

MX™ Storefront Training Manual Merchant Portal

Version: 2.0
June 2015

Introduction

The purpose of this document is to provide MX™ Storefront clients with a guide for the merchant MX™ Storefront Management Console, also referred to as the **MX™ Storefront Merchant Portal**. The major functionality included in this portal is summarized below:

- **Manage Your Business:** This component enables a merchant to add, update, or delete any of its underlying business information from its MX™ Storefront account and website. The merchant can also build out its menu or list of services using the “Edit Menus & Price Lists” feature.
- **Manage Your Website:** This component enables a merchant to perform the following actions on its MX™ Storefront website:
 - **Customize Style & Layout:** The merchant can update its MX™ Storefront template and colors from this page. The merchant can also view how MX™ Storefront website renders on desktop and mobile devices.
 - **Edit Pages:** The merchant can add, edit, deactivate, or delete MX™ Storefront website pages using this feature. The merchant can also build new or customize current pages with the website page builder.
 - **Manage Media:** The merchant can upload, manipulate, and manage files for its MX™ Storefront website from this page.
 - **Manage Access:** The merchant can add more users to its MX™ Storefront account and manage its accesses to the MX™ Storefront platform.
- **Manage Your Store:** This component is relevant for those merchants with “ecommerce” enabled for MX™ Storefront. This page enables a merchant to add, edit, suspend, or delete the products that it is selling online, fulfil customer orders that have been submitted through its MX™ Storefront website, and edit global settings for its MX™ Storefront account.
- **Manage Your Brand:** This component enables a merchant to manage its social media and review engine presence across the Web. The merchant can post updates to social media outlets (i.e. Facebook and Twitter), consume information from several online properties such as Facebook, Twitter, Instagram, Google+, Flickr, and YouTube, and interact with reviews websites to view both positive and negative reviews about its business.

The rest of this guide will provided a functional overview, aided by annotated screenshots, of the major features of this component of the MX™ Storefront product.

Logging into the MX™ Storefront Merchant Portal

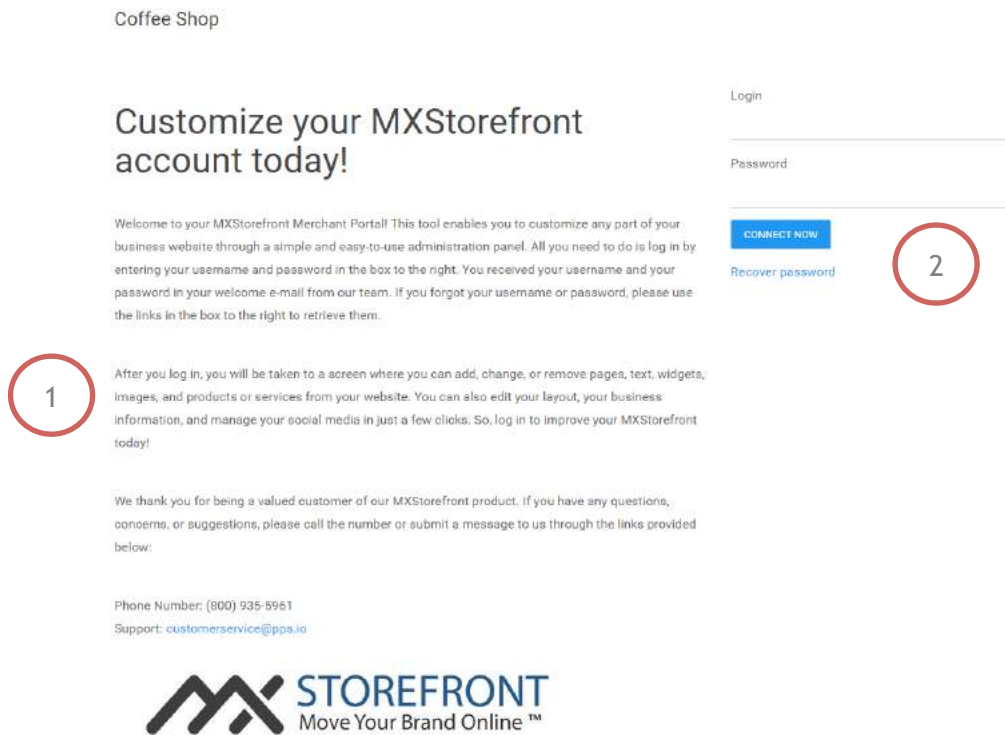
To log into the MX™ Storefront Merchant Portal, a merchant needs to do the following:

- Navigate to the merchant’s MX™ Storefront website and add “/admin” to the end of the URL in the browser (i.e. <https://merchant-name.MX™ Storefront.com/admin>);
- Submit its MX™ Storefront Merchant Portal username and password to log into its MX™ Storefront Merchant Portal.

If the merchant no longer has this material in its possession, the merchant should contact MX™ Storefront customer service to receive another copy of this information:

Contact number: (800) 935-5961
 Support link: <http://prioritypaymentsystems.com>
 Email: customerservice@pps.io

When the merchant navigates to its Merchant Portal URL, it will see the following screen:

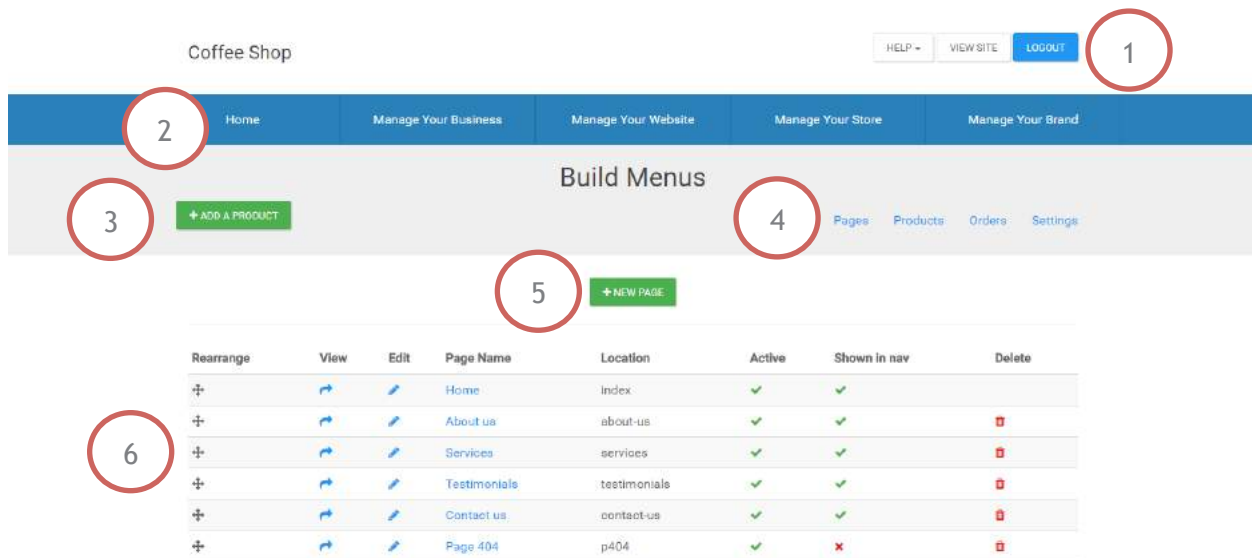


Please see the following notes on the annotated features of this page:

- 1: This section displays pertinent product information and contact information for the customer service team.
- 2: This box is the login prompt for the Merchant Portal. See directions above on how to log into the MX™ Storefront Merchant Portal. If the merchant forgets its password, it can click the “Lost Password?” link and submit its email address to the system. The merchant will receive an email with its new password immediately after submitting this request.

MX™ Storefront Partner Portal: Homepage

Once the merchant logs into its MX™ Storefront Merchant Portal homepage, it will see the following screen:



Please see the following notes on the annotated features of this page:

1: This is the top menu navigation for the Merchant Portal. The following options are available:

- **HELP → FAQ:** This link opens a PDF of the Merchant Portal FAQs.
- **HELP → Help Manual:** This link opens a PDF of the Merchant Portal Training Guide (i.e. this document).
- **VIEW SITE:** This button opens up the merchant’s MX™ Storefront website in a new browser tab.
- **LOGOUT:** This link logs the merchant out of the Merchant Portal.

