



CMS Guide

Updated October 2018

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Introduction

Welcome to the new oomph website! This document will help you understand how to manage the content on your site. Using your login credentials (below), you can login from any device to manage the site.

Shopify Login

You can access the site at: www.oomphhome.com

You can access the admin panel at: <https://oomphhome.myshopify.com/admin>

Your username is: Your oomph email address

Your password is: Your pre-set password

** Whenever you make any edits to the site, ALWAYS check the site immediately after to make sure that anything you changed looks and works as intended.*

Newsletter Login

You can access MailChimp at: mailchimp.com via your established account.

User newsletter sign ups go to the list titled: oomph

Amazon S3 Login

You can access Amazon S3 at: <https://aws.amazon.com/s3/>

Your username is: jeff@oomphonline.com

Your password is: oomph2017

Linode Login

*This is hosting the POS app

You can access Linode at: <http://linode.com/>

Your username is: verbalplusvisual

Your password is: vpv2008!



Heroku Login

*This is hosting the product engine

You can access Amazon S3 at: <https://www.heroku.com/>

Your username is: Jeff@oomphonline.com

Your password is: oomph2017

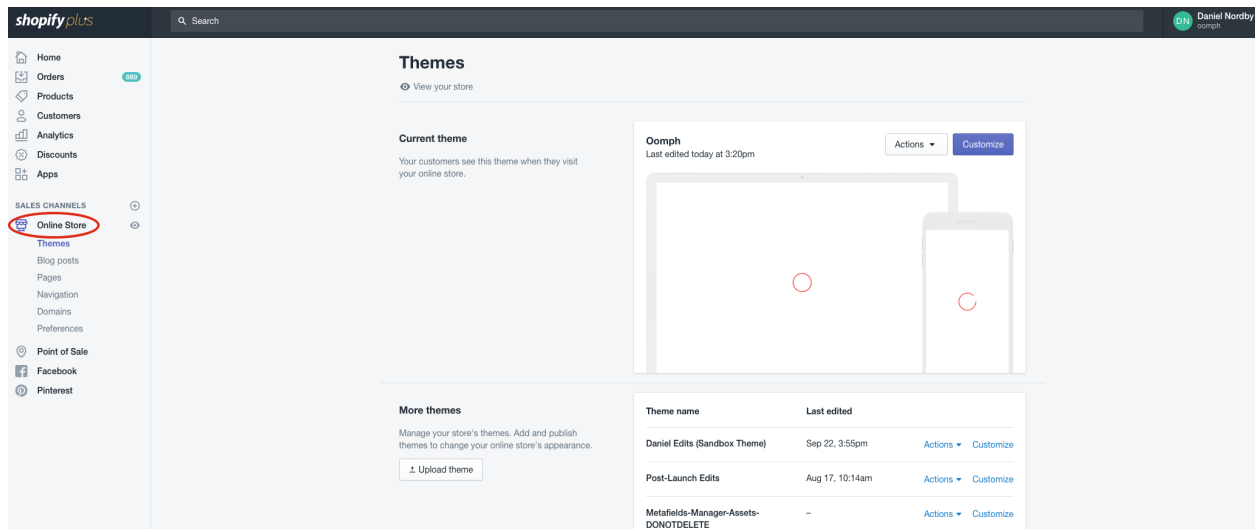
Content Management

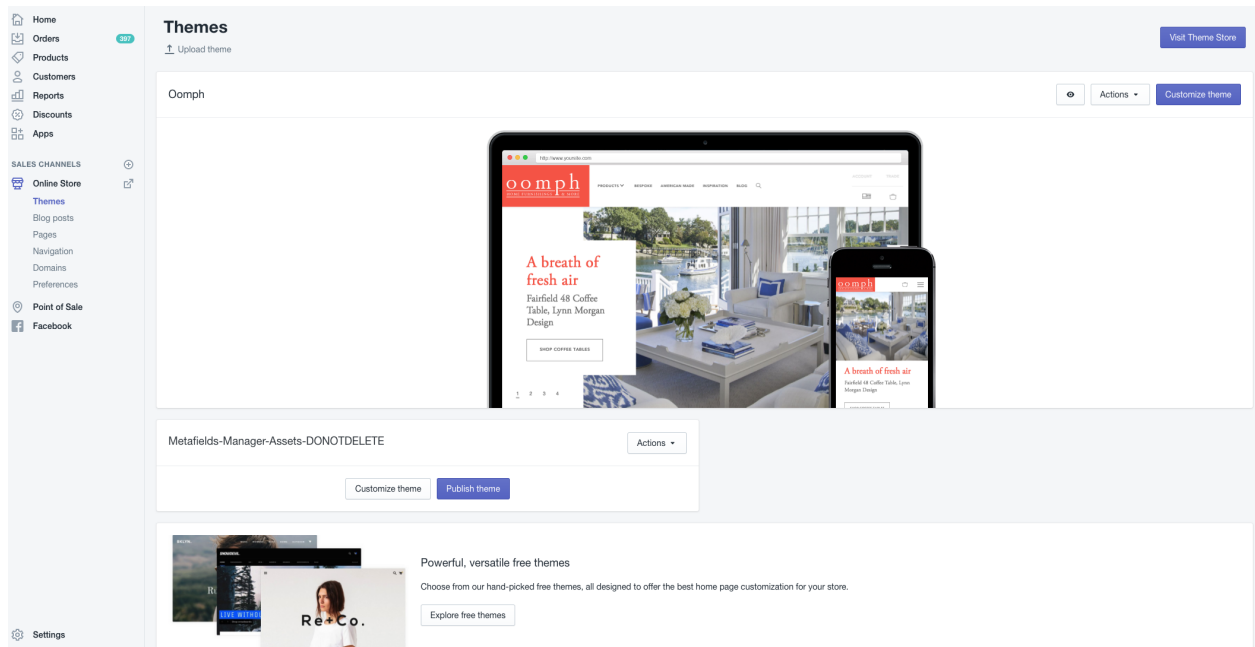
This section will help you understand how to edit your site's content.

+ Once logged in to Shopify, you will be taken to the **Admin dashboard**.

+ From here, navigate to the "Themes" page by clicking on the left side of the screen titled "Online Store."

You can also access the "Themes" page at <https://oomphhome.myshopify.com/admin/themes>





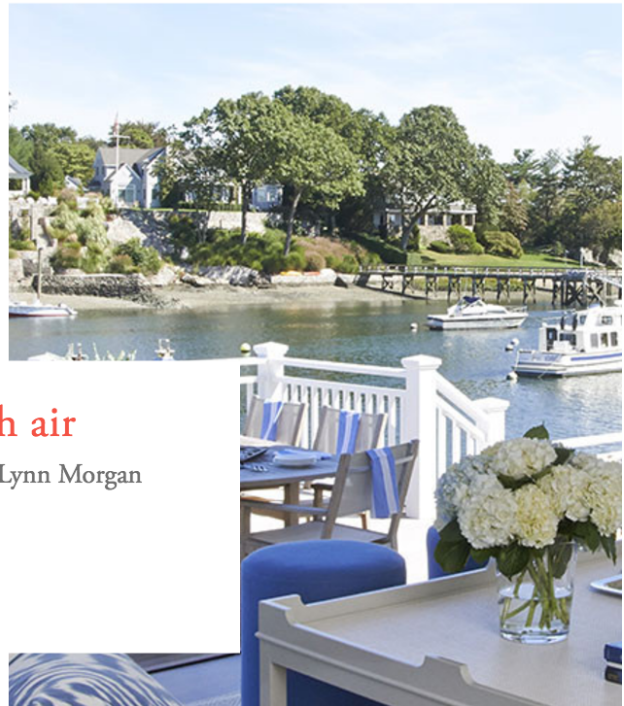
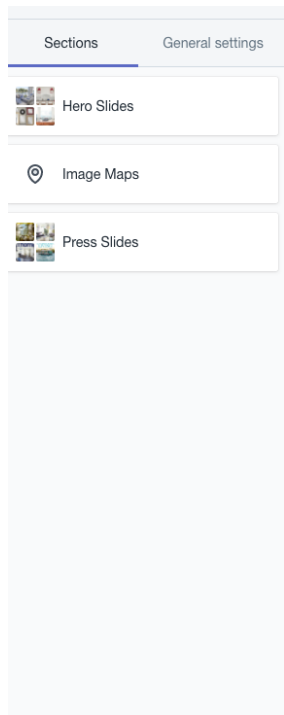
+ Once you are there, you can begin to manage the site content by clicking on the button that says “Customize.”

Home Page Content

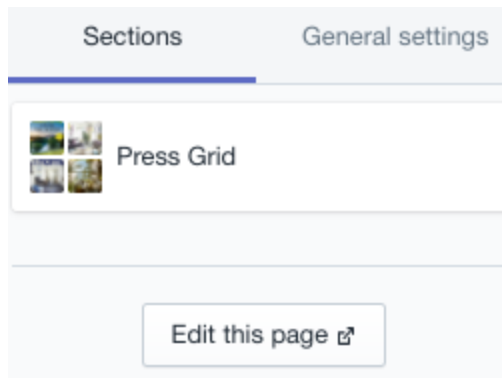
The Home Page can be edited by doing the following:

- + From the Customize Theme area of the themes page, navigate from General settings > Home page.
- + Once there, you will see various areas to input different text.
- + You may change text according to desired content blocks.
- + The Press Slider images can be changed by clicking into "Sections" to the left of "General Settings" of the Theme navigation bar.

Please note that you must be currently on the Home Page to access its "Sections."



+ You can also add to/edit the Press Grid by clicking into “More Press” below the Press Slider and clicking into “Press Grid” on the left column of the page.

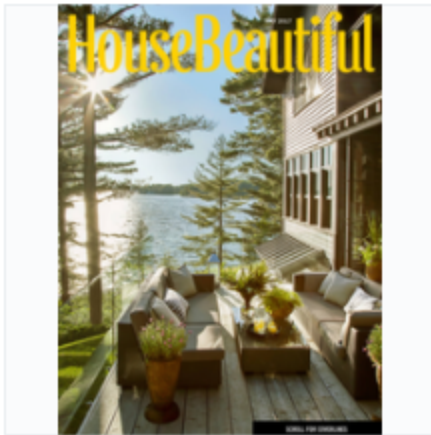


+ From here, you can add press spreads, in addition to the covers.

Cover Text (on hover)

May 2017

Modal Image 1



Update ▾

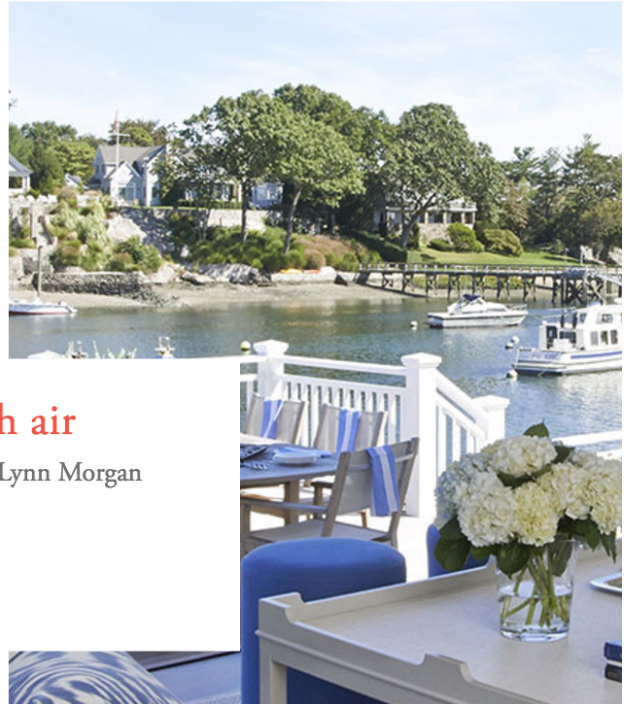
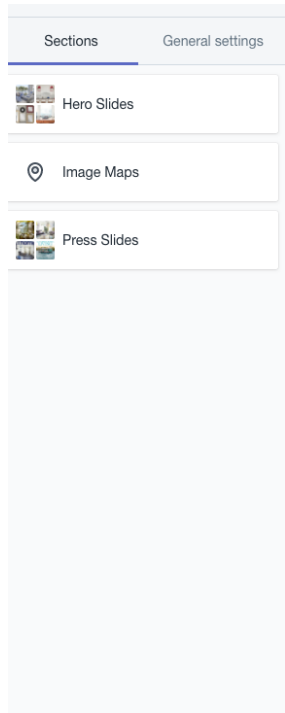
Remove

Modal Image 2



+ The Home Page slider images can be changed by clicking into “Sections” to the left of “General Settings” of the Theme navigation bar.

Please note that you must be currently on the Home Page to access its “Sections.”



A breath of fresh air

Fairfield 48 Coffee Table, Lynn Morgan Design

[SHOP COFFEE TABLES](#)

+ The Fans/Shop Our New Arrivals/Nina Campbell Collection sections can be updated within the Home Page content blocks.

Feature 2 Area - Text

Shop Our New Arrivals

Feature 2 Area - Image



Update ▾

Remove

Feature 2 Area - Link

 New



Feature 3 Area - Text

The Nina Campbell Collection

+ The Shop This Look section can be updated within the Home Page content blocks.



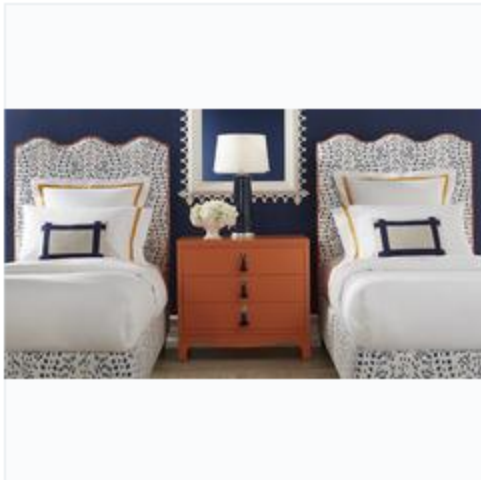
Home Page

SHOP THIS LOOK



Section Visible?

Shop This Look - Image



Update ▾

Remove

+ To edit the location of the tags from the General Sections area click Image Maps. You can then associate an X and Y coordinate for each tag - it does require a bit of guess and check. Once you are happy with the placement use the product dropdown to choose the product it should link to.

+ The Designer Profile section can be updated within the Home Page content blocks.

Please note that this update does not feed into other Designer Profile areas on the site; you must update them individually.



Home Page

FEATURED DESIGNER



Section Visible?

