# eHorseAds.com

# Administrator's Guide

**Version 2.1**

Morris DIGITALWORKS

PUBLISHED BY

Morris Digital Works, LLC
A Division of Morris Company LLC
P.O. Box 936
Augusta, GA 30903
Fax: 706-828-4339
Phone: 800-622- 6358
www.morrisdigitalworks.com



**Revision History**
**November 2004**

**Contact Information**
For questions or concerns regarding this publication contact the Morris Digital Works Documentation Department at mdw.doc@morris.com.

# Table of Contents

# Introduction

This document explains the administrative features of eHorseAds.com. It focuses mainly on the Ad Order Entry features, but also covers other administrative features in order to provide a comprehensive understanding of the site functionality. EhorseAds employs a customized version of the Ad Order Entry product specifically for horsecity.com. It allows horsecity.com visitors to create, manage, and purchase ads for various equestrian related items and horses. In addition, eHorseAds administrators can create upsells, customize the site templates, activate ads, and view ad and user lists.

## Providing Feedback

To maintain the quality of our publications and software, we welcome your comments on the accuracy, clarity, and value of this publication and all other product documentation. Send comments to the Documentation Department at: mdw.doc@morris.com

## Supported Browsers

- Internet Explorer 4 or higher
- Netscape Navigator 4 or higher

## Components

EhorseAds.com utilizes several different products to provide functionality. It is important to understand how each of these interacts with each other. Products used by eHorseAds include the following:

**Registration-** Users must register before they can post ads. These templates are a stripped down version of the registration product providing only basic functionality. In actuality, users are registering for the AOE and PSearch services.

**PSearch-** Allows users to save search criteria and have new results e-mailed to them.

**Ad Order Entry (AOE)-** Enables the creation, purchase and editing of ads.

**Administrative Product Entry Utility (for AOE)-** Allows administrators to create and manage ad upsells/enhancments.

**Ad Manipulator-** Required in order to setup an Administrative Account. Administrators must have an Ad Manipulator account before they can access the Administrative pages and functions. Ad Manipulator is also used to regulate ad pricing.

**Template Manger**- Allows Administrators to modify the templates and customize the variables.

## The Ad Creation Process

The following section explains the overall process that occurs when a user creates an ad, as well as the administrative functions that must be performed.

| Step | Action |
|---|---|
| 1 | Customer goes to the horsecity.com site and registers to create a user account. Customer's personal information is inserted into the database (Email address, first and |

<table>
<tr><td></td><td>last name, zip code).</td></tr>
<tr><td>2</td><td>Customer logs in and places an ad online using the AOE functionality.</td></tr>
<tr><td>3</td><td>The ad information is inserted into the database. The ad is initially marked as "PENDING PAYMENT".</td></tr>
<tr><td>4</td><td>The customer's credit card information is forwarded to PayFlow Pro (a VeriSign product).
<table>
<tr><th>If...</th><th>Then...</th></tr>
<tr><td>If the credit card is approved</td><td>the ad is marked ACTIVE and goes live on the website. An email containing customer information, ad information, and a credit card authentication number is sent to the Ad Administrator (for informational purposes).</td></tr>
<tr><td>If the credit card is not approved</td><td>the customer receives an error, indicating that the credit card was not approved.</td></tr>
</table>
Note: Users can also pay by check, which is mailed in. Ads are not active until check has been received. Administrators must verify that the check matches the actual ad total before activating the ad.</td></tr>
</table>

# Registration

Registration is required for all new users and administrators before they can create and manage ads.

## User Registration:

1. Open a web browser and enter the following URL: www.ehorseads.com. Users can also gain access by going to www.horsecity.com and clicking **Place an Ad**.
2. Click **Log In**.
3. On the login page, click **Signup to Start Selling**.
4. Enter your full e-mail address in the format of (userid@domain.com)
5. Enter and confirm a password for the account. If desired, you can also enter a hint that will be displayed if you forget your password.
6. Enter your first name, last name and zip code.
7. Click **SignUp!**

## Administrator Registration:

1. Follow all of the steps listed above for User Registration.
2. The email address you use to register with should be given to someone who has administrative privileges in Ad Manipulator.
3. The Ad Manipulator Administrator adds Ad Manipulator permissions to your account.
4. Once permissions are added you should be able to login and view the Admin Options on the first screen.

They simply enter their Ad Manipulator account information to login.

# Logging In

To login enter the e-mail address and password you created during registration.

**Note:** If a user forgets his or her password, they can click the **Get Your Password** link on the Login screen and a hint is displayed.

