MercuryFlow™ Tutorial

Using MercuryFlow™ to
Manage and Publish Content

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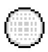
I. General Instructions

A. INTRODUCTION

The main navigation for the administrative publishing tools is in the form of a hierarchical **tree** in the left panel of the admin screen. This tree contains **nodes** that organizationally represent the content that is stored inside the MercuryFlow content database. It is important to note that this content tree should not be viewed as a direct **site map**. The administrative site reflects content organization rather than site structure and navigation.

B. TERMS/ICONS

Here are a few of the main concepts behind the MercuryFlow admin navigation:

 **Website Node:**

This node reflects the entry point for the content in a website.

 **Area:**

This icon represents a broad organizational point for a group of content. This icon is frequently used to denote a section of a website, or a top-level organization of content, such as NEWS or COMMUNITY. An area can contain other **areas** or **pages**.

 **Page:**

Though this is called a **page**, it will not always correspond directly to a physical page on the website. It is simply used as a sub grouping mechanism for content in an **area**. A page can contain **containers**.

 **Container:**

A **containe**r is the main grouping mechanism for batches of published content. Containers are usually used to represent some section on a webpage in which you can create, publish, and manage the content for that section. Usually, a **container** consists of elements of like content (such as news items or events) and does not mix **content types**. Items in a **container** can be published by date range, ordered, featured, and even “queued,” and these concepts may behave differently in different areas of the website depending on the needs of the developer.

 **Content Types:**

Usually, there will be several different types of content in the MercuryFlow admin, ranging from articles to events books to CDs, etc. Each of the content types can be browsed generically (i.e. regardless of where it is published) by going to the **content types** node. Each area within the site can have its own sets of content as well, so as you drill down in the tree, you can view the content types associated with an area. This is also where archived items can be found after they’ve fallen out of their published state.

 **Content Type:**

An individual content type. Users with the appropriate permissions can edit a **content type** by clicking on this icon.

 **Content Item:**

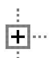
Each type of content consists of items of that content (such as an article). You can add items either from the **content types** node in the tree, or from the **container** interface**.** When you add a piece of content, that content always gets "owned" by the area in which you added that piece of content. Therefore, if you add an article to the NEWS area of a site, it will always be owned by the news area. Consequently, it will only show up in that **content type** tree. However, you can publish a piece of content to any **container** in which you have publishing rights.

 **Copy Content:**

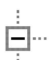
Whenever you see this icon next to a piece of content, it means that this piece of content is available for you to copy and paste into another **container** or attach to a **linked item**. Content can only be pasted into containers or linked via a linked item; the wand cannot be used to move a piece of content from one content types tree to a content types tree in another area.

 **Users:**

When you expand the users node, you'll see up to two additional nodes, one for your admin users, and one for the site users. Admin users also have basic site privileges.

 **Expand:**

Used to expand any directory tree and drill down to the next level in the hierarchy.

 **Collapse:**

Used to collapse an expanded directory tree.

II. Using MercuryFlow™ to Manage Content (Content Management Interface)

When setting up a new structure within MercuryFlow, you will need to first decide how the content will be organized and published within the MercuryFlow interface. Generally, you will need to first evaluate the channel to which your content will be published. Usually (at least at the time of this writing), that channel will be a website. Many of the icons and terminology in MercuryFlow 3.0 are geared towards the web world, and this should be used to your advantage when possible.

Tallent Communications recommends modeling your MercuryFlow site/section after the organizational structure of the website for which you are providing the development. For example, if it is a smaller site with only a few pages, you might have one parent area denoting the structure of the website, underneath which would be a MercuryFlow page for each of the website pages, and the appropriate containers underneath those pages to organize page-specific content. For a larger site with multiple sections, each section having multiple pages, you might consider having a parent website area node, with a series of sub areas, and then the pages underneath those sub areas.

A. ADDING AREAS

All MercuryFlow installations will start with a **base** area underneath which all other areas will be organized. To add a new area, click on the area icon for the parent area and select *Add New Sub area*. In the main interface panel, you will see a new form for adding an area:

- **Item Name** – the friendly name of the area (i.e. “Acme Website” or “Community”).

- **Custom icon** – you can add a custom icon to an area. The default icon for an area is, but if you are designating the root of a website, you might add an icon like, or if you are designating an area that contains utility sections of a site, you might have an icon. All icons should be 20 x 20 pixels.

- **Has Admin Users** – designates whether this area will have direct site administrators, in which case a users node will show up under the area to administer the admin users.

- **Has Site Users** – designates whether this area will have site users, in which case a users node will show up under the area to administer the site users.

- **Application Path** – you can plug any custom page or section into a MercuryFlow structure by adding a “custom” area node to your tree. In the application path field, you would put the URL to the path of your new section or site. When the name of the area is clicked, it will take the admin user to the application path specified. When an application path is specified, the expand/collapse icons will not appear with that area. The MercuryFlow admin will automatically pass the area id of the parent area for the application in the querystring.

Keep in mind that an area can contain other areas or pages. You can infinitely nest sub areas.

B. ADDING PAGES

A page is simply a placeholder between an area and a container. A page can only have containers underneath it.

C. ADDING CONTAINERS

When adding containers, you can also add a custom icon, so if your container was to hold only banner ads, you could have a sale icon like . Containers can only contain content items.

D. ADDING NEW CONTENT TYPES

1. Setting up the base content type properties.

Find the **content types** icon to which you'd like to add the content type (usually the root node of the website with which you are working) and select *Add New Content Type*. You will notice that a content type node lives underneath each area. Add the new content type to the highest node at which you will need to use the content type (see section E, **Attaching Content Types**). After pressing *Add…,* you will be presented with the following options:

- **Name –** This is the internal name for the content type.
- **Label –** If you need to have a more friendly name for the content type, you can enter it here. For example, if your content type is "News," you might want the label to be "Hot Website News!!!"
- **TCMS Version –** deprecated. Do not use.
- **Default Action File –** This is the name of the file that can handle content items of the type you are creating. This is extensively used in the search capabilities of MercuryFlow. As content items are returned in the search, the item will be linked to the default action file for that content type.
- **Content Type to Copy From –** If there is another content type that is similar to the one that you are creating, you can copy that content type as a starting point for the new content type, and it will populate the content types with new instances of the attributes for that content type.
- **Navigation Type –** The default display type for a content type when browsing the content type node is "Default," which lists the item id, the item name, and the magic wand for easy copying. The items are then paged 20 items at a time. However, if the content item is date based (i.e. a Word of the Day content type), you can optionally choose to navigate the content type by date. Choose "By Date" as the navigation type.
- **Navigation Attribute ID –** Used only when "By Date" is selected. This ID indicates the id of the attribute to base the date navigation off of.
- **Callbacks –** A callback is a stored procedure that is executed immediately following the action on a particular item of the content type you are working with. For example, you might add a callback to a Web Link content type so that every time a new link item is added, you check the URL attribute to make sure that it starts with http://. Please note that the stored procedure will run on *every* item of that content type. To add a callback, simply enter the name of a valid stored procedure in the MercuryFlow database. The two parameters that are always passed to a callback are the item id and the content type id of that item.

