Smith Gift Registry™ v.4.92

Users Manual

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I. Introduction

The Gift Registry module (also referred to as Smith.Vendor) is integrated and included with SmithCart. This module can provide your online store with significant incremental revenue since all of your customers have at least two gift receiving occasions a year such as a birthday or holiday, not to mention numerous milestone events such as weddings, baby showers, graduations, house warming, etc. Smith Gift Registry was designed to provide the ability to maintain a list of items or "gifts" and offer potential gift givers the capability to purchase these items. Buyers can be certain that they are purchasing items that the receiver will appreciate. A registry is limited to the stock of a given retailer and once an item has been purchased it is removed from the list and can prevent gift givers from duplicating gifts.

Each registrant can display, create, and manage multiple gift registries. Registrants are also able to leave comments for each gift or registry, as well as indicate the date of the event and address for shipping the gifts.

This manual will guide you step-by-step through installation, setup, and use of the module.

II. What is Smith Gift Registry

The Gift Registry module is an excellent way to attract new customers and gather information about the demand for your products as well as your customer's preferences. Use this data to strengthen the relationships with valuable customers and generate incremental sales.

Possibly the most common form of a gift registry is the bridal registry.   Newly engaged couples can specify particular themes or items so guests attending the wedding would know which style of dishes to bring or desired retailers to buy from for the newly married couple.

Retailers such as Williams-Sonoma, Pottery Barn, J. C. Penney, Wal-Mart and Target provide registries for almost any occasion.

III. Configuring the Smith Gift Registry

The following section describes how to configure a SmithCart as a Gift Registry.

A. Configuring the BuyNow Module

The first step is to configure the BuyNow module settings. To load the BuyNow module settings, navigate to the page with the BuyNow module and click on the "Cart Settings" button:
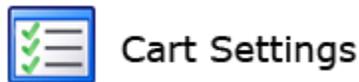
Scroll down to the section titled "Vendor Store Setup" section and expand it.

Select the radio button list option titled "Enable Registry" and check the box titled "Show Vendor Search". Click the "Save Settings" button and the bottom of the page to save your settings.

B. Adding Module to a Page

Create a new page that you want as gift registry landing page and add the Smith.Vendor module to the page.

After you add the Smith.Vendor module to a page you will see the following:
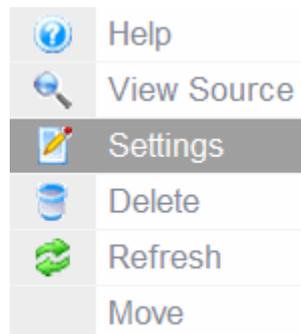

C.   Gift Registry Settings

To configure the Gift Registry module settings, hover your mouse over the module context menu (the drop down arrow in the upper right hand corner of the Vendor module container) and choose settings.

The following settings allow you to customize the basic functions of the Gift Registry module after it has been installed.

BuyNow Page Name – Select the page where you have added the BuyNow module. This tells the Vendor module which page has the BuyNow module on it for retrieving product information for your registry.

Exit Button Page Name – Select the page to navigate to when you click the "Exit" button from the Vendor module main menu.

Vendor Type – Allows you to configure the type of vendor that the vendor module is used for in your store. The following are the two options:

> **Vendor** - Extends Smith Cart to provide Marketplace or "Ecommerce Mall" capability similar to vendorsbay.com. Allows "Vendors" to sell products on your site. Currently, this feature is not currently fully implemented. Please check the change log at smithcart.com for a release date for this feature.

> **Registrant** - Extends Smith Cart to provide Gift Registry or Wedding Registry capability.

Show Textbox #1 and #2 – When the show user defined textbox is checked, a custom textbox will be displayed on the Manage Registrant page. This can be utilized for any need that meets your specific business requirement. For example, you could create a custom field for Wedding Date or Baby's Due Date, etc.

Label #1 and #2– Textbox label is the label that is displayed to the left of the custom text box #1 and custom text box #2.

Vendor Admin Email – Enter the email address you would like a confirmation email to be sent from.

Vendor Email Confirmation Subject – Enter the message that you want to appear in the subject of the confirmation email.

D.   User Setup

The Gift Registry module supports the following three types users:

1. Store Admin – Any DNN user account with administrator privileges.
2. Registrant – The registrant of the gift or wedding registry.
3. Buyer – Any anonymous or registered user purchasing gifts using the cart for a registrant.
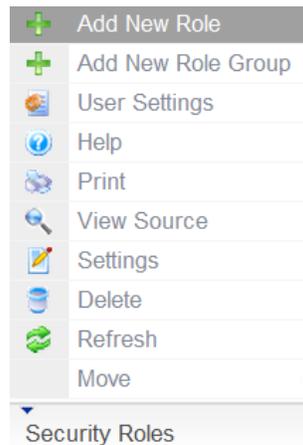
1.   Registrant User Setup

The first step in setting up a registrant in the Gift Registry is to grant the registrant DNN permissions.