# Account Management

### Editing Account Information

1. On the User Options page, scroll to the bottom and click **Edit Your Account**.
2. On the Update screen, make any desired changes to the password, personal information, or e-mail notifications.

### Password Changes

1. Enter your current Password
2. Enter and confirm your new password.
3. Enter a hint that will be displayed if you forget your password.

### Personal Account Information

Enter your first name, last name and zip code. Note that all of these fields are required.

### E-mail Notifications

There are two instances where you may choose to receive e-mails:

- To receive notification of special offers such as ad sales, reduced ad rates, coupons and special events.
- To receive notifications when 30-day ads expire. When users receive this message, they have 8 days to renew the ad before it is completely deleted from the database.

# Admin Only Options

Administrators (users who have an Ad Manipulator account) have access to several features that are not available to normal users. This section describes the administrative features, most of which are located on the Admin Options page.

## User Search

Administrators can perform searches to locate user accounts. To find a user account:

1. On the Admin Options screen, click U**ser Search**.
2. On the Find a User screen, enter any of the following information to search on: User Login or email address, First Name, or Last Name.
3. Select how you want the results ordered by either: user name, date created, first name or last name.
4. Click **Find 'em!**

The results for the search are returned.

- To view the details of an account, click the User Details link.
- To add an Item or Horse Ad click the respective link located to the right of the User Name.
- To pay for or extend a current ad, click Add List link.

### User List

To view a list of all user accounts, click the User List link on the Admin Options screen. A list of all current users is displayed.

### Summary Ad List

Clicking the Summary Ad List link on the Admin Options screen, displays a list of all ads (irregardless of status). The following details are displayed for each ad: category, description, start/end date, price, status of Payment and the ad ID number. You can also edit the ad, print a receipt, and mark the ad as sold.

### Locating and Editing Ads

Administrators can edit user ads if the ad ID is known.

1. On the Admin Options screen, enter the Ad ID in the ad id text box.
2. Click **find it**.
3. The ad entry page is displayed for editing. The name of the user who created the ad is displayed in red at the top of the screen.
4. Make any desired changes to the ad features.

### Activate Ads

During checkout, administrators can activate a user's ad by clicking **Make this Ad Active**, on the Ad Summary Page. This is used mainly when a user sends a check as payment through the mail. However, is also used if administrators enter ads themselves and do not need to pay. When activating ads for users, ad administrators should verify that the check amount matches the total on the Ad Summary page before activating the ad. Once ads are activated, they are posted immediately to the horsecity.com website.

# Ad Pricing

Pricing for ads is managed in the Ad Manipulator application. To create or edit pricing for the ehorseads.com site, do the following:

**Note:** This explains how to set the price foe the entire ad, not the upsells or enhancements. For information on setting the price for upsells or enhancements see upsell on page 5.

1. Open Ad Manipulator, and login in.
2. In the left panel, navigate to EHORSEADS.COM and select it.
3. Right click and select **Edit Pricing**.
4. Make any desired pricing changes.

**Note:** For detailed information on using Ad Manipulator options, see the Ad Manipulator User Manual located at: http://admin.morris.com/qa/links.html

# Modifying Ad Upsells/Enhancements

Site Administrators can create and modify the upsells and enhancements available for ads on the eHorseAds site. They can also edit the pricing of these items. These tasks are performed using the eHorseAds product entry utility.

## Accessing the Product Entry Utility

1. Go to the following URL: http://classifieds.ehorseads.com/forge/data_entry?classification=products&temp_type=data+entry
2. Login using your Ad Manipulator username and password

## General Guidelines

The following guidelines apply to all upsells:

### Deactivating Upsells

Upsells cannot be deleted, only deactivated. To deactivate an upsell, assign it to a non-AOE category.

**Caution:** If you delete all values for an upsell, existing ads using the upsell will receive an error. Example: The administrator removes the upsell in the product entry utility. A user, whose current ad uses the upsell, logs in and edits their ad. When they click Submit, they receive an error. To remedy, assign the upsell to a non-AOE category, or replace it with a different upsell.

### Upsell Pricing

**Not**e: The price field in the Product Entry Utility sets the pricing for upsells only. The pricing for ads is controlled using Ad Manipulator. For more information, see Ad Pricing on page 4.

- In general enter pricing in the format of 5.00. If you enter a price containing 3 numbers after the decimal, the price is rounded up when it is displayed on the page.
- **Example:** In the product entry utility the administrator enters a price of 9.999. When the upsell appears on the eHorseAds site, the price displays as 10.00.