Featured Designer - Headline

Designer Profile

Featured Designer - Name

Chloe Redmond Warner

Featured Designer - Photo



Update ▾

Remove

+ The Catalog and Greenwich Showroom section can be updated within the Home Page content blocks.



Home Page

MORE INFO AREA

☒ Section Visible?

More Info 1 Area - Text

Our 2017 Catalog

More Info 1 Area - Image



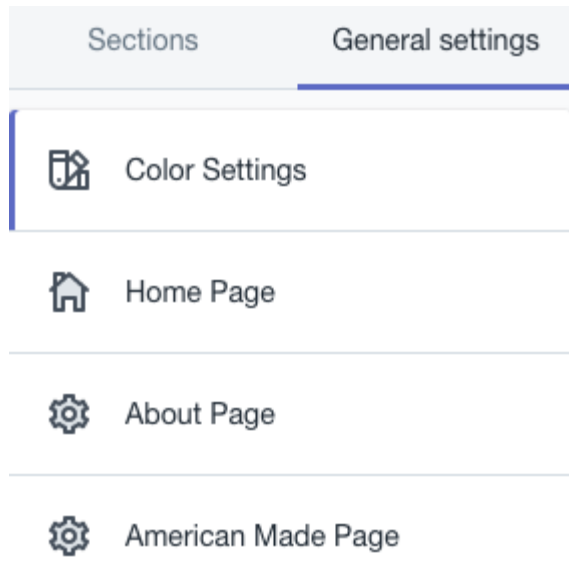
Update ▾

Remove

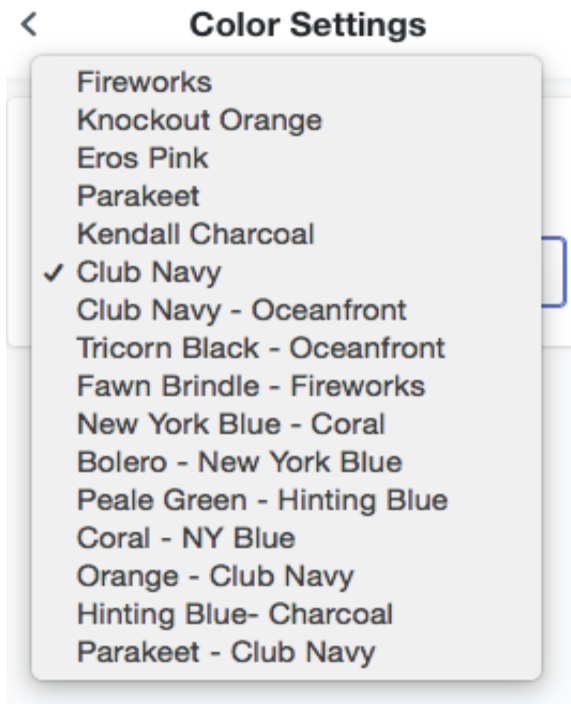
Managing Site Wide Primary / Secondary Colors

To manage your site's primary color settings, you will do the following:

+ From the Customize Theme area of the site, click into "Color Settings" under "General Settings" of the Theme navigation bar.



- + Choose from the list of predefined primary color options.

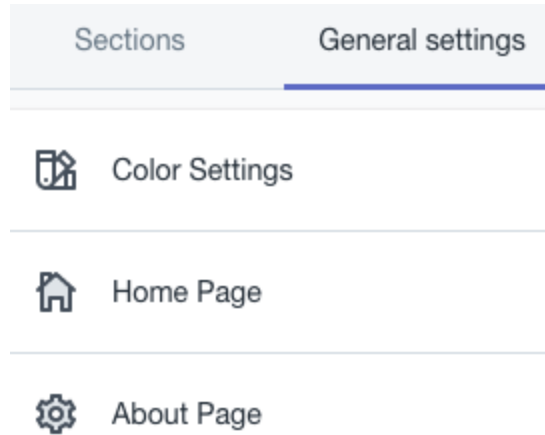


- + Click "Save" to make the change live.

About Page

The About section can be edited by doing the following:

+ Click "About Page" next to the gear icon under "General Settings" of the Theme navigation bar.



+ Once there, you will see various areas to input different text.

+ You may change text according to desired content blocks.



About Page

HEADER/VIDEO/TEXT AREA

About - Header

Every Home Needs a Little oomph

About - Video Name (i.e.
'main_video.mp4' - MUST BE SAVED
IN [SHOPIFY FILES](#))

Oomph_Showroom_Louise_Brook

About - Text Area 1

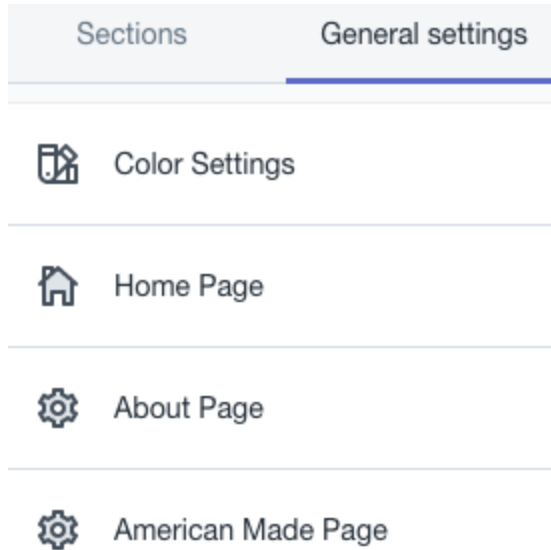
We believe that adding a few
simple elements of great design
can totally transform a room. In
other words, hip tables, chic

Please note that you cannot update the contact information, as it is coded in HTML.

American Made Page

The American Made section can be edited by doing the following:

+ Click "American Made Page" next to the gear icon under "General Settings" of the Theme navigation bar.



+ Once there, you will see various areas to input different text.
 + You may change text and images according to desired content blocks.

< American Made Page

HEADER/VIDEO/TEXT AREA

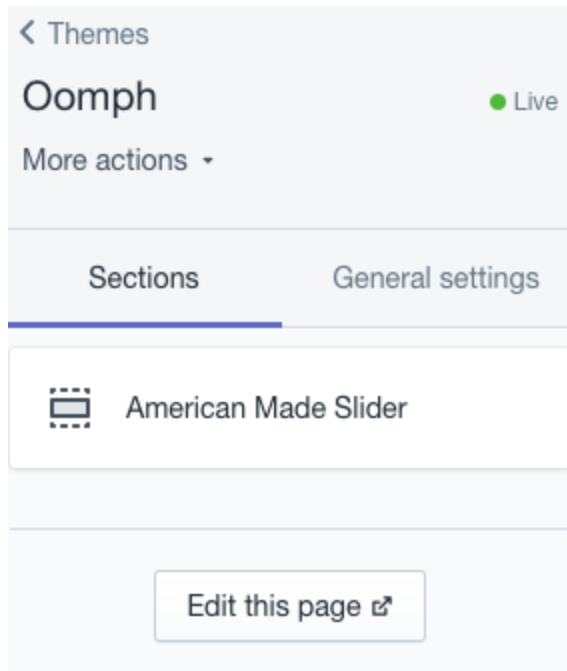
American Made - Header

The Importance of Made in Americ

American Made - Video Name (i.e.
 'main_video.mp4' - MUST BE SAVED
 IN [SHOPIFY FILES](#))

Oomph_Made_In_America.jpg

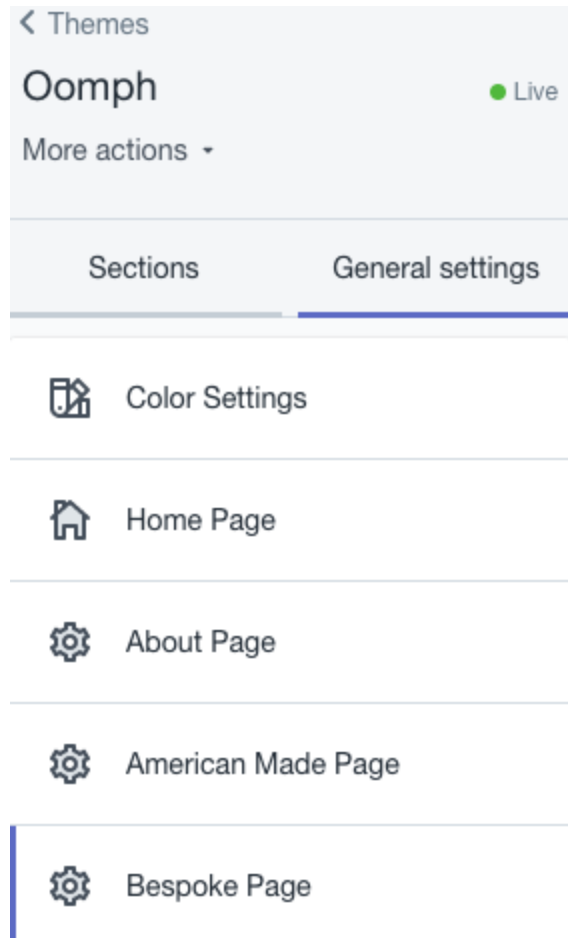
+ The American Made slider images can be changed by clicking into “Sections” to the left of “General Settings” of the Theme navigation bar. Please note that you must be currently on the American Made page to access its “Sections.”



Bespoke Page

The Bespoke section can be edited by doing the following:

+ Click “Bespoke Page” next to the gear icon under “General Settings” of the Theme navigation bar.



- + Once there, you will see various areas to input different text.
- + You may change text and images according to desired content blocks.

< Bespoke Page

100% CUSTOM MADE SECTION

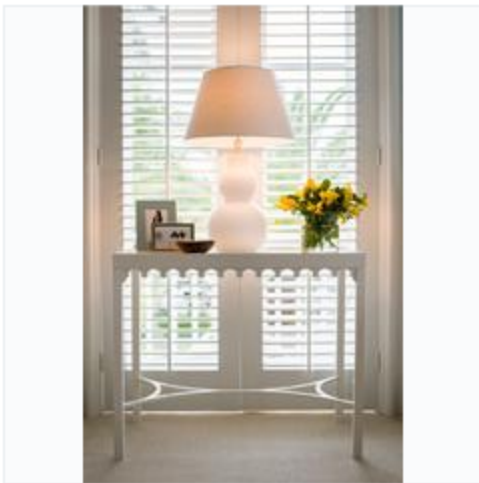
Custom Made - Subtitle

At oomph, we try to offer enough \

Custom Made - Text

But every so often, a piece needs to be specially tailored. With oomph's Bespoke Services, your imagined designs can come to

Custom Made - Image 1









Update ▾

Remove

Contact Page

The Contact Page can be edited by doing the following:

+ Click “Contact Page” next to the envelope icon under “General Settings” of the Theme navigation bar.

Sections	General settings
	Color Settings
	Home Page
	About Page
	American Made Page
	Bespoke Page
	Contact Page

+ Once there, you will see various areas to input different text.








+ You may change text and the Greenwich Showroom image according to desired content blocks.

Please note that you cannot change the “FOMO”/Newsletter signup/social icon box, as it is coded in HTML.

Designer Resources Page

The Designer Resources section can be edited by doing the following:

+ Click “Designer Resources Page” next to the gear icon under “General Settings” of the Theme navigation bar.

Sections	General settings
	Color Settings
	Home Page
	About Page
	American Made Page
	Bespoke Page
	Contact Page
	Designer Resources Page

+ Once there, you will see various areas to input different text.









+ You may change text and images according to desired content blocks.

Please note that this update does not feed into other Designer Profile areas on the site; you must update them individually.

Help Page

The Help section can be edited by doing the following:

+ Click "Help Page" next to the gear icon under "General Settings" of the Theme navigation bar.

Sections	General settings
	Color Settings
	Home Page
	About Page
	American Made Page
	Bespoke Page
	Contact Page
	Designer Resources Page
	Help Page

- + Once there, you will see various areas to input different text.
- + You may change text and images according to desired content blocks.



Help Page

HELP - HEADER AREA

About - Header

Need Help?

About - Subtext 1

We're available by phone Monday-

About - Subtext 2

and Saturday 11am - 4pm

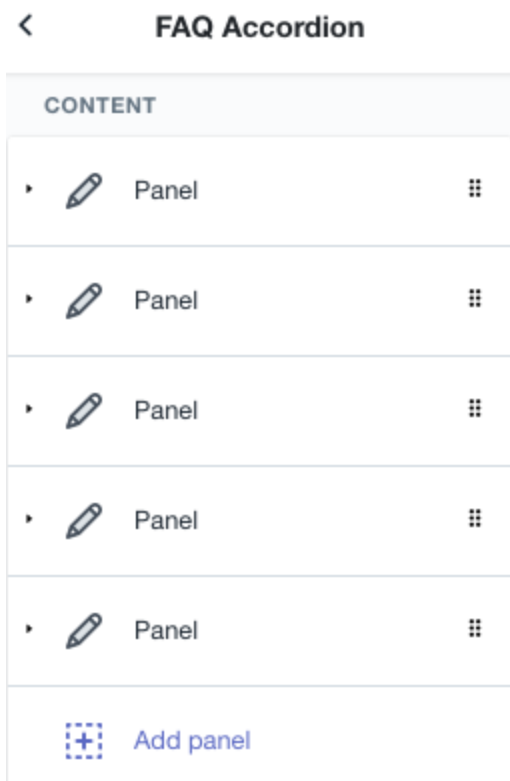
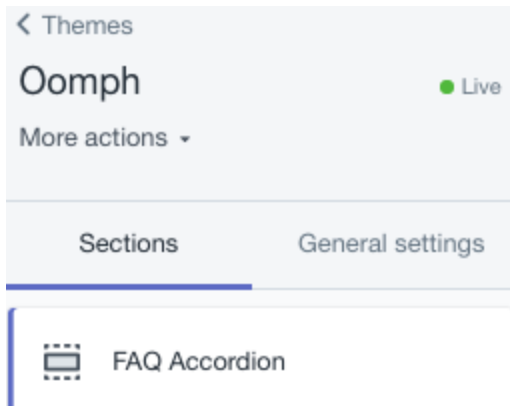
About - Subtext 3

203-216-9848

About - Subtext 4

sales@oomphhome.com

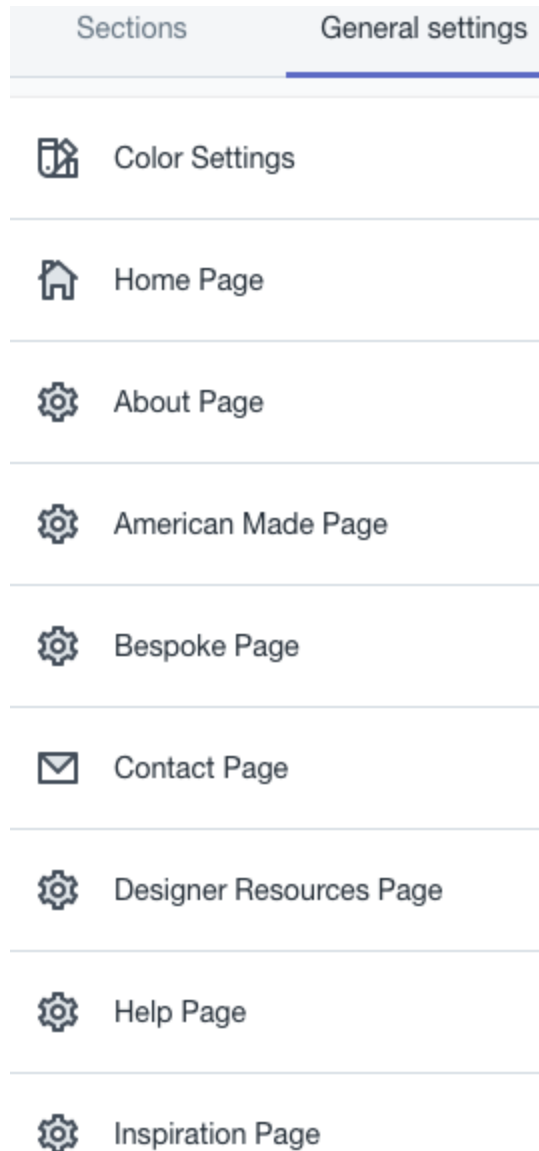
+ The FAQ/Terms and Conditions accordion can be changed by clicking into “Sections” to the left of “General Settings” of the Theme navigation bar. Please note that you must be currently on the Help page to access its “Sections.”