2. Configuring attributes

After setting up the base properties of a content type, you now must configure the attributes. These attributes are what distinguish one content type from another. For example, a news content type might have headline, summary, body, and photo as its attributes, whereas a book content type might have title, author, ISBN number, description, price, etc. as its attributes.

As you set up attributes, you will also define properties that will assist in the auto-creation of the admin forms to add/edit items of the specific content types. Certain attribute properties will tell the form builder how to display the form element, such as the rows and columns of a textarea for a long-text attribute type.

a. Core attributes

There are 8 core attributes that are native to every content type. These attributes are locked and cannot be modified through the web interface:

i. **Item ID –** This is the unique ID of the item within the context of its content type. This ID is automatically created in the database. Please note that within the entire MercuryFlow database, the item id and the content type id **together** are what constitute a unique key for an item. Each content type is stored in a separate table, so different content types might have matching Item IDs.

ii. **Item Name –** The item name should be anything that contextually identifies the item for the administrator of the content. Often times, item names will overlap with another attribute for the item, such as headline. Sometimes it's difficult to distinguish when to use the item name and when to use a different attribute. An example is a news item, where you could very well put the headline in the item name. However, sometimes headlines are not the best way to categorically identify an item. If a news headline is "New Pollination Technique Causes Waves of Excitement in Gardening Community," it might be helpful for the administrator to give the item a name like "04.12.04: Gardening, New Pollination Method."

iii. **User ID –** This attribute is automatically stamped with the user id of the administrator that created the item within the system.

iv. **Area ID –** This attribute is automatically stamped with the area id underneath which the content type was created. A content item can be included in any container in any area in which the administrator has permissions, but it is always "owned" by the area in which it was created. This is important to remember for several reasons, the first of which is locating that item. The item will only appear in the content type tree underneath the area in which the item was created. If you add that item to a container in a different area, that item will **not** show up in the container's parent area's content types node. The area id also comes into play when dealing with uploaded files (images, files, etc), discussed below in the **Adding New Attributes** section.

v. **Status ID –** The status ID simply indicates whether the item is active or inactive. Setting an item to "inactive" is an easy way to ensure an item will not be returned in object-level MercuryFlow calls, regardless of the container in which it is included.

vi. **KSet ID –** refers to the keyword set used within the user profiling system. Unless you know what this is, do not use it.

vii. **Last Modified –** This attribute is automatically stamped with the datetime when a user modifies a previously created item. This value is overwritten each time the item is modified.

viii. **Last Modified By –** This attribute is automatically stamped with the user id of the administrator that last modified a previously created item. This value is overwritten each time the item is modified.

b. Custom Attributes

Custom attributes are the attributes that the administrator adds to define the "personality" of the content type. To add a new attribute, click the ⊞ *Add New Attribute* button beneath the **Content Type Attributes** section of the content type interface.

All custom attributes have a base set of properties that help define its behavior:

i. **Attribute Type:** This defines the datatype and behavior of the custom attribute. The options are:
   - **Short text –** used for shorter entries of text, usually 255 characters or less, such as a headline.
   - **Long text –** used for larger blocks of text, such as an article body.
   - **Number –** only used for whole numbers. If you need a decimal type, choose Money or Decimal.
   - **Money –** decimals that are always rounded to 2 digits after the decimal point
   - **Date –** any valid date or datetime format.
   - **Checkbox –** used for any valid Boolean statement. Might be used for any item where an answer could be limited solely to yes or no.
   - **Radio –** deprecated, do not use.
   - **Menu –** deprecated, do not use.
   - **Image –** used for any images where the content administrator needs to be able to upload an image to disk with the content item.
   - **Decimal –** decimal number. Same as money, except that with this type, you can specify the decimal precision (digits after the decimal point).
   - **File –** used for any file where the content administrator needs to be able to upload a file to disk with the content item.

ii. **Name –** This name will ultimately be the name of the database column within MercuryFlow, so it must be a name that fits database column naming conventions (i.e. moms_cookie_recipe or MomsCookieRecipe).

iii. **Label –** This is the "friendly" name displayed for the user in the admin forms for this item ("Mom's Cookie Recipe").

iv. **Description –** This description will be used only in the admin form to clarify or describe the attribute to the user (i.e. "Limit recipes to 500 characters").

v. **Default value –** The value entered here will get stamped into any item added in which the user did not specify a value for the attribute.

vi. **Display type –** Indicates whether the form field should be displayed in its default format (a text input for short text, a textarea for long text, etc) or as a menu or radio format. When menu is chosen, you can set up multiple options for the user to choose in a dropdown menu. When radio is chosen, you can set up multiple options for the user to choose in a radio button list. Please note that any items you specify for the list must be consistent with the attribute type you selected for the attribute (i.e. a number dropdown menu must contain numbers as their values). After selecting "Menu" or "Radio," you will be presented with a field called "Radio Menu Text." This is where you specify the data for the radio list or dropdown menu data. There are two ways to format this data:

- **Hard coded list –** to hard code the list of items, type in the value, followed by a pipe character ("|"), followed by the label, followed by a carriage return.

  For example:

  0|No
  1|Yes
  2|Maybe
  3|Sometimes
  4|Never

  In this example, the ensuing radio or menu display would show "No, Yes, Maybe, Sometimes, and Never" as its options, but when inserted into the Database it will insert 0 – 4, depending on the selection. Please note that you **must** have both a value and a label. If they are the same, display the value twice (i.e. Yes|Yes).

- **SQL Query** – You can optionally specify a query to dynamically build your menu or radio data. The statement should always be "sql:" followed by the query. Additionally, your query should return **exactly** two columns, the first being the value and the second being the label. For example, if you had a state table in the database, and you wanted to return a list of states where the state abbreviation would be entered into the database, but the full state name needed to be entered into the label, you would enter the following into the "Radio Menu Text" field:

  sql:select state_abbrev, state_full FROM cms_states ORDER BY state_full

vii. **Required** – this property indicates whether the attribute will be required when adding/editing an item.

viii. **Type** – A misnamed label, this property should read "Secondary Validation Type." It indicates any other types of regular expression validation you would like to use to qualify the input value in order to measure its integrity. If the item is not required, it will allow the user to decline to enter a value, but if the user does enter a value, that value will be run it through the secondary validation upon submission. The secondary validation options are:
   a. **No secondary validation** – this indicates that it will only check to make sure that, if required, it has a non-whitespace value.
   b. **Custom** – this option allows the administrator to provide his or her own regular expression against which the value will be run. If this option is selected, you will be required to enter the custom regular expression as well as the ensuing message the user will receive should the value they entered fail to validate against the specified expression.
   c. **Email** – this option will ensure that the value matches a valid email address format (john@smith.com). It will **not** use any POP features to ensure it is a valid mailbox.
   d. **Zip Code** – this option will ensure that the value matches any 5 or 9 digit US postal code. 9 digit codes require the dash after the 5^{th} character.

ix. **Editable** – This property determines how the attribute will be displayed for the user on the admin form. The options are:
   a. **Editable** – selecting this option allows the user to add and modify the values for this attribute.
   b. **Read only** – selecting this option will allow the user to see the value of the attribute for the item, but will not allow them to modify that value from the admin form.

    c. **Hidden** – selecting this option will make the attribute hidden to the user from the admin form. It can be modified only through direct data manipulation or manipulation of the item through the MercuryFlow business objects in code.

x. **Search description** – This option designates the attribute as the attribute to be returned when displaying a basic search description through the search object. For example, you might select an attribute such as “Summary” for a news item or “Short Marketing Copy” for a book.

