ArtfulBits Shopping Cart

For Microsoft® SharePoint®

User Guide

Overview

***ArtfulBits Shopping Cart* is intended to provide ecommerce functionality.**

This web part provides a possibility to exhibit items for sale, its description, images, price, size, type or category, availability, amount in stock, submit or resend an order, pay by PayPal or on delivery, save order in history, choose approver and take part in the contest by bidding on special product.ArtfulBits Shopping Cart allows providing **different categories and subcategories of goods for sale**. Therefore, it is very easy to find a specific set of items for purchase and filter them out:

An image gallery can be easily provided for every product:
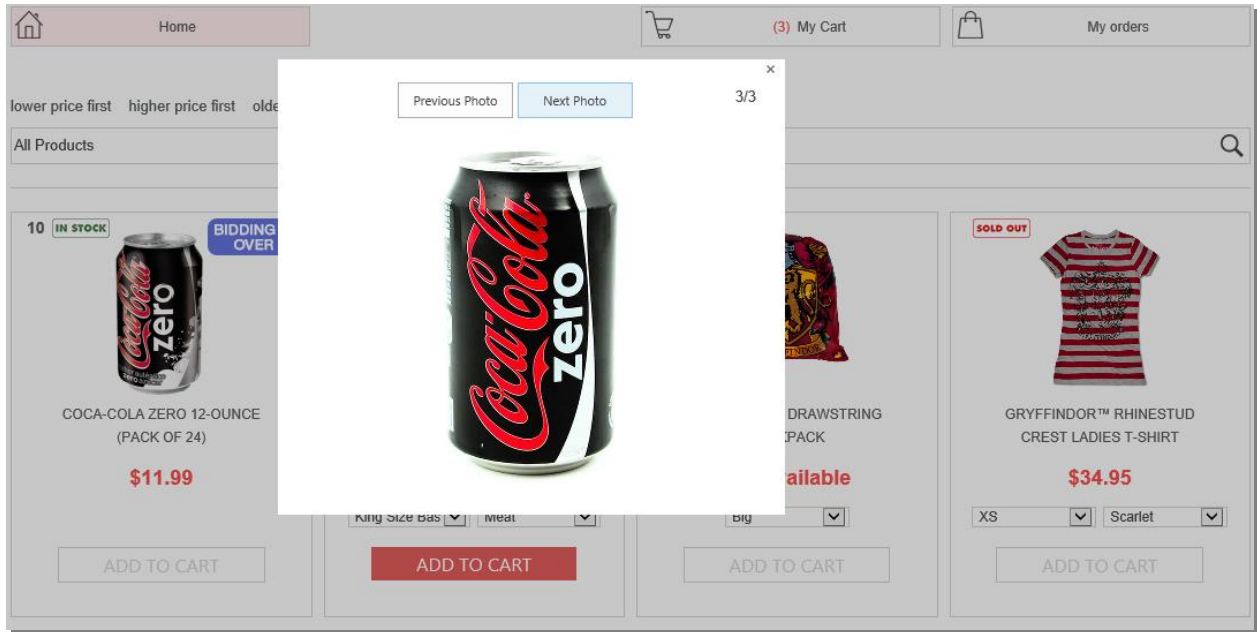
While a product is the cart, a customer can **change its quantity**, **remove from the purchase list** or **return**. Then the order can be processed via Order Now form either with **PayPal** or **POD option**.

Feature List

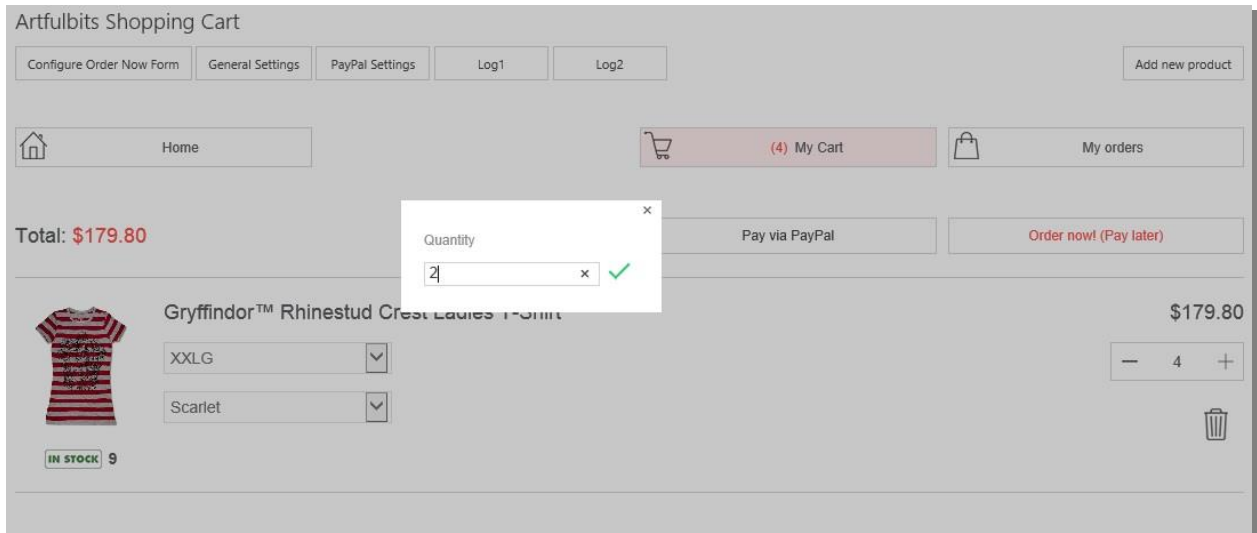| Feature	SharePoint Server 2010	SharePoint Server 2013
Product 2-level categorization	✔	✔
Cart view	✔	✔
Basic information about product (price, description, image, availability)	✔	✔
Product image gallery	✔	✔
Smooth loading (no full postbacks)	✔	✔
Filtering products by categories and subcategories	✔	✔
Sorting by price and date	✔	✔
History of purchase and resend order option	✔	✔
Payment method: On Delivery and PayPal	✔	✔
Configurable "Order Now" form	✔	✔
Bidding functionality	✔	✔
Email purchase confirmation and configurable Email Templates	✔	✔
Order Approvers option	✔	✔
Return products option	✔	✔
Goods Shelves	✔	✔
Search Products	✔	✔
Language pack support (desired localization can be added by request)	✔	✔