## Creating/Modifying Upsells

To add or modify upsells for eHorseAds administrators (who have adman accounts) should go to the following URL and login with their Ad Manipulator account information:
http://classifieds.ehorseads.com/forge/data_entry?classification=products&temp_type=data+entry
There are five upsells you can modify:

- Features
- Enhancements
- HTML
- Icon
- Discounts

Select the upsell you want to edit and click **Go**. Each is explained below.

### Features

The features page, displays all currently defined features available for eHorseAds. It also allows you to create new features.
To create a new feature:

1. Under the Enter a new Feature section, complete the following fields:
   - **Name as it should appear on the ad entry form.** Enter any name that you want.
   - **Category.** From the drop down box, select the category that the upsell will apply to. To make the upsell available to all ads, assign it to CLASSIFIEDS.
   - **"What is this?"URL.** The URL for the popup help window that appears when you click the "What is This?" link located next to each upsell.
2. Click **Do it!**

To edit an existing feature:

1. Scroll to the lower half of the screen and locate the feature you want to modify.
2. Make any desired modifications.
3. Click the Do it! button located under that feature.

### Enhancements

The enhancements page displays all of the currently defined for enhancements. It also allows you to create new enhancements.
To create a new enhancement:

1. On the main screen, select **enhancements** and click **Go!**
2. Enter the following information:
    - Name of the enhancement as it will appear on customer receipts
    - Name of the enhancement as it will appear on the website
    - The category the enhancement is assigned to
    - A description of the enhancement
    - Price
    - URL for the "What's This" popup help window
3. Click **Create new Enhancement!**

To edit an existing enhancement:

1. Locate the enhancement and make any desired modifications.
2. Click **Update Enhancement *Name*.**

### HTML

Options for HTML upsells are displayed as radio buttons. Note that adding an HTML upsell in the product entry utility does not make it functional. It only makes it available for purchase. You must still edit the ad output templates to enable the functionality as described in step 4.

**To create a new HTML upsell:**

1. On the first screen, select HTML, and then click **Go!**
2. Select one of the following HTML upsells you want to create:
    - **Bold-** Displays the ad text in bold.
    - **Font Color-** Displays the ad text in color.
    - **New HTML Upsell** (if you select this, you must also enter the number of options that will be available.)
3. Modify the upsell for the option you chose:
    - **Font Color-** The font color screen contains default text. You can edit any of the fields that you choose. Pay special attention to the Price, category and options fields. To remove a color, delete its value and Ad Entry Form Label. To add a color, enter the color value and Ad Entry Form Label.
    - **Bold-** Modify any desired fields, paying special attention to Price and Category. Do not change the options text.
    - **New HTML Upsell-** The fields on this page are blank to allow you to define your own upsell. Enter any HTML based feature that you want. Note that the number you specified in the previous screen, is the number of blank option fields displayed on this screen. The **first option** in the list will be **pre-selected** for new ads. Unless the product is a forced upsell, be sure to include an option that's **no** or **none**.

    **Tip:** The value the user chooses is stored under the HTML name you enter here, with underscores (_) substituted for spaces. For example, for the HTML upsell "All Italics" you will use the MTL tag <mtl classifieds.ad.attribute_value(all_italics)>.
4. Click **Do it!**

5. You must now activate the HTML upsell by editing the ad output template to enable the functionality. **Example:** If you create an "All Italics" upsell with "yes" and "no" options, you would add the following to the appropriate output templates:

```
<mtl if {classifieds.ad.attribute_value(all_italics)  = "yes"}>
      <i>
</mtl if>
```

### Icon

To create a new icon:

1. Select Icon on the first screen and click Go!
2. Enter the following information:
   - Name of the Icon as it will appear on the customer receipt.
   - The category the icon will be assigned to.
   - Price of the Icon
   - The URL where the icon is stored on your site.
3. Click **Ad New Icon.**

**Tip:** To find whether the user purchased an icon, (i.e. 1D Winner) look at the value of <mtl classifieds.ad.attribute_value(1D Winner)>. The value should be yes or no.

### Discounts

To create a discount:

1. On the first screen, select Discounts and click **Go!**
2. Enter the following information:
   - Discount Code- This is the code you will give to customers to enter. It is recommended you enter a descriptive word describing the discount (i.e. EARLY RENEWAL)
   - Select the category the discount will be available for.
   - Enter a negative price for the discount in the format of -5.00. A "-" must appear before the price.
   - Enter an Internal Memo description, which informs MDW employees what the discount is for. The user does not see this text.
3. Click **Do it**!