Inspiration Page

The Inspiration section can be edited by doing the following:

+ Click “Inspiration Page” next to the gear icon under “General Settings” of the Theme navigation bar.



+ Once there, you will see various areas to input different text.

+ You may change text and images according to desired content blocks.

< Inspiration Page

HEADER/VIDEO/TEXT AREA

Inspiration - Header

Need a little inspiration?
You\'

Inspiration - Subheader

Need a second opinion? Let some

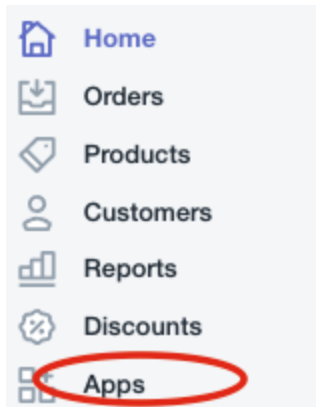
Inspiration - Image Name (i.e.
'main_video.jpg' - MUST BE SAVED
IN [SHOPIFY FILES](#))

inspiration.jpg

Please note that updates to the Designer of the Month content boxes do not feed into other Designer Profile areas on the site; you must update them individually.

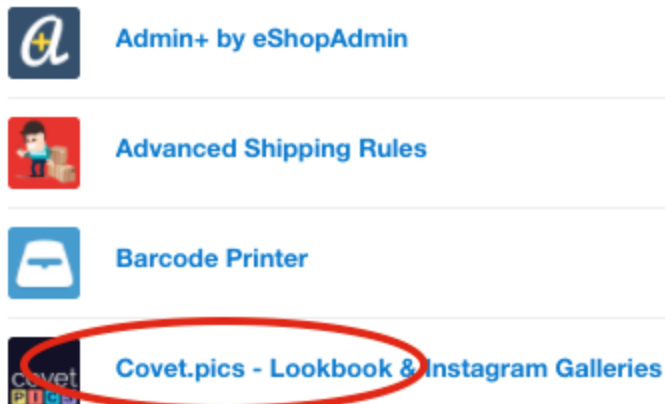
+ The Inspiration slider can be changed by clicking into "Sections" to the left of "General Settings" of the Theme navigation bar. Please note that you must be currently on the Inspiration page to access its "Sections."

+ To tag products to the Glass House page (accessible via the “More Info” button on the Inspiration slider), return to <https://oomphhome.myshopify.com/admin> and click “Apps.”



+ Select the Covet.pics app.

Installed apps

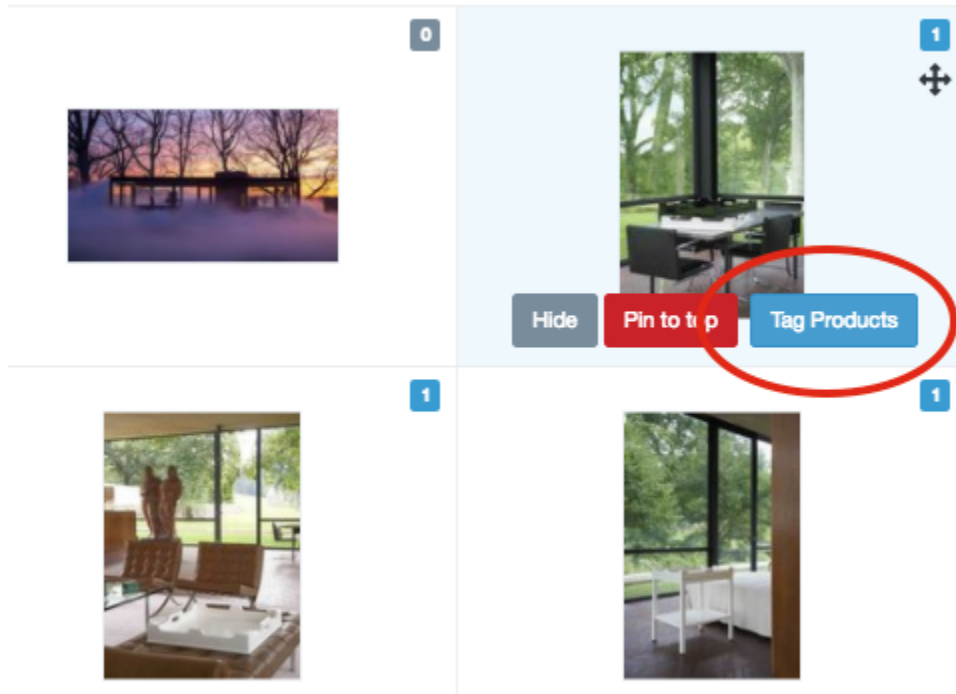


+ Once inside the app, select the Glass House Gallery.

Galleries




+ Once inside the gallery, hover over the image you want to tag products to, and an option to tag products will appear. Click into it.



+ From here, type the product title in the search field and results will appear. Select the product and it will be tagged to the image. Click confirm to save.

Tag Products

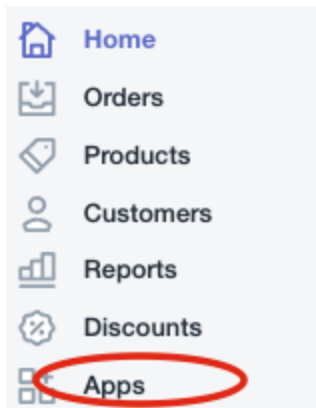
Type Product Title or Custom URL ...

1  **Edgartown Rectangle Tray**

Edit Post

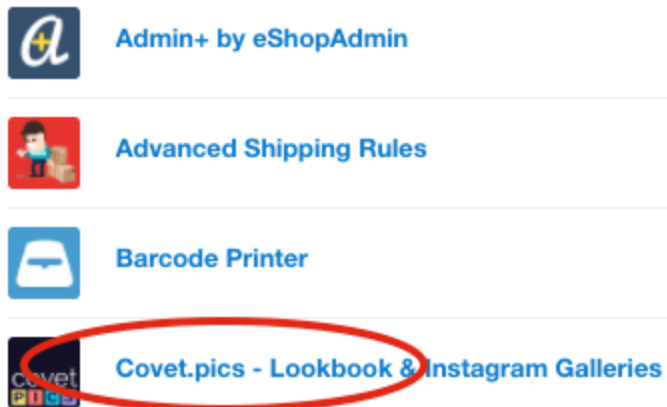
Confirm

+ To tag products to the #Sundayoomph page (accessible at the bottom of the page), return to <https://oomphhome.myshopify.com/admin> and click "Apps."



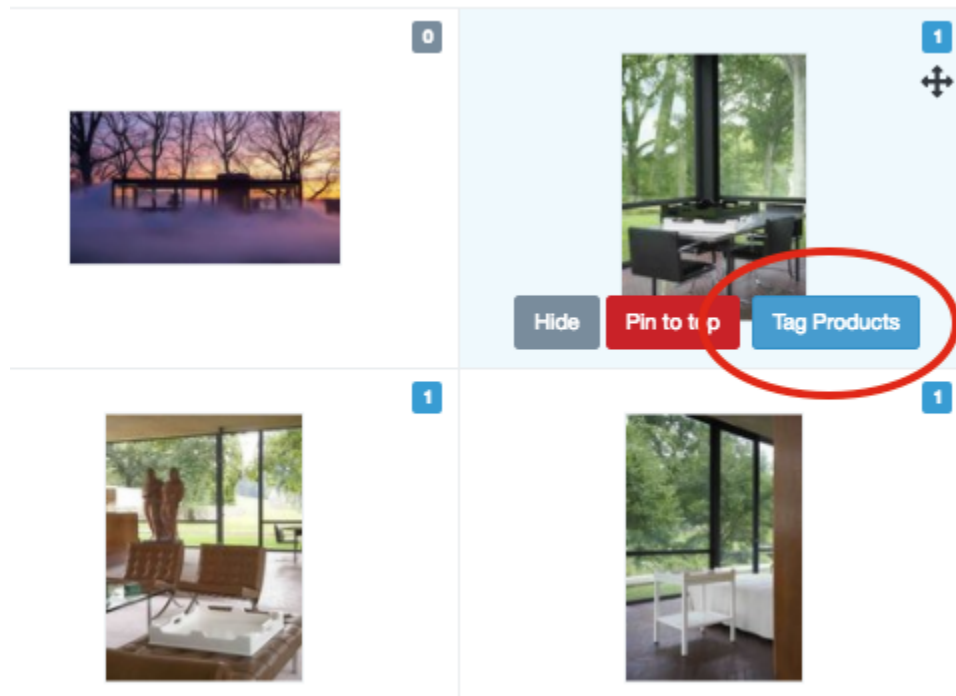
+ Select the Covet.pics app.

Installed apps



+ Once inside the app, select the Sunday oomph Gallery.

+ Once inside the gallery, hover over the image you want to tag products to, and an option to tag products will appear. Click into it.



+ From here, type the product title in the search field and results will appear. Select the product and it will be tagged to the image. Click confirm to save.

Tag Products

Type Product Title or Custom URL

...

1



Edgartown Rectangle Tray











Edit Post

Confirm

Upcoming Events Section

The Upcoming Events Module can be edited by doing the following:

+ Click “Upcoming Events Module” next to the gear icon under “General Settings” of the Theme navigation bar.

Sections	General settings
	Color Settings
	Home Page
	About Page
	American Made Page
	Bespoke Page
	Contact Page
	Designer Resources Page
	Help Page
	Inspiration Page
	Upcoming Events Module

+ Once there, you will see various areas to input different text.

+ You may change text and images according to desired content blocks.

< Upcoming Events Module

SHOW MODULE?

☒ Show events module?

EVENT 1

Event 1 - Image



Change

Edit

Remove

Event 1 - Full Event Title

Danielle Rollins Trunk Show and B

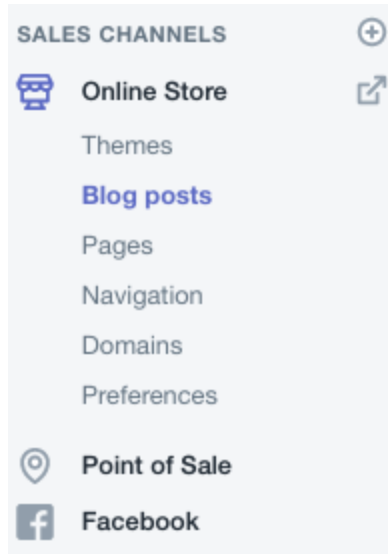
Event 1 - Full Date and Time

November 3, Reception and Shop

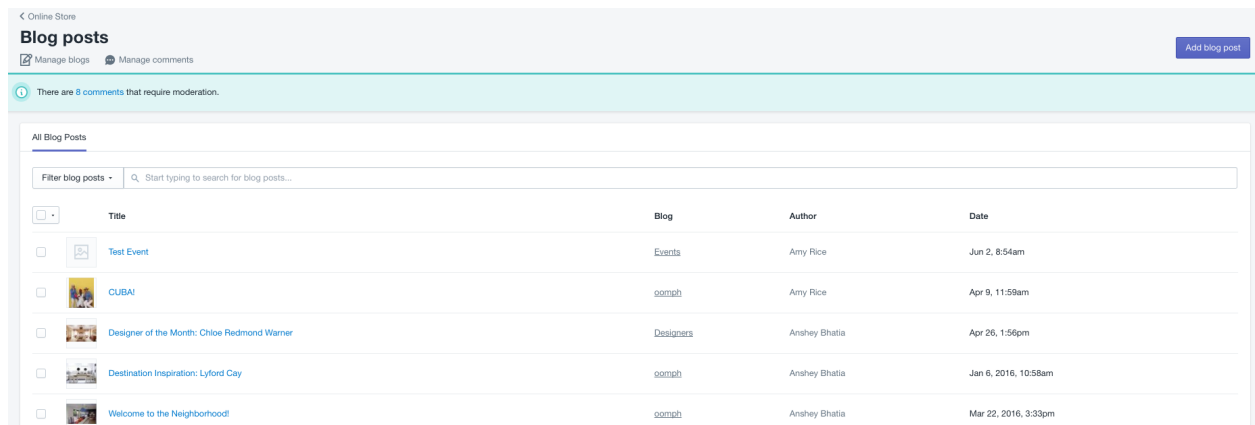
Editing Blog Content

Blog posts can be edited by doing the following:

+ Click “Blog posts” under “Online Store” on the main Admin Themes page.







+ Once you are in, you can access existing posts, or add new ones as you wish.








oomph Blog

+ To create/edit general posts, make sure you are tagging them to the oomph blog, not the Designers blog.