Why ArtfulBits Shopping Cart?

ArtfulBits Shopping Cart is a simple and efficient solution for approaching your ecommerce processes. Most solutions available on the market offer complex and extremely packed solutions. However small and mid-size companies don't need gigantic modules for ecommerce. That's why ArtfulBits provides a simple tool that provides a commonly used set of functionalities: cart view, goods shelves, and information about products, categories of products, pay via PayPal, bidding, information about product availability, customizable notification, variations of the same product by a chosen category or subcategory with the possibility to filter and preview pictures. Also a history of purchases is kept in the cart. These modules can be easily enhanced. This is an ideal solution for small business, as it will quickly enable you to start selling on your site. Also it is very straightforward when it comes to configuration and is intuitively understandable.

How to Use

Configuration 2010

In order to configure **ArtfulBits Shopping Cart Web Part** you need to complete several steps:

1. Use the installer provided in the package to install the Web Part (see Install Guide for more details).
2. Navigate to any Site Collection selected during the installation process:

a. Go to Site Collection Features and activate "ArtfulBits Shopping Cart" feature.
b. Go to "Create new site" menu, select "ArtfulBits Shopping Cart Web Part" site template, fill in Title & Url name and click create.
3. You will be redirected to a newly created site that includes ArtfulBits Shopping Cart Web Part and all required infrastructure.

Configuration 2013/2016

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   b. Go to "Create new site" menu, select "ArtfulBits Shopping Cart Web Part" site template, fill in Title & Url name and click create.
3. You will be redirected to a newly created site that includes ArtfulBits Shopping Cart Web Part and all required infrastructure.

How to Add a New Product

1. Click "**Add new product**".

2. Click "**Edit product**" and add information to the required fields: **Title**, **Description** and **Description (For Filtering)**.
3. Checkbox "**Visible**" by default is unchecked. If you want to make the product available on the main view of the Shopping Cart, check "**Visible**" and click "**Save**".
4. You can also provide a number of items in stock if you click on "**Edit price/stock**" and provide a value in "**Amount in stock**" field. This amount will be displayed nearby "**In stock**" indicator

NOTE: If you don't want to display the number of items in stock, but want to display "**In stock**" indicator besides the product, uncheck the checkbox "*Display stock count for the clients*" in **General Settings**.

5. Click ✅ for confirmation

After saving this information, a new product will appear on the main view of the Shopping Cart. A user with Full Control access level will be able to see additional buttons for each product in the main view, when hovering over the product:

Under "Manage product data": **Edit price/stock**, **Edit product**, **Delete product**
Under "Manage bidding data": **New**.

Edit Product form contains other options
1. **Product Image**. You can add Image URL for the image that will be displayed on the main view. E.g.: http://store.img1.jpg
2. **Image Description**.
3. **Category** and **SubCategory** of the product.
4. **Gallery**. It contains additional product images that can be viewed in the image gallery after clicking on the **Product image** in the product view. You may enter any amount of new-line separated image URL's:
   http://store.img1.jpg
   http://store.img2.png
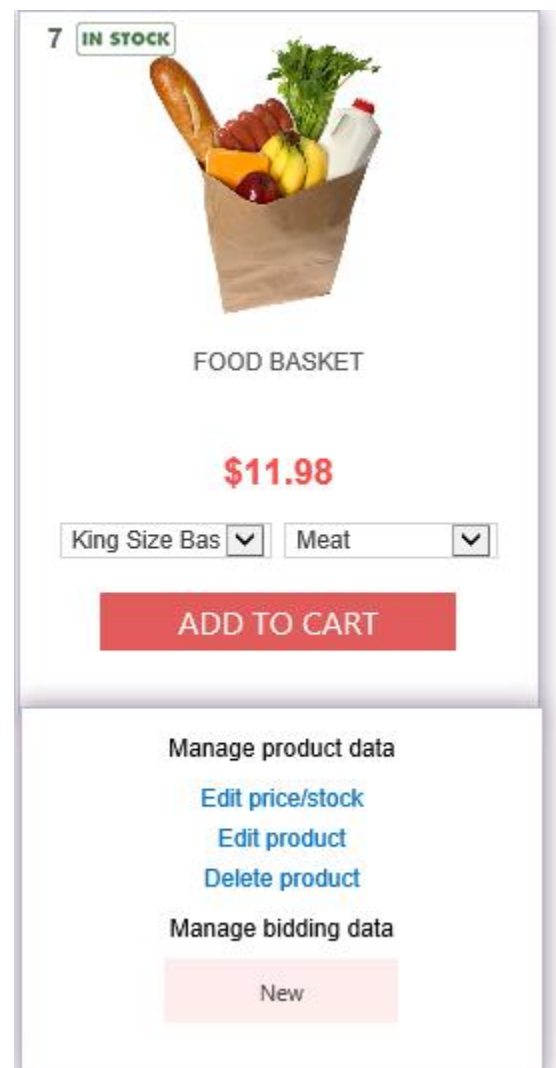
Edit Price/Stock form