2: This is the menu navigation for the Merchant Portal. The following options and sub-options are available:

- **Manage Your Business**
 - Update Business Information
 - Edit Menus & Price Lists
- **Manage Your Website**
 - Customize Style & Layout
 - Edit Pages
 - Manage Media
 - Manage Access
- **Manage Your Store**
 - Manage Products
 - Fulfill Orders
 - Edit Settings

- Manage Your Brand
 - Engage With Customers
 - Monitor Social Media
 - Monitor Reviews

Each of these components will be covered in more detail within this manual.

3: The “Add a Product” button is present on every page in the Merchant Portal and provides a shortcut to jump to the Manage Products > Add a Product component through a single click.

4: These buttons are present on every page in the Merchant Portal and provide a shortcut to jump to the following components through a single click:

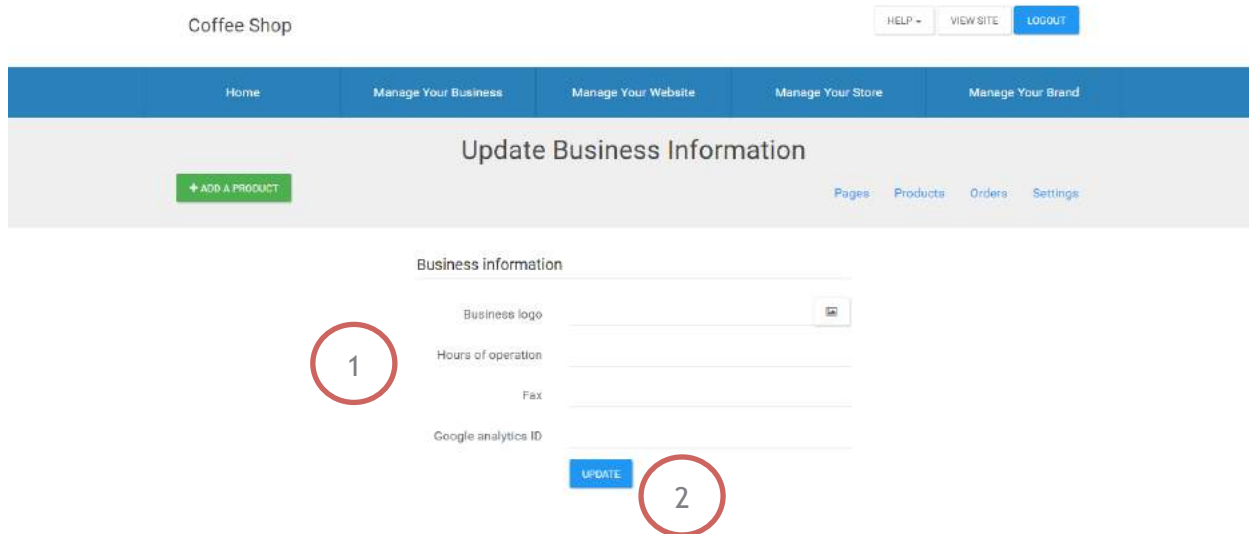
- Pages: Jumps to Edit Pages with a single click.
- Products: Jumps to Manage Products with a single click.
- Orders: Jumps to Fulfill Orders with a single click.
- Settings: Jumps to Edit Settings with a single click.

5: The MX™ Storefront Merchant Portal homepage is actually the same page as the Edit Pages landing page because the merchant often logs into the system to perform this task. This “Add a new page” link enables the merchant to add a new page to its MX™ Storefront website.

6: This datagrid is the pages listing datagrid and contains all pages that have been created for, or by, the merchant for its MX™ Storefront website. A more detailed explanation of this functionality can be found in the “Edit Pages” section below.

MX™ Storefront Merchant Portal: Update Business Information

By clicking on the “Manage Your Business” option on the MX™ Storefront Merchant Portal menu and selecting the “Update Business Information” submenu option, the merchant will be navigated to the following screen:



Please see the following notes on the annotated features of this page:

1: These fields are the subset of the MX™ Storefront merchant data fields that are editable by the merchant through the Merchant Portal:

- Business Logo
- Hours of Operation
 - Note: semi-colons should be used to represent line breaks when submitting the Hours of Operation to the MX™ Storefront system.
- Fax
- Google analytics ID
 - Note: this value enables a merchant to link its MX™ Storefront website to its individual Google Analytics account.

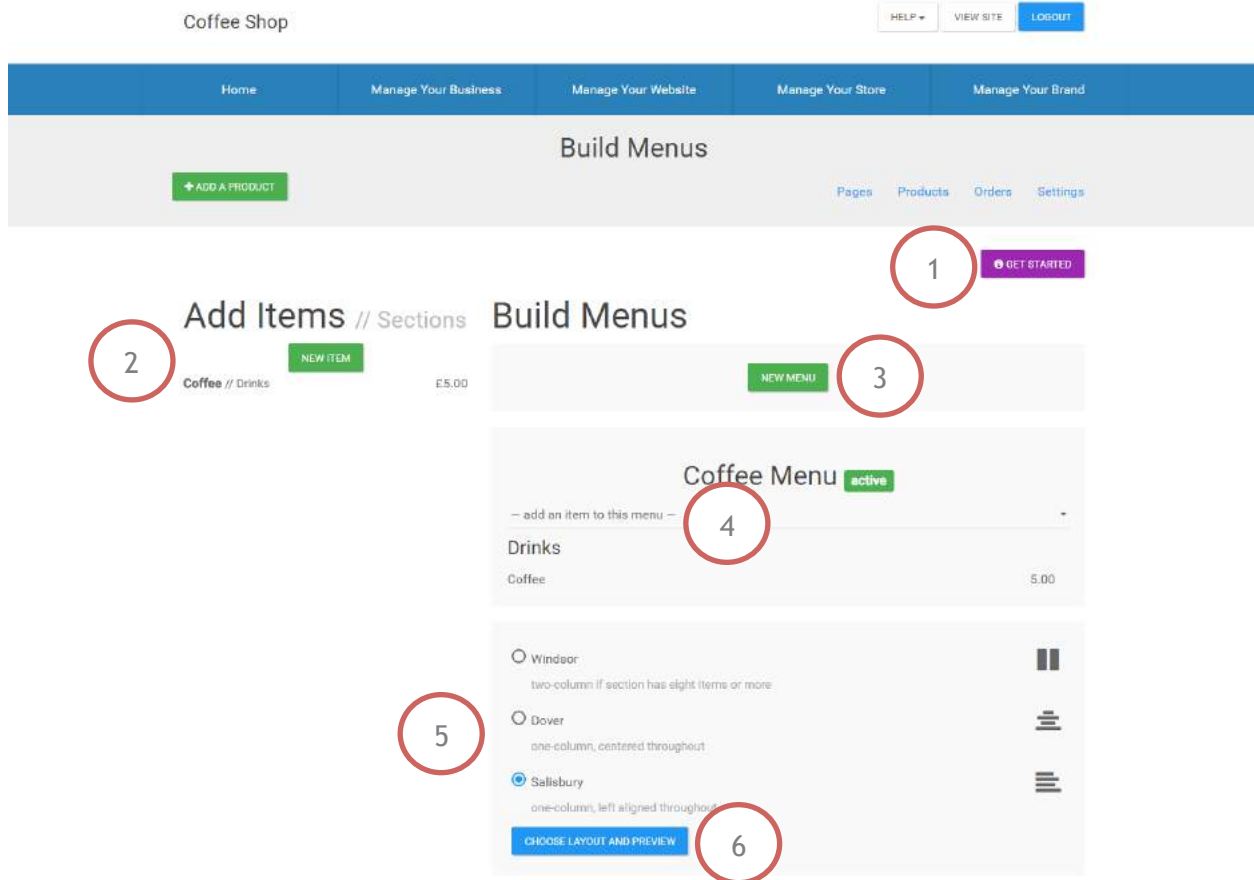
Note: In order to edit core merchant data fields (such as address, phone number, email address), the merchant must contact MX™ Storefront customer service:

Contact number: (800) 935-5961
 Support link: <http://prioritypaymentsystems.com>
 Email: customerservice@pps.io

2: This button saves the updated business information provided by the merchant. Any changes to the merchant’s MX™ Storefront website due to these updates will automatically take effect.