In addition to these base properties that are included with every content item, there are other properties that can be defined depending on the attribute type that you selected.

i. **Short text, Number, Money**
    a. **Max Length –** defines the maximum length, in number of characters, that the attribute may be.
    b. **HTML Size –** defines the width, in pixels, of the HTML field that will be displayed when adding/editing this attribute.

ii. **Long text**
    a. **Number of columns –** defines the width of the textarea that will be displayed when adding/editing this attribute. Please note that the name of this is misleading. You must enter the Number of Columns as the total pixels in width. So entering “500” would denote a textarea 500 pixels wide, not a textarea with 500 columns.
    b. **Number of rows –** defines the number of rows that the textarea will contain when adding/editing this attribute. This entry is in number of rows (not pixels), so it is accurately named.

iii. **Date –** this attribute has one extra property that is a drop down menu containing options as to how the date should be entered from within the admin forms. The options are:
    a. **No helper –** Selecting this option will allow the user to simply enter the date into a field. The value entered must be of a valid date or datetime format.
    b. **DateOnly helper –** Selecting this option will place a calendar icon next to the admin field. When clicked, a popup calendar will be launched, displaying a month view of the dates. The user simply clicks on the link for the day they’d like to use, and the admin will automatically enter a formatted date string into the field for the attribute. The user can then manually edit the string, or click the calendar icon to modify their entry.
    c. **DateTime helper –** Same as the DateOnly helper, except that a time field will also show a time field at the bottom of the popup window, defaulted to the current system time. The user should first edit the time fields, and then click on the link for the day they’d like to use, and the admin will automatically enter a formatted datetime string into the field for the attribute.

iv. **Decimal**
    a. **Max Length –** defines the maximum length, in number of characters, that the attribute may be.
    b. **HTML Size –** defines the width, in pixels, of the HTML field that will be displayed when adding/editing this attribute.
    c. **Decimal Precision –** defines the number of digits to be stored after the decimal point in a number. For example, if 3 is entered as the precision, a stored number might look like 23.334.

v. **Image, File –** the two properties specified here will help derive the path to which a file or image will be uploaded on the server. The path to which the image will be uploaded will be derived by combining the two properties to get a path for storage. You must make sure that the ASP.NET user has Write/Modify/Add permissions in the folder to which you are trying to upload the files.

a. **Upload Path Type –** there are three ways to manage uploaded files to the server. Each specifies the method by which the path up to the **File Upload Path** (see below) will be calculated. The selection of the upload path type will require that you to be somewhat familiar with the setup of the server to which the files will be uploaded, specifically the relationship of the upload folder to the location of the MercuryFlow administration root.

    1. **Relative –** use this type only if the admin root is located within the same main folder as the parent web root (i.e. your admin URL is something like http://www.acme.com/admin/ In this case, all images will be calculated relatively from the application root's starting point.
    2. **Full –** use this type: 1) if the administrative site lives outside of the web root, but the MercuryFlow admin pages are only used for one main website, or 2) if all media, regardless of the website, lives in one place. You can specify any UNC path, either local (i.e. d:\web\acmeRoot) or a network path (i.e. [\\MediaServer\media-d\web\acmeRoot\](\\MediaServer\media-d\web\acmeRoot\)).
    3. **Derive from Area/Config –** use this method if different areas within the MercuryFlow admin have different web roots. When using this method, the MercuryFlow admin will calculate the path first by looking at the area_id of the item in which you are uploading an image, and then by looking for a key in the configuration settings of the MercuryFlow admin's web.config file that matches that area. For example, if the area_id of an item is 105, the config key would (and must) look like:

        <add key="Area_105" value="d:\Web\acmeRoot" />

        If no area exists, the admin will find its parent area and try to find that entry in the web.config, recursively walking back up the tree until it finds a matching key or reaches the top of the hierarchy, at which point it will throw an error.

b. **File upload path –** Once the path to the root of the site has been determined using the method above, this property of the attribute will tell you how to get from that root to the folder in which the image lives. It can be as simple as "/images/" where all items live in a flat root, to something complicated like "/images/uploads/newsitems/thumbnails/". Tallent Communications recommends that you come up with a consistent file upload storage structure, and stick with that structure across all sites. For example, we use "images/uploads/" for all uploaded content (images and files alike), and then place content below based on content type, so that you end up with the more complicated structure listed above like: "/images/uploads/[contenttype]/[attribute]"

vi. **Linked Items –** when setting up a linked item, you will specify the "Linked Content Type ID" as a property. This designates the content type to which you will be linking. For example, in the news content type, you might want a "Related Links" attribute that contains a link to the weblink content type. To find out the content type of the content type to which you'd like to link, find the content type in the node and click the content type icon and choose *Edit Content Type*. The ensuing screen will have the ID. As an alternate "quick method" way of accessing that ID, you can hover over the link of an item of that content type. In the querystring will be a parameter key called "tid" (i.e.

http://www.acme.com/admin/CMS/Item.aspx?iid=123&tid=456). The value of the "tid" parameter is the content type id for that content type. Linked items always have a one-to-many relationship with their item. To administer Linked Items, see D, 2 (**Managing Linked Items**) in section **III**.

E. ATTACHING CONTENT TYPES

By default, a content type will immediately be available underneath the area in which it was configured. However, if you would like a content type to another area for use there, you may do so at any area below the original area in the hierarchy. Therefore, if you have a content type that will be used in many areas, always add the content type to the highest area node in the root to which you have access.

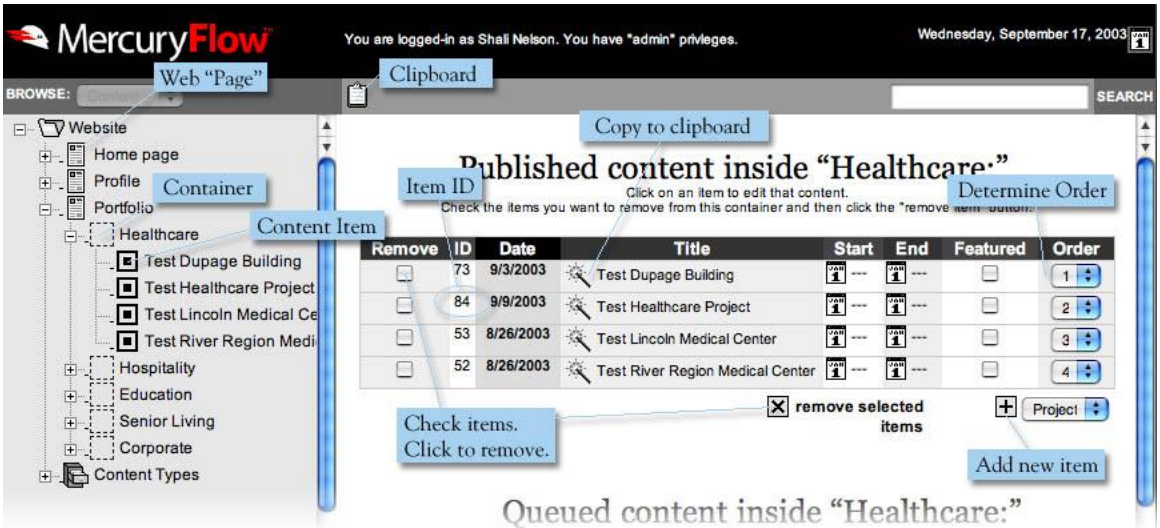
To attach a content type to an area, find the area, single click on its icon, and then check the box next to the content type you would like to include with this area. After checking the box, you will now be able to see that content type in the content types cabinet for that area.