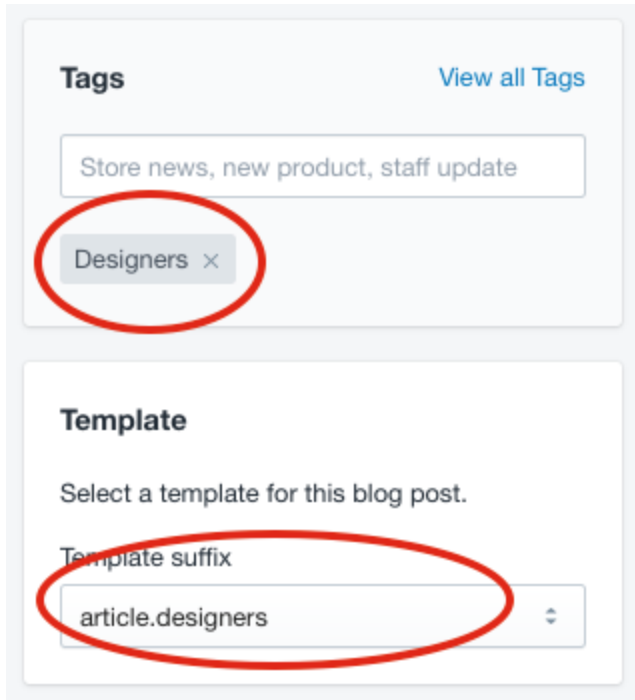
<input type="checkbox"/>	Title	Blog	Author	Date
<input type="checkbox"/>	 Designer of the Month: Lynn Morgan	Designers	Amy Rice	Mar 1, 5:02pm
<input type="checkbox"/>	 Designer of the Month: Chloe Redmond Warner	Designers	Amy Rice	Apr 26, 1:56pm
<input type="checkbox"/>	 Coastal Living Idea House in Newport	oomph	Amy Rice	Jul 13, 9:42am
<input type="checkbox"/>	 QUICK SHIP is BACK	oomph	Amy Rice	May 18, 2015, 11:21am

Designers Blog

+ To create/edit Designer of the Month posts, make sure you are tagging them to the Designers blog, not the oomph blog.

<input type="checkbox"/>	Title	Blog	Author	Date
<input type="checkbox"/>	 Designer of the Month: Lynn Morgan	Designers	Amy Rice	Mar 1, 5:02pm
<input type="checkbox"/>	 Designer of the Month: Chloe Redmond Warner	Designers	Amy Rice	Apr 26, 1:56pm
<input type="checkbox"/>	 Coastal Living Idea House in Newport	oomph	Amy Rice	Jul 13, 9:42am
<input type="checkbox"/>	 QUICK SHIP is BACK	oomph	Amy Rice	May 18, 2015, 11:21am
<input type="checkbox"/>	 oomph SUMMER	oomph	Amy Rice	May 22, 2015, 1:10pm

+ Also, when you are working within a Designer of the Month blog post, be sure to select the “article.designers” template and to tag the post to “Designers,” to ensure that the post formats correctly and populates the site appropriately.



Tags [View all Tags](#)

Store news, new product, staff update

Designers ×

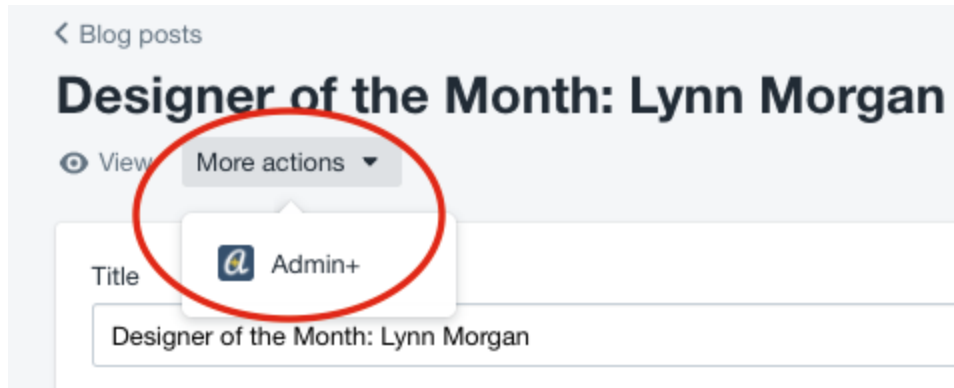
Template

Select a template for this blog post.

Template suffix

article.designers

+ To add “Designer Picks” products to Designer of the Month posts, click the “Admin” app under “More Actions” (found beneath the blog post title).



+ Once inside the app, under the Designer Picks metafield editor, add the full product names to each field. They will then populate the bottom of the Designer’s blog post. **Note you need to enter the exact product title. It is recommended you just pull the URL ending from the end of the individual product page.

Metafield Editor

Designer of the Month: Lynn Morgan

Namespace: designerPick, Key: pick1

Namespace: designerPick, Key: pick2

Namespace: designerPick, Key: pick3

Image Sizes

We recommend using these image sizes:

- + Home Page sliders and collage: 16x9 ratio (landscape) / 1280 pixels x 720 pixels
- + Shop Our New Arrivals: 3x4 ratio (landscape) / 900 pixels x 1200 pixels
- + Nina Campbell Collection: 3x4 ratio (landscape) / 900 pixels x 1200 pixels
- + Press images: 8x10 ratio (potrait) / 800 pixels x 1000 pixels
- + Catalog/Greenwich Showroom: 8x10 ratio (potrait) / 800 pixels x 1000 pixels
- + American Made header and sliders: 16x9 ratio (landscape) / 1280 pixels x 720 pixels
- + Inspiration Page Sliders: 16x9 ratio (landscape) / 1280 pixels x 720 pixels

Also, be sure your images are saved for the web and optimized. We recommend running them through a program like ImageOptim.

Navigation Management

Main Navigation

- + To edit the main navigation click Online Store > Navigation
- + Click on the menu name you want to edit. If you want to edit the items in the Products dropdown click Products. If you want to edit the subcategories within that Products dropdown, choose the subcategory you wish to edit. For all other main nav. Items choose Main Menu

[Online Store](#)

Navigation

[URL Redirects](#)

Add menu

Menus

Menus, or link lists, help your customers navigate around your online store.

You can also [create drop-down menus](#) for your online store.

Title ▲	Menu items
Accessories Menu	Art, Pillows, Trays
Collections Menu	Nina Campbell Collection
Footer menu	
Footer Shop	New, Furniture, Lighting, Mirrors, Accessories (+2 others)
Footer Support	Designer Resources, About Us, Colors & Finishes, Blog, Bespoke (+3 others)
Furniture Menu	Tables, Chests, Beds, Seating

- + Change the name of the menu item by using the Name form field
- + Edit where the menu actually links to by choosing the link type in the Link dropdown and then choose the appropriate destination.
- + Click Save Menu to make the changes live.

Footer Navigation

- + To edit the footer navigation click Online Store > Navigation
- + Click on the menu name you want to edit. It will be either footer menu, footer shop, footer support, etc.

[Online Store](#)

Navigation

[URL Redirects](#)

Add menu

Menus

Menus, or link lists, help your customers navigate around your online store.

You can also [create drop-down menus](#) for your online store.

Title ▲	Menu items
Accessories Menu	Art, Pillows, Trays
Collections Menu	Nina Campbell Collection
Footer menu	
Footer Shop	New, Furniture, Lighting, Mirrors, Accessories (+2 others)
Footer Support	Designer Resources, About Us, Colors & Finishes, Blog, Bespoke (+3 others)
Furniture Menu	Tables, Chests, Beds, Seating

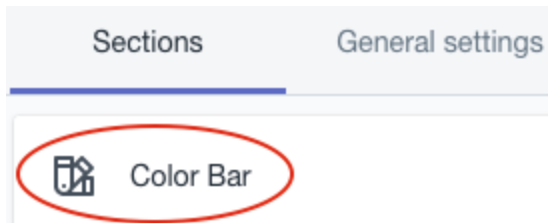
- + Change the name of the menu item by using the Name form field.
- + Edit where the menu actually links to by choosing the link type in the Link dropdown and then choose the appropriate destination.
- + Click Save Menu to make the changes live.

Browse By Color

+ If you want to edit the product color bar, access the Products page from the Home page.





+ Once you land on the Products page and click into one of the Product filters, the Color Bar editor will appear in the left column.



+ From here, you can edit the color names and hex codes, as well as their order (by dragging and dropping).


< **Color Bar**



CONTENT

▼  Color 

Hex Color/Image URL

Color Name

 [Delete](#)

▶  Color 

+ Be sure to save (and check!) your work.

Browse By Product

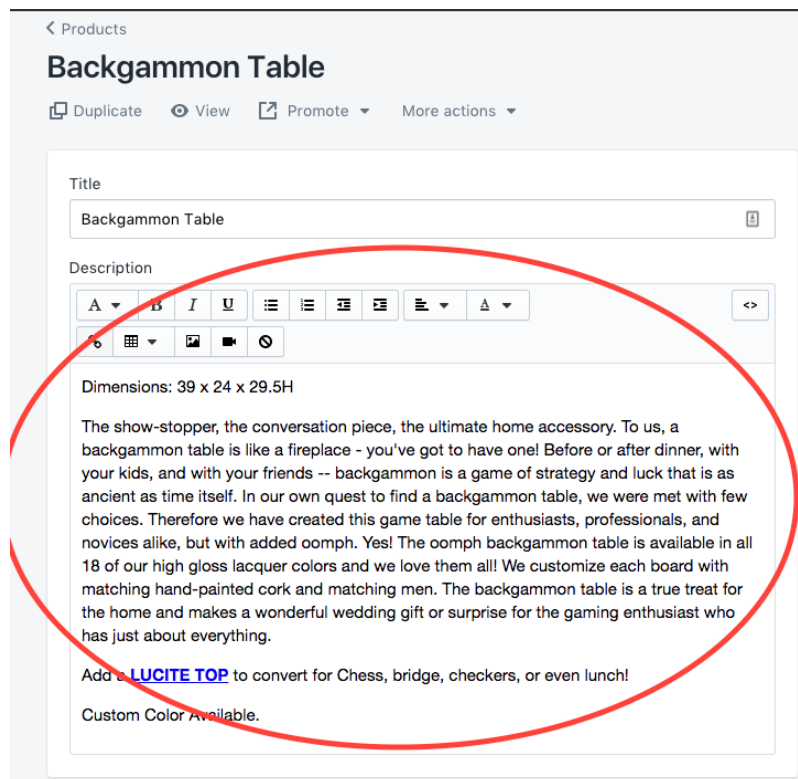
+ The Browse By Product navigation bar found on the collection pages is dynamically created based on the product type. You do not have control of the order of this. If you have requests to change the order you will need to contact Verbal+Visual.

Product Management

Editing Existing Products

To edit the collection image, tags, description or pricing of a product you will do the following:

- + From the Shopify Dashboard click "Products" and search for the product you want to edit
- + Click on it
- + Edit the description within the main content area using the word processor

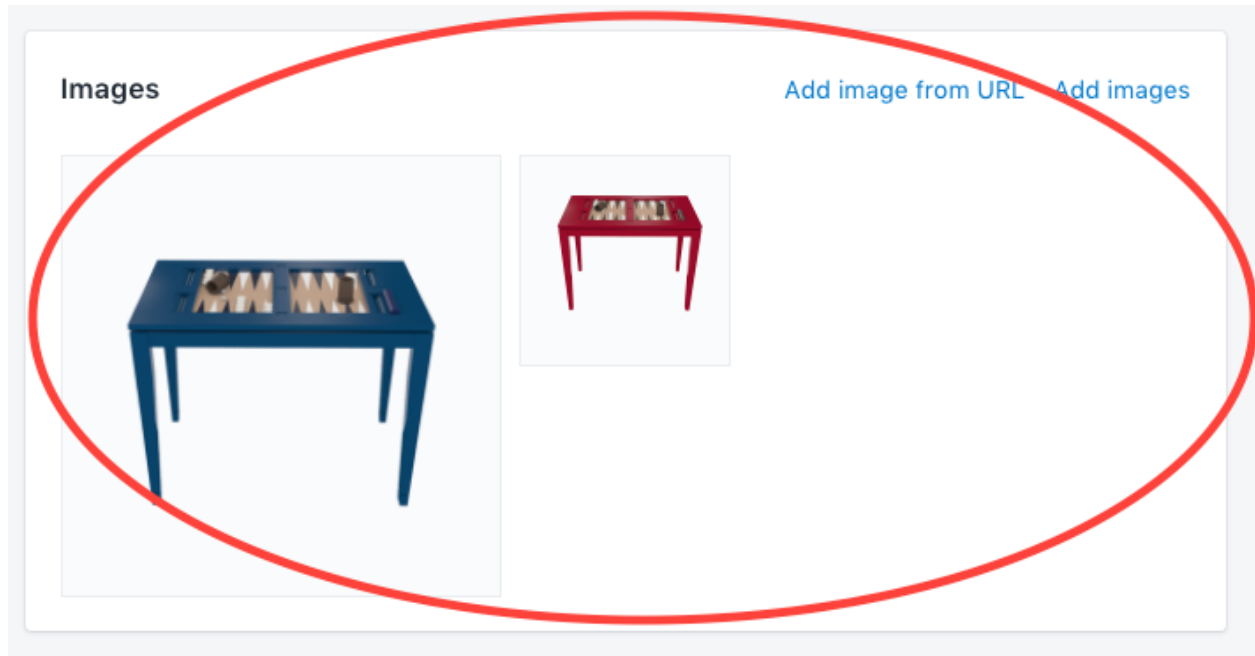


Please note, to format the dimensions properly, click the <> at the top right of the editor to switch to HTML mode and ensure you have the following code around the dimensions:

```
<p class="dimensions">Dimension content goes here</p>
```

- + To view / hide various sales channels click "Manage" to the right of the Sales Channel box and check and uncheck the channels you want the product to appear on.



























+ To edit the collection image, the image that appears in the collection prior to a user clicking into that product page, drag and drop, or upload an image into the images area:



The first image showing will be the one that shows on the collection landing pages, anything after that will show for ALL product variants - we recommend you use this for lifestyle images

+ To edit the pricing, scroll down to the variant area and update the price column as needed
















Reorder variants Edit options Add variant

	color	Price	SKU	
<input type="checkbox"/>	 Bolero	\$1,425.00	—	Edit 
<input type="checkbox"/>	 Club Navy	\$1,425.00	—	Edit 
<input type="checkbox"/>	 Creme	\$1,425.00	—	Edit 
<input type="checkbox"/>	 Dove	\$1,425.00	—	Edit 
<input type="checkbox"/>	 Eros Pink	\$1,425.00	—	Edit 
<input type="checkbox"/>	 Fawn Brindle	\$1,425.00	—	Edit 
<input type="checkbox"/>	 Fireworks	\$1,425.00	—	Edit 
<input type="checkbox"/>	 Hinting Blue	\$1,425.00	—	Edit 
<input type="checkbox"/>	 Kendall Charcoal	\$1,425.00	—	Edit 
<input type="checkbox"/>	 Knockout Orange	\$1,425.00	—	Edit 
<input type="checkbox"/>	 Ny Blue	\$1,425.00	—	Edit 
<input type="checkbox"/>	 Oceanfront	\$1,425.00	—	Edit 
<input type="checkbox"/>	 Parakeet	\$1,425.00	—	Edit 

+ To edit the fulfillment vendor scroll down to the variant area - use the checkbox to select all and click edit. Using the Add Fields dropdown make sure Fulfillment Service is selected. Use the dropdown to select the proper fulfillment service. If you need to add a new one, review Adding / Editing Fulfillment vendors later in the document.