ArtfulBits Shopping Cart provides a possibility to indicate the price and the number of items left in stock for each product. This option can be managed via **Edit Price/Stock** form which provides the following options:

Price/Stock for product

If you have just a single product type, then you can provide its price in **General Price** field. The price can be provided as *double* or *integer* data type.

Price/Stock for different product types

If you have different product types and, therefore, different price for these types of the product, you can provide it in the following way:

1. Provide sizes and types of the products divided by semicolon

2. Provide Price value for each size/type of your choice:

Size	Type	Price	Stock count	
King Size Basket	Meat	11.98	4	✗
King Size Basket	Bread	12.99	6	✗
King Size Basket	Milk	15.99	7	✗
Middle Size Basket	Meat	11.99	5	✗
Middle Size Basket	Bread	12.99	5	✗
Middle Size Basket	Milk	15.99	7	✗
Small Size Basket	Meat	11.99	5	✗
Small Size Basket	Bread	12.99	6	✗
Small Size Basket	Milk	15.99	6	✗

Add

3. You can also provide a number of items in stock for each size/type of your product.
4. Click ✓ for confirmation

Stock indicators

ArtfulBits Shopping Cart provides several out-of-box stock indicators:

"**In Stock**" indicator – appears, when more than 1 items are in stock. Nearby is displayed the number of items in stock

"**Last piece**" indicator – appears when 1 item is left in stock

"**Sold Out**" indicator - appears if 0 items are left in stock.

IN STOCK   LAST PIECE   SOLD OUT

The orders are prevented from going through if the amount of items ordered exceeds the stipulated amount.

NOTICE! If you want to disable Stock Counter completely, for all products, you can do it via "**General Settings**" button on the main view. You need to uncheck "**Enable stock count**" option and click ✓

Also, you can do it in the Settings list. Check "**EnableStock**", click Edit Item, delete value "*Yes*" (leave value empty), and save.

"Display stock count for the clients" option provides an ability either to display the number of items in stock for the visitors, or not.

Low inventory level notification

Administrator can receive a notification if the inventory level of the product is low. You can set-up a minimum inventory level in General Settings. Each time when the number of items in stock drops below this number, an administrator will receive a standard notification with the corresponding message.

Please, note that it is possible to provide several email addresses in the vendor email field. They should be comma-separated. If there are a few values, all of them will be notified.

Categories and Subcategories

ArtfulBits Shopping Cart provides a 2-level hierarchy of goods categories.

In order to provide 1st level category you need to:

1. Go to Category List.
2. Add new item -> Fill in category Title

In order to provide 2nd level category you need to:

3. Go to Subcategory List.
4. Add new item -> Choose category -> Fill in subcategory Title

You can hide filter pane via General Settings.
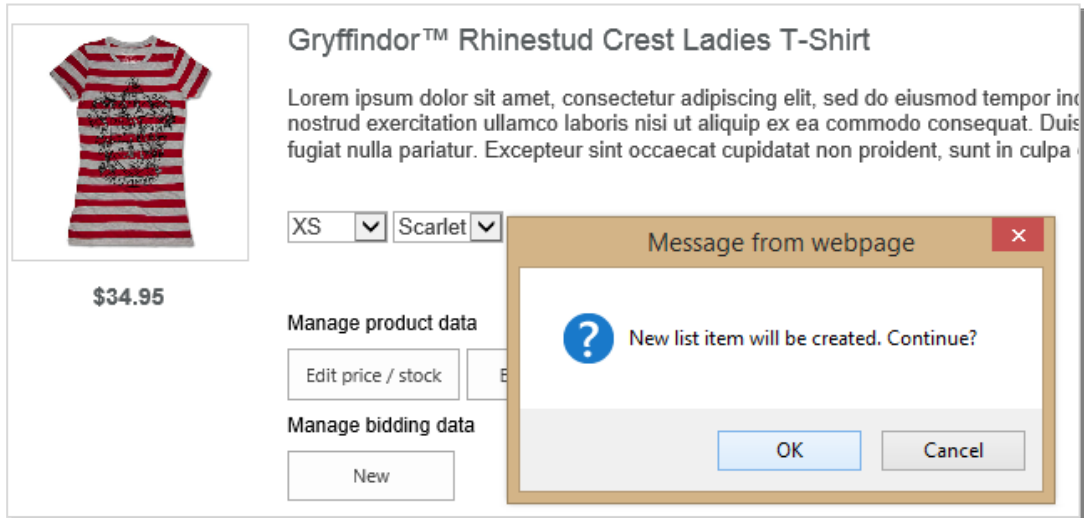
Bidding

ArtfulBits Shopping Cart provides a possibility to bid for products. This feature can be used in various ways. For example, you can create Special Offers category and exhibit products that are available for an auction. Thw bidding type provided by ArtfulBits Shopping Cart is *Timed Bidding* which allows users to bid at any time during a defined time period, simply by entering a maximum bid.

