



***HOW TO
Set Up and
Modify Categories***

Revision 1.2



Miva Corporation
5060 Santa Fe Street
San Diego, CA 92109

Telephone: 858-490-2570
Telefax: 858-731-4200

<http://www.miva.com>
info@miva.com

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HOW TO

Set Up Categories

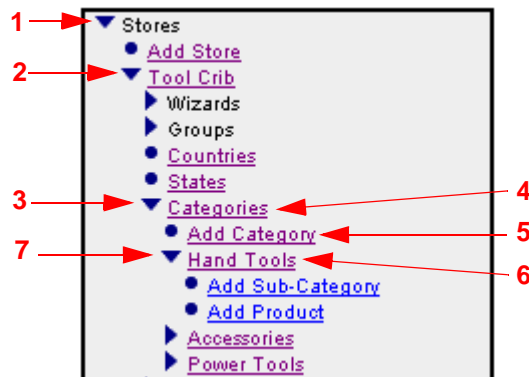
Using the Administration Interface

Introduction

To get your storefront up and moving, you will want to add products, and arrange your products by categories. You may also want to have sub-categories. It is best to have an outline of your categories and sub-categories, and how you want to arrange your products. You can place products in more than one category. Miva Merchant helps you easily set up categories and place products into categories. Miva Merchant Simple Administration guides you through creating categories and adding products to the categories, as well as other store configurations. If you are creating your first store, refer to *Start Using Miva Merchant, Wizards, & Maintain Your Store*.

To edit or add new categories:

1. Click the triangle to the left of Stores.
2. Click the triangle to the left of the store name.
3. Click the triangle next to Categories to display the current categories and the Add Category link.
4. To edit the Categories List, select the Categories link. See [“Edit Categories List” on page 2](#).
5. To add a new, top-level category, select the Add Category link. See [“Add New & Edit Category Tabs” on page 4](#).
6. To edit a specific category, select the link for the category. See [“Add New & Edit Category Tabs” on page 4](#).
7. To display links under a category, click the triangle next to the category name.
 - a. To add a sub-category, select the Add Sub-Category link.
 - b. To add products to the category, select the Add Product link. Refer to *HOW Add and Modify Products*.




Edit Categories List

The Categories link opens a form that displays a list of the categories, and allows you to perform the following tasks:

1. [“Search for a Category”](#)
2. [“Sort the Way the Categories are Displayed”](#)
3. [“Remove a Category”](#)
4. [“Add a New Category”](#)
5. [“Edit a Category”](#)
6. [“Add New & Edit Category Tabs”](#)

Search for a Category

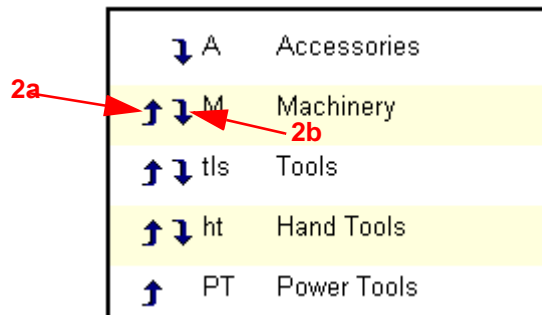
Enter a word, or part of a word, and click the Search  button. This can be either part of the Category name or the Category code. All categories containing the letters you entered are displayed.

Sort the Way the Categories are Displayed

You can display the categories by name or by code, either in ascending or descending alphabetical order.

You can sort the categories in one of the following ways:

- Name Ascending Displays the Category list A to Z by Category name.
 - Code Ascending Displays the Category list A to Z by Category code.
 - Name Descending Displays the Category list Z to A by Category name.
 - Code Descending Displays the Category list Z to A by Category code.
1. Click one of the sort links and the Category list will sort in that manner. There is a confirmation message warning you that the sort cannot be undone.
 2. You can move a Category up or down the list.
 - a. Click the up arrow to move the category up the list.
 - b. Click the down arrow to move the category down the list.