**Tip:** To determine whether a user used a discount, look at the value of <mtl classifieds.ad.attribute_value(discount)>. The value will be the Discount Code.

# Reporting

EHorseAds currently uses a different type of reporting than other AOE products. The data presented in the reports is specific to ehorseads.com and does not contain data for any other Morris Business Unit.

## Accessing Reports

The ehorseads.com AOE Reporting data is located at the following URL:
http://stats.morris.com/internal/forge?classification=reports&temp_type=detail&tp=ehorseads.com

## Report Data

Data is viewable in three main formats:

- Overall Sales for Current Month (default view)- Provides revenue and product sales results for the current month
- Overall Sales for Previous Months (requires permissions)- Provides revenue and product sales results for previous months.

- Multi-Month Overview- Provides a comparison report displaying the monthly revenue and product sales for multiple and months (set to your desired dates)

**Overall Sales (for current month)**

The overall month to date report displays the following data:

- An table of the current month's activity (per day).
- Number of free ads, 30 day ads, and Run 'Til it Sells ads that were sold
- Number of upsells that were sold (per ad type)
- Base revenue for each ad type (per day)
- Averages and totals for ad data and revenue
- Hi/Low revenue totals (per day), and projected month end revenue based on current sales
- Total number of horse and item ads (per type)
- Total number of ads on each of the main eHorseAds sites: BarrelHorses.com, CuttingHorses.com, HorseCity.com, and RopeHorses.com

**Upsells Breakdown (for current month)**

The Upsells month to date report displays the following data:

- Daily breakdown of icon types sold, and the total revenue generated for each.
- Total and average revenue for all upsells (per day).
- Total revenue per upsell.

**Multi-Month Overview**

The Multi-Month report displays the following data:

- Provides the same data as the Upsells report, but it also provides monthly totals instead of daily totals.
- Details for each month are viewable by clicking on the month name. (Requires permissions)
- Users select the start/end month and date for the report.

# Templates

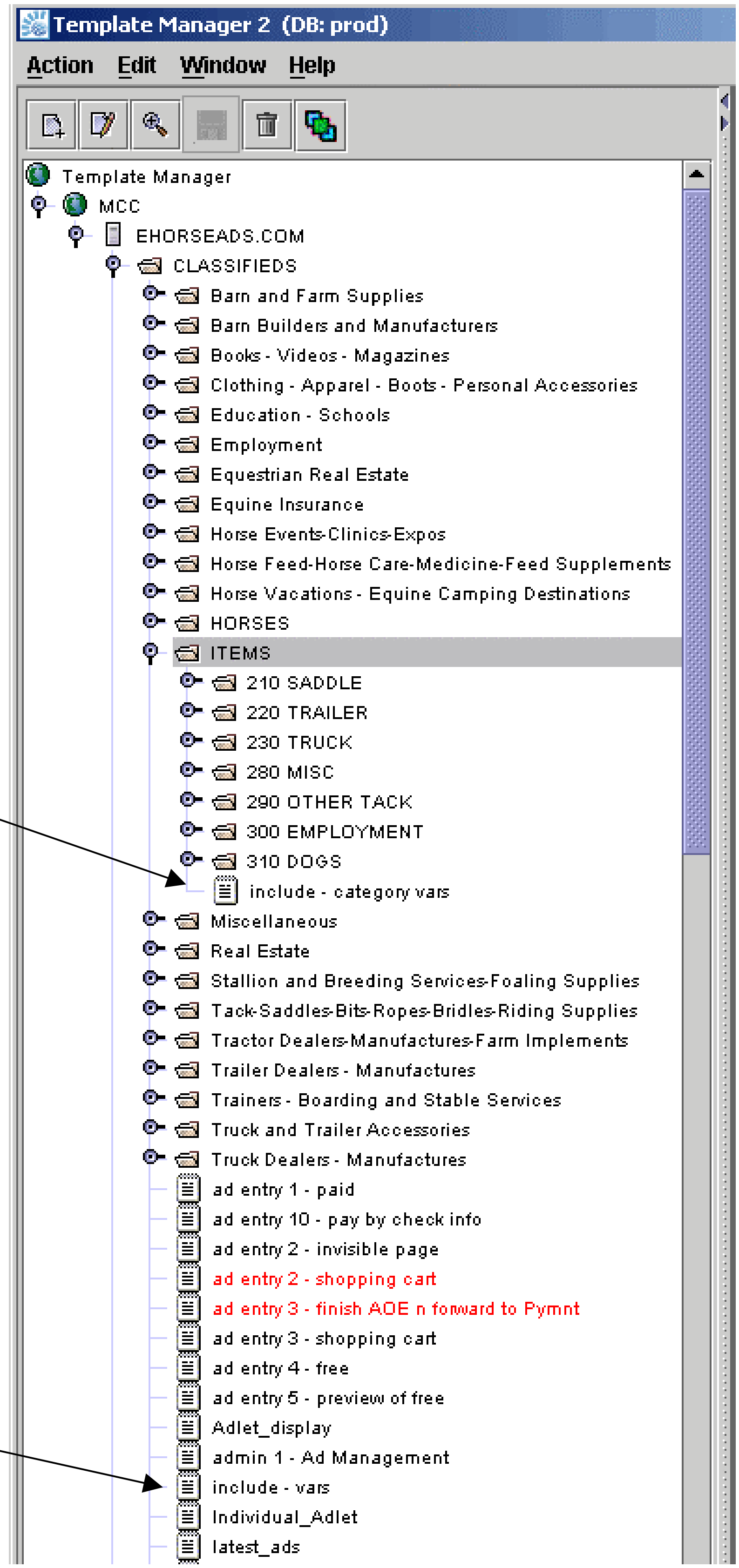
Administrators can modify the templates to alter the look and feel of the site. All ehorsead.com templates are stored and modified within Template Manager. You must have a Template Manger account to edit templates. This section explains where the templates are stored in Template Manager, lists the new variables, and provides a list of all templates.