Manage bidding

1) Make sure that you checked "**Enable bidding functionality**" option at the **General Settings**

2) In order to arrange an auction for the product, you need to click on "**New**" button under "**Manage bidding**" section.

3) Next you need to provide the following values:

- **Product** – you can change a product here
- **StartDate** (and time) – the time when the bidding will become open
- **EndDate** (and time) – the time when the bidding will be over. When the **EndTime** will expire, a notification about it will be visible nearby the product. E.g.: Bidding is over. (end date: December 16, 2015 23:40)
- **InitialPrice** – the initial price of the bid. Notice that if the product price was provided when creating a new product, then **InitialPrice** will take precedence over it.
- **CurrentPrice** – the price the product currently costs (presumably after bidding by someone). **InitialPrice** and **CurrentPrice** can differ in order to provoke an interest from customers.
- **Bidder** – a bid owner. Bid owner is a SharePoint user who owns the information and receives notifications on the bids made for the product.

4) Click "**Save**"

After the information for bidding was created, button "**New**" under "**Manage bidding**" section will be substituted by 2 buttons: "**Edit**" (*allows for editing the information for bidding*) and "**Delete**" (*deletes information for bidding*).

Bidding Process

- After the information for bidding is set up, "**Add to Cart**" button is substituted by "**Bid**".
- All registered users can place bid.
- Bid amount will automatically be incremented by 1. However a user can place a higher bid. Bid increment lower than the previous bid is not permitted.
- Each time a new bid is placed, bid owner will receive a notification.
- After **EndTime** expiration a notification about becomes visible nearby the product.
- A user which placed the bid will receive a notification about winning a contest. This user will see "**Add to Cart**" button for this product, and will be able to purchase this product. Other user will not be able to order

Notification of the winner

Notification of the winner by default is not enabled. In order to enable user notification, you need to do the following:

- Central Administration → Application Management → Manage Web Applications → <choose correct web-application> → Manage Features
- Find **ArtfulBits.WebParts.ShoppingCart.Timer** and click "**Activate**"

- If bidding will be enabled, but the Timer Job will not be enabled, you will see a message "*Please activate Timer Job Feature in Central Administration*" in the main view.

Notifications are configurable via General Settings. You can manipulate with the message received by the winner in the same way as it is possible to do with other email templates.

PayPal

ArtfulBits Shopping Cart provides a possibility to pay for the product by PayPal. After adding products to the shopping cart, a user can either proceed to check out by clicking on "**Pay via PayPal**" or "**Order Now! (Pay later)**". With PayPal option a user will be redirected to PayPal for payment, and with "**Order Now!**" option a user will be able to proceed without payment.

In order to set up PayPal option you need to do the following:

1. Make sure that you checked "**Enable PayPal**" option at the **General Settings**
2. Create PayPal business account
3. Create PayPal app

4. Get the following credential set:
- *API Username*
- *API password*
- *Signature*

Use this developer guide: https://developer.paypal.com/docs/classic/api/apiCredentials/

5. Click "**PayPal settings**" and provide *API Username* value, *API password* and *Signature*
6. Make sure that Currency Code corresponds to the chosen currency of your PayPal account and PayPal currency

