with the active countries at the top, and disabled countries at the bottom. They are then sorted alphabetically.



Country	Code	Code (long)	Enabled	Default	Actions
Austria	AT	AUT	✓	★	✎ ✕
Belgium	BE	BEL	✓	★	✎ ✕
Canada	CA	CAN	✓	★	✎ ✕
Denmark	DK	DNK	✓	★	✎ ✕
France	FR	FRA	✓	★	✎ ✕
Germany	DE	DEU	✓	★	✎ ✕
Greece	GR	GRC	✓	★	✎ ✕
Italy	IT	ITA	✓	★	✎ ✕
Netherlands	NL	NLD	✓	★	✎ ✕
Portugal	PT	PRT	✓	★	✎ ✕
Spain	ES	ESP	✓	★	✎ ✕
Switzerland	CH	CHE	✓	★	✎ ✕
United Kingdom	GB	GBR	✓	★	✎ ✕
United States	US	USA	✓	★	✎ ✕

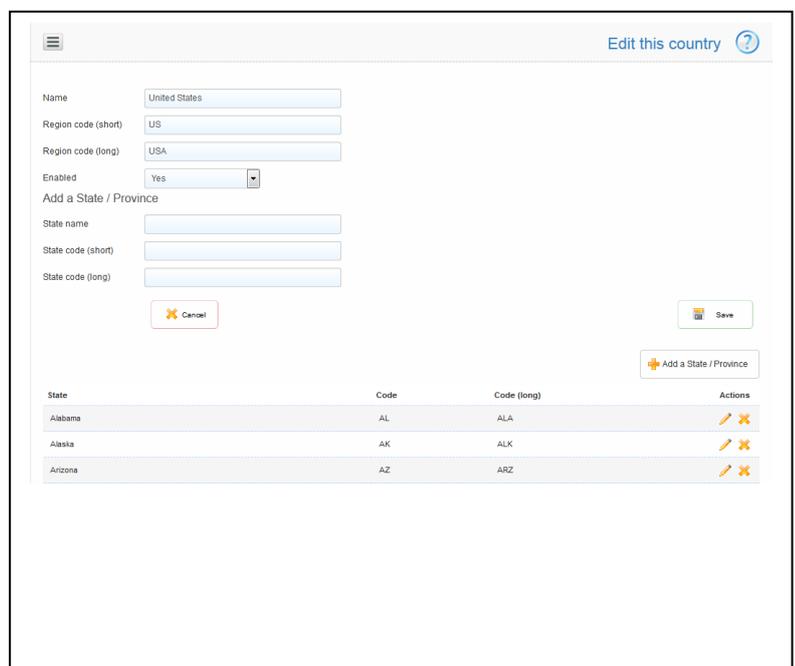
### Edit a country

If you edit a country, you will see this screen.

You can easily create states for each country. This is very useful if each state within a country has a different tax law, or if you want to set shipping costs based on the buyer's state.

**However, you do not need to create states if you do not want to use these features.** For example, the UK has just one tax rule for the entire country, so you do not need to define states (unless you want to), and this makes it easier for your customer to simply select their country, and for you to set up shipping and tax rules.

If you do create states, please ensure that you use the correct state code so that it is properly recognised by payment systems such as PayPal.



Name:

Region code (short):

Region code (long):

Enabled:

Add a State / Province

State name:

State code (short):

State code (long):

State	Code	Code (long)	Actions
Alabama	AL	ALA	✎ ✕
Alaska	AK	ALK	✎ ✕
Arizona	AZ	ARZ	✎ ✕

**As you add each state, please click the Save button to save your new information.**



Once you have finished editing a country, click the main Save button to save the changes.



## SalesPro Taxes

You can set up taxes for each country, or set them on a state by state basis.

If tax is not defined for a particular country or state, tax will not be charged on purchases from that region.

If you are registered to pay sales tax, you should set up taxes for each region where you are registered, and ensure that the tax levels are accurately set.