## Directory Structure

All template modifications, deletions and additions for ehorseads.com templates are performed in the following directories in Template Manager:

- MCC/EHORSEADS.COM/reg
- MCC/EHORSEADS.COM/CLASSIFIEDS

The eHorseAds template tree in Template Manager is shown below.




An include-category vars file is located under each Major (i.e. HORSES, ITEMS). These files define settings only for that category.

The include-vars file is the main template used to customize the AOE functions.

## File Prefixes

You can examine the prefixes of filenames to determine the function of each template. The most common prefixes are explained below:

- ad entry, admin, update- These templates all relate to the classifieds entry and update processes.
- email- These templates are cronned to send out reminders on a nightly basis.
- include (such as include-vars)- These templates control many of the customizable administrative settings.

## Main Customization Templates

Although there are many templates involved in ehorseads.com, there are only a few that contain most of the customizable variables. These templates are listed and explained below:

**include-vars**
This file is located within the MCC/EHORSEADS.COM/CLASSIFIEDS directory. It is the main template used to customize the functions, including: modifying the dimensions of free images, editing the disclaimer text for deleting images, define the maximum length for captions, and create an order for enhancements to be displayed.

**include-category vars**
A file by this name is located under each Major (i.e. HORSES, ITEMS). These files define settings only for that category.

## New Template Variables

The variable additions and modifications for this release are explained below. Administrators can modify the values for these variables to customize the eHorseAds options and text. Each variable is also well documented in the templates. Simply read the code comments directly above each variable entry.

| Modification | Directory Location | Variable |
|---|---|---|
| Define the sizes to which uploaded photos can be resized. | include - vars | $free_pic_max_width<br>$free_pic_max_height<br>$thumbnail_max_width<br>$thumbnail_max_height<br>$paid_pic_max_width<br>$paid_pic_max_height<br>**Note:** If you change the size, old images retain their original size. This only affects new images. |
| Edits the disclaimer text displayed when users delete photos. It informs them there is no refund for deleted images | include - vars | $image_delete_disclaimer_full_edit_ad<br>$image_delete_disclaimer_partial_edit_ad<br>**Note:** Disclaimer text can only be modified for fully edited ads. |

| | | |
|---|---|---|
| Define which fields users are required to fill in for ads. | Major's include-category vars | $required_features<br><br>Enter fields in the format of:<br><mcc $required_features="Item Type, Ad Text"<br>**Note:** Required features are not case sensitive. |
| Defines the maximum length (in characters) of image captions | include - vars | $max_caption_length |
| Defines the order in which products of a given type appear on a page | include - vars<br><br>Classification's include -category vars | $enhancements_order, $html_order, $icon_order<br><br>$feature_order |

## Template Reference

The following is a list of all the major templates and explanations of their functions.