MX™ Storefront Merchant Portal: Edit Menus & Price Lists

By clicking on the “Manage Your Business” option on the MX™ Storefront Merchant Portal menu and selecting the “Edit Menus & Price Lists” submenu option, the merchant will be navigated to the following screen:



Please see the following notes on the annotated features of this page:

1: This button provides a “how-to” guide for creating menus or price lists within the MX™ Storefront solution. The merchant can use these steps to build out its items, sections, and menus & price lists.

2: This button enables the merchant to add a new item to the MX™ Storefront menu builder. Items have four attributes:

- Name (required): the name of the item.
- Section (required): the section to which an item belongs.
 - Note: if a section does not exist, the merchant can add a section by choosing “[New Section...]” during the item creation process.
- Description: the description of the item.
- Price: the price of the item.
 - Note: the merchant should submit the numerical value, and NOT the currency type, through this field.

3: This button enables the merchant to add a new menu or price list (branded as menu throughout this page) to the MX™ Storefront menu builder. Menus have four attributes:

- Name (required): the name of the menu.
- Start time: the time of day at which the menu becomes relevant to the business (for display purposes to customers).
- End time: the time of day at which the menu ceases being relevant to the business (for display purposes to customers).
- Active: a checkbox to determine whether the menu is active for the merchant. If this box is checked, the menu content will be displayed on the merchant's MX™ Storefront website provided it has been added to a page. If this box is unchecked, the menu content will not be displayed, even if the menu widget has been added to a merchant's MX™ Storefront website.

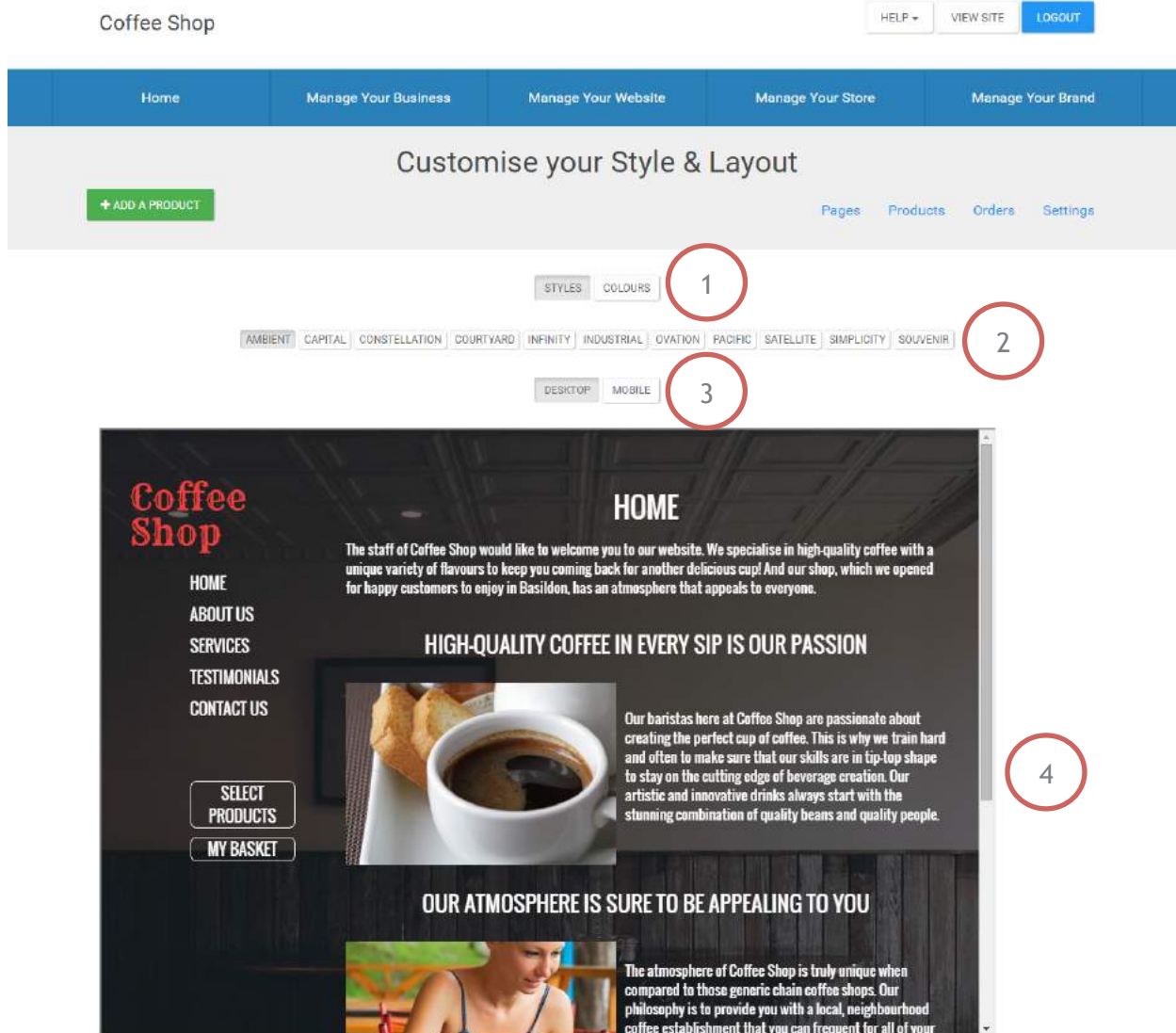
4: This dropdown enables the merchant to associate an item with a menu in the MX™ Storefront menu builder. This is how items (and therefore their sections) are added to menus, and the menu builder handles the display of this information in a structured manner to the merchant's customers.

5: This set of options enables the merchant to choose the desired display for its menu on its MX™ Storefront website. The options include descriptions and thumbnail images depicting the menu's display.

6: This button shows the merchant a preview of its menus for its MX™ Storefront website. Note that the menus will not automatically be displayed on the merchant's MX™ Storefront website when this step is completed. The merchant must add the "Business Menu" widget to a website page within the "Edit Pages" section for the menus to display. A more detailed explanation of this functionality can be found in the "Edit Pages" section below.

MX™ Storefront Merchant Portal: Customize Style & Layout

By clicking on the "Manage Your Website" option on the MX™ Storefront Merchant Portal menu and selecting the "Customize Style & Layout" submenu option, the merchant will be navigated to the following screen:



Please see the following notes on the annotated features of this page:

1: These buttons enable the merchant to choose between selecting the style or the color scheme of its MX™ Storefront website.

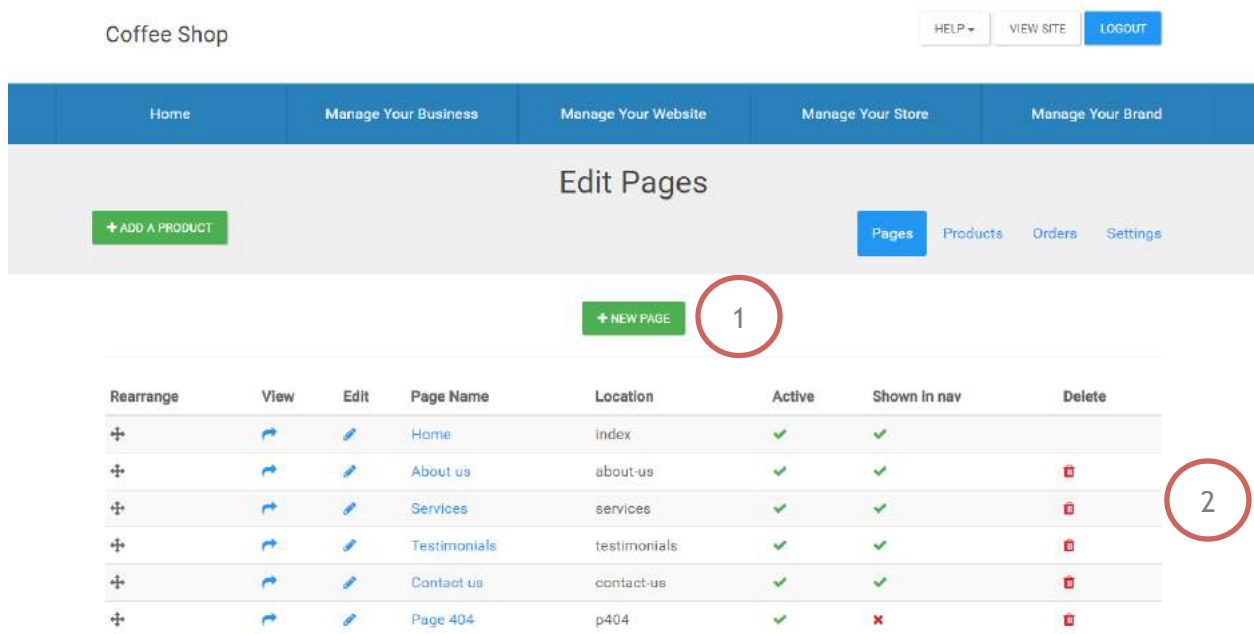
2: These buttons enable the merchant to choose among the available styles in the MX™ Storefront system. When a new style is chosen, it will automatically load in the screen below the list of buttons. To save the style to the merchant’s MX™ Storefront website, the merchant simply clicks the button corresponding to the style and navigates to another screen; there is no need to click “Save” or any other button on the screen. Note: when the merchant is on the Colors tab, these buttons will enable the merchant to choose among the supported colors for the currently selected style for the merchant’s MX™ Storefront website.