Name	Regions	Type	Value	Enabled	Actions
Arizona State Tax	Arizona	% Percent	15	✓	
California State Tax	California	% Percent	20	✓	
GST Tax	Anguilla	% Percent	20	✓	
VAT Tax	United Kingdom	% Percent	20	✓	
VAT Tax 2	Multiple selected	% Percent	15	✓	

Create a tax rule, and then select one or more countries or states where the tax should apply. You **must** select each state where the tax rule applies, not just the country.

After setting up each tax, please ensure your products also have the correct tax rules set, to ensure the tax rules apply as needed.

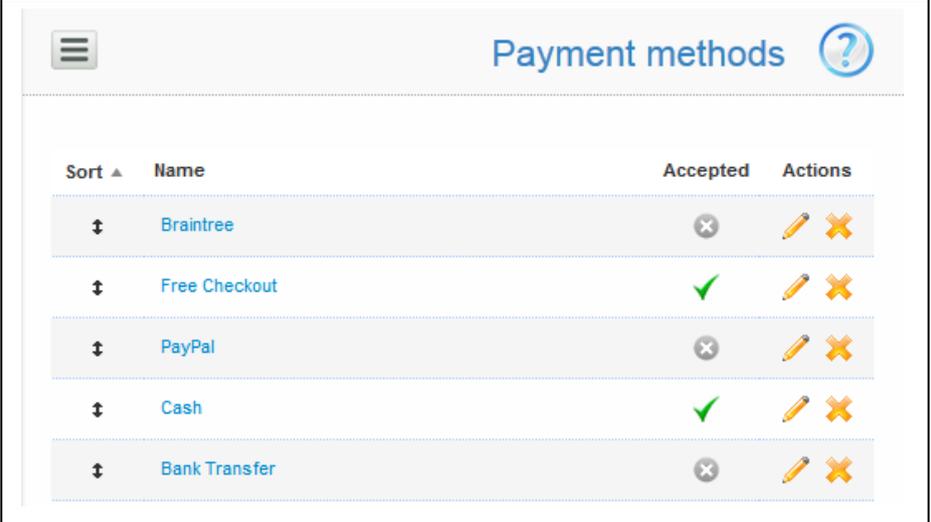
**Please note:** your products can either include tax already (as they do in Europe) or they can have taxes added to them during checkout. Please go to Configuration – Taxes for more information on this functionality.

## SalesPro Payment methods

Visit the payment methods to enable or disable specific payment types.

As of version 1.0.6 of SalesPro, you have several payment methods available to you:

- Free Checkout
- PayPal
- Cash
- Cheque
- Bank Transfer
- Cash on Delivery
- Braintree



Sort ▲	Name	Accepted	Actions
↕	Braintree	<input type="checkbox"/>	
↕	Free Checkout	<input checked="" type="checkbox"/>	
↕	PayPal	<input type="checkbox"/>	
↕	Cash	<input checked="" type="checkbox"/>	
↕	Bank Transfer	<input type="checkbox"/>	

If there is a payment method you would like, but it is not yet available, please request it on the SalesPro Forum.

**Reorder:** You can drag and drop payment methods to change the order they appear in the frontend.

**Accepted:** You can easily click to enable or disable a specific payment method

**Important concept:** After you have set up your Payment Methods, you MUST change your Shipping Method to ensure that the correct payment methods are available to the shipping method. For example, if you only accept Cash on Delivery with DHL, please create a Cash on Delivery payment method, then edit your DHL shipping method, to ensure that Cash on Delivery is available and is selected.

## Payment methods: Edit a payment method

Each payment method can be edited, and you can change the way it works within the SalesPro framework. There are further details on each individual payment method below, which are important, since some have specific setup fields. However, here are the basic payment method fields:

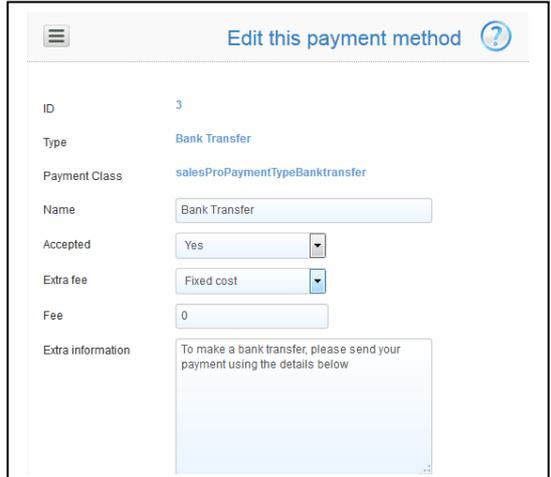
**Name:** Please enter a name for your Payment Method. This will be shown on the frontend