code nomenclature https://developer.paypal.com/docs/classic/api/currency_codes/

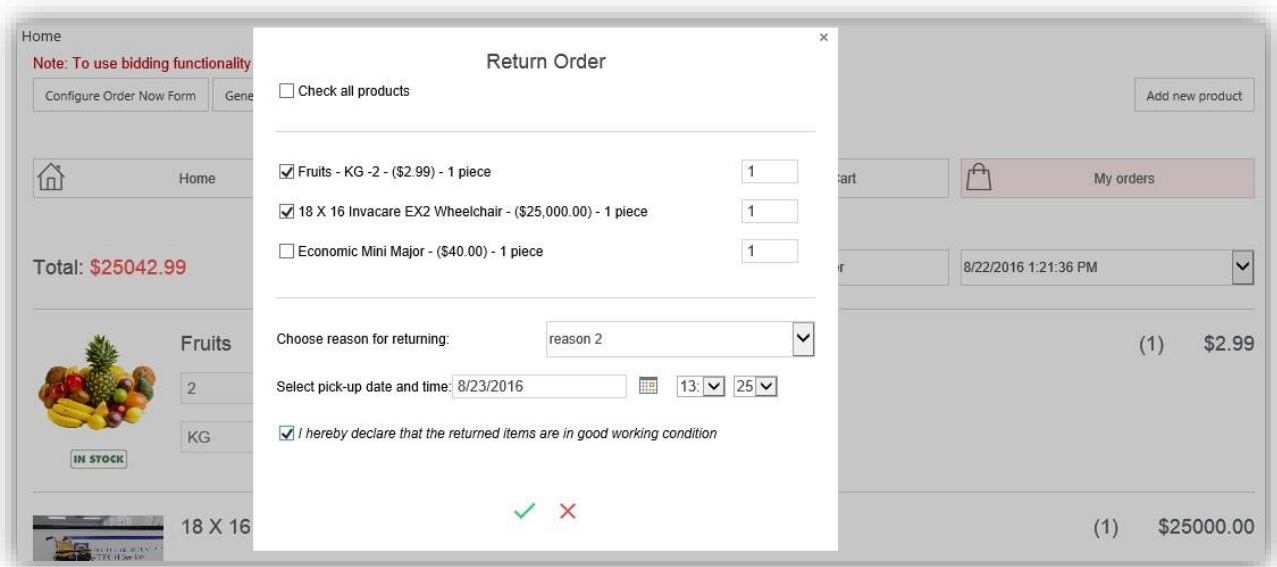7. Recommended **timeout** is 16000 milliseconds.

8. Click ✅

You can test the connection with your account by checking the option **"Use sandbox environment"**. Make sure you use PayPal credential set for the test app in this case.

NOTE: It is recommended to turn on SSL and SessionState in order to use PayPal.

Return products

Return products option can be enabled via General Settings.

After **Return products** option is enabled, a user will be able to see Return Order button order in "My Orders".

User can provide a number of items to return or choose to return all products. Also it is required to specify a reason for the return, select pick-up date and time, if this is relevant, and agree with the statement: "*I hereby declare that the returned items are in good working condition*" in order to process the return.

After confirmation, a notification will be sent to **vendor email** with the link to the information about returned goods. If admin confirms the return, the number of items in stock will be updated correspondingly, and the history of orders will contain the corresponding record about the number of items returned.

In order to provide reasons of return for the users, administrator should do the following:

1. Open **Site Contents**
2. Find and open *ReturnOrderReasons* list
3. Fill in the list with the reasons you'd like to be chosen by the users in a case of a return

Order Now Form

After adding items to the shopping cart and choosing the payment option, a user is redirected to **Order Now** form. In the case with "**Order Now! (Pay later)**" option, **Order Now** form is called right away. In the case with "**Pay via PayPal**", **Order Now** form is called after payment confirmation on **PayPal**.

Order Now form can be configured by clicking on "**Configure Order Now Form**" button on the main view of the Shopping Cart.

Order now form contains a set of fields that can be added/deleted/edited. The format of the fields corresponds to the following example, where you can see 4 values:

Field key	Field display name	Required/Non required	Field type
NAME	Full name:	Yes	Multiple lines

Field key is an identifier of the field. It is not visible to the user, but you can refer to it when configuring email templates. Also it is important to remember that even though you can assign **Field key** value arbitrary, but some of the **Field keys** can be autofilled if using PayPal. These Field Keys are: COUNTRY, STATE, CITY, ADDRESS, POSTALCODE But it is not required to use these fields.

Field display name is the name of the field that will be visible on the **Order now** form for the users.

Required/Non required option indicated the type of the information that is required for Order Now form submission.

Field type is the type of the field visible to the user. There are 5 field types available:

1. *Text Field*
2. *Multiple lines*
3. *Dropdown*
4. *People Picker*
5. *Calendar*

In the **Properties** if the **Field types** it is possible to indicate the following:

1. Number of *Multiple lines*
2. Values of *Dropdown.* Notice, that the values of *Dropdown* should be separate with semicolon "**;**".

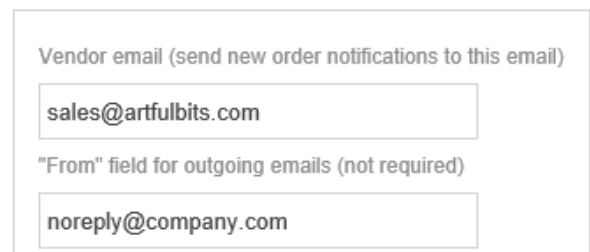### Integration with SharePoint User Profile Service

Administrator can use data from User Profile for Order Now form, if needed. ArtfulBits Shopping Cart supports user profile properties (string fields). For example you may want to create your own field in SharePoint User Profile and get its value into the Order Now form automatically.

In order to do that, you need to create a new field in Order Now form, and indicate a special field key for it: UPP_propertyName Where "propertyName" corresponds to the property of the field in SharePoint User Profile.

Approvers list

Certain workflows require a choice of the "order manager" or some approver for the order. For example, if there are different departments within a company, then certain orders can be approved only by specific departments. ArtfulBits Shopping Cart provides a possibility to set up a list of approvers by 2 different ways:

1) With the help of APPROVERS **field key**, when configuring **Order Now** form
2) With the help of APPROVERS_PP **field key**, when configuring **Order Now** form

Vendor email (send new order notifications to this email)

sales@artfulbits.com

"From" field for outgoing emails (not required)

noreply@company.com

APPROVERS **field key** provides a possibility for the user to choose an approver from a predefined list of approvers.