Once you've attached a content type to an area, you can now attach a content type to a container. Attaching a content type to an area is what allows you to add an item of that type directly to that container in the container interface using the ⊞ drop down menu of content types.

To attach a content type to a container, find the container, single click on its icon, and then check the box next to the content type you would like to include with this container. After checking the box, you will now be able to see that content type in the ⊞ drop down menu of content types.

III. Using MercuryFlow™ to Work with Content

Most of the content for the website will be administered through the administrative interface. The screenshot below shows a generic interface displaying a typical screen:



A. ADDING CONTENT

There are two basic ways to add new content.

1. If you are adding an item to a specific section of the website, you will normally do so through the **container** interface. To add a new item to a **container**, expand/collapse the tree until you find the **container** you are looking for. Then, at the bottom right corner of the "Published Content" table, you'll find a ⊞ button with a list of **content types** after it. Select the type of content you'd like to add, and click the ⊞ button. Fill out the ensuing content addition form, and click "Submit." This item will now show up with the "Published Content" table.
2. If you are adding content generically that might not show up within a published location on the site, or if you are adding an item that you will copy/paste to multiple locations within the site, the best place to add content will be the **content types** node. Expand the **content types** node underneath the area in which the item needs to "live." Find the **content type** you are looking for from the tree and click on its name (i.e. "Worship Leader"). In the right-main pane, you will see a list of the content with an "Add New [content type name]" link at the top. Add the content here.
3. If you wish to add an item to a container that already exists in the system, find the item in the system (either by browsing to another **container** or **content types node**) and click the magic wand icon next to the item. You will notice that the item will appear in the clipboard section underneath the header. Find the container into which you'd like to add the item and single click the icon. Then, select "Add item [item id] to this container." You will then see the item listed in the contents of the container. **PLEASE NOTE: though you are allowed to add any item to a container, the public display for that container (i.e. section of a website) only knows how to handle certain content types specific to that container. If you are not certain as to which content types are allowed in a container, please consult a project manager or developer**.

B. EDITING CONTENT

To edit content, simply find the location of that content either by navigating to a **container** in which it is published, or by finding the piece of content in the **content types** node. Click on that item's name, and you will be presented with a read-only page containing the content for that item. Click the ⊞ *Edit* button at the bottom to edit the item. You will be presented with a form containing that item's content. Edit the content until satisfied, and click the "Submit" button, at which point you will be returned to the read-only content for that item.

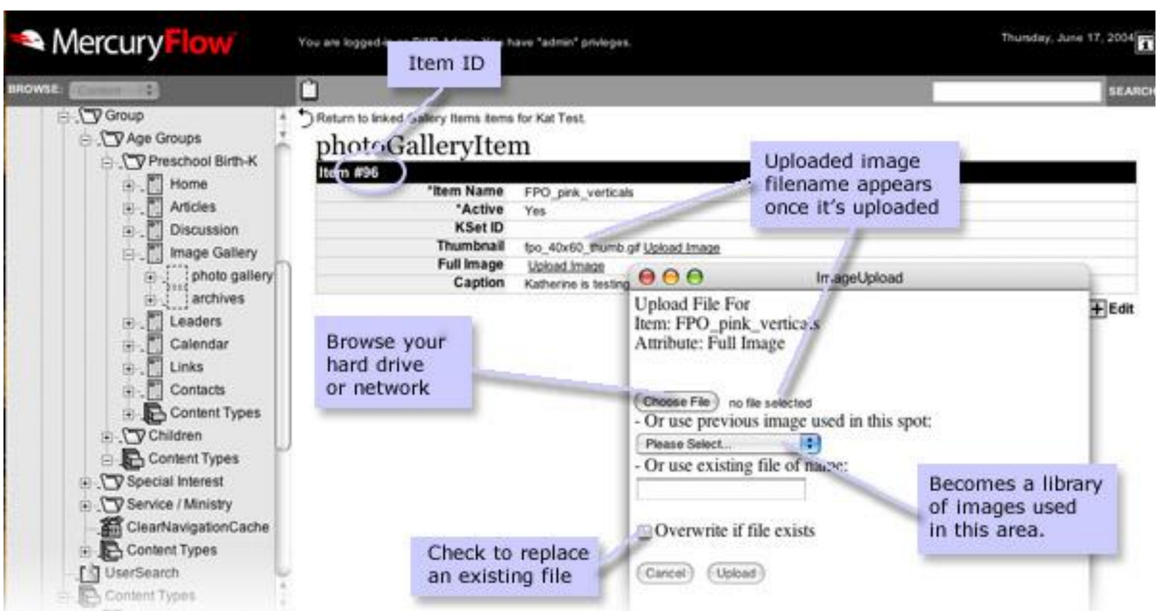
C. REMOVING CONTENT

To remove content from a **container**, navigate to the **container** from which you'd like to remove the content. Find the content item in the list under the "Published Content" table and check the box in the "Remove" column of the table. Then click the ⊞ *Remove Selected Items* link at the bottom of the table. **PLEASE NOTE that performing this action will not delete the item from the system.** It will only remove that content item from that **container**. That item will remain inside any other **containers** in which it is published, as well as the **content types** node where the content lives.

To remove content from the system, simply find the location of that content either by navigating to a **Container** in which it is published, or by finding the piece of content in the **content types** node. Click on that item's name to open it. Then click the ⊞ *Delete* link at the bottom of the screen. You will then be presented with an "Are you sure you wish to delete…" dialog. Select *No* if you've made a mistake and do not want to delete the content. Select *Yes* if you'd like to remove the item. Selecting yes will delete this piece of content from the system completely.

D. OTHER MANAGEMENT CONCEPTS

1. Adding Images



First have all images sized correctly. Label all groups of images in a consistent way so that multiple sizes of the same photo are clearly named.

In the PREVIEW of an item, click the hypertext link to “Upload Image” next to the section of the item that contains the photo.