3: These buttons enable the merchant to choose between seeing a preview of its MX™ Storefront website from a standard desktop or from a mobile device (i.e. phone or tablet).

4: This frame shows the merchant a preview of its current MX™ Storefront website, as well as automatically changes when a new style or color is chosen using the buttons above it.

MX™ Storefront Merchant Portal: Edit Pages

By clicking on the “Manage Your Website” option on the MX™ Storefront Merchant Portal menu and selecting the “Edit Pages” submenu option, the merchant will be navigated to the following screen:



Please see the following notes on the annotated features of this page:

- 1: This button enables the merchant to jump to the “New page” feature of its MX™ Storefront system.
- 2: This datagrid is the pages listing datagrid and contains all pages that have been created for, or by, the merchant for its MX™ Storefront website. The fields and accompanying functionality are summarized below:

- Rearrange: Ability to drag and drop the row to another location within the datagrid. The order of the pages in the datagrid is reflective of the listing order of the pages on the MX™ Storefront website.
- View (link): Link to the page on the merchant’s website.
- Edit (link): Link to the “Edit Page” page in the Merchant Portal.
- Page Name (link): Name of page and link to the “Edit Page” page in the Merchant Portal.

- Location: Name of the page within the URL string for the merchant’s website.
- Active: Indicator as to whether the page is active or inactive
 - Note: inactive pages do not show up on the merchant’s website and display a “Page Not Found” notice if a customer manually types the page URL into its browser.
- Shown in nav: Indicator as to whether the page is listed in the merchant’s website’s navigation menu.
- Delete (action): Action to delete the page from the datagrid and the MX™ Storefront system.
 - Note: the homepage cannot be deleted from the MX™ Storefront system.

MX™ Storefront Merchant Portal: Add a New Page

By clicking on the “New page” button on the MX™ Storefront Merchant Portal “Edit Pages” page, the merchant will be navigated to the following screen:

Coffee Shop

HELP VIEW SITE LOGOUT

Home Manage Your Business Manage Your Website Manage Your Store Manage Your Brand

Edit Pages

+ ADD A PRODUCT Pages Products Orders Settings

Create page detail

Page name *

Page location

Title

Background image On applicable layouts only

Banner image On applicable layouts only

Active

Show in menu

Create page content

ADD A SECTION

ADD A SECTION

MODIFY THIS PAGE

Please see the following notes on the annotated features of this page:

1: This list of page attributes enables the merchant to set the parameters for the selected page in its MX™ Storefront website. The page attribute fields are summarized below:

- Page name (required): Name of the page, as displayed on the website menu and in the “Page Title” page section.
- Page location: Name of the page within the URL string for the merchant’s website.
- Title: Content for the <title> tag for the page on the merchant’s website.
- Background image: The background image displayed on the page for templates with background images as part of their design.
 - Note: This field is used to overwrite the default background image used on the merchant’s MX™ Storefront website. If left blank, the system will automatically choose a background image for the page based on the merchant’s business type.
- Banner image: The banner image displayed on the page for templates with banner images as part of their design.
 - Note: This field is used to overwrite the default banner image used on the merchant’s MX™ Storefront website. If left blank, the system will automatically choose a banner image for the page based on the merchant’s business type.

2: This set of checkboxes enables the merchant to set “on/off” parameters for the selected page in its MX™ Storefront website. The checkbox attribute fields are summarized below:

- Active (checkbox): Checkbox that determines whether page is active or inactive on merchant’s MX™ Storefront website.
- Show in Menu (checkbox): Checkbox that determines whether page is shown in global menu or not on merchant’s MX™ Storefront website.

3: This button enables the merchant to add a new section to the page, allowing the merchant to add content to the selected page of its MX™ Storefront website. This button will display a pop-up of section options for the merchant to add, along with the ability to add the sections in one-column or two-columns. A more detailed explanation of this functionality can be found in the “Add Page Sections” section below.

4: This button enables the merchant to save the current version of the page that it is building for its MX™ Storefront website. Note: this page will be immediately available on the merchant’s MX™ Storefront website once this button is clicked, unless the “Active” checkbox is unchecked.

MX™ Storefront Merchant Portal: Add Page Sections

By clicking on the “ADD A SECTION” button on the MX™ Storefront Merchant Portal “Add a New Page” page, the merchant will be navigated to the following screens:

Add a section ×

One column Two columns 1

Basic

- PAGE TITLE
- HEADING
- TEXTBOX
- IMAGE
- EXTRA SPACE
- LINE
- IMAGE LEFT
TEXT RIGHT
- IMAGE RIGHT
TEXT LEFT

Business

- ACCEPTED CARDS
- BASIC INFORMATION
- HOURS OF OPERATION
- MAP
- STREETVIEW
- MENU

Images

- IMAGE GALLERY
- IMAGE SLIDER 2

E-commerce

- TOP PRODUCTS

Social media

- FACEBOOK

Reviews

- YELP RATING
- YELP TESTIMONIALS
- TRIPADVISOR RATING
- TRIPADVISOR TESTIMONIALS

Forms

- CONTACT

Please see the following notes on the annotated features of this page:

1: This option enables the merchant to choose between adding page sections in a one-column (i.e. full-width) format, or two-column (i.e. half-width) format for the selected style. If the two-column option is chosen, the page sections will add in a “left-right” orientation, and a page section added after a “left” option will automatically be placed to the right of the previously added section.

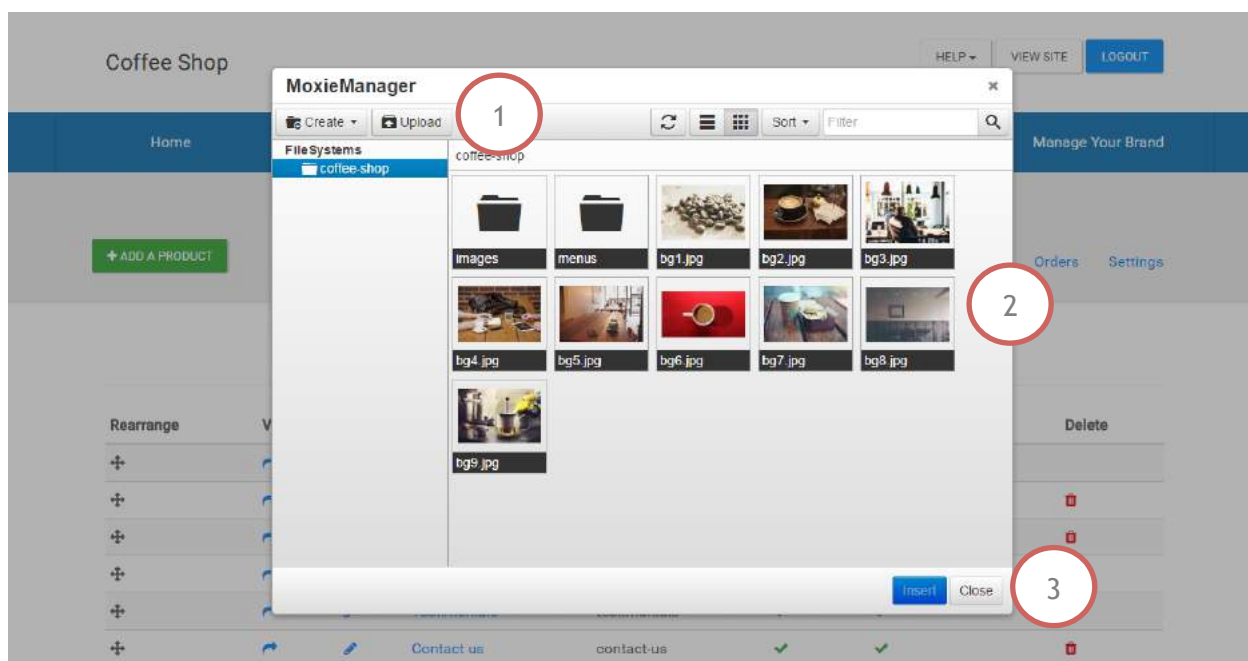
2: This pop-up shows the supported page sections in the MX™ Storefront Merchant Portal, enabling the merchant to build its own pages on its MX™ Storefront website. The page sections are separated into six categories:

- **Basic:** These are the most basic and most commonly used page sections in the system.
- **Business:** These are the page sections that leverage the merchant’s own data and translate it to render professionally presented website content.
- **Images:** These are the page sections that utilize default or merchant-supplied images and translate it to professionally presented website content.
- **E-commerce:** These are the page sections that display e-commerce products on the merchant’s website pages.
 - **Note:** this function is used to display e-commerce products through the system’s page builder. The products are already displayed through the e-commerce workflow, which is not controlled through the page builder.
- **Social Media:** These are the page sections that utilize the merchant’s information from, and presence on, social media, and translate it to professionally presented website content.
- **Reviews:** These are the page sections that utilize the merchant’s information from, and presence on, review engines, and translate it to professionally presented website content.
- **Forms:** These are the page sections that enable the merchant to add forms to its MX™ Storefront website.

By clicking the page section button, the page section will load on the “Add a new page” page and the merchant can customize its content for its own purposes.

MX™ Storefront Merchant Portal: Manage Media

By clicking on the “Manage Your Website” option on the MX™ Storefront Merchant Portal menu and selecting the “Manage Media” submenu option, the merchant will be navigated to the following screen:



Please see the following notes on the annotated features of this page:

1: These buttons enable the merchant to add file content to its MX™ Storefront website. The “Create” button enables the merchant to add additional folders for file organisation purposes, and the “Upload” button enables the merchant to upload content from its computer to the MX™ Storefront website, which can then be used on any page by selecting the appropriate page section and associating it to the uploaded content.

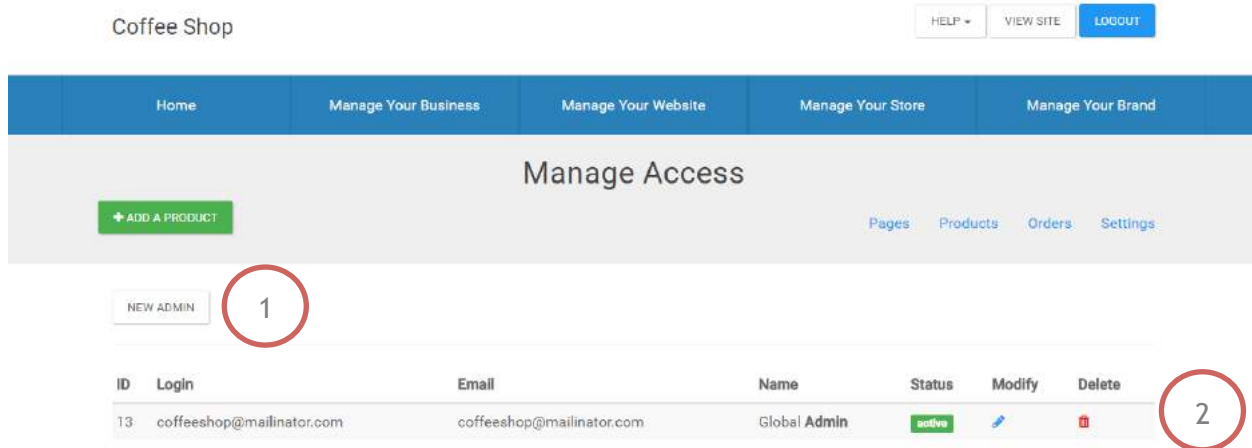
Note: The merchant can upload up to 15MB of content at a time, with a maximum single file size of 2MB and files with the following valid extensions: .jpg, .gif, .png, .doc, .docx, .pdf.

2: This display enables the merchant to select a file to add to a page section (left click), or to edit (right-click). For example, if the merchant wants to edit an image (i.e. crop or resize), it simply right-clicks the file, clicks edit, and is redirected to a built-in image editor. Other options include renaming a file, downloading a file to local storage, or removing a file from the MX™ Storefront system.

3: These buttons enable the merchant to insert a file into a page section (i.e. image into image gallery page section), or close the “Manage Media” pop-up box, respectively.

MX™ Storefront Merchant Portal: Manage Access

By clicking on the “Manage Your Website” option on the MX™ Storefront Merchant Portal menu and selecting the “Manage Access” submenu option, the merchant will be navigated to the following screen:



Please see the following notes on the annotated features of this page:

1: This link enables the merchant to add a new administrator to its MX™ Storefront account. This account has the ability to log in to the MX™ Storefront Merchant Portal and manage the merchant’s account on its behalf.

2: This datagrid shows a listing of the merchant’s current administrators for its MX™ Storefront account. The admin attribute fields are summarized below:

- ID: The internal ID of the MX™ Storefront administrator account.
- Login: The username (or login) of the MX™ Storefront administrator account.
- Email: The email address of the MX™ Storefront administrator account.
- Name: The first name and last name of the MX™ Storefront administrator account.
- Status: The status of the MX™ Storefront administrator account.
 - Note: valid status values are either “active” or “inactive.”
- Modify (link): Link to the “Edit Admin Account” page in the Merchant Portal.
- Delete (action): Action to delete the administrator account in the MX™ Storefront system.

MX™ Storefront Merchant Portal: Manage Products

By clicking on the “Manage Your Store” option on the MX™ Storefront Merchant Portal menu and selecting the “Manage Products” submenu option, the merchant will be navigated to the following screen:

Coffee Shop HELP VIEW SITE LOGOUT

Home Manage Your Business Manage Your Website Manage Your Store Manage Your Brand

Manage Products

[+ ADD A PRODUCT](#) Pages Products Orders Settings

[ADD A PRODUCT](#) 1

Show 10 entries Search: 2

ID	SKU	Name	Price	Stock	Category	Subcategory	Status	Image	Variants	Actions	Rearrange
106		Autumn Flavored Coffees	£13.25	100	Coffees		active	no image		edit delete add	
107		Dark Roast	£12.25	100	Coffees		active	no image		edit delete add	
108		Coffee Burlap Sack	£3.00	100	Merchandise		active	no image		edit delete add	
109		Hand-Thrown Mugs by The Trail Potter	£20.00	100	Merchandise		active	no image		edit delete add	

Showing 1 to 4 of 4 entries Previous 1 Next 3

Please see the following notes on the annotated features of this page:

1: These links enable the merchant to perform the following functions:

- **ADD A PRODUCT:** Add a product to the merchant’s MX™ Storefront website.
- **Upload multiple products:** Add multiple products to the merchant’s MX™ Storefront website using a .csv template.

2: This search functionality enables the merchant to search its store’s product listing based on any attribute about the product displayed in the corresponding datagrid below it.

3: This datagrid shows a listing of all of the products in the merchant’s MX™ Storefront system. The values in this datagrid are as follows:

- **ID:** Internal ID for the product in the MX™ Storefront system.

- SKU: External ID for the product in the MX™ Storefront system.
- Name: Name of the product in the MX™ Storefront system.
- Price: Price of the product in the MX™ Storefront system. Note: the currency is set at the merchant level, and price values for products always adhere to currency setting for the merchant's MX™ Storefront account. A more detailed explanation of this functionality can be found in the "Edit Settings" section below.
- Stock: The number of units in stock for the product. Note: this number automatically decrements as new orders are placed by customers on the merchant's MX™ Storefront website.
- Category: Category within which the product is placed in the MX™ Storefront system.
- Subcategory: Category within which the product is placed in the MX™ Storefront system.
- Status: Status of the product in the MX™ Storefront system.
 - Note: valid status values are either "active" or "inactive."
- Image: Thumbnail display of the primary image for the product in the MX™ Storefront system.
- Variants (link): Link to the "Edit variants" page in the Merchant Portal.
- Actions: The following actions are available for a product in the MX™ Storefront system:
 - Edit (link): Link to the "Edit Product" page in the MX™ Storefront system.
 - Copy (link): Link to the "Copy Product" page in the MX™ Storefront system.
 - Delete (action): Action to delete the product in the MX™ Storefront system.
- Rearrange: Ability to drag and drop the row to another location within the datagrid. The order of the products in the datagrid is reflective of the listing order of the products on the MX™ Storefront website.