APPROVERS_PP **field key** provides a possibility for the user to choose any other users who should be notified about the order.

APPROVERS and APPROVERS_PP **field keys** are not required and can be eliminated from the **Order Now** form. However **Vendor email** in **General Settings** is always required.

So, **Vendor email** in **General Settings** can serve as an inbox that would accumulate notification about ALL orders. If you'd like to notify some different departments about the order you need to use either APPROVERS or\and APPROVERS_PP **field key** (*see how to configure [Order Now Form](#) for more details*).
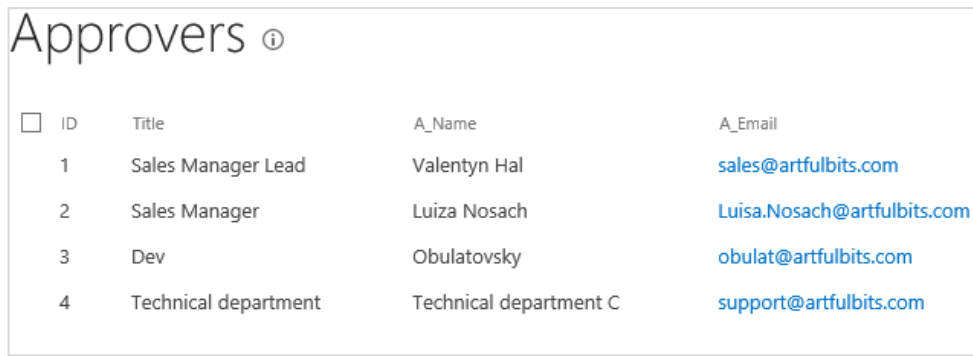
In order to set up the Approvers list, you need to do the following:

1. Open "**Approvers**" list
2. Create new item
3. Provide **Title**, **A-Name**, **A-Email**

Title is visible for customer in the list of approvers on the **Order Form**

A-name is a name of the responsible person and is not visible for users.

A-Email is an email where the notification about the order will be received.

ID	Title	A_Name	A_Email
1	Sales Manager Lead	Valentyn Hal	sales@artfulbits.com
2	Sales Manager	Luiza Nosach	Luisa.Nosach@artfulbits.com
3	Dev	Obulatovsky	obulat@artfulbits.com
4	Technical department	Technical department C	support@artfulbits.com

4. Click **Save**

Templates

All email templates as well as price format are adjustable via **General Settings**. There are the following email templates:

To the vendor. This is a template of the email that vendor or approver (APPROVERS or APPROVERS field key – see [Approvers list](#)) receives **after the order was placed**. If values are provided for ALL (vendor email, APPROVERS field and APPROVERS_PP field) than all of these recipients will receive this message.

To the client. This is a template of an email that clients receive after the order is completed.

To the last bidder. This is a template of an email that the [bid](#) submitter receives, if his [bid](#) is bitten by someone else.

To the bidding winner. This is a template of an email that is received by the winner of the bidding process in order to notify him.

Notification about returned order. This email is being sent **to the vendor** with the

Email Templates can also be changed via Templates list

NOTE: **ProductTemplate** is a concise information about the product that can be used for any template with the help of the $PRODUCT_LIST$ Field key.

Configuration of email template

In order to configure a template, you need to do the following:

1. Open "**General Settings**"
2. Choose the template and click "*Edit email template*"
3. Use "**Value**" text field for providing the email body content.
4. Combine text and **Field keys**.
5. Notice that different email templates contain different field keys. Use only those field keys that are used with the email template you edit.
6. The format of the **Field key** for the email should be the following: $FIELDKEY$
   E.g. Field key APPROVERS for email should be $APPROVERS$

ID	Title	Value	Usage
1	EmailTemplate	**New order by: $NAME$** Responsibility of: 	Entity	Department	Approver
---	---	---
$ENTITY$	$DEPARTMENT$	$APPROVERS$ | ORDERED ITEMS: $PRODUCT_LIST$ Total: **$TOTAL$** Payment type: $PAYMENT$ Shipping Information | Street	City	State	Zip Code	Email / Phone
---	---	---	---	---
$ADDRESS$	$CITY$	$STATE$	ZIP	$EMAIL$	 Special Instructions $INSTRUCTIONS$	Template of the email that vendor receive after the order was made. You can use all of the fields below in any order and shape: $NAME$ - User Display Name $SHIP_ADRESS$ - Shipping adress (includes built-in "Pick Up" checkbox) $CITY$ - Shipping city $STATE$ - Shipping state ZIP - Zip code $EMAIL$ - User's email $INSTRUCTIONS$ - Special Instructions $PRODUCT_LIST$ - Order Details (format is specified in "ProductTemplate" setting) $TOTAL$ - Order Totals
2	ProductTemplate		Product Name	Type	Size	Price	Number
---	---	---	---	---
$PRODUCT_NAME$	$PRODUCT_TYPE$	$PRODUCT_SIZE$	$PRODUCT_PRICE$	$PRODUCT_COUNT$		Template for individual products (shown in the email vendor receive after the order was made). You can use all of the fields below in any order and shape: $PRODUCT_NAME$ - Name of the product $PRODUCT_TYPE$ - Selected type $PRODUCT_SIZE$ - Selected size