Currently editing these fields:

SKU × Price × Compare at price × Fulfillment service × Add fields ▾

Title	SKU		Price	Compare at price	Fulfillment service
Bolero			\$ 1425.00	\$	Century Furniture
Club Navy			\$ 1425.00	\$	Century Furniture
Creme			\$ 1425.00	\$	Century Furniture
Dove			\$ 1425.00	\$	Century Furniture
Eros Pink			\$ 1425.00	\$	Century Furniture
Fawn Brindle			\$ 1425.00	\$	Century Furniture
Fireworks			\$ 1425.00	\$	Century Furniture
Hinting Blue			\$ 1425.00	\$	Century Furniture
Kendall Charcoal			\$ 1425.00	\$	Century Furniture
Knockout Orange			\$ 1425.00	\$	Century Furniture
Ny Blue			\$ 1425.00	\$	Century Furniture
Oceanfront			\$ 1425.00	\$	Century Furniture
Parakeet			\$ 1425.00	\$	Century Furniture
Peale Green			\$ 1425.00	\$	Century Furniture
Rainwashed			\$ 1425.00	\$	Century Furniture

+ To edit tags associated with a product, you will update the tags area. Tags are used for trade and wholesale pricing, “Complete this Look,” as well as to make collections conditional i.e. new. To add, type the tag followed by a “-”. To remove, hover over the tag and click the X.

Tags [View all tags](#)

Vintage, cotton, summer

wholesale-1895 × Turkish Coffee ×

Tucson Coral × Tricorn Black ×

trade-1195 × Rainwashed ×

Peale Green × Parakeet ×

Oceanfront × Ny Blue ×

Knockout Orange ×

Kendall Charcoal × Hinting Blue ×

Fireworks × Fawn Brindle ×

Eros Pink × Dove × Custom ×

Creme ×

complete-backgammon-table ×

Club Navy × Bolero ×

+ To add a manufacturer SKU, from the Admin > Products > Click the product you want to add to. In the SKU field enter the manufacturer SKU *****REMINDER: This is only for manufacturer SKU, individual oomph SKUs are all managed via the oomph product engine***

Be sure to click Save to make the changes live.

Editing Product Options (non-primary)

To edit existing product options such as adding or removing surface options you will do the following:

- + Visit Apps > oomph Product Engine
- + Use the search tools to search for the product you wish to edit.
- + To add or remove new variant options, click "View / Edit Variant Options"
- + From this screen you will see all product variant options associated with that product.
- + To remove an option simply uncheck that option and click save - all SKUs associated with this product will be deleted.
- + To add a new product option you will want to check the option(s) you want to add and click save. Once you click save all coordinating SKUs will be created.
- + The next step — to add the new option SKU — is completed via the product app navigating to Products, search for the product you just added options to and click "View / Edit Associated SKU lookups" - use the "View Blank SKUs only" checkbox and submit to only see the new empty SKU lookups.
- + Add the image / SKU associated with each new option and click save for each.

Please note this is just for additional variants - to add a new primary variant see below. Please note you need to save each SKU record individually.

Edit Individual Variant Image / SKU

To edit an individual variant image or SKU, you will do the following:

- + Navigate to "apps" > "oomph product engine"
- + Search for the product you need to update a variant image or sku for
- + Click "View / Edit Associated SKU lookups" associated with that product.
- + Find the SKU record you want to edit and update the SKU or image as needed. You can add up to 3 images per variant.

**To easily see any variants that do not have SKUs associated click the "Show blank skus only" checkbox and submit - this will filter to just show you the records which have blank SKUs - from here you can add and save each SKU record.*

- + Click save! Please note you have to click save after each image / SKU you add.

Adding New Variant Option

To add a new primary variant option to a product you will do the following:

- + First you must make sure the variant option exists. Travel to “apps” > “oomph product engine” “Variant Options” - If the option already exists you are good to go (take note of the name). If not, click “Add a new variant option” and add the option.
- + Once you are sure the variant option exists. Then via the Shopify dashboard click Products > then the product you want to add a primary variant to.
- + Scroll down to the variant area .
- + Once you add the primary variant to the product you must travel to the Apps > oomph Product engine. Search for the product you updated in the products area and click “View / Edit Variant Options.”
- + Scroll all the way to the bottom and click “Update” - this will create all of the individual SKU lookups associated with the product - the other option is to import via a spreadsheet.
- + The next step is via the product app navigating to Products, search for the product you just added options to and click “View / Edit Associated SKU lookups” - use the “View Blank SKUs only” checkbox and submit to only see the new empty SKU lookups.
- + Add the image / SKU associated with each new option and click save for each.

Please note you need to save each SKU record individually.

Adding Wholesale and Trade Pricing

- + Click “Products” under “Home” of the main Admin navigation page.
- + Navigate to the product you wish to edit and click on it.
- + In the tags area you will need to add two tags. trade-XXX and wholesale-XXX. The XXX should be replaced with a number - this is the difference between the retail price and the trade / wholesale price.

For example, if a product retails for \$10,000 and the trade should get it for \$9,000 the tag would

be trade-1000 because it is 10,000 - 9,000. The wholesale tag can be the same or different than the trade tag.

If a user is tagged Designer/Architect and is logged in, they will see trade pricing. If a user is tagged Wholesaler and is logged in, they will see wholesale pricing.

Adding Products via Shopify Admin

To add a new product via the dashboard you will do the following:

- + Click "Products" via the admin dashboard and "Add Product"
- + Enter in all product information you can via the the Shopify product template. This includes title, description, product type, tags.

Please note you will not be able to easily change the product title without re-adding the product completely, so ensure you are happy with the product title upon creation.

- + To assign product options you will navigate to Apps > oomph Product Engine, search the product and click "View / Edit Variant Options".

- + Via the product app, navigate to Products and search for the product you just added options to. Click "View / Edit Associated SKU lookups," use the "View Blank SKUs only" checkbox, and submit to only see the new empty SKU lookups.

- + Add the image / SKU associated with each new option and click save for each.

Please note you need to save each SKU record individually.

Adding Products via Import

More often than not, you will want to add products via a product import.

*Here is a video tutorial for more specific information:

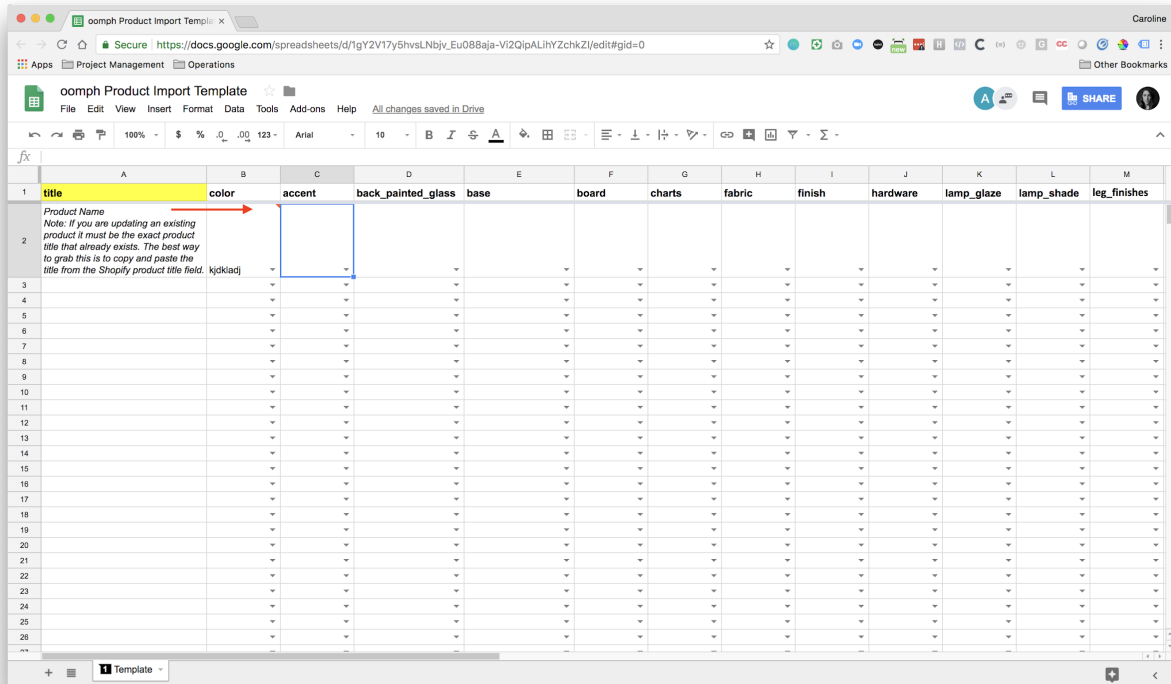
https://drive.google.com/file/d/1kwI_BEJQSFJIAH9_i61ZT3AWg2nLhLW8/view?usp=sharing

To import products you will do the following:

- + Using the template found [here](#), you will make a copy by clicking File > Make a Copy
- + Populate the spreadsheet with all of the necessary product information.

***Note: All required fields are highlighted in yellow.*

+ If you are seeing any validation errors, this means a field either has formatting issues or that variant option does not yet exist in the Product Engine. Refer to the dropdowns for each column to see what acceptable inputs are for that column.



***Note: If you need to add a new variant option to the spreadsheet, reach out to the V+V team and they will add for you. Adding a variant option in the oomph Product Engine in Shopify will not automatically add that option within the spreadsheet.*

+ To import the images you will first need to import them via AmazonS3.

+ Log in to <https://aws.amazon.com/s3/>

+ Click the oomphhome folder then the approved renders folder

+ Click "Upload"

+ Drag the renders from your computer and drop them into the upload prompt

+ Click Next > Under Manage Public Permissions be sure to change the dropdown to Grant Public Read Access to this Object(s) ****This is vital or the image will not appear.**

+ Continue clicking next and upload the images.

+ Once the images upload you will need to use a simple formula to get the image added to the Google Sheet.

+ You will then paste the following formula in the variant_image_one field:

=["https://s3.amazonaws.com/oomphhome/Approved+Renders/"&A2&"-&B2&"-&C2&".png"](https://s3.amazonaws.com/oomphhome/Approved+Renders/)

Replace B2 and C2 (highlighted above) with the most relevant columns ie. if lamp glaze and hardware would be K2 and J2. If you need to add additional columns simply add &"-&D2 prior to the last &".png"

***Note: This will only work if the render file format matches the required format which is:*

Product Title-variant 1-variant 2-variant 3.png

The product title needs to match exactly what will be uploaded into Shopify and then the variant names need to match exactly what is listed in the import dropdown options.

+ Next simply drag that formula down to populate all other rows.

+ When all cells are populated click File > Export and export as a .csv

+ Navigate to "Apps" > "oomph Product Engine"

+ Click "Add New Product"

This can be done for a full product, or just to add one set of product options.

+ Click "Choose file" and choose the .csv file from your computer

+ Upload the completed .csv

+ If there are any errors you will see that information displayed on screen - update the errors prior to importing.

+ Once an error free import has been chosen it will begin the import process.

*Please note depending on the number of line items that need to be imported this can take anywhere from 1-15 minutes or so. *You must leave the browser open and do not click back or the import will not finish.*

+ Once the import completes, go to the admin > products and preview the product to ensure everything imported the way you would hope.

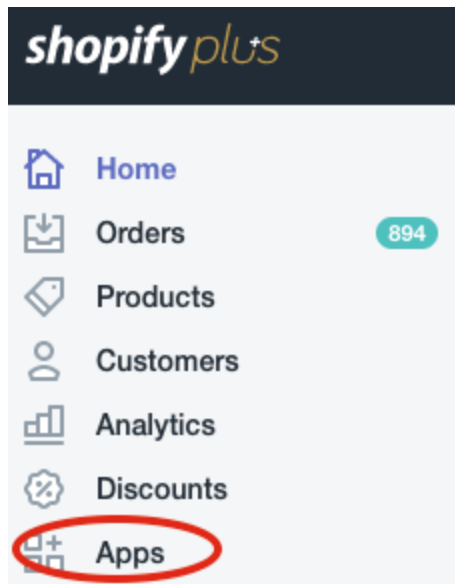
Uploading Images to Amazon S3

Variant images should be hosted on Amazon S3 and referenced via the SKU lookup in the product app. To upload an image to Amazon S3:

+ Visit <https://aws.amazon.com/s3/>

+ Click Sign In to Console > S3

- + Click oomphhome > Approved Assets folder
- + Click Upload - drag and drop or choose assets for upload.
- + Click Next > Under Manage Public Permissions use the dropdown and choose Grant Public Read Access. ***This is important as if you do not set the image will not show on the site as it will be private.*
- + Click next and upload
- + From there you can pull the URL starting with the https:// and ending with .png, which you will then drop into the Product app.
- + To access the Product app, you will navigate from Home > Apps.



















- + From here, travel to the oomph Product Engine.

Apps

[Visit Shopify App Store](#)


Installed apps

	Admin+ by eShopAdmin	View details	
	Advanced Shipping Rules	View details	
	Barcode Printer	View details	
	Bulk Account Inviter	View details	
	Covet.pics - Lookbook & Instagram Galleries	View details	
	MailChimp for Shopify	View details	
	MetaFields Editor	View details	
	Oomph Product Engine	View details	

+ Once inside the Product Engine, click into “View/Edit Associated SKU lookups” of the product whose image URL you want to edit/add.

Oomph Product Engine			
EASTON MIRROR	Dimensions: 41.5 x 31 x 1.5	View/Edit Variant Options	View/Edit Associated SKU Lookups
	Like no other, our Easton Mirror offers casual glamour and modern flair for a fabulous look. Dramatic curves are accented with your choice of custom color trim.		
	Chose any of our 18 lacquer colors for the mirror and a contrasting color for the trim. We also offer this piece in a brushed silver finish, truly something special. **At this time, residential delivery for the Easton Mirror is not available. Please ship to a furniture receiver or Moving and Storage facility. If you need to advice on shipping, please call us at 203-216-9848.**		

+ Paste the URL pulled from Amazon S3 into the image field.