MX™ Storefront Merchant Portal: Add a Product

By clicking on the "Manage Your Store" option on the MX™ Storefront Merchant Portal menu and selecting the "Manage Products" submenu option, then clicking the "ADD A PRODUCT" button, the merchant will be navigated to the following screen:

Coffee Shop HELP VIEW SITE LOGOUT

Home Manage Your Business Manage Your Website Manage Your Store Manage Your Brand

Manage Products

+ ADD A PRODUCT Pages Products Orders Settings

Product Information

Basic Information

1

Optional Information

Either a flat rate (e.g. 7.50) or a percentage (e.g. 9%)

Suspended

Top Product

Product Images

3

1

2

3

4

5

6

Discount

to

SEO

Product Description

6

7 SAVE

Please see the following notes on the annotated features of this page:

1: These are the required fields for a new product. The fields are summarized below:

- Name (required): Name of the product in the MX™ Storefront system.
- Category (required): Category of the product in the MX™ Storefront system.
- Price (required): Price of the product in the MX™ Storefront system.
- Stock (required): Stock of the product in the MX™ Storefront system.

2: These are a set of optional fields for a new product. The fields are summarized below:

- Subcategory: Subcategory for the product in the MX™ Storefront system, if applicable.
- Sub-subcategory: Sub-subcategory for the product in the MX™ Storefront system, if applicable.
- SKU: External ID for the product in the MX™ Storefront system.
- Tax Rate (%): The Tax Rate for the product in the MX™ Storefront system.
 - Note: There is a global tax setting in the “Edit Settings” page of the “Manage Your Store” section of the MX™ Storefront Merchant Portal. This field supersedes the global setting if supplied by the merchant.
- Additional Shipping Rate: The additional shipping rate for the product in the MX™ Storefront system.
 - Note: There is a global shipping setting in the “Edit Settings” page of the “Manage Your Store” section of the MX™ Storefront Merchant Portal. This field applies a shipping charge to the product that is additional to the global setting if supplied by the merchant.
- Suspended: Checkbox to indicate whether the product is suspended in the MX™ Storefront system and therefore not displayed on the merchant’s MX™ Storefront e-commerce website.
- Top Product: Checkbox to indicate whether the product is flagged as a top product in the MX™ Storefront system. This attribute displays the product in the “top selection” page section available in the “Edit Pages” page of the “Manage Your Website” section of the MX™ Storefront Merchant Portal.

3: These are a set of image fields for a new product. The fields are summarized below:

- Images 1-6: Image upload fields for up to 6 images for the product in the MX™ Storefront system. These images are displayed on the product category page, the product details page, and the checkout pages on the merchant’s MX™ Storefront e-commerce website.

4: These are a set of discount engine fields for a new product. The fields are summarized below:

- Discount Rate (%): The percentage of discount for any discount offering of the product in the MX™ Storefront system.
- Discount Dates (start): Start date for any discount offering of the product in the MX™ Storefront system.
- Discount Dates (end): End date for any discount offering of the product in the MX™ Storefront system.

5: These are a set of SEO fields for a new product. The fields are summarized below:

- Rewrite URL: SEO field for product page optimization in the MX™ Storefront system.
 - Note: This field automatically populates based on product name upon saving the new product, so this field does not have to be supplied by the merchant.
- HTML Title: SEO page title field for the product in the MX™ Storefront system.
- HTML Meta: SEO meta field for the product in the MX™ Storefront system.

6: This text editor is used to provide a description of the product in the MX™ Storefront system.

7: This button enables the merchant to add the product to the MX™ Storefront system.

MX™ Storefront Merchant Portal: Fulfill Orders

By clicking on the “Manage Your Store” option on the MX™ Storefront Merchant Portal menu and selecting the “Fulfill Orders” submenu option, the merchant will be navigated to the following screen:

Coffee Shop

HELP VIEW SITE LOGOUT

Home Manage Your Business Manage Your Website Manage Your Store Manage Your Brand

Manage Orders

+ ADD A PRODUCT

Pages Products **Orders** Settings

Show 10 entries **1** Search: **2**

Order ID	Order Total	Date	Status	Buyer Name	See Invoice	Manage Order
1	£13.25	2015-06-09 07:42:17	Waiting for payment	Coffee Shop Customer		

Showing 1 to 1 of 1 entries

Previous 1 Next **3**

Please see the following notes on the annotated features of this page:

1: This link enables the merchant to set the number of orders displayed from the merchant’s MX™ Storefront website in the corresponding datagrid below it.

2: This search functionality enables the merchant to search its store’s order listing based on any attribute about the order displayed in the corresponding datagrid below it.

3: This datagrid shows a listing of all of the orders in the merchant’s MX™ Storefront system. The values in this datagrid are as follows:

- Order ID: Internal ID of the order in the MX™ Storefront system.
- Order Total: Total price of the order in the MX™ Storefront system.
- Date: Date that the customer order was received by the MX™ Storefront system.
- Status: Status of the customer order in the MX™ Storefront system.
- Buyer Name: First name and last name of the customer who submitted the order to the MX™ Storefront system.
- See Invoice (link): Link to the invoice page in the MX™ Storefront system.
- Manage Order (link): Link to the “Manage order” page in the MX™ Storefront system.

MX™ Storefront Merchant Portal: Manage Orders

By clicking on the “Manage Your Store” option on the MX™ Storefront Merchant Portal menu and selecting the “Fulfill Orders” submenu option, then clicking on the “Manage Order” icon for any order, the merchant will be navigated to the following screen:

Coffee Shop

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Manage Orders

+ ADD A PRODUCT Pages Products Orders Settings

1

Waiting for payment Payment refused Processing Shipped Completed

2

SHIPPED COMPLETED REFUNDED CANCELLED PROBLEM

3

Order #: 1
 Order Status: Waiting for payment
 Order Date: Jun 09, 2015 07:42:17 AM

Customer Information
 User #: 1
 Email: coffeeshopcustomer@mailinator.com

Merchant Information
 Coffee Shop
 345 Endeavour Drive
 Basildon Essex SS14 3WF
 GB
 +441268296083
 coffeeshop@mailinator.com
 VAT Reg No:

4

Billing Information
 Coffee Shop Customer
 Coffee Shop Customer Address
 Coffee Shop Customer City, Coffee Sho
 United Kingdom
 Coffee Shop Customer Phone Number
 Payment Method:

Shipping Information
 Coffee Shop Customer
 Coffee Shop Customer Address
 Coffee Shop Customer City, Coffee Shop Customer Postal Code
 United Kingdom
 Coffee Shop Customer
 Comment:

5

Item(s) Ordered
 Autumn Flavored Coffees

Quantity	Price
1	£13.25
Discount	£0.00
Total	£13.25
Shipping	£0.00
VAT	£0.00
Total Incl. VAT	£13.25

Please see the following notes on the annotated features of this page:

1: This workflow image shows the current and future statuses of the order in the MX™ Storefront system.

2: This set of workflow buttons enables the merchant to manage the status of an order in the MX™ Storefront system.

Note: the “shipped,” “refunded,” and “cancelled” order statuses trigger an email to the customer informing it of the update to its order status. Conversely, the “completed” and “problem” statuses do not trigger an email to the customer.

3: This section shows the basic order information, including order status and order date.

4: This section shows the basic customer information, including internal user # and customer email, as well as basic merchant information, including name, address, phone number, and email.

5: This section shows the order invoice, including the following:

- Customer billing information for the order in the MX™ Storefront system.
- Customer shipping information for the order in the MX™ Storefront system.
- Items ordered, including name, quantity, and price for the order in the MX™ Storefront system.
- Pricing breakdown, including discounts, subtotal, shipping fees, tax fees, and total price for the order in the MX™ Storefront system.