7. Use standard SharePoint text editing capabilities to enliven your email.
8. In order to edit the subject of the email, click "*Edit email subject template*". The only field key that can be used for email subject is $USER_NAME$

Configuration of the email "subject" field template

It is also possible to edit "subject" field of all 5 email templates. By default, all 5 subject fields contain certain value In order to change "subject" field, you should do the following:

1. Open "**General Settings**"
2. Choose the template and click "*Edit email subject template*"

Configuration of price template

Price (*displayed for the customer*) format can be changes by operating with the key $PRICE$

Currency symbol should be added to the $PRICE$ key. It can be added either before the key, or at the end. E.g.: $$PRICE$ or $PRICE$€ or $PRICE$dollars
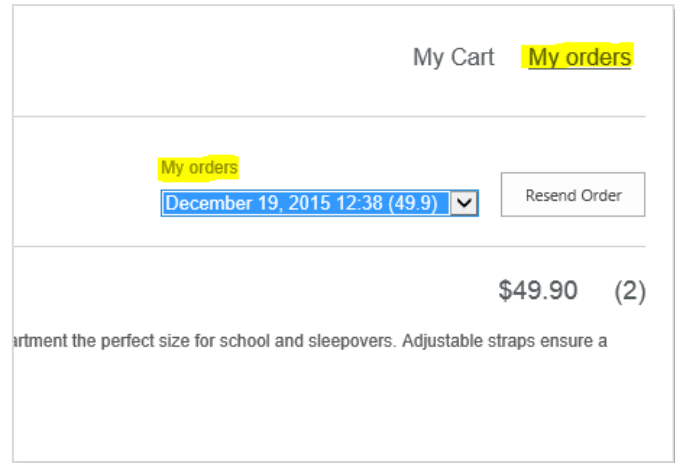
History of orders. Recurrent orders.

ArtfulBits Shopping Cart provides a possibility to save the history of the orders for the specific user, and use it for the next orders, as well as the history of all orders for the administrator.

User history

The details of each order are saved for the user under "**My orders**" button. Orders can be sorted by the date.

Recurrent orders

Orders saved under "**My orders**" button can be used recurrently. If user clicks "**Resend order**", the order will be added again to the shopping cart, where user can change the details of the order: change amount, add/delete products and purchase it.
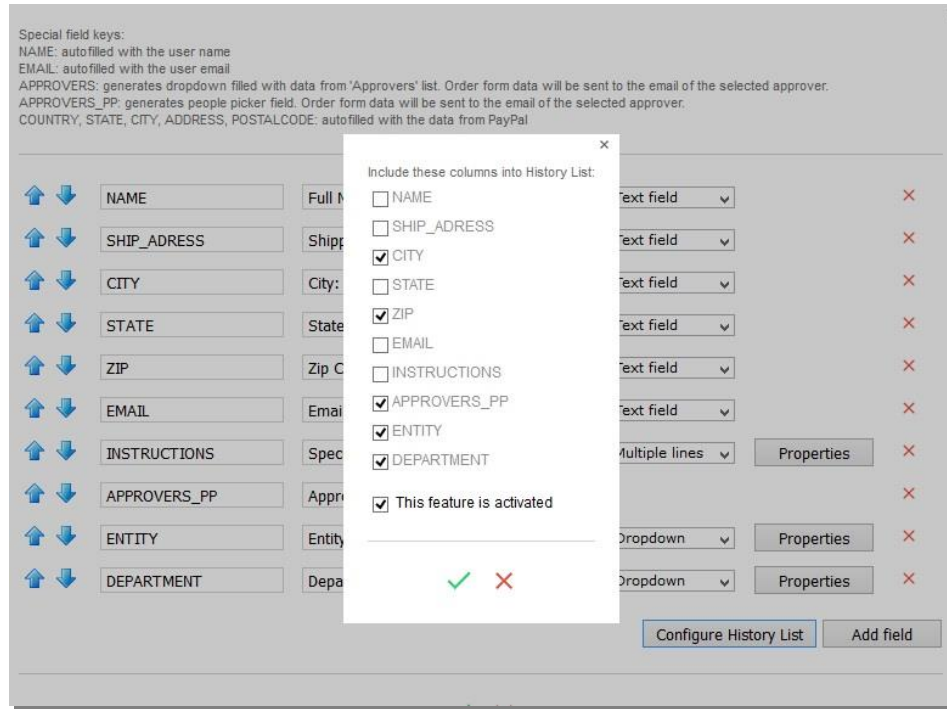

Order history

History list is available for the administrator. The details of each order are saved in the **History** list**. History list** can be modified in order to facilitate the work of the administrator.

In order to modify the History list you need to do the following:

1. Plan the columns, its data type, sequence of columns and their names.
2. Check existing columns in the list. Some of them may already match your requirements.
3. If you need to add some new column to the **History list**, do the following:
   - Open **Configure Order Now Form** and add new Field, click Save

- Open **Configure Order Now Form**, click **Configure History List** and add new Field to the **History list**

- Create a new order, click Pay, provide the value for the fields in the **Order Now Form** , as well as the value for the newly created Field

After that a new column should appear in the History List. Please, note, that in order the column to appear, it must contain some data. That's why you need to submit at least 1 order, so that the column was filled with the data. The result may look like this:

Order management
Administrator can use a convenient tool for order management by clicking on "Manage Orders" button.