**Accepted:** Enable or Disable the Payment Method

**Extra Fee:** Decide if use of this Payment Method incurs an extra cost. For example, if your Payment Method is Cash on Delivery, you might want to add a £5 fee, or if it's PayPal, you might want to add a surcharge fee. If there's no extra fee, change the option to *FREE*

**Fee:** Enter the payment fee here, or leave it at 0 if there is no charge.

**Extra information:** If the user selects this Payment Method, any information in this box will be shown to them on the frontend.



Edit this payment method ?	
ID	3
Type	Bank Transfer
Payment Class	salesProPaymentTypeBanktransfer
Name	Bank Transfer
Accepted	Yes
Extra fee	Fixed cost
Fee	0
Extra information	To make a bank transfer, please send your payment using the details below

## Payment methods: PayPal

The PayPal setup allows you to use either the 'normal' API, or the 'sandbox' API.

**Important: you must ensure that the API is set to 'normal' if you want to accept payments.**

### Normal API

Simply enter your PayPal seller email address so that you can receive payments.

### Sandbox API

The sandbox API allows you to test payments and the sales system.

To use it, you will need to sign up for a sandbox account and enter your PayPal sandbox email address in the Sandbox API tab.

Sign up for a sandbox account here: <https://developer.paypal.com/webapps/developer/applications/accounts>

**Payments made with PayPal are automatically recorded as 'Completed' once checkout is finished, and payment is confirmed. You can then update the sale status to 'Shipped' as necessary in the sales screen.**

The screenshot shows the 'Edit this payment method' page for PayPal. At the top, there are tabs for 'Setup', 'Normal API', and 'Sandbox API'. A blue banner at the top states: 'You can test your PayPal integration for free using a PayPal sandbox'. The form fields are as follows:

- ID: 2
- Type: PayPal
- Payment Class: salesProPaymentTypePaypal
- Name: PayPal
- Accepted: No
- Active API: Normal
- Extra fee: Fixed cost
- Fee: 0
- Extra information: E.g. 'PayPal offers secure credit card payments'

## Payment methods: Free Checkout

Free Checkout allows your customers to complete the purchase of a free item without entering any payment details at all. You can use this checkout method to give away free items, test your SalesPro system, and so forth.

For the Free Checkout method to be offered, it must be enabled, and the user must have items worth exactly £0 in their cart, including any shipping fee, payment fee and so forth. Please also check that the shipping method has Free Checkout added as one of its valid payment methods.

**Payments made with Free Checkout are automatically recorded as 'Completed' once checkout is finished.**

The screenshot shows the 'Edit this payment method' page for Free Checkout. At the top, there are tabs for 'Setup', 'Normal API', and 'Sandbox API'. The form fields are as follows:

- ID: 6
- Type: Free Checkout
- Payment Class: salesProPaymentTypeFreeCheckout
- Name: Free Checkout
- Accepted: Yes
- Extra fee: FREE
- Fee: 0
- Extra information: E.g. 'PayPal offers secure credit card payments'

Below the form, there is an 'Information' section with the text: 'Free Checkout lets your users check out even if they have only free items in their cart. To use it, please ensure it is enabled, and is selected for your shipping methods where necessary.'

## Payment methods: Cash / Cheque / Bank Transfer / Cash on Delivery

These payment methods are all very similar, and work in the same way.

Your clients can check out as normal, but you will then confirm payment after the cheque has cleared, cash has been received, or bank transfer has completed.