MX™ Storefront Merchant Portal: Edit Settings

By clicking on the “Manage Your Store” option on the MX™ Storefront Merchant Portal menu and selecting the “Edit Settings” submenu option, the merchant will be navigated to the following screen:

Coffee Shop HELP VIEW SITE LOGOUT

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Edit Your Store settings

+ ADD A PRODUCT Pages Products Orders Settings

Website Settings

Title: Coffee Shop

Background image:

Banner image:

VAT Rate: 0.0000

Standard Shipping Rate: 1

Either a flat rate (e.g. 7.50) or a percentage (e.g. 9%)

Currency: GBP

Google Key: AlzaSyD5GihAjyddV7TqukohrpX6RoKziQ7iV7M

VAT Reg No:

Website Footer: 2

Words: 21

Cookie Policy: 2

Words: 427

3 SAVE

Export Mailing List

4 EXPORT MAILING LIST

Please see the following notes on the annotated features of this page:

1: These fields enable the merchant to set some global settings for its MX™ Storefront website. The settings fields are as follows:

- Title: Title for the merchant’s MX™ Storefront website.
- Background image: Background image for the e-commerce portion of the merchant’s MX™ Storefront website.
 - Note: this image will appear as the background image for all e-commerce-related pages on the merchant’s MX™ Storefront website.
- Banner image: Banner image for the e-commerce portion of the merchant’s MX™ Storefront website.
 - Note: this image will appear as the background image for all e-commerce-related pages on the merchant’s MX™ Storefront website.
- Tax Rate: Default tax rate setting for the merchant’s MX™ Storefront website.
 - Note: if set, this rate will be applied to all orders that come through the merchant’s website.
- Standard Shipping Fee: Default shipping rate setting for the merchant’s MX™ Storefront website.
 - Note: if set, this rate will be applied to all orders that come through the merchant’s website.
- Currency: Default currency for the merchant’s MX™ Storefront website.
 - Note: this field can only support one currency at a time.
- Google Key: The merchant’s Google key for its MX™ Storefront website. This functionality is used to power page sections such as Business Maps and Business Streetview.
 - Note: this field has a default value and should only be changed if the merchant has its own Google account to which it wants to link its MX™ Storefront website.
- EIN: The EIN number for the business, which is required to be displayed on customer-facing invoices for e-commerce transactions.

2: These text editors enable the merchant to amend default policies for its MX™ Storefront website. The text editor options are as follows:

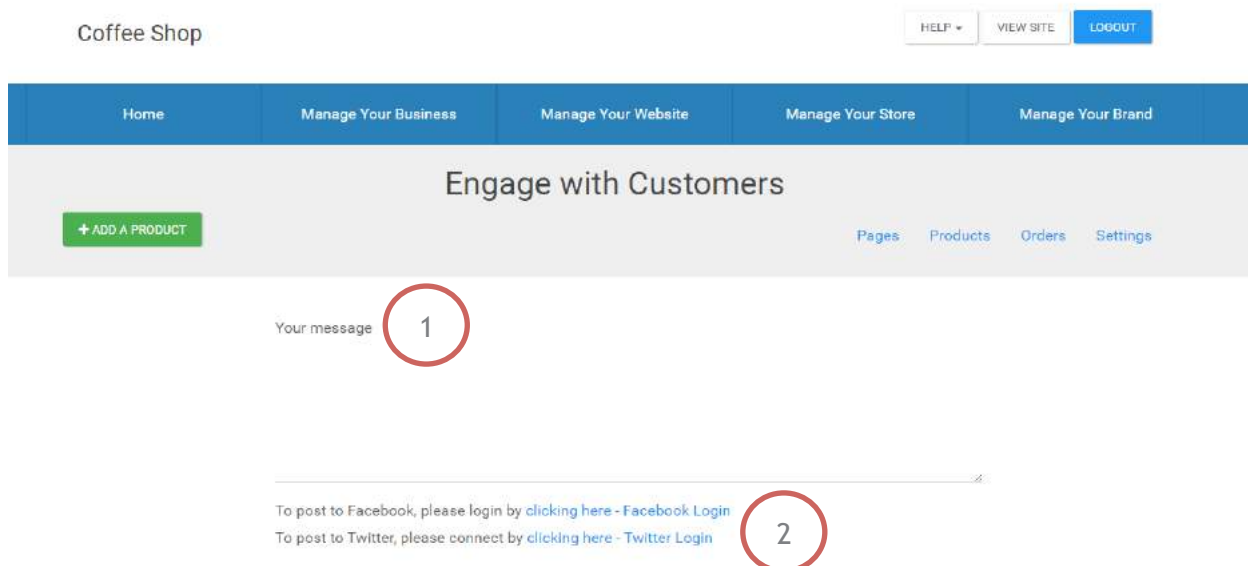
- Website Footer: The footer for the merchant’s MX™ Storefront website.
- Terms of Use: The Terms of Use for the merchant’s MX™ Storefront website.
- Privacy Policy: The Privacy Policy for the merchant’s MX™ Storefront website.
- Cookie Policy: The cookie policy for the merchant’s MX™ Storefront website.

3: This button enables the merchant to save the settings for its MX™ Storefront website.

4: This button enables the merchant to export a list of customers who have opted in to receive proactive communications from the merchant when creating a customer account on the merchant’s MX™ Storefront website.

MX™ Storefront Merchant Portal: Engage With Customers

By clicking on the “Manage Your Brand” option on the MX™ Storefront Merchant Portal menu and selecting the “Engage With Customers” submenu option, the merchant will be navigated to the following screen:



Please see the following notes on the annotated features of this page:

1: This input box enables the merchant to submit a social media post that will post to Facebook, Twitter, or both depending on the merchant’s preference.

Note: the ability to post to social media outlets is dependent on the merchant’s successful integration with each outlet by clicking the integration links underneath this box (see 2 below).

2: These links enable the merchant to integrate its MX™ Storefront account with its Facebook account and Twitter account, respectively, through simple authorization workflows. Once the merchant authenticates its social media accounts from within the MX™ Storefront Merchant Portal, the merchant can post to these social networks from this interface.

Note: a merchant is able to post to its own Facebook profile, or its Facebook business page, through this workflow. To set which Facebook property to post to, the merchant will need to configure its social media settings correctly in the “Configure Social Media” section. A more detailed explanation of this functionality can be found in the “Configure Social Media” section below.

MX™ Storefront Merchant Portal: Monitor Social Media

By clicking on the “Manage Your Brand” option on the MX™ Storefront Merchant Portal menu and selecting the “Monitor Social Media” submenu option, the merchant will be navigated to the following screen:

Coffee Shop

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Monitor Social Media

ADD A PRODUCT Pages Products Orders Settings

CONFIGURE SOCIAL MEDIA 1

2 3 4

Please see the following notes on the annotated features of this page:

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1: This button enables the merchant to configure its social media settings. A more detailed explanation of this functionality can be found in the “Configure Social Media” section below.

2: These buttons populate when valid social media accounts are submitted through the “Configure Social Media” page. The merchant can choose which platforms to enable / disable in its social media monitor view by selecting / de-selecting the icons that populate.

3: These buttons enable the merchant to view the social media outputs in three different manners:

- Timeline: enables the merchant to see all social media outputs on a timeline.
- Windows: enables the merchant to see all social media outputs via a side-by-side comparison using windows (default mode).
- One-column: enables the merchant to see all social media outputs in a single column.

4: This is the merchant’s main monitoring dashboard where the merchant can see all activity related to its submitted social media accounts and / or keywords / hashtags across social media platform. These entries are displayed based on time posted inside the platform (from most recent to least recent).