 Oomph Product Engine

Variant description

Easton Mirror - Accent: Kendall Charcoal, Color: Silver

Image 1

https://s3.amazonaws.com/oomphhome/Approved+Renders/EASTON+MIRROR_Silver+Leaf_kendall+charcoal.png



+ Be sure to click "Update SKU Lookup" for each individual product update to make sure your changes are saved and made live.

Oomph Product Engine

Image 1

https://s3.amazonaws.com/oomphhome/Approved+Renders/EASTON+MIRROR_Silver+Leaf_kendall+charcoal.png

Image 2

Image 3

Parent Product ID:

Parent Product ID

9752429777

Update Sku lookup

Changing Default Image Color

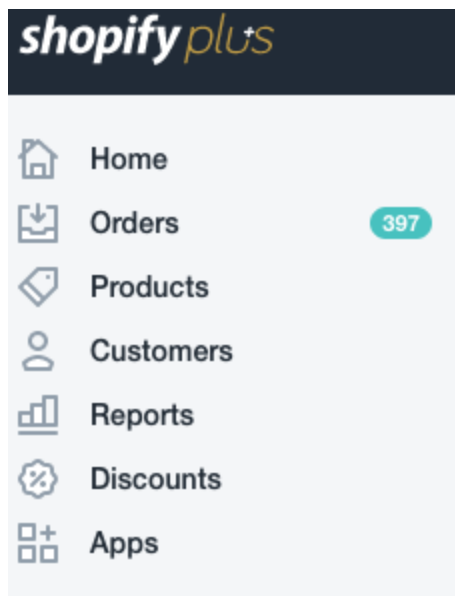
- + To change the default color selected for each of the variant options navigate to Online Store > Themes > Customize > General Settings > scroll to Variant Options Defaults for Dropdowns
- + Use the various dropdowns to set what you want the default to be.
- + Click Save

Collections

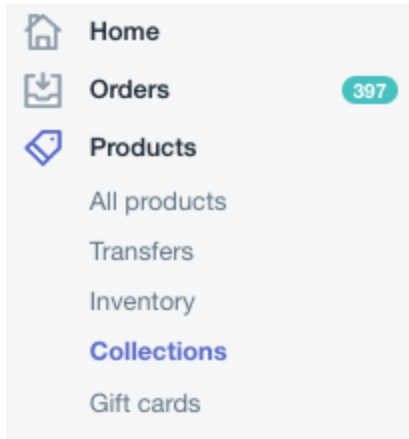
Collections can be used to categorize products. Collections are important for merchandising products as well.

Collections can be edited by doing the following:

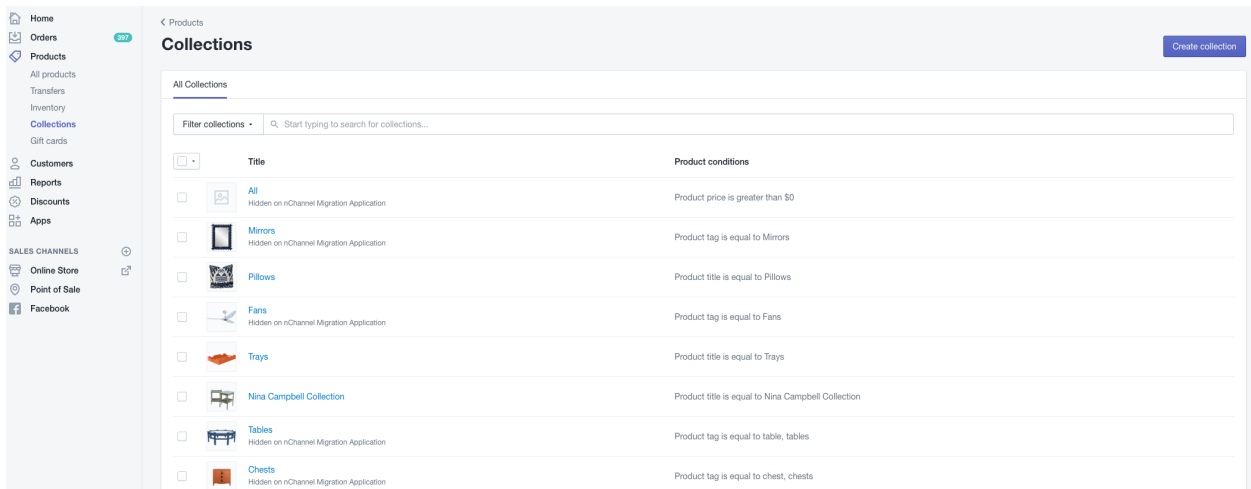
- + Click "Products" next to the tag icon on the right side of the main Admin Themes page.



+ Once you are in “Products,” click into “Collections.”



+ Once you are in “Collections,” you will see your collections displayed on the screen.



+ Select the collection you want to update. For example, if you want to work within the Nina Campbell Collection, you'll be taken to that collection page.

< Collections

Nina Campbell Collection

View More actions

Title

Nina Campbell Collection

Description

A B I U Bulleted List Numbered List Table Code Block Link Image Video Embed

Conditions

Products must match:

all conditions

any condition

Product titleis equal toNina Campbell Collection

Add another condition

Products

Sort:By best selling

There are no products in this collection

Search engine listing preview

Edit website SEO

Add a description to see how this collection might appear in a search engine listing.

Sales channelsManage

Visible on 4 of 4

Online Store

Point of Sale

Facebook

- Facebook is not connected. Connect your account to use this sales channel.[Learn more](#)

nChannel Migration Application

Collection image

UpdateRemove

Delete this collection

Save



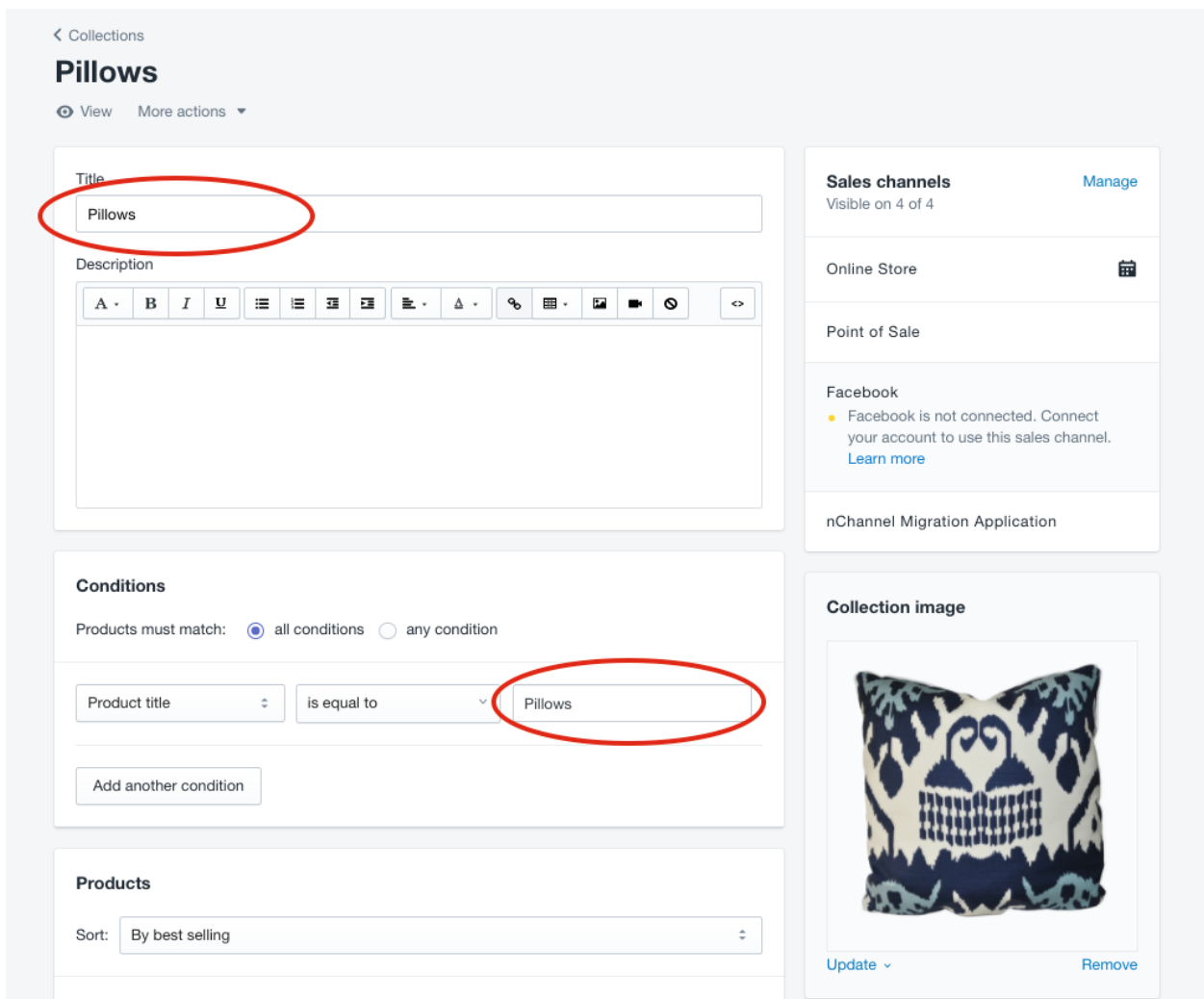
- + To edit the collection description which shows under the title on each collection page, simply edit the content within the word processor.
- + Reorder the products within each collection, by drag and drop them into the preferred order.
- + Once you are finished making edits, be sure to click “Save” at the bottom right of your screen.
- + As always, we suggest double checking that your saved edits look the way you want them to.

Create a New Collection

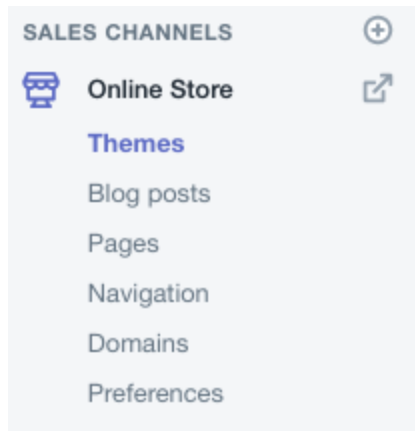
+ If you want to create a new collection, click “Create Collection” on the top right screen.



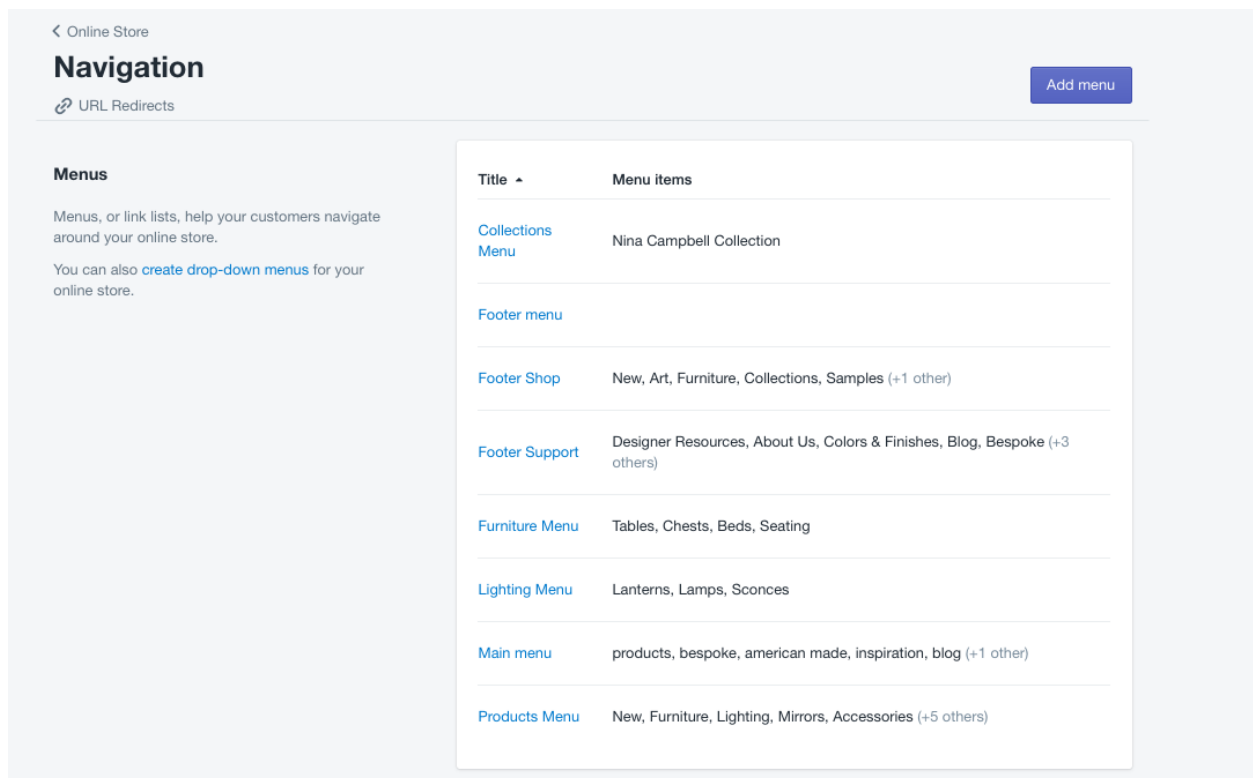
+ Once you are there, be sure to name the collection, set its condition equal to how you want it to appear (usually as itself — for example, below as “pillows”), and upload its image.



+ Then, to link your collections, click “Navigation” on the main Admin Themes page.



+ Once you are there, you will see the Collections Navigation page.



+ Here you can click into the various menus (for example, below, the Nina Campbell Collection) to link them as you want them to appear.

[< Navigation](#)

Collections Menu

Menu description

Name

Collections Menu

Handle [\(what's this?\)](#)

collections-menu

Menu items

Drag menu items to change the order that they appear in on your online store.

Add menu item

Name	Link
⋮ Nina Campbell (Collection <div>⌵</div> Nina Campbell Co... <div>⌵</div> Filter with tags <div>🗑</div>

Delete menu

Save menu

+ Be sure to save any changes and check to make sure your updates appear as you want them to.