Remove a Category

1. To remove a Category, check the box in the Remove column.
2. To remove all displayed categories, click + in the Remove column.
3. Click Update.


Add a New Category

- Click the New Category  button on the Categories List form.












The Add Category form displays.

See “Add New & Edit Category Tabs” on page 4.


Edit a Category

1. Click the Edit Here  button to change the Category name or code.
2. Enter the new Code or Name.

The screenshot shows the 'Categories' administration interface. At the top, there is a search bar and a 'Sort:' section with links for 'Name Ascending', 'Name Descending', 'Code Ascending', and 'Code Descending'. Below this is a table with the following columns: Code, Name, Active, and a set of action buttons. The table contains five rows of categories: 'ac' (Accessories), 'ht' (Hand Tools), 'ma' (Machinery), 'pt' (Power Tools), and 'ct' (Cordless Tools). The 'Accessories' row is highlighted in yellow. Red arrows indicate the following actions: 1. Points to the 'New Category' button (top right). 2. Points to the 'Code' and 'Name' input fields in the 'Accessories' row. 3. Points to the 'Edit Here' button (bottom right). 4. Points to the 'Remove' button (middle right).

Code	Name	Active	Action Buttons
ac	Accessories	<input checked="" type="checkbox"/>	  
ht	Hand Tools	<input checked="" type="checkbox"/>	 
ma	Machinery	<input checked="" type="checkbox"/>	 
pt	Power Tools	<input checked="" type="checkbox"/>	 
ct	Cordless Tools	<input checked="" type="checkbox"/>	 

At the bottom of the interface, there is a pagination bar showing '1-5' and a page number '10' with a refresh button.

3. Click Update.
4. To display the Edit Category form, click the Edit  button.

The Edit Category form displays, which is similar to the Add Category form with the existing data for the category filled in.

Note: The links displayed on your screen may be different from the ones shown, depending on which Layout you have selected and which modules you have installed for your store.

Add New & Edit Category Tabs

The Add Category and Edit Category forms allow you to enter information for the following areas:

- Category
- Pagination
- Headers & Footers
- Images
- Product layout
- Products

Category Tab

Category Code

The field is alphanumeric. You can enter up to 50 characters.

Category Name

The field is alphanumeric, with a length of up to 100 characters. You may enter text and HTML.

Parent Category

Enter the desired code, or click the Lookup button. In the Category Lookup page, select the category you want as the parent, if any.




Category Lookup Search

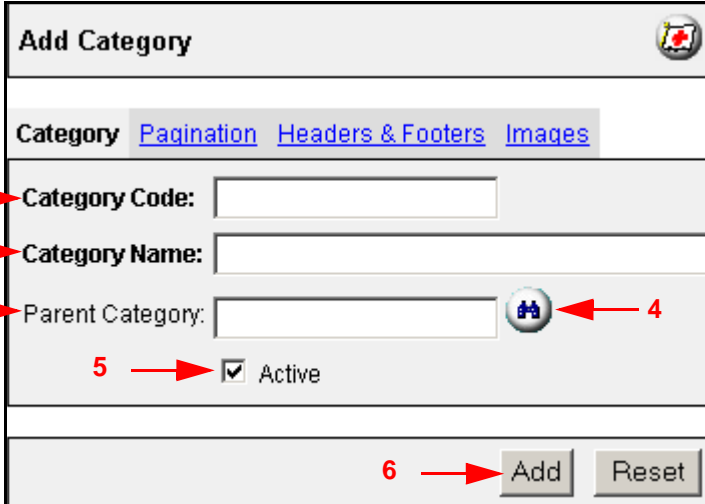
If you have many categories, you may enter a search variable in the Text Box, then click the Search button.

To see the next part of the list, click the yellow button at the bottom, right corner. Or, change the number of categories that are listed in the text box near the bottom, right corner.