### Templates in MCC/EHORSEADS.COM/CLASSIFIEDS

| Template Name | Function |
|---|---|
| ad entry 1- paid | Enters and edits unpaid for ads (first-time purchases and to renew expired ads.) |
| ad entry 2- invisible page | Performs error checking for the data entered on the "ad entry 1- paid" template. |
| ad entry 3- shopping cart | Displayed if there are no errors on "ad entry 2 - invisible page". It includes a brief explanation of the data entered and the selected enhancements (free and paid). Also allows user to preview the "more details" page, edit the ad, and pay for the ad. |
| ad entry 4- free | The first entry page for free ads. |
| ad entry 5- preview of free | Displays the free ad text up to the maximum number of characters allowed (200 characters by default, but can be modified in the "include - vars" template). Users can also edit the ad, make it live, change it to a paid ad. |
| admin 1- Ad Management | An invisible, "traffic directing" template. It queries for the ad id & based on the ad characteristics (status, ad type, administrator) decides what the next page displayed should be. |
| admin 2 -Errors -n-Thank-you's | Displayed after completing the ad entry (both completing purchases and updating ads). It displays the ad id & redirects to the User Center. |
| browse 1-Results List | The public ad search/browse results page |
| browse 2- user's ad list | A list of the user's ads with administration links for each. Users can mark an ad sold, edit the ad, or renew it. |
| data entry 1- payment inputs | Displays after the "ad entry 3 - shopping cart" template and allows you to fill in the CC info. |

| | |
|---|---|
| data entry 2- process payment n email receipt | An invisible page that processes the payment and emails a receipt to the customer. |
| data entry 3- printable receipt | The printable receipt for ads. |
| email (free ad) | This is cronned to run nightly, and sends an email to the owners of free ads that are 30 days old, prompting them to buy a paid ad. |
| email renewal notice (30 Days) | Cronned to run nightly. Sends emails to owners of recently expired ads prompting them to renew. |
| email renewal notice (Until) | Cronned to run nightly. Sends emails to owners of Run Till ads that are about to expire prompting them to extend their ads. |
| include-vars | Contains most of the basic settings and gets included by most templates. |
| update 1- (until-active) | Allows users to update the price of a Run Till it Sells ad.<br>If the ad is in the "extension window" also allows the ad to be extended. |
| update 2 (30 Days) | Allows users to edit 30 Days ads. Administrators see this template even for Run Till it Sells ads. |
| update 3- invisible page (30 Days) | Performs error checking before an ad update is finalized. |
| update 4- (UN)mark ad sold | Allows users to add or remove a "sold" icon for ads. |

### Templates in MCC/EHORSEADS.COM/reg

| Template Name | Function |
|---|---|
| admin 1-user center | The "you're not logged in" version of the user center. Options for things like "sign up" etc. |
| admin 2- user center (logged in) | The logged-in version of the user center. Gives users the ability to enter new ads, and get to the user's ad list |
| admin 3- user detail | A brief explanation of the user account. Linked from "admin 4 - list of users (admin only)" |
| admin 4- list of users (admin only) | Displays the results of a user search performed by administrators. Provides links to the user's list of ads, and to add ads for the user. |
| data entry 1- New User Account | A basic registration template for the minimal requirements of ehorseads.com. |
| detail 1- forgot username | Template not in use. |
| detail 2- forgot username email | Template not in use. |
| detail 3- forgot password | Resets passwords to a random value & then emails that value to the user. |
| detail 4 forgot password email | Sends e-mail notifications. |
| detail 5- password hint | Displays the user-entered password hint. |

| | |
|---|---|
| login 1- TEMPLATE PROTECTION | This template, along with TEMPLATE PROTECTION, secures the password-protected portions of the site. |
| TEMPLATE PROTECTION | See previous. |
| login 2- logout | Disables the cookie that is set during log in. |
| update 1- update user account | Allows users to update their registration info. |

### Templates in MCC/EHORSEADS.COM/PSEARCH

| Template Name | Function |
|---|---|
| ALT_DETAIL-1-View Searches | Displays a user's saved searches. |
| Email Psearch | Sends an e-mail message to a user when new ads match their search terms. Only works if the user has enabled this functionality. |
| UPDATE-1-Edit a search | Allows modification of a user's saved search. |

### Other Templates

The templates in the following locations should not be modified; the explanations included here are for informational purposes only.

- MCC/EHORSEADS.COM/Reports - Contains the templates for the AOE reporting Utility.
- MCC/EHORSEADS.COM/Products - Contains the templates for the administrative Product Entry Utility.

# Index