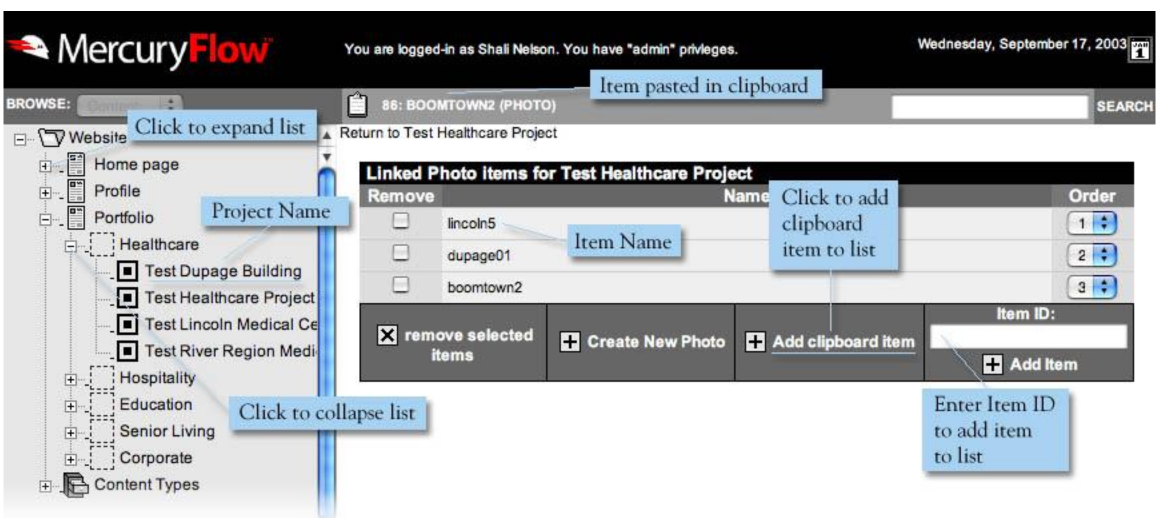
In the pop-up window, you will have three options for uploading an image:

1. **Choose File:** By clicking the button “Browse,” you will be asked to browse your hard drive or network to find the file. The filename will appear to the side of the “Choose File” button. If you have edited a photo and need to replace the file on the database, make sure the filename is the same and check the checkbox “Overwrite if file exists.”
2. **Use previous image:** if you know have already uploaded an image to this attribute slot for a different item, and you’d like to use that same image for the current item, it will show up in the dropdown menu labeled “Please select.” By selecting an item from this list and pressing “Upload,” that previous image will be used in the current attribute slot. This feature could be used, for example, if you have previously written a news item about a person whose headshot you attached to that item, and you are now writing another news article about that person. Rather than uploading the same headshot, you can simply select the one you’ve already used.
3. **Use existing filename:** Use this item if you are certain that the image exists in the image directory, but it is not listed in the “Use previous image” dropdown menu. Use this feature if you have pre-loaded images into the directory through some alternative method, such as FTP.

After you SUBMIT, the pop-up window will close and the filename will appear next to the Thumbnail label.

2. Managing Linked Items

Often an Item should link or relate to another Item in the database. In the PREVIEW of an Item, you might see a text link “Linked Item.” Click the “Linked Item” text link and you will see a screen with 4 options: Remove selected items, Create New [Item Name], Add Clipboard Item, Add Item (Item ID)



a. CREATE A NEW LINKED ITEM

Click “Create New [Item Name] and submit. The item is automatically linked to the original item. If you were to PREVIEW the original item, you will see the item name listed beside Linked Items. **You have the ability to link as many items as you wish.** You may also remove Linked Items from the list by checking them and clicking “Remove Selected Items”.

b. ADD CLIPBOARD ITEM (USING THE MAGIC WAND)
If an item already exists, navigate to it in the Nav Tree. Find the ITEM NAME you want to add and click the magic wand beside it. This places the Item onto your Clipboard (item ID and Name should appear in the dark gray bar of the Clipboard).

Go back to the Linked Photo Items screen and click ⊞ Add Clipboard Item. This "links" the Items.

b. ADD ITEM USING THE ITEM ID#
If you know the Item ID #, enter the ITEM ID# in the text input field and click ⊞ ADD ITEM.

IV. Using MercuryFlow™ to Manage Your Store

Any area within MercuryFlow can be marked as a store, at which point that area assumes certain behaviors associated with the MercuryShop application. To mark an area as a store, find the area with the Mercury Flow navigation tree and expand its node. Underneath that area is an Area Configuration node. Click on that node, check the checkbox next to "Is Store" in the ensuing form, and select "Submit." This action marks that area as a MercuryFlow store.

Please be aware that marking and area as a store is only beneficial if the MercuryShop portion of the MercuryWeb application has been installed on your website. Simply marking an area as a store does not automatically mean that you have a ready-to-use e-commerce website. The action simply enables the administrative portion of the MercuryShop system so that you can begin preparing and configuring your content.

GLOBAL STORE MANAGEMENT

Basic Concepts

Area Configuration – this node is where you will configure anything global about your store, such as a store-wide sale or promotion, as well as rules about how certain calculations are made. Any changes made in the Area Configuration will have global ramifications within the store, so be certain you understand the concepts of global behavior changes. However, all modifications to the Area Configuration will be applied only to the content nested underneath the area in which it is located.

Item Area Config – each item within a store area optionally has an **Item Area Config** setup that dictates how that individual item should behave within the context of the store in which it is located. It can control pricing, discounting, as well as basic product description, each applying only to the item within that store. For example, you can set the price of a product within one store to be different for the same product within another store without modifying the base price of the item. To get to the Item Area Config for an item, navigate to the item anywhere within the store in which you'd like to manage the attributes, either by finding the product in a container, or by browsing the Content Types node within that store area.

When you click on that item and open its expanded view, you will find the Item Area Config information at the top of that item's view page. If the item does not yet have an Item Area config, you will see an "Add Item Area Config" button at the top. Clicking this button will attach an **Item Area Config** to the item for that area. Any changes future modification to the **Item Area Config** will help dictate the behavior of the item within that area (store). If there is already an **Item Area Config** attached, you will see an "Edit Item Area Config" link. Click on that link to make changes to that items behavior within that area (store).

Store Item – when creating a new content type, you will need to decide whether the content type will be offered for sale within a store. If so, the content type will need to be marked as “Is Store Item” when creating the content type. This will automatically create several default attributes about that item that will live with the item regardless of which area it is in.