Active

Ensure Active is checked. If not checked, the category will not display in your store.

1. Enter the Category code. The field is alphanumeric. You can enter up to 50 characters. Miva Merchant uses this code internally, therefore the code should be as short as possible.
2. Enter the Category Name. The field is alphanumeric, with a length of up to 100 characters. You may enter text and HTML.
3. If you want to assign this new Category to a Parent Category, you can either type the desired code, or click the Lookup  button to open up the Category Lookup window. Click the Select  button for the desired Parent Category. The category code is automatically placed in the Parent Category text box.
4. To find a Category, enter the search criteria in the text box and click the Search  button.
5. To display the category on your store, ensure that Active is checked (the default). If not checked, the category will not be seen by your customers.
6. If you do not have information to add to other tab(s), click Add (if this is a new category), or click Update (if this is an existing category). Otherwise, select the next tab.



The screenshot shows the 'Add Category' form with the following elements and callouts:


- 1**: Points to the 'Category Code' text input field.
- 2**: Points to the 'Category Name' text input field.
- 3**: Points to the 'Parent Category' text input field.
- 4**: Points to the 'Lookup' button (house icon) next to the Parent Category field.
- 5**: Points to the 'Active' checkbox, which is checked.
- 6**: Points to the 'Add' button at the bottom right of the form.

At the top of the form, there are tabs for 'Category', 'Pagination', 'Headers & Footers', and 'Images'. A 'Search' button (magnifying glass icon) is located below the Parent Category field.

Pagination Tab

If you want a certain number of products to display on this Category page of your store, set the pagination. The default is set to “Do not paginate products.”

1. To set the pagination, click the radio button next to Display
2. Enter the number of products you want to display on each page.
3. If you do not have information to add to other tab(s), click Add (if this is a new category), or click Update (if this is an existing category). Otherwise, select the next tab.

Add Category 

[Category](#) **Pagination** [Headers & Footers](#) [Images](#)

Pagination: Do not paginate products
 Display products per page

Headers & Footers Tab

Display Category Title

Displays the name of your category. Deselect it, if you want to make room for you customized Header.