Further, administrator can set up the date range and indicate a specific product for search. Or just search for all order within a chosen time period:

Search

Users are provided a possibility to search for products by using search line. Search displays all products where the searched words are found. The search results are displayed in the order corresponding to the number of entries that match the search. If zero entries are found, then these products are not displayed.

Sorting

ArtfulBits provides a possibility to sort products. There are 2 search attributes: price and date. Therefore the user is able to sort the products by the date (starting from the newest or vice versa) and sort products by the price (starting from the cheapest and vice versa).

The soring will be performed within the certain category of the products, if user chooses the category, and then sort.

See Also

ArtfulBits Blog

ArtfulBits Blog web part is intended to enhance the standard SharePoint blog functionality. It complements and extends its features by the possibility to add a video or a zoomable image, and preview it.

Bulk Check In

ArtfulBits Bulk Check can check in multiple documents from any library location in one operation, and provides you with different edit options like overwriting existing column value, filling in if blank or ignoring.

Cascaded Lookup Column

Cascaded Lookup Column allows building relationship between parent and child columns, the data selected in one field will determine the options presented in another.

Category Column

Category Column allows tracking, organizing and grouping list items. Outlook 2007 approach for elements categorization, easy indicator color changing and using of advanced tooltip, provide a high professional component style.

Column Data Adapter

Column Data Adapter is an extension component providing ability to use ArtfulBits Columns in Microsoft Access forms, reports and Microsoft Excel.

Column Permissions

Column Permissions allows you to manage access to list content on column level. Permissions can be assigned for individual users and for SharePoint groups as well and are effective in forms and list views, as well as in the SharePoint Alerts, RSS, Datasheet and even during exporting to Excel and opening with Access.

Cross-Site Lookup Column

Use Cross-Site Lookup Column for getting data from any site within site collection. Component includes a powerful function of searching over lookup list. This function provides substring matching in selected column which is very useful for large lists (over 50-100 items).

Discussion Column

Need to organize well formatted conversation in the list item without enabling list versioning? Discussion Column is the right choice. Component allows entering rich text with formatting, images, tables, hyperlinks and other features.

Email Web Part

ArtfulBits Email Web Part allows sending e-mail messages directly from Microsoft SharePoint site. E-mail fields To, Subject and body can be auto populated with column item values.

Email As Attachment
ArtfulBits Email as Attachment allows sending one or more documents as attachments directly from SharePoint library. Multiple documents more convenient, they can be compressed into a single archive file before sending.

Follow-Up Column
Follow-Up Column enables due date flags similar to Outlook follow-up functionality. Applying of flags to the list item allows adding of visual reminder in a natural way.

Image Upload Column
Quick and simple way of uploading pictures. Image Upload Column provides with ability to select a picture using file browsing dialog, upload and display it in the list view.

KPI Column
KPI (Key Performance Indicator) Column is simple graphical scorecards that can be used to evaluate business data against business goals. With this column you reduce risk to overlook information about the status of value.

Link to Document Column
Link to Document Column allows referencing files and folders placed at Document Library and provides easy and intuitive way to download files directly from column. Use this column to provide a browsing interface that allows users to browse to an object to link to instead of typing a URL.

List Search Web Part
List Search Web Part is indispensable for quick targeted search for any fields of any list and column. It provides powerful capabilities for search by any of standard or custom columns, search by any number of columns. It filters "contains", "exact", "begin with", as well as AND/OR conditions. Users can save, name and share search results.

Parent Selector Column
Parent Selector Column is used for organizing hierarchical relations in SharePoint list. Picker dialog allows choosing data from large lists. Standard Lookup column can be easily converted to Parent Selector column and vice versa.

Password Change Web Part
Password Change Web Part allows users to change their own passwords from within the SharePoint environment using standard text box interface (current password, new password and confirm new password).

Password Expiration Web Part
Password Expiration Web Part enables Active Directory users to be notified via Web Part interface that their passwords are about to expire. It also automatically sends out email notifications to users before the password expiration date.

Password Reset Web Part
ArtfulBits Password Reset Web Part allows users to reset their forgotten passwords from within the SharePoint environment without administrator intervention.

Professional Calendar Web Part

Professional Calendar Web Part provides following key benefits: it allows combining events from different SharePoint Lists, from any SharePoint Site, in ongjne Calendar view; allows specifying different color sets for different event sources; supports on-the-fly AJAX-enabled editing features in Outlook like style; and other enhanced functionalities.

Progress Column

Progress Column provides users with the ability to make SharePoint lists more visualized by displaying numerical data on the page sing percentage-based progress bar. Professional progress bar style will make your SharePoint list really modern and stylish.

Video

Video Column and Video Web Part are powerful controls made for uploading, managing, linking and playing video files. These controls support variety of video files that can be uploaded from computer, or linked from SharePoint library or streamed from direct URL.

Remarks

Information in this document may be outdated. Please, visit www.ArtfulBits.com for the latest product version.