MX™ Storefront Merchant Portal: Configure Social Media

By clicking on the “Manage Your Brand” option on the MX™ Storefront Merchant Portal menu and selecting the “Monitor Social Media” submenu option, then clicking the “CONFIGURE SOCIAL MEDIA” button, the merchant will be navigated to the following screen:

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Monitor Social Media

+ ADD A PRODUCT Page Products Orders Settings

Configure Social Monitor

Twitter handle	Twitter Username	✈
Twitter keyword	Twitter Hashtag or Keyword	✈
Google+	COMING SOON: Google+ ID from URL (https://plus.google.com/ID)	g+
Facebook	Facebook Name or ID from URL (https://www.facebook.com/nameorID)	f
Instagram hastag	Instagram Hashtag	#
Flickr	Flickr User ID (submit username from Flickr to http://dgettr.com/)	f
Flickr tag	Flickr Tag	f
Tumblr	Tumblr Username	t
Youtube	Youtube Username or Channel ID (https://www.youtube.com/channel/ID)	y
Youtube search	Youtube Search Keywords	y
Pinterest	Pinterest Name from URL (https://www.pinterest.com/name)	p

SAVE



Please see the following notes on the annotated features of this page:

1: These fields enable the merchant to submit valid social media accounts and /or hashtags / keywords to monitor based on the merchant’s business needs and preferences. Currently, the merchant can monitor social media outputs from the following platforms:

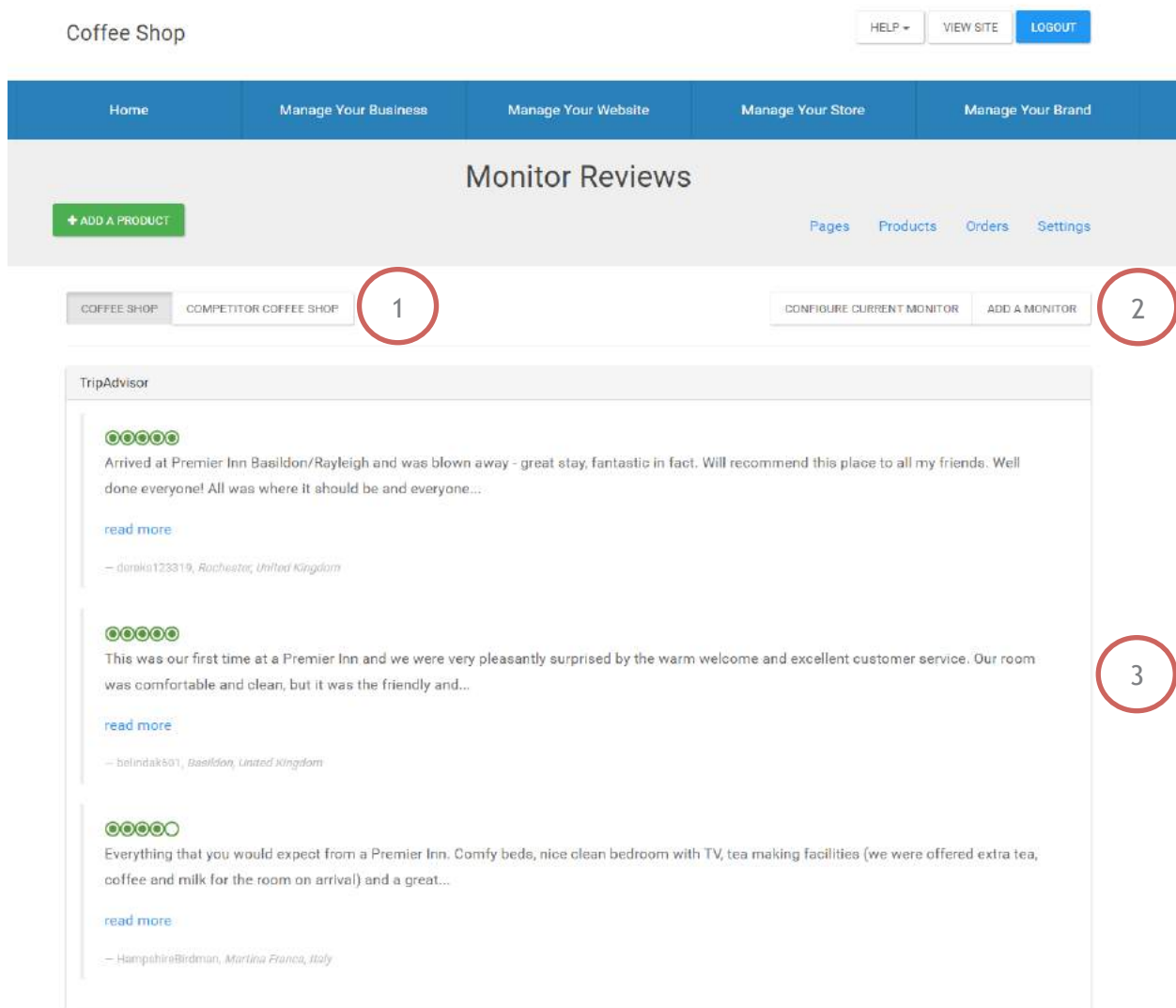
- Twitter (user account and keywords)
- Google+ (user account)
- Facebook (user account and business pages owned by user)
- Instagram (hashtags)
- Flickr (user account and tags)
- Tumblr (user account)
- Youtube (user account and keywords)
- Pinterest (account)

Each social media account field is displayed with placeholder text providing the merchant with simple directions to integrate the account with its MX™ Storefront website.

2: This button enables the merchant to save the social media account information for its MX™ Storefront website.

MX™ Storefront Merchant Portal: Monitor Reviews

By clicking on the “Manage Your Brand” option on the MX™ Storefront Merchant Portal menu and selecting the “Monitor Reviews” submenu option, the merchant will be navigated to the following screen:



Please see the following notes on the annotated features of this page:

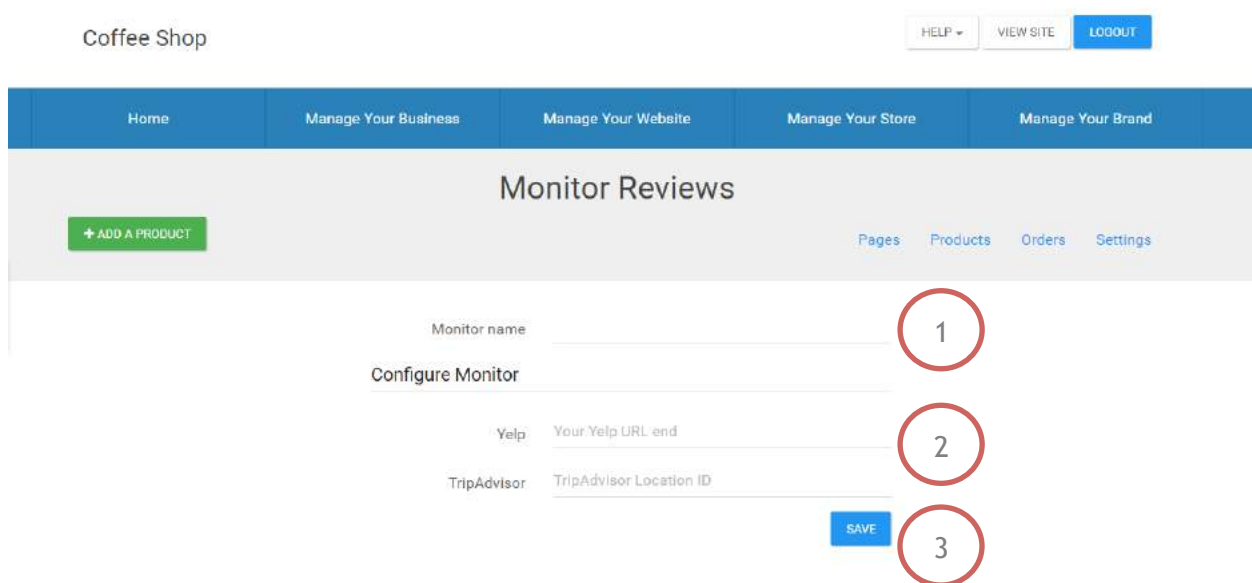
1: These buttons enable the merchant to choose among different businesses review dashboards. When the merchant chooses a business, the reviews for that business across different review engines populate below.

2: These buttons enable the merchant to configure the current business (called monitor), or add a new business (monitor) to the “Monitor Reviews” page.

3: This is the listing of reviews for a particular business across multiple review engines. Each review engine has its own expandable section so that the merchant can focus on the reviews about which it cares most.

MX™ Storefront Merchant Portal: Add A Monitor

By clicking on the “Manage Your Brand” option on the MX™ Storefront Merchant Portal menu and selecting the “Monitor Reviews” submenu option, then clicking “ADD A MONITOR,” you will be navigated to the following screen:



Please see the following notes on the annotated features of this page:

1: This field enables the merchant to provide a name for the monitor being added to the MX™ Storefront system.

2: These fields enable the merchant to add review engine accounts to the monitor so that the monitor’s reviews display on the Reviews dashboard. The merchant can monitor review engine outputs from the following platforms:

- Yelp (user account)
- TripAdvisor (user account)

3: This button enables the merchant to save the review engine account information for its MX™ Storefront website.