**Payments made with these methods are automatically recorded as 'Pending'. Once you have confirmed payment, please update the sale status to 'Complete' and then, if necessary, to 'Shipped'.**

### Payment methods: BrainTree

Before setting up a BrainTree Payment Method, please sign up for an account at <https://www.braintreepayments.com/>

BrainTree is an innovative payment gateway that supports hundreds of currencies, including many not accepted by PayPal. So if you can't use PayPal for some reason, it's worth trying it out.

Setting up BrainTree is slightly more involved than any other Payment Method, so if anything doesn't work as expected, please check your configuration carefully both in your BrainTree account area, and in the SalesPro Payment Method configuration screen here.

#### Currencies

The first thing to do is register currencies that you want to accept, in your BrainTree account. You can do this in Braintree > Settings > Processing > Merchang Accounts.

Once you have set up your currencies, enter each currency and corresponding merchant account ID here.

Please also ensure your currencies are correctly set up and are enabled in the SalesPro Currencies screen.

#### Normal API

This is the API that you should use when you go 'Live'. Please get your keys in Braintree > Account > My user > Authorization > API Keys. Then, enter the key information here.

The only other option is to decide whether you want to use BrainTree's PayPal integration.

**Please ensure the Active API is set to 'Normal if your shop is live.**

#### Sandbox API

This API allows you to test your Braintree and SalesPro setup. Please enter your Sandbox key here.

Please ensure the Active API is set to 'Sandbox' if you want to use the Sandbox.

**Payments made with BrainTree are automatically recorded as 'Pending'. Once you have confirmed payment in your BrainTree account, please update the sale status to 'Complete' and then, if necessary, to 'Shipped'.**

The screenshot shows the 'Edit this payment method' interface for a 'Bank Transfer' method. The ID is 3. The Type is 'Bank Transfer' and the Payment Class is 'salesProPaymentTypeBanktransfer'. The Name field contains 'Bank Transfer'. The 'Accepted' dropdown is set to 'Yes'. The 'Extra fee' dropdown is set to 'Fixed cost'. The 'Fee' field contains '0'. The 'Extra information' field contains the text: 'To make a bank transfer, please send your payment using the details below'.

The screenshot shows the 'Edit this payment method' interface for a 'Braintree' method. The ID is 5. The Type is 'Braintree' and the Payment Class is 'salesProPaymentTypeBraintree'. The Name field contains 'Braintree'. The 'Accepted' dropdown is set to 'No'. The 'Active API' dropdown is set to 'Normal'. The 'Extra fee' dropdown is set to 'FREE'. The 'Fee' field contains '0'. The 'Extra information' field contains the text: 'E.g. 'PayPal offers secure credit card payments''. Above the form, there are tabs for 'Setup', 'Currencies', 'Normal API', and 'Sandbox API'. A blue notification banner at the top states: 'Braintree allows you to accept credit card payments in multiple currencies. Click here for a list of accepted currencies'.

## SalesPro Shipping methods

Shipping methods are very powerful, and are very flexible, so you can create a shipping method for just about any provider you like.

If you want to sell physical goods that need to be delivered, you will need to set up your shipping methods carefully, to ensure that there is a method available for all states, countries and basket sizes.

### Key concepts

Each shipping method allows you to define a series of rules that will determine whether the shipping method is available to the customer, and if so, how much the customer should be charged.

You can make very simple rules, that simply charge a flat rate, no matter how much your customer buys, or you can create very complex rules, that charge a user more for shipping to a specific state, or for buying large and bulky items.

Price	Basket weight	Basket items	Basket price	Actions
10.00	Min: 0.000 Max: 0.000	Min: 0 Max: 3	Min: 0.00 Max: 0.00	
20.00	Min: 0.000 Max: 0.000	Min: 4 Max: 10	Min: 0.00 Max: 0.00	
30.00	Min: 0.000 Max: 0.000	Min: 11 Max: 0	Min: 0.00 Max: 0.00	

You can also change which Payment Methods are permitted for checkout alongside a specific Shipping Method. So, if you only accept Cash on Delivery for DHL-delivered shipments, then ensure that Cash on Delivery is selected in the Shipping Method setup screen.

### Basic setup

Creating a new shipping method is very easy. Simply create it as follows:

**Name:** Enter the name of the shipping company

**Enabled:** Enable or disable the shipping method

**Payment methods:** Select which payment methods are permitted for this shipping method

**Extra information:** If the user selects this shipping method, they will be shown any extra information given in this box.