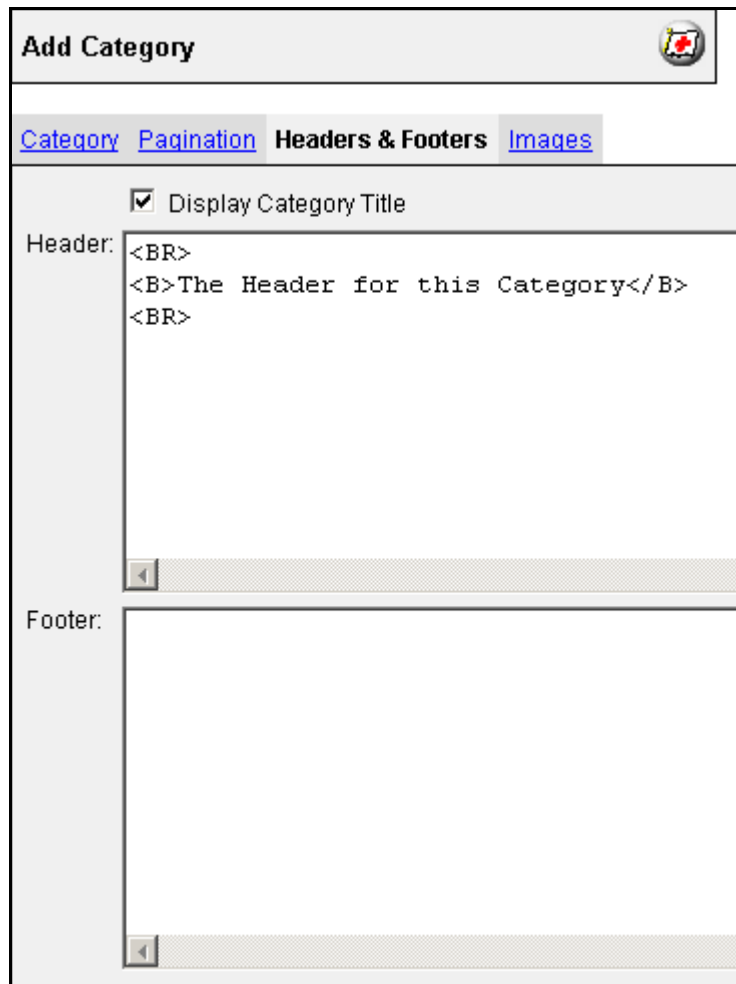
Header and Footer

Enter text and any HTML to describe this Category.

1. Enter text and any HTML to describe this Category in the Header and Footer text boxes.
2. If desired, deselect the Display Category Title checkbox to allow room to create a customized Category Title in the Header area.

The Display Category Title uses the Category Name as the Title on the select Category page in your store.

3. If you do not have information to add to other tab(s), click Add (if this is a new category), or click Update (if this is an existing category). Otherwise, select the next tab.



The screenshot shows the 'Add Category' interface with the 'Headers & Footers' tab selected. The 'Display Category Title' checkbox is checked. The 'Header' text area contains the following HTML code:

```
<BR>
<B>The Header for this Category</B>
<BR>
```

The 'Footer' text area is currently empty.

Images Tab

Tree Image

The category tree image displays in the category tree (the category menu, on the left side in your store front), and replaces the textual category name.


Title Image

The category title image displays at the top of each category page, above the products list, in your store.

You may load images for the Category menu (Tree Image) or for the title (Title Image).

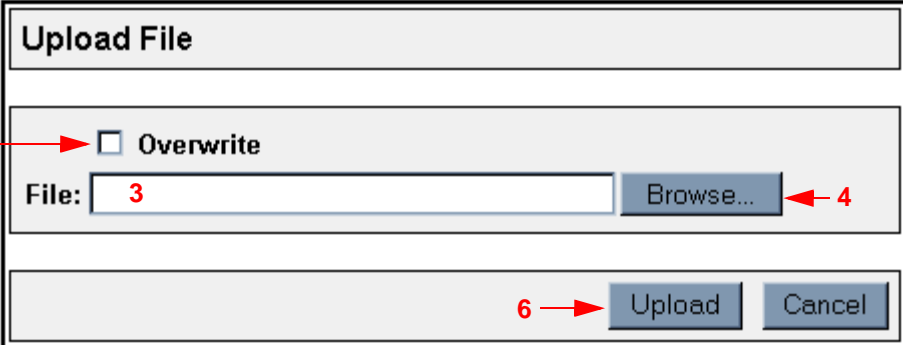
1. If the image has already been uploaded, enter the path for your graphic in the text box provided.

The Tree Image will appear in the menu area and the Title Image will appear in the main data area of your page.

2. To upload, the file, click the Upload File  button.



3. Enter the path on your local computer for the image files. These files will be uploaded to your store's website and placed in the appropriate directory.
4. If you do not know the path, click the Browse button to find the file.
5. If you have uploaded the image file before, and you are updating the file, click the Overwrite checkbox.
6. Click the Upload button.



Caution: If you use a graphic Tree Image or Title, it will replace the textual Category name.

- If you do not have information to add to other tab(s), click Add (if this is a new category), or click Update (if this is an existing category). Otherwise, select the next tab.

Product Layout Tab

Displaying when you edit the category, the Product Layout form allows you to define the way the products in the category will be displayed in your store.

Similar to the Product List and Search Layouts, you choose the format, product fields, buttons, image, and inventory message (if Tracking Inventory is activated).