- **Product Name –** the product name will be the default, official name of the product.
- **Product Alt Name –** occasionally, the official name of the product might not be the friendliest way to display the product on the website, in which case you would put the alternate “friendly” name in the Product Alt Name field. For example, the product might be called “Walk In the Park, A” but you might want to display as “A Walk in the Park.” When displaying products on the site, the code will always look to the Alt Name first, and if none is there, it will use the Product Name.
- **Product ID –** this ID is the product ID that is used to identify and catalog the product by the content owner, such as the ISBN or a product code like “RG1123”
- **MSRP –** this is the base, default price of the item. When no **Item Area Configuration** has been set up, the MSRP will be used. If an **Item Area Configuration** has been set up for the area in which the item is being managed, it will use the “Price” attribute associated with the **Item Area Configuration**.
- **Is Free –** the MSRP is a required field. If the MSRP is $0, and Is Free is not checked, the store will not allow a customer to add that item to their cart, just as a safety check (so that you don’t accidentally sell valuable merchandise for $0). However, if the product is free, check the box and the customer will be allowed to add that item to their cart for no charge.
- **Is Free Max Item Qty –** if the item is free, but you’d like to limit how many items the user can purchase for free, indicate that number in this field.
- **Weight –** the weight of the product.
- **Shipping Type –** Indicates how the shipping for this item should be calculated. If default ship method, then it will use the base store calculation method to calculate shipping for this item. Flat rate indicates that the item will be included in a flat shipping rate structure. Flat rate + per item indicates that the item will be included in a flat shipping rate structure, but each unit purchased incurs an additional amount per unit over and above the flat rate. No shipping means that the item should be excluded from any shipping cost calculations, but the item is still shipped. Not shippable means that an item should not incur any shipping costs, and also should not be shipped (for example, an electronic download purchase). Note that most shipping types will match across a store, with the exception of not shippable items.
- **Enable Add To Cart –** when checked, this indicates that an item is allowed to be purchased by the user. If not checked, the user will not be allowed to add the item to their cart, but the item will still display or not display in the store based on the “Active” attribute.
- **Add To Cart Btn Alt Text –** if the Enable Add to Cart option above has been unchecked, text added to this field will be displayed for the customer as an explanation or description of why the product can’t be added (“Out of Stock,” “Backordered,” “Will Publish on June 2005,” etc)
- **Restrict by Pay Type –** Use this feature to designate a product that can only be purchased using a certain pay type. For example, you might want an item to be available only to customers who shop using their credit account. Conversely, you might want to exclude an item from being put on a credit account, in which case you would choose “Credit Card.”
- **Product Desc Short –** this is the short product description or summary.
- **Product Description –** this is the full product description.
- **Thumbnail –** this attribute contains thumbnail images that are uploaded to the server using the Mercury Flow interface. Please check with your web developer as to the image specifications.
- **Thumbnail URL –** this attribute is the full URL to a thumbnail image (usually on a different website).

- **Photo –** this attribute contains full images that are uploaded to the server using the Mercury Flow interface. Please check with your web developer as to the image specifications.
- **Photo URL –** this attribute is the full URL to the full size image (usually on a different website).

Like any content type in Mercury Flow, your store item may have additional attributes that help distinguish them from other store items (such as “Number of Page” for a book or “Color” for a shirt), but the above attributes will be a part of all store content types.

PRICING STRUCTURES

Every store item contains an **MSRP** attribute that indicates the base, default price of the item. When no **Item Area Configuration** has been set up, the **MSRP** will be used. However, if an **Item Area Configuration** has been set up for the area in which the item is being managed, it will use the **Price** attribute associated with the **Item Area Config**. Since an item can have an **Item Area Configuration** file attached for each store area in which it appears, the prices for that item can be different for each store area in which it is contained.

As an example, think of a retail online store that has a members-only section. In the main section, an item might have a base price of $10, so in the **Item Area Config** for the item in that area, you would set the price to $10. However, in the members only area, the item might be sold for $7.50. So within the members only area, you would set the price in that **Item Area Config** as $7.50. The price that the customer sees will be dependent upon the area in which they are shopping.

SALES

There are several ways to create the concept of a “sale” within your MercuryShop store. A sale will cause the override, or recalculation of, the MSRP price that is required for all store items.

Global Sales – to add a global sale that will affect all items in the store, do the following:

1. Click on the **Area Configuration** for the store area to which you’d like to apply the sale.
2. Next to the **Global Sale** attribute, click **Edit**.
3. Click **Create New Global Sale Price.**
4. Give the sale a name (“Holiday Sale”). Then decide when the sale should start and end. You must supply a start date, but if you do not supply an end date, the sale will run until it is deactivated by an administrator. Then choose the percentage discount the customer will receive. You cannot apply a dollar discount ($10 off all items) in a global sale. When you have filled out the information about the sale, click “Submit**.”**

You have now added your global sale. You may queue up more than one global sale using the start and end dates parameters, but if more than one global sale exists, the one with the most recent start date will be applied. Global sales apply to all items unless overridden at the item level (described in **Item Level Pricing Ladder**).

Item Sales – to add a sale for a single item, do the following:

1. Navigate to the item to which you’d like to apply the sale and click the item’s **Item Area Config**.
2. Next to the **Sale Prices** attribute, click **Edit**.
3. Click **Create New Item Sale Price**.
4. Give the sale a name (“Holiday Sale on Acme Widget”). Then decide when the sale should start and end. You must supply a start date, but if you do not supply an end date, the sale will run until it is deactivated by an administrator. You can either apply a dollar

amount discount ($3.00) or a percentage discount (10%), but not both. When you have filled out the information about the sale, click "Submit**."**

PROMOTIONS

Promotions are driven off of a Code (referred to as the "Promo Code") that the administrator configures, and the customer enters at time of checkout. As with **Sales**, **promotions** can be configured globally, or at the item level.

Global Promotions - to add a global promotion that will affect all items in the store, do the following:

1. Click on the **Area Configuration** for the store area to which you'd like to apply the promotion.
2. Next to the **Global Promo** attribute, click **Edit**.
3. Click **Create New Global Promo Code.**
4. Give the promotion a name ("Holiday Promotion"). Then decide when the promotion should start and end. You must supply a start date, but if you do not supply an end date, the promotion will run until it is deactivated by an administrator. Enter a promotion code, which can be any combination of numbers or letters. Traditionally, these are short codes in all caps (i.e. XMAS or AD011), but you may use whatever fits your business needs. Then choose the percentage discount the customer will receive if they supply that promotional code upon checkout. You cannot apply a dollar discount ($10 off all items) in a global promotion. When you have filled out the information about the promotion, click "Submit**."**

You have now added your global promotion. You may queue up more than one global promotion using the start and end dates parameters, but if more than one promotion exists, the one with the most recent start date will be applied. Global promotions apply to all items unless overridden at the item level (described in **Item Level Pricing Ladder**).

Global Sale to Global Promo Relation – if you have a global sale and a global promotion running at the same time, you can also dictate their relationship to each other in how they are applied to the customer's invoice. By default, the MercuryShop engine will select **Highest Value**, which will allow MercuryShop to choose the highest discount between global sale and global promotional discounts and will give that discount the customer. However, you may also select **Additive**, meaning that the global sale and global promotions will be combined for the customer, **Force Sale**, which will always apply the sale discount and exclude the Promotional Code, or **Force Promo**, which will force the global promotion to be applied rather than the global sale.

Item Level Promotions – to add a promotion that applies to a single item, do the following:

1. Navigate to the item to which you'd like to apply the promotion and click the item's **Item Area Config**.
2. Next to the **Item Promo Codes** attribute, click **Edit**.
3. Click **Create New Item Promo Code**.
4. Give the promotion a name ("Holiday Promotion on Acme Widget"). Then decide when the promotion should start and end. You must supply a start date, but if you do not supply an end date, the promotion will run until it is deactivated by an administrator. Next, enter a promotion code, which can be any combination of numbers or letters. Traditionally, these are short codes in all caps (i.e. XMAS or AD011), but you may use whatever fits your business needs. You can either apply a dollar amount discount ($3.00) or a percentage discount (10%), but not both. When you have filled out the information about the promotion, click "Submit**."**

Now return to the product's **Item Area Config**. You may decide how this item level promotion relates to any item level sale that might be running by editing the **Sale to Promo Relationship**. By default, the MercuryShop engine will select the **Highest Value,** which will cause MercuryShop to choose the highest discount between item sale and item promotional discounts and will give that discount the customer. However, you may also select **Additive**, meaning that the item sale and item promotions will be combined for the customer, **Force Sale**, which will always apply the sale discount and exclude the Promotional Code, or **Force Promo**, which will force the item promotion to be applied rather than the item sale.