### Shipping prices

Creating the shipping prices is also quite easy, once you have grasped the basic concept. I recommend you have 'open-ended' rules, to ensure that every eventuality is covered. For example, you might set a rule that has Minimum 0 items (i.e. zero items), maximum 15 items in the basket; and another that has Minimum 15 items, Maximum 0 items (i.e. unlimited). This is so that, no matter how many items the user has in their cart, they will have a definite shipping price available.

Let me walk you through the setup process – click Add a Price to start, and then enter:

**Price (£):** Enter the shipping price in your normal, default currency.

**Regions:** Enter the countries and states that you will ship to, at this price. You **must** select all states you ship to at this price, not just the country. E.G. if you ship to Alberta, please select Canada AND Alberta

### *Shipping prices: Advanced rules*

You can leave all the advanced rules blank (or simply set to 0) if you want a 'flat rate' shipping fee. This will mean that all rules are open-ended, there is no minimum or maximum for any of the rules.

**Basket items:** Set the minimum and maximum **number** of items the user should have in their cart, for this price to be available (or set to 0 to have no limits)

**Basket price:** Set the minimum and maximum **value** of all items the user should have in their cart, for this shipping price to be available (or set to 0 to have no limits). N.B. This price is in your default, standard currency.

**Weight:** Set the minimum and maximum **weight** of all items the user should have in their cart, for this shipping price to be available (or set to 0 to have no limits). The weight is determined by the combined weight of all items in the cart. N. B. The unit of weight is set in Configuration > Localisation

**Height:** Set the maximum **height** of items the user has in their cart. The maximum height is determined by the tallest item in the cart. Set to 0 to have no limits. N.B. the unit of measurement is set in Configuration > Localisation

**Width:** Set the maximum **width** of items the user has in their cart. The maximum width is determined by the widest item in the cart. Set to 0 to have no limits.

**Depth:** Set the maximum **depth** of items the user has in their cart. **Important note:** the depth is calculated by the total, combined depth of all items in the cart. Set to 0 to have no limits.

After making a change, or adding a shipping rule, click the Save button to save the rule



### *Important concepts*

- 1) You should decide how you want to calculate the price, whether by weight, basket price, basket size, or number of items, rather than fill all available fields. For example, it's better to calculate shipping by checkout price **OR** by combined weight – leave any unused fields empty (or set to 0). This creates 'open-ended' rules that will ensure your users are always given a shipping price.
  - For example, it would be a mistake to restrict shipping to, minimum 2 items, maximum 3 items, maximum height 200mm). If the user tries to buy 4 items, or the maximum height is 250mm, there will not be a shipping price available to him.
- 2) If more than one rule makes the Shipping Method valid for a user, the system will use the rule with the lowest price.
- 3) Check that each shipping method has one open-ended rule (where all the min/max fields are set to 0), which is available to all countries and states you will delivery to. This way, you can ensure that your users are always given a shipping price, no matter what they buy, or where they live.

## SalesPro Templates

SalesPro allows you to easily switch between templates in the template manager. You can also edit the templates, which lets you select a colour (if colour switches are available for the template).

Only one template is included with SalesPro, but as templates are released, you will be able to add them from the AddOns Manager.

Template	Alias	Default	Action
Original	original	★	✎ ✕
Blue Sky	bluesky	★	✎ ✕

We will also be creating a template development guide soon to help you develop your own templates – please check back soon at <http://www.sales-pro.co.uk>.

## How to create your own custom styles

**You can easily override the template stylesheet with your own colour ‘switch’. This means you can make changes, and ensure that they will not be overridden if you update SalesPro.**

To create a new colour switch, please use FTP to open `/components/com_salespro/templates/[TEMPLATENAME]/css/colours/`. You will see that your template has a number of different colour files.

Please create a new colour file, and call it something you will recognise, for example ‘mycolour-blue.css’

Then, open the SalesPro Template Manager, and edit your default template, as shown here.