- Select the Format you desire.
 - Expanded This is the way products have been displayed on the category page in past releases of Miva Merchant.
 - Line item This displays in the manner of the product listing. You can defined additional fields to be displayed than are displayed on the Product Listing screen.
- Check the Product Fields that you want to display in the store.
- Check the Buttons you want to display.
- Select the Image type you want to display with the product data on the category page, if any.
- If you are tracking inventory, select the length of the Inventory Level Message you want to display in the store, if any.
- If you selected Line Item Format, also check Product Code so there will be a link to the full description of the product. If this item is not enabled in the store, the customer will only be able to see the product data that is on the category page.

Edit Category: Accessories

[Category](#) [Pagination](#) [Headers & Footers](#) [Images](#) **Product Layout**

[Products](#)

1 → **Format:** Expanded

2 → **Product Fields:**
 Product Name Product Code
 Price Weight
 Description

3 → **Buttons:**
 Add One To Basket
 Buy One Now

4 → **Image:** Thumbnail

5 → **Inventory Level Message:** Long

6 → (Arrow pointing to the Product Code checkbox)

- If you do not have information to add to other tab(s), click Update. Otherwise, select the next tab.


Products Tab

The products tab lists all the products. You can choose which products to view, assign and unassign products to the current category, and select the sort order of the products within the category. If you have many categories, Search helps you locate them.

1. Click the All, Unassigned, or Assigned tab to view the applicable product list.

All	Displays all products
Unassigned	Displays only those products that have not been assigned to a category.
Assigned	Displays only those products that are assigned to the current category.

Search for a Product

2. To search for a specific product, enter the name, or partial name, in the text box and click the Search  button.



The product(s) matching the search text is displayed.

Assign Product

3. Check the box next to the product(s) you want to assign to this category, or click + to check all displayed products. Click Update.


Unassign a Product

4. To a product, check the box under the Remove column. Click + to check all, and – to uncheck all displayed products.






Edit Category: Hand Tools  

[Category](#) [Pagination](#) [Headers & Footers](#) [Images](#) [Product Layout](#)

Products

All **Unassigned** **Assigned** Search: 

Sort: [Name Ascending](#) [Name Descending](#)
 [Code Ascending](#) [Code Descending](#)

Assigned	Code Name	
✓+ ✓-		
<input checked="" type="checkbox"/>	↓ P001 Finish Hammer	
<input checked="" type="checkbox"/>	↑↓ P002 Screwdriver set	
<input checked="" type="checkbox"/>	↑ P005 Wrench Set	
N/A		<input type="text" value="10"/> 

Change the Sort Order

5. To change the sort order:


You can display the products by name or by code, either in ascending or descending alphabetical order.

Name Ascending	Displays the Product list A to Z by Product name.
Code Ascending	Displays the Product list A to Z by Product code.
Name Descending	Displays the Product list Z to A by Product name.
Code Descending	Displays the Product list Z to A by Product code.

- a. Click one of the links to sort the product list.

A confirmation message warns you that the sort cannot be undone.

- b. To move a product up or down, click an arrow next to the Code.

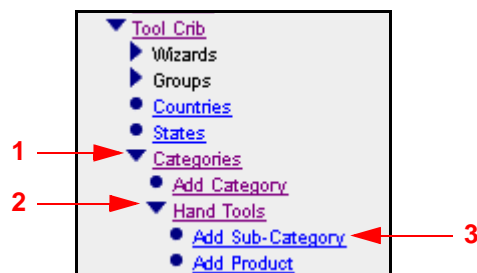
6. To open the Edit Product form, click the Edit  button.
7. Click the yellow triangle at the bottom, right corner to view the rest of the list. Or, change the number in the box and click the Refresh button.
8. Click Update.

Add a Sub-category

You may have so many products under one category that you want to further divide the products by subcategories.

1. In the Administration menu, click the triangle next to Categories.
2. Click the triangle next to the desired category.
3. Select the Add Sub-Category link.

The Add Category form is displayed with the Parent Category text box filled with the category you selected.



4. Refer to "Add New & Edit Category Tabs" on page 4.