Shipping Promo Discount – A shipping promo discount behaves just like a Global Promotional offer, except that the discount calculations are applied directly to the shipping total on the order. To set up a **Shipping Promo Discount**, do the following:

1. Click on the **Area Configuration** for the store area to which you'd like to apply the shipping promotion.
2. Next to the **Shipping Promo Discount** attribute, click **Edit**.
3. Click **Create New Shipping Discount Code.**
4. Give the shipping promotion a name ("Holiday Shipping Promotion"). Then decide when the promotion should start and end. You must supply a start date, but if you do not supply an end date, the promotion will run until it is deactivated by an administrator. Enter a promotion code, which can be any combination of numbers or letters. Traditionally, these are short codes in all caps (i.e. XMAS or AD011), but you may use whatever fits your business needs. Then, specify the amount required in order to receive the discount (i.e. "you must purchase $10 of product to receive the shipping discount"). You can either apply a dollar amount discount ($3.00 off ship total) or a percentage discount (10% of ship total), but not both. To apply "free" shipping, make the percentage discount 100%. The final attribute is "Restrict by Country." Use this attribute when you want your shipping discount to only apply to a certain country, such as the US. This is helpful when international shipping costs would be too costly to apply shipping discounts. When you have filled out the information about the shipping promotion, click "Submit**."**

Item Bulk Price Discount – If your store offers bulk pricing discounts, that model can be accommodated within MercuryShop. There are two components to the bulk pricing mechanism.

- **Bulk price range** – this content type allows you to set up a quantity range to which a particular discount applies, and in addition, what dollar amount or percentage discount (but not both) should be applied to that range. For example, if someone orders between 50 – 100 products, they might get a 2% per unit discount. If they order between 101 – 200, they might get a 5% per unit discount.
- **Bulk price set** – a bulk price set is a collection of bulk price ranges that can be applied to an item. So in the example above, you might have a bulk price set that contains your 50 – 100 and 101 – 200 discount definitions.

Creating a Bulk Price Set

There are two components to a **Bulk Price Set**…the **Bulk Price Set** itself, and the **Bulk Price Ranges** contained within that group. To configure a new **Bulk Price Set**:

1. Go to the **Content Types** node directly underneath the store in which you are managing items.
2. Click on the "Bulk Price Set" content type item in the **Content Types** tree.
3. Click "Add new Bulk Price Set" at the top of the resulting page.
4. Give the item an item name.
5. Click "Submit."

To configure the **Bulk Price Ranges** within that set:

1. Click the "Edit" button next to the **Bulk Price Ranges.**

2. Click the “Create New Bulk Price Range” button.
3. Give the range an item name, usually a representation of the upper and lower bounds of the range (i.e. “50 – 100”).
4. Specify the range start, which represents the lowest end of the range quantity for this range.
5. Specify the range end, which represents the highest end of the range quantity for this range.
6. Specify either a percentage discount (i.e. 5%) or a dollar discount ($3.00), but not both, that customers will receive if ordering a quantity of units that falls within this range.
7. Click “Submit.”
8. Click the “Return to linked Bulk Price Ranges items for…” link at the top left of the main screen.
9. If you would like to add additional options, repeat steps 2 – 7.

Once you have configured your **Bulk Price Set**, you can now apply that set to an item within that area.

To apply a bulk price discount to an item, do the following:

1. Navigate to the item to which you’d like to apply the promotion and click the item’s **Item Area Config**.
2. Click the “Edit” link located at the bottom right corner of the **Item Area Config** box.
3. Select the bulk price set you wish to apply to that item, and then click the “Save” button.

The Item Level Pricing Ladder

Because each item can contain multiple pricing structures, be it a sale, a promotion, or a bulk price discount, or by just being a part of a global sale or promotion, it is important to understand the hierarchy by which these discounts are applied. Once you understand the hierarchy, or **pricing ladder**, you can control most of the rules for how these discounts are applied. When calculating the price of an item within a store area, MercuryShop walks up a rules ladder to determine what to apply. After calculating the discount for the first rung, it steps to the next rung to determine the next level of pricing, using the price calculated from the previous rung. Here are the rungs of the ladder and how they relate to each other, all of which assume that an **Item Area Config** file has been set up for the item (if not, it simply uses the MSRP price from the base item).

1. **Price –** the very first price applied comes from the **Price** attribute of the item’s **Item Area Config** settings.
2. **Sale to Promo Relationship –** when calculating discounts, MercuryShop will first look to see if a **Sales Price** or an **Item Promo Code** has been applied to the item. If one or the other has been applied, it will calculate that price using the defined sale or promotion. If both have been applied to an item, the calculation will look to the **Sale to Promo Relationship** attribute to figure out which one (or both) should apply. The following choices are available:
    a. **Additive –** this option will add both discounts to the purchased item.
    b. **Highest value –** this option will take the higher of the two discounts and apply that discount to the purchased item. This is the default setting for every **Sale to Promo Relationship**.
    c. **Force sale –** this option will always take the sale price and apply it to the item.
    d. **Force promo –** this option will always take the promo code price and apply it to the item.
3. **Sale Promo to Bulk Relationship –** if a bulk set has been applied to the item’s **Item Area Config** file, and the customer has ordered an amount falling within the bulk set, you can control the relationship of the bulk discount to the price that was calculated in rung 2 of the pricing ladder (**Sale to Promo Relationship)**. The following choices are available:
    a. **Additive –** this option will add both discounts to the purchased item.

   b. **Highest value –** this option will take the higher of the two discounts and apply that discount to the purchased item. This is the default setting for every **Sale Promo to Bulk Relationship**.
   c. **Force sale –** this option will always take the price calculated in rung 2 of the pricing ladder and apply it to the item.
   d. **Force bulk –** this option will always take the bulk price and apply it to the item.
4. **Item to Global Relationship –** if a global sale or promotion has been applied, you can control the relationship between the price calculated for the item in rungs 1 – 3 and any global discounts going on. These actions will take the result from rung 3 of the **Item Level Pricing Ladder** and the result of the global **Sale to Promo Relation** calculation from the **Area Config** for the store and apply the following rules to those two calculations:
   a. **Additive –** this option will add both the item level discounts and the global discounts to the purchased item.
   b. **Highest value –** this option will take the higher of the two discounts and apply that discount to the purchased item. This is the default setting for every **Item to Global Relationship**.
   c. **Force Item Discount –** this option will always take the price calculated in the **Item Level Pricing Ladder** and apply that amount. This effectively excludes the item from receiving any global discounts. Therefore, this is also a method for excluding this item from global discounts, regardless of any item level discounts. For example, if no sales, promotions, or bulk discounts apply to the item, the base **Price** attribute from the **Item Area Config** will be the resulting calculation from the **Item Level Pricing Ladder**. Therefore, if you then choose **Force Item Discount** from the **Item to Global Relationship**, this item will always be excluded from global discounts.
   d. **Force global discount –** this option will always take the global discounts and apply them to the item.