The name of the colour file you created will appear in the Colour scheme drop-down list. Select it, and save the template.

Your colour file will then be ‘active’ and any changes you make will override the default template stylesheet, so you can easily change styles throughout your system and customise it any way you like.

**Edit this template** ⓘ

To quickly customise this template, create a colour file in `/salespro/templates/moderna/colours/`. The colour file will override all other template rules, and will not be affected if you update SalesPro ⓘ

ID: 1

Alias: moderna

Name: Moderna

Colour scheme: 

- black
- blue
- chris
- green
- red

## SalesPro Widget Manager

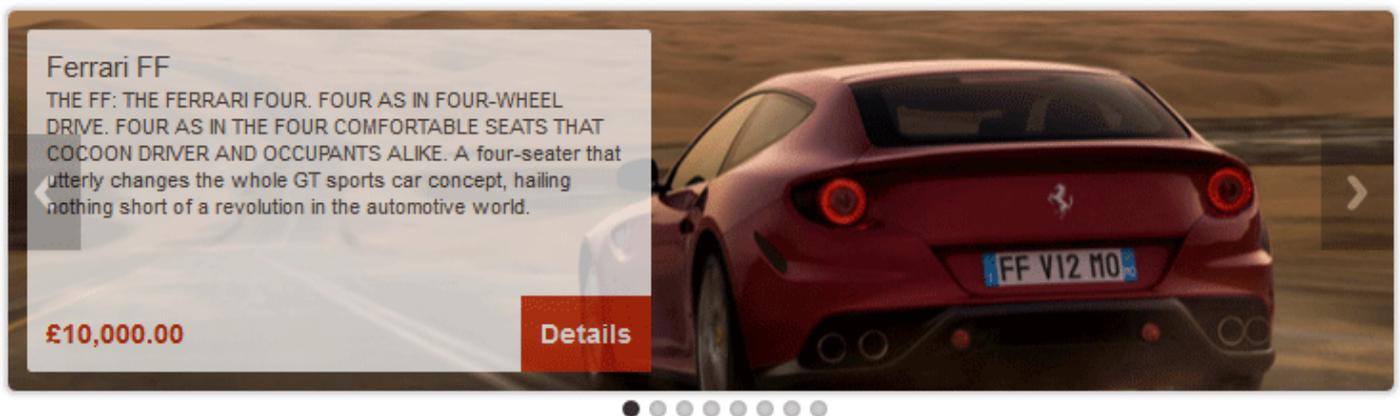
Widgets are a very powerful way to easily display categories and items across your SalesPro system.

For example, you can easily deploy a few widgets on your home page, such as Showcase Items, Categories and Featured Items, to create an attractive, interactive page that engages your customers.

You can drag and drop widgets to resort the order they appear on the front end, and click the Enabled button to enable or disable the widget globally across your SalesPro System. Click the Edit button to edit the widget.

Here is an example of the 'Showcase Items widget as it appears on the home page:

### Showcase items



Click to edit the Showcase widget, and you will see the options available to you.

### Widget options

**Widget Name:** Change the name of the widget

**Enabled:** Display or hide the widget

**Show Title:** Display or hide the widget name

**Show Button:** Display or hide the 'Details' button (where available)

**Number to show:** How many items or categories to show

### Where the widget displays

Select to show the widget on a number of pages throughout your SalesPro system. If the widget is active on a particular page view, and there are items or categories that can be displayed, it will automatically show up on the relevant page.

Sort ▲	Widget Name	Alias	Enabled	Actions
↕	Showcase items	showcase	✓	
↕	All categories	categories	✓	
↕	Featured items	featured	✓	
↕	New items	new	✓	

☰
Widget Manager ?

This widget displays featured items in a showcase box ?