Remove Browse By Color Bar From Collection

For collections you do not want the Browse By Color bar to show you will do the following:

- + Create the collection via Products > Collections
- + On the right hand side you will see a “Theme Templates” dropdown - using the dropdown change this to collection.no.browse.by
- + Go ahead and save the collection

Create a Complete This Look Collection

To manage the Complete This Look images that fall under any given product you will do the following:

- + First you need to create the collection you will associate with the product. [See previous section](#) for instructions on how to create a collection.
- + Complete this Look collections have been named with the following naming convention:
complete-product-title
- + Next go to “Products” the product you need to add the collection to
- + In tags, add the collection name tag and click save.

Adding / Editing Shipping Rates

To add a new shipping rate you will do the following:

- + Navigate to Apps > Advanced Shipping Rates
- + Ensure all products synced by clicking the “Sync Products” button if it appears
- + Navigate to the appropriate fulfillment provider across the top and click in
- + Click “Create Product Group” to add a new group.
- + The title should be the shipping rate ie. \$XXX Shipping *Note this is only for organization on the admin site - a user will not see this on the frontend
- + Next use the search to choose the products to add to that product group *Note this is just the products associated with that fulfillment vendor that should fall in the product group.
- + Once the product group is created, click “Add Method” to add new shipping methods.
- + You will want to set up a method for Residential and Business (if both are applicable)
- + Next enter in the price by item.

- + Do the same for the sub groups of Nantucket and Port Washington.

To move just certain variants of a product into a new shipping group you will do the following:

- + Navigate to Apps > Advanced Shipping Rates
- + Navigate to the shipping group you want to edit by clicking the name of the vendor and then the shipping group.
- + Click "Manage Products"
- + Click X Variants in small gray letters next to the product name - this will allow you to choose an individual variant as opposed to the whole product.
- + Choose the variants you want to reassign and click "Reassign"
- + Choose from the dropdown the new shipping group they should fall into. *Note the new shipping group must be created prior to reassigning.

*Note this only works for the primary variant for the product as those are the ones controlled by Shopify as opposed to the Product Engine.

Adding / Editing Fulfillment Vendors

To add a new fulfillment provider you will do the following:

To edit the email address associated with a fulfillment provider you will do the following:

- + Navigate to Settings > Shipping
- + Scroll all the way down to the fulfillment provider area and click "Manage Services"
- + Click on the provider to edit and update the email address in the email field
- + Click save - at this point all fulfillment requests for this vendor will be sent to the new email address.

Discount Script

Updating / Activating Discount Script

A custom discount script has been created for you to be able to give users a percentage off all products of a specific color. *Note this discount percentage is applied to retail and trade customers only, it does not get applied to wholesale customers.

- + To change the percentage and what color it applies to, you will navigate to Apps > Script Editor > Designer + Wholesale Discount + Color Promo - this will register as draft if it is not currently live.
- + Once you click in review lines 6, 7 and 8
 - promo_discount: this is the percentage you want to come off those products - this should be a decimal ie. 0.1 for 10%, 0.2 for 20%, etc.
 - promo_discount_message: this is what will display as the discount message - this should just be the percentage off in percentage format. This should fall within single quotes ie. '20%'
 - promo_color: this is the color that you will be discounting. This should fall within single quotes ie. 'dove' or 'tucson coral'

```
1 Input.cart.line_items.each do |line_item|
2   variant = line_item.variant
3   product = line_item.variant.product
4   customer = Input.cart.customer
5   final_discount = Money.new(cents: 0)
6   promo_discount = 0.2
7   promo_discount_message = '20%'
8   promo_color = 'dove'
```

- + Click save and publish to make it live.

+ To disable you will want to switch back to the [Trade & Wholesale Discount Script](#) by publishing that.

Scheduling Discount Script for Future

To schedule the discount script to run at a future date you will do the following:

- + Ensure you have edited the discount script based on what you want to run in the future using the instructions above.
- + Next navigate to Apps > Launchpad and click New Event to create a the event you are scheduling for.
- + Enter in a title that you will understand - this is only for organizational purposes on the backend - perhaps it is something like "Snow Day Promo" *Note a user will not see this title.
- + Enter in the start date and time in the Start Date area - if you also want to apply an end date click the checkbox under the End Date field and enter the end date and time.
- + On the right hand side click the checkbox next to "Enable Line Item Scripts"
- + The During Event dropdown should be changed to "Trade & Wholesale Discount + Color Promo"
- + The After Event dropdown should be set to "Trade & Wholesale Discount Script" as this is the active script that does not account for a promotion for products of a specific color.
- + When everything is setup click "Save" to make the changes live.

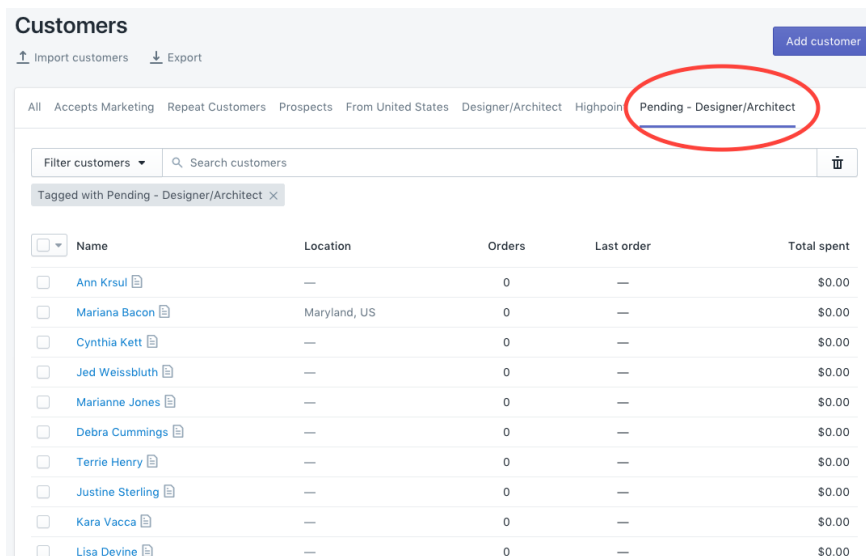
Customer Management

For additional Shopify Customer Management info review:

<https://help.shopify.com/manual/customers/manage-customers>

Reviewing / Accepting Trade Customers

+ Click “Customers” from the admin dashboard and “Pending - Designer / Architect”



Customers

↑ Import customers ↓ Export Add customer

All Accepts Marketing Repeat Customers Prospects From United States Designer/Architect Highpoint **Pending - Designer/Architect**

Filter customers ▾ 🔍 Search customers 🗑️

Tagged with Pending - Designer/Architect ✕

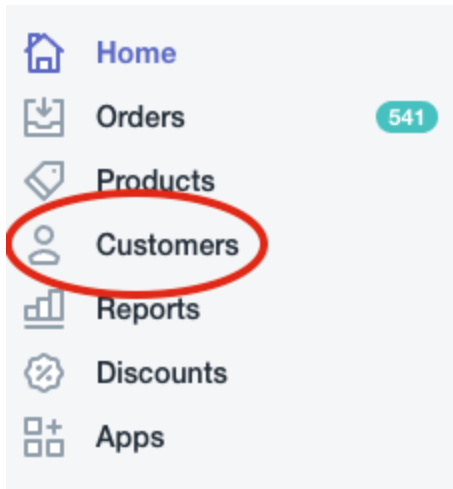
<input type="checkbox"/>	Name	Location	Orders	Last order	Total spent
<input type="checkbox"/>	Ann Krsul	—	0	—	\$0.00
<input type="checkbox"/>	Mariana Bacon	Maryland, US	0	—	\$0.00
<input type="checkbox"/>	Cynthia Kett	—	0	—	\$0.00
<input type="checkbox"/>	Jed Weissbluth	—	0	—	\$0.00
<input type="checkbox"/>	Marianne Jones	—	0	—	\$0.00
<input type="checkbox"/>	Debra Cummings	—	0	—	\$0.00
<input type="checkbox"/>	Terrie Henry	—	0	—	\$0.00
<input type="checkbox"/>	Justine Sterling	—	0	—	\$0.00
<input type="checkbox"/>	Kara Vacca	—	0	—	\$0.00
<input type="checkbox"/>	Lisa Devine	—	0	—	\$0.00

+ These are the customers that have submitted trade registration forms. You can click into each of them and review the customer notes which are the items submitted.

+ To approve, simply remove the Pending tag and tag as Designer/Architect. Also be sure to tag them as tax exempt.

Tagging Customers to Wholesale and Trade Pricing

+ If you want to tag customers that may not have gone through the trade registration as trade customers, click "Customers" under "Home" of the main Admin navigation page.



+ Click on the customer name.

 A screenshot of the 'Customers' page in the Admin interface. The left sidebar shows the navigation menu with 'Customers' selected. The main content area has a title 'Customers' and buttons for 'Import customers' and 'Export'. Below the title are filter tabs: 'All', 'Accepts Marketing', 'Repeat Customers', 'Prospects', 'From United States', 'Designer/Architect', and 'Highpoint'. The 'All' tab is active. There is a search bar labeled 'Search customers' and a 'Filter customers' dropdown. A table lists customers with columns for 'Name' and 'Location'. Each row has a checkbox on the left.


	Name	Location
<input type="checkbox"/>	Tika Brewer	New York, US
<input type="checkbox"/>	Emily Condon	Massachusetts, US
<input type="checkbox"/>	Pilar Larraz	Florida, US
<input type="checkbox"/>	Danielle Barnes	New York, US
<input type="checkbox"/>	Brigitte Sosnovsky	Georgia, US
<input type="checkbox"/>	Pamela Stutz	New York, US
<input type="checkbox"/>	Sophie Metz	Massachusetts, US
<input type="checkbox"/>	amanda reynal	Iowa, US
<input type="checkbox"/>	Louise Hurlbutt	Florida, US
<input type="checkbox"/>	David Sciacqua	—
<input type="checkbox"/>	Cathy Kincaid	California, US
<input type="checkbox"/>	Kristin Mullen	Texas, US

+ To the right, you will see a space for tags.

< Customers ← →

Tika Brewer

🚫 Disable account 🔁 Reset password ⌵ More actions




Tika Brewer
New York, NY
Customer for 15 days

Customer Note

Add a note

Recent orders



This customer hasn't placed any orders yet

Contact [Edit](#)

info@tika-b.com
Has an account

DEFAULT ADDRESS [Change](#)

Tika Brewer
129 East 80th Street Unit 1A
New York NY 10075
United States
2123272080

Tags [View all tags](#)

VIP, sale shopper, etc.

InChannel × Designer/Architect ×

- + Tag "Wholesaler" if this particular customer should receive wholesale pricing and "Designer/Architect" if they should receive trade pricing.
- + Be sure to save (and check!) your work.

Order Management

For additional Shopify Order Management info review: <https://help.shopify.com/manual/orders>

Order Type	Payment Type	Fulfillment Process	Notifications
Online	Credit Card	Order is automatically marked as fulfilled and request for fulfillment email sent to vendor with no admin action necessary.	+ Request for fulfillment > Vendor + Order confirmation > customer
POS	Credit Card	Admin must manually mark all POS orders as fulfilled. **In doing so, be sure to unselect “notify customer of this shipment”. Note: If no shipping address associated, no request for fulfillment email will go out - it will be marked as manually fulfilled.	+ Receipt can be emailed from the POS itself + Request for fulfillment > Vendor sent upon manual fulfillment selection
POS	Manual Payment	Admin must manually mark all POS orders as fulfilled. **In doing so, be sure to unselect “notify customer of this shipment”. Note: If no shipping address associated, no request for fulfillment email will go out - it will be marked as manually fulfilled.	+ Receipt can be emailed from the POS itself + Request for fulfillment > Vendor sent upon manual fulfillment selection

POS	Partial Payment	<p>Admin must manually mark all POS orders as fulfilled. **In doing so, be sure to unselect “notify customer of this shipment”.</p> <p>Note: If no shipping address associated, no request for fulfillment email will go out - it will be marked as manually fulfilled.</p>	<p>+ Receipt can be emailed from the POS itself</p> <p>+ Request for fulfillment > Vendor sent upon manual fulfillment selection</p>
Draft Order	Credit Card via invoice		<p>+ Order confirmation > customer</p> <p>+ Request for fulfillment > Vendor</p>
Draft Order	Credit Card via admin	<p>Admin must manually mark Orders originally created as draft orders where payment is accepted via admin. **In doing so, be sure to unselect “notify customer of this shipment”.</p>	<p>+ Order confirmation > customer</p> <p>+ Request for fulfillment > Vendor sent upon manual fulfillment selection</p>
Draft Order	Manual Payment: Paid	<p>Admin must manually mark Orders originally created as draft orders where payment is accepted via admin. **In doing so, be sure to unselect “notify customer of this shipment”.</p>	<p>+ Order confirmation > customer</p> <p>+ Request for fulfillment > Vendor sent upon manual fulfillment selection</p>
Draft Order	Manual Payment: Pending	<p>Admin must manually mark Orders originally created as draft orders where payment is accepted via admin. **In doing so,</p>	<p>+ Order confirmation > customer</p> <p>+ Request for fulfillment > Vendor sent upon manual</p>

		be sure to unselect “notify customer of this shipment”.	fulfillment selection
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Multiple and Partial Payments

For information on collecting multiple and partial payments, review the Shopify docs here:

<https://help.shopify.com/manual/sell-in-person/transactions/select-payment-methods/multiple-partial-payments#collect-the-balance-on-a-partially-paid-order-ipad-specific>

This is applicable to the iPad app exclusively.

Using the POS App

Review the Shopify documents for information on using the POS App:

<https://help.shopify.com/manual/sell-in-person>

**Make sure all iPads under Store under Settings have Mark Orders as Fulfilled toggled off*

Pulling in Product Options on the POS App

Since the POS app was customized for oomph, you will do the following to associate each line item property with the custom products you are selling on the POS:

- + Once all of the products have been added to the cart click the three dots in the top right of the screen.
- + Click "Admin+"
- + A pop-in will load - click "Line Items"
- + This will provide all of the dropdown options associated with that product. Select from the dropdowns and click save.

**Note you need to choose ALL product options using these dropdowns.*

- + Proceed with checking the customer out.