Free Item Offer

You might occasionally want to give the customer a free item just for shopping in your store (i.e. "For a limited time only, all customers purchasing $25 or more in the Acme Store will receive a FREE acme widget!!"). To implement a **Free Item Offer**, do the following:

1. Navigate to the item that you would like to offer as a free item. When you locate the item, note the **Item #** that is located in the black header bar underneath the name of the content type. It will look like **Item #123**
2. Click on the area configuration for the store area to which you'd like to apply the promotion.
3. Next to the **Free Item Offer** attribute, click **Edit**.
4. Click **Create New Free Item Offer.**
5. Give the free offer a name ("Free Acme Widget"). Then decide when the free item offer should start and end. You must supply a start date, but if you do not supply an end date, the free item offer will run until it is deactivated by an administrator. Next, decide the amount the customer must purchase in order to receive the free item. Then enter the Item # from step 1 into the Item ID field, and select the content type of the Free Item from the Content Type ID menu. Then enter the quantity of units of that Free Item the customer will receive (i.e. "Two free Acme Widget's with every purchase over $10"). You may use the **Free Item Offer** with or without a promotional code. If you'd like to tie the offer to a promo code, enter one in the "Promo Code" field, ensuring that the customer will only receive the free item if they enter the code upon checkout. Finally, you must decide whether or not the free item will be tied to the purchase of another item ("Buy the new Acme Widgets T-Shirt and receive a free copy of Acme Widgets for Dummies"). To do this, first check the "Require Cart Item" checkbox, and then enter the Required item's item ID and content type ID (to do so, follow steps 1 – 3 for the required item).
6. When you have filled out the information about the **Free Item Offer**, click "Submit**."**

Flat Promo Discount

The **Flat Promo Discount** is different than the promotional discounts above in that it operates outside the scope of the pricing ladder. A **Flat Promo Discount** does not take into consideration any items in the cart, but rather subtracts a flat dollar value from the subtotal of the invoice. This discount will applied after all cart calculations have been completed, and therefore will **always** be factored into the invoice total, regardless of any rules specified above. To implement a **Flat Promo Discount**, do the following:

1. Click on the **Area Configuration** for the store area to which you'd like to apply the shipping promotion.
2. Next to the **Flat Promo Discount** attribute, click **Edit**.
3. Click **Create New Flat Promo Discount.**
4. Give the flat promotion a name ("Holiday Flat Promo Promotion"). Then decide when the promotion should start and end. You must supply a start date, but if you do not supply an end date, the promotion will run until it is deactivated by an administrator. Enter a promotion code, which can be any combination of numbers or letters. Traditionally, these are short codes in all caps (i.e. XMAS or AD011), but you may use whatever fits your business needs. Then, specify the amount required in order to receive the discount (i.e. "you must purchase $10 of product to receive the shipping discount"). Next, decide the amount the customer must purchase in order to receive the flat promotion. Then, enter the amount (in dollars) of discount the user will receive after entering the correct promotional code.
5. When you have filled out the information about the **Flat Promo Discount**, click "Submit**.**"

OPTION GROUPS

Occasionally, a product will have multiple configuration options for the customer to choose from, all relating to a single item. For example, a t-shirt can come in small, medium, and large, and can be red, green, or black. They are all the same t-shirt in the store, but they have different option associated with them. A black, XL shirt is the same product as the red, S shirt. To achieve this result, MercuryShop includes the concept of option groups that can be applied to items.

Configuring an Option Group

There are two components to an option group…the option group itself (i.e. "Sizes"), and the options contained within that group (i.e. "S, M, L, XL"). To configure a new option group:

1. Go to the **Content Types** node directly underneath the store in which you are managing items.
2. Click on the "Option Group" content type item in the **Content Types** tree.
3. Click "Add new Option Group" at the top of the resulting page.
4. Give the item an item name, which is a name that will not be used for display, but will be used by the content administrator to identify the group (i.e. "T-Shirt Size Set, as of 10/2/2004"). Then, give the option group a display name that will be used on the website (i.e. "Sizes").
5. Click "Submit."

To configure the options with that group:

1. Click the "Edit" button next to the **Option Group Options.**
2. Click the "Create New Option Group Options" button.
3. Give the option an item name, which is a name that will not be used for display, but will be used by the content administrator to identify the option (i.e. "Extra Large"). Then, give the option a display name that will be used on the website (i.e. "XL").
4. Click "Submit."
5. Click the "Return to linked Option Group Options items for…" link at the top left of the main screen.
6. If you would like to add additional options, repeat steps 2 – 5.

Once you have configured your option group, you can now apply that group to an item within that area. When you apply an option group, you can choose which options within the group to attach to the item (i.e. if a particular shirt does not come in XL, you can choose to apply the sizes option group, but exclude that size option.

To apply an option group to an item, do the following:

1. Navigate to the item to which you'd like to apply the option group.
2. Click "Edit Item Area Config" on that item's **Item Area Config** box.
3. Click "Edit" in the bottom left of the **Item Area Config** box.
4. Check the box next to the **Enable Options** attribute and click the "Submit" button. If the **Enable Options** box is not checked, none of the options that you configure will show up on the website.
5. In the **Option Groups** section of the **Item Area Config** file, select the option group from the "Available Option Groups" drop down list and click "Add Group."
6. You will then be presented with the list of options within the option group you selected. For each option you wish to include, check the box next to the option to include it in the option group attached to the product. You can optionally also configure pricing adjustments for that item, as well as different product numbers for each item. The additional pricing will always be added to the base price of the item (before any discounts are applied). So, for example, if the extra large shirt costs $1 more than the small, medium, and large versions of the shirt, you would enter a 1 in the **Add Cost** field next to that option. If the extra small shirt is $1 less, enter a -1 into that field.
7. When you have configured all of the options, click "Save."

RELATED ITEMS

Each item can have its own set of related items per store. To configure the related items for a particular store item, do the following:

1. Navigate to the item to which you'd like to attach a set of related items.
2. Click "Edit Item Area Config" on that item's **Item Area Config** box.
3. Click "Edit" next to the **Related Items** attribute.
4. Keeping the screen open in the main pane, navigate in the left navigation tree to a container that contains the product you wish to add as related and expand that container.
5. In the left navigation tree, click on the icon next to the item you'd like to relate, and select "Copy to Clipboard" from the pop-up menu.
6. In the main right screen, click the "Add Clipboard Item" button.
7. To add additional items, repeat steps 4 – 6.

If you do not know the container in which an item you wish to relate is located, you can optionally go to the **Content Types** node for that area, click on the content type of the item you wish to relate, and then use the magic wand feature to copy the related item to the clipboard. However, because this method requires the right screen to load the content type item listing, you will have to navigate back to the parent item in order to paste it, making for a much more clunky process.