ID	1
Alias	showcase
Widget Name	<input type="text" value="Showcase items"/>
Enabled	<input checked="" type="checkbox" value="Yes"/>
<b>Widget settings</b>	
Show title	<input checked="" type="checkbox" value="Yes"/>
Show button	<input checked="" type="checkbox" value="Yes"/>
Number to show	<input type="text" value="20"/>
<b>Where the widget displays</b>	
Home page	<input checked="" type="checkbox" value="Yes"/>
Category pages	<input checked="" type="checkbox" value="Yes"/>
Item pages	<input checked="" type="checkbox" value="Yes"/>
Basket page	<input checked="" type="checkbox" value="Yes"/>
Checkout page	<input checked="" type="checkbox" value="Yes"/>
Thank you page	<input checked="" type="checkbox" value="Yes"/>

## Email Manager

Emails can be sent out automatically, when your users do a range of different things.

The most common email is an order acknowledgement or a 'Thank you' email.

If you created sample data using the SalesPro Wizard you will have a few emails available to you which you can use as templates to follow.

A useful feature is the Email Preview button, which you can use to see how the email will appear.

Important Note: the preview feature uses 'real' sales data from your system, so you might need to create a dummy sale before you can preview an email.

Email subject	Email trigger	Product types	Active	Email preview	Actions
Your downloads are ready	Order placed	Downloadable	✓		
Your order has been refunded	Order refunded	All Types	✓		
Your order has been shipped	Order shipped	Standard	✓		
Thank you for your order	Order placed	All Types	✓		

## Edit an email

Please click an email, or create a new one, to set it up. You will see a screen like this:

**You may style the email however you like. If you use an image or logo, please remember to use the full url (including http://)**

Email subject:

Your email address:

Email trigger:

Product types:

Send yourself a copy:

Enable this email:

Email template

Dear {user\_name}

Your downloads are ready to access.

Please visit this page to download your items: {download\_link}

Sincerely,

The SalesPro Team

**You may use the following variables in your email:**

Variable	Description
{user_name}	Gives the user's registered name
{user_email}	Gives the user's registered email
{note}	Gives the user's order note
{order_details}	Gives the full order details, including products, shipping cost, tax and total price
{order_date}	Gives the order date
{order_status}	Gives the order status
{total_quantity}	Gives the total number of items purchased
{total_weight}	Gives the total weight of items purchased
{net_price}	Gives the net subtotal price of items purchased (ex. tax, shipping and discounts)
{shipping_type}	Gives the shipping method
{shipping_price}	Gives the shipping price
{taxes}	Gives the tax name and values
{grand_total}	The total price (inc. tax, shipping and discounts)
{billing_name}	Gives the billing contact name
{delivery_name}	Gives the delivery contact name
{billing_address}	Gives the user's full billing address, including contact name
{delivery_address}	Gives the user's full delivery address, including contact name
{items}	Gives all purchased item details

**Email subject:** The subject line of your email

**Your email:** Enter your email address. This will be used as the 'from' address, and will also be used to send you a copy of the email, if you would like one.

**Email trigger:** Select the user action that triggers this email. These triggers relate directly to the Sale Status. You can change the Sale Status by editing the individual sale. So, when a user has bought an item, and you have shipped it, change the Sale Status to 'Shipped' to ensure the 'Shipped' confirmation email gets sent out.

**Product types:** Select the product types that this email should relate to. For example, you might want to send a download link to only those users that have bought a downloadable item. Or you might want to send an order confirmation to all users, regardless of the product type. You can select one or more product types in this field.

**Send yourself a copy:** If you would like a BCC copy of the email that is sent out, select 'Yes'

**Enable this email:** This is an overriding setting to enable or disable this email. If your emails aren't being sent, check it's enabled, and that the email is enabled for the correct product types.

**Email template:** This is a full WYSIWYG editor, and enables you to set up the email exactly as you like.

Important note: The email template supports variables! The full list of available variables is on the right hand side. You can add variables to your email in the format {variable\_name}.

So, if you want to include full order details in your email, use the syntax {order\_details} somewhere in your email

Important note #2: You can include images (like your shop's logo) in the email. Just make sure that you include the full address to your image (including http://) to ensure that it's shown to your users. If you use a variable like {order\_details} it will automatically include the item images in the email, where applicable.

**Email preview:** Once you have set up your email, and saved it, you can preview the email with 'real' data. Firstly, make sure you have made a sale through your SalesPro system – create a dummy sale if you need to. Then, click the Email Preview button to preview your email:

[Email preview](#)