Checking Trade Pricing on POS App

Since the POS app was customized for oomph, you will do the following to check if a customer should get trade pricing, or to associate trade pricing with a POS order:

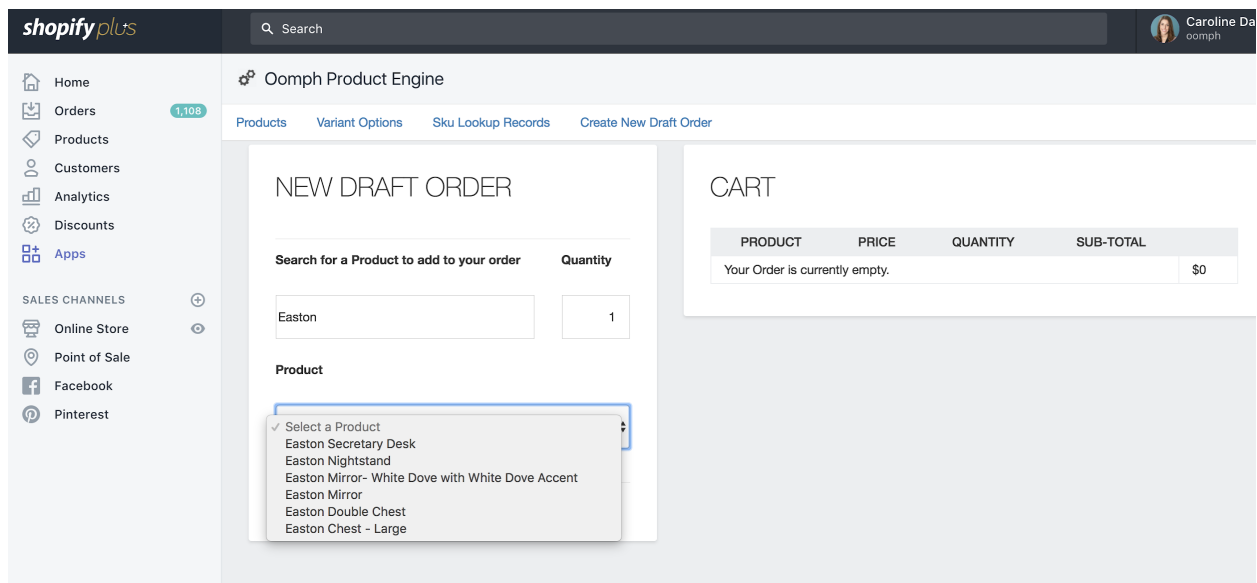
- + Once all of the products have been added to the cart, be sure to add a customer via the "Add Customer" link
- + Once the customer is added click the three dots at the top right of the screen - click "Trade Discount"
- + You can choose to check the customer to apply discount or to simply apply the discount. If you check the customer first it will check to see if the customer is tagged as Designer/Architect and if they are it will apply the trade discounts.
- + Proceed with checking the customer out.

Draft Orders

Draft orders should be used by oomph admin when they want to place an order for a customer.

To create a draft order you will do the following:

- + From the Shopify admin click “Apps” > “oomph Product Engine”.
- + Select “Create New Draft Order” from the tabs across the top
- + Use the search field to type in the product title (you can type the full title or just a part of the title)
- + Use the dropdown to select the product



- + Use the additional dropdowns that appear to assign the relevant options for that product.

The screenshot shows the Shopify Plus admin interface. On the left is a sidebar with navigation links: Home, Orders (1,108), Products, Customers, Analytics, Discounts, Apps, SALES CHANNELS (Online Store, Point of Sale, Facebook, Pinterest), and Settings. The main content area is titled 'Oomph Product Engine'. It features a dropdown menu with 'Easton Secretary Desk' selected. Below this are four sections, each with a dropdown menu: 'Primary Variant' (Select a Primary Variant Option), 'Accent' (Select an Option for accent), 'Hardware' (Select an Option for hardware), and 'Tassel' (Select an Option for tassel). At the bottom of these sections is an 'SKU' field.

- + You will see a SKU populate based on those options
 - + *Note this is an editable field, so if for any reason you need to change the SKU you can here.

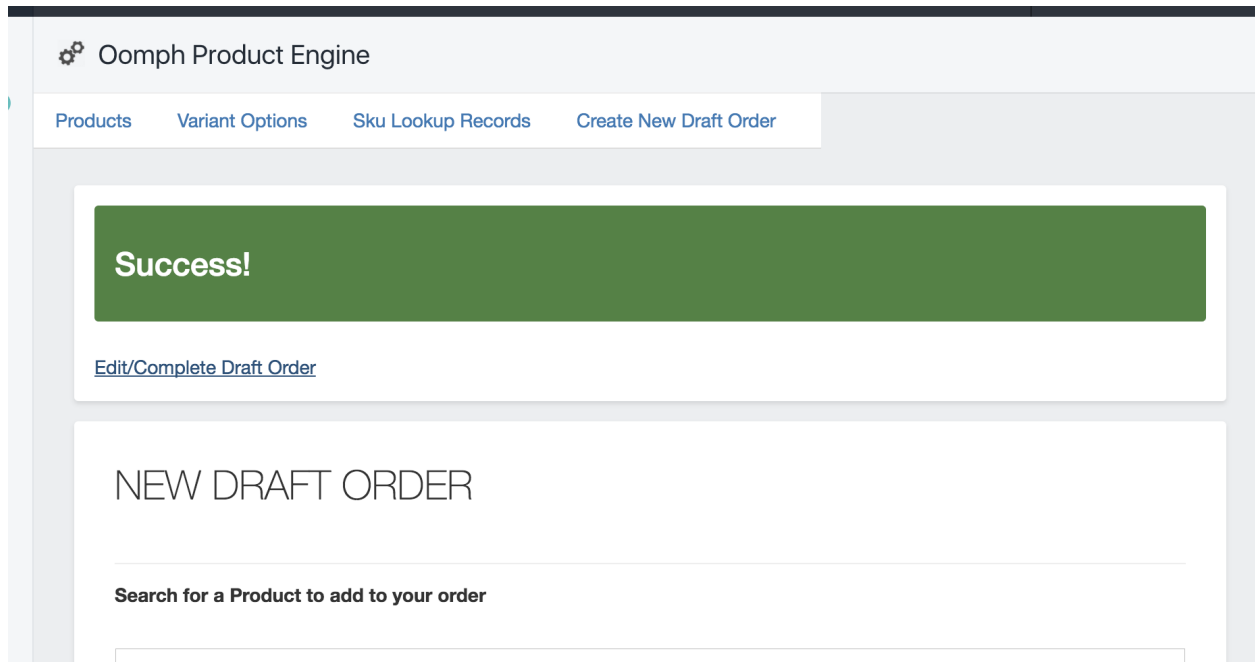
SKU

THED0404BR10

Add Selected Product to your Draft Order

- + Click "Add selected product to draft order"
- + Repeat this process for all of the products you want to add to a draft order. You will see these appear in the cart.

- + When ready click "Create Draft Order"
- + You will see a success message and a link to complete the draft order - click to navigate to the open draft orders dashboard.



- + Click on the individual product prices to add product specific discounts, or add a general discount to the whole order

#D384

Updated by an app Today at 1:17pm

Duplicate

Order details

Add custom item

Search products

Browse products

Easton Secretary Desk

Tricorn Black

SKU: MPH-763

tassel: knock

hardware: br

color: tricorn

accent: tricorn

SKU: THED0

\$5,795.00

x

Discount this order by

\$ % \$

Reason

Damaged item, loyalty discount

Close Apply

Notes

Add discount

Add a note...

Subtotal\$5,795.00

Find or create a customer

Search customers

Tags

View all tags

Urgent, reviewed, wholesale

< Draft orders

#D384 Updated by an app Today at 1:17pm


Duplicate

Order details

Add custom item

Search products

Browse products



Easton Secretary Desk
Tricorn Black \$5,795.00 x 1 \$5,795.00 x
SKU: MPH-763

Discount this item by

\$ % \$

Reason
Damaged item, loyalty discount

Close Apply

Notes

Add a note...

Subtotal \$5,795.00

Add shipping

Find or create a customer

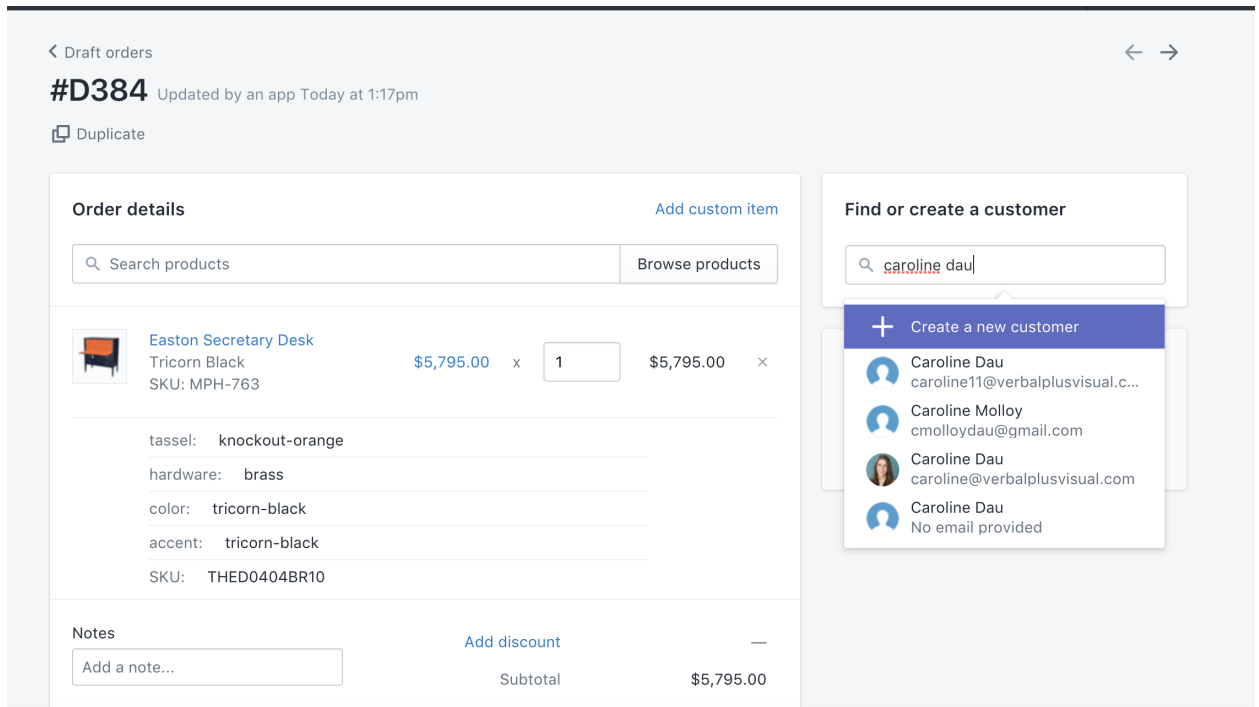
Search customers

Tags

View all tags

Urgent, reviewed, wholesale

- + Use the “Find or Create customers” option to associate the order with a customer.



The screenshot displays the 'Draft orders' section for order #D384, updated at 1:17pm. The order details include a search bar, a product list with 'Easton Secretary Desk' (SKU: MPH-763) priced at \$5,795.00, and a list of specifications: tassel: knockout-orange, hardware: brass, color: tricorn-black, accent: tricorn-black, and SKU: THED0404BR10. A 'Find or create a customer' dropdown is open, showing a search for 'caroline dau' and a list of suggestions including 'Caroline Dau' with email 'caroline11@verbalplusvisual.c...' and 'Caroline Molloy' with email 'cmolloydau@gmail.com'. The interface also includes a 'Notes' section and a 'Subtotal' of \$5,795.00.

- + Choose from one of the payment options if you are accepting payment or “email invoice” to send the invoice to the selected customer.
- + If you email the invoice, a user will then be able to review the invoice and pay via credit card themselves. If you choose one of the other payment methods, it will automatically send that draft, and the order and fulfillment process will begin.

Analytics

Below is a list of where you can access various reports. Additionally, you can create or edit custom reports as needed, and leverage the abundance of standard reports via the Reports dashboard.

Creating a New Custom Report

- + Analytics > Reports > Create Custom Report button in top right
- + Enter the name and choose the report type
- + Choose the columns you wish to have displayed
- + Choose any filters you may want to add by using the Manage Filters button
- + Click save — now that report can be accessed from the Analytics > Reports > Custom Reports area of the site.

Editing / Sorting Reports

- + Analytics > Reports > choose the report you wish to edit.
- + Use the Edit Columns button on the right of the screen to add or remove what columns are shown on screen and what data is pulled.
- + Use the Manage Filters button the left hand side of the screen to filter data as desired
- + Sort columns by clicking on on the column header itself

Exporting Reports

- + Analytics > Reports > choose the report you wish to export
- + Use the Export button at the top of the report (under the report name) - a prompt will appear. Click export to download the report as a .csv to your desktop.

Current Custom Reports

To access the custom reports that have been currently set up:

- + Analytics > Reports > Custom Reports > Sales by Product Type
- + Choose date range

+ Click the total sales category to sort by total sales

Existing custom reports include:

- + Sales by Color
- + Sales by Fabric
- + Sales by Shipping State
- + Sales by Billing State
- + Sales by Shipping City
- + Sales by Shipping City
- + Sales by Location (combo of all the shipping / billing location reports)

Notes

- + Sales by Designer Company — in order to pull this information you would need to manually tag customers to the designer parent company and then export the data and filter by tags.
- + Sales by Surface — since this is not the primary variant captured, it cannot be pulled within the Shopify Analytics.

Customer Reports

A number of customer reports can be accessed via the Analytics Reports area. Certain customer data will be pulled from the customers area of the site.

Sales by Customer Type (Trade, Wholesale)

To analyze sales by trade customers:

- + Go to Customers in admin panel and click the "Designer/Architect" tab at the top. This will filter to only customers tagged with the Designer/Architect tab (these are the trade customers)
- + You can then filter by total spent (last column) to analyze lifetime sales, or use the Filter Customers dropdown and choose "Placed an order in option" with the relevant date frame ie. last month, etc.

To analyze sales by trade customers:

- + Go to Customers in admin panel and click the "Wholesale" tab at the top. This will filter to only customers tagged with the Wholesaler tab (these are the wholesale customers)
- + You can then filter by total spent (last column) to analyze lifetime sales, or use the Filter Customers dropdown and choose "Placed an order in option" with the relevant date frame ie. last month, etc.

Sales Reports by Customer Type

To get sales information for specific customers types (retail, wholesale and designer), you will do the following:

- + Login to the Shopify admin dashboard and navigate to Apps > EX Exporter by Highview Apps
- + Navigate to the "data settings tab" and click either Wholesale Orders, Designer Orders or Retail orders depending on the report you want to update first.
- + Under "Filters" you will see a From / To date picker under the Created: Custom tab. You can choose which dates you want to run the report for, or choose some more standard options from the dropdown.
- + Click the purple Update button when you are done.
- + Then from the "Export Profiles" dashboard click Download next to the report you want to download to your computer OR click Run to have it emailed to you.