1. Navigate to the DNN Admin - > Security Roles menu option
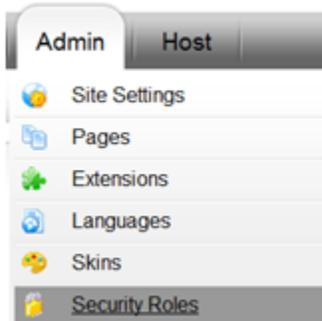
2. Select "Add New Role"

3. Enter the role name "SCRegistrant" and click update
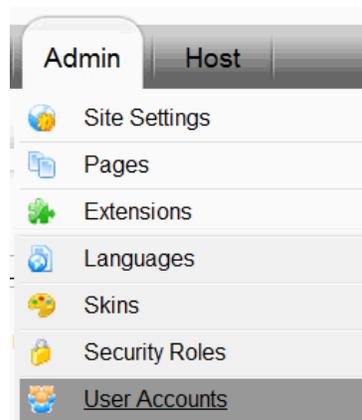
4. Navigate to the DNN Admin - > User Accounts option

5. Find your desired user and click the manage roles button

6. Assign the "SCRegistrant" role to your desired user
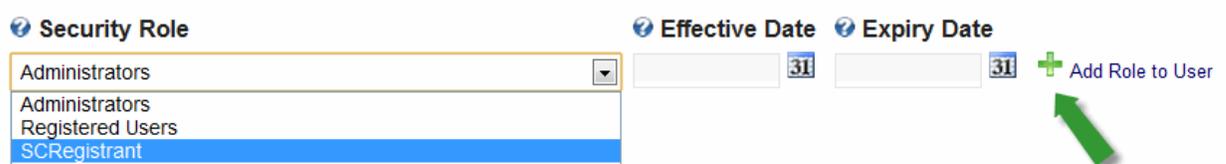
IV. Registry Management

Registry management consists of the following activities:

- Creating a new registry
- Adding items to your registry
- Updating your registry
- Deleting items from your registry

A. Creating a New Registry

To create a new registry or manage an existing registry do the following:

1. Login to your portal using the "Registrant" DNN account you created in the "User Setup" section described above.

2. Navigate to the Registry Admin Menu.

Registry Admin Menu

Manage Registrant

Manage Products

3. Click the "Manage Registrant" option from the Registry Admin Menu and the following Registry Management screen will be displayed:

Registry Management

Grooms First Name: * | JP

Grooms Last Name: * | Josephson

Brides First Name: | Kelli

Brides Last Name: | Josephson

Name of Registry: * | The Gift of Marriage for Kelli and JI

Upload Photo: | Choose File No file chosen

Current Photo:

Address: * | 20 Kendall St

Address 2: |

City: * | Laguna

Country: * | United States

State: * | California

Postal Code: * | 92677

Email: * | support@smith-consulting.com

Phone: * | 9498293020

Fax: |

Wedding Date: | 12/31/2011

Message to your Guests: | Thank you for sharing this important milestone with us.

The Registry Management screen above can be seen by the site Admin and Registrant and is used to populate registry information.

Registry Management Field Definitions

First Name and Last Name – The registrants first name and last name. The labels can be changed to anything that fits your business by modifying the RESX label values located in the \desktopmodules\smith.vendor\app_localresources folder. In the Registry Management screen above we have configured the labels for a wedding registry and named them bride and groom first and last name.

Name of Registry – Used to populate a dropdown list used for filtering on the product listing page of the BuyNow module. Shoppers use this dropdown to view your registry. When a buyer selects your registry from the dropdown on the product listing page, the items they add to their cart automatically are applied to your registry.

Photo – Does not appear in the front end cart. This feature is only for reference by the store admin.

Contact Information – All contact information should be filled out as thoroughly and accurately as possible. This is used by Admin to contact registrants regarding orders placed and/or changes that have been made to the store.

Once all fields have been populated and saved, the Registry Listing screen will be displayed as follows:

| Search: | All | | | | Search | Add Registrant | | | | | | Records: 25 |

Vendor ID	Vendor Name	First Name	Last Name	Address	City	State	Country	Postal Code	Telephone	DNN Login			
6	The Gift of Marriage for Kelli and JP	JP	Josephson	20 Kendall St	Laguna	CA	US	92677	9498293020	Kelli	Edit	Edit Products	Delete

Figure 1 - Registry Listing Screen

The registry listing screen above has quick links for the registry owner or admin to modify the products in their registry or edit their registry information.

B.   Adding Items to the Registry

Adding items to a registry associates products in the store with a registry. Adding items to the registry should be done by the Registrant or the owner of the registry.

To add items to a registry do the following:

1. Make sure you are logged in as a user that has been added to the "SCRegistrant" role.

2. Navigate to the page with the BuyNow module on it and you will see your products listed with an "Add to Cart" and "Add to Registry" buttons displayed next to the product as follows:

3. Click the "Add to Registry" button next to the desired product and you will see the following confirmation message displayed:

4. You can then return to the BuyNow module and proceed to add more items to your registry.

C.   Deleting Items from Your Registry

In order to remove an item from your registry you can go to either the product listing page or the product details page and you will see a "Remove from Registry" button displayed next to a product.

Please see the following screen shot of the product details page with a product that is already in the registry:

To remove the product from a registry click the "Remove from Registry" button and the product will be removed from the registry and the following message will be displayed on the screen:

Item Successfully Removed from Registry

You can then return to the store and add or remove more items in your registry.

Please Note: The "Add to Registry" and "Remove from Registry" buttons on the product listing and product detail pages will only show up if a user is logged in and a member of the "SCRegistrant" role.

V.   Managing Registry Products

To manage the registry products navigate back to the Registry Admin Menu.

From the Registry Admin Menu, click the "Manage Products" button. You will see the following screen displayed:

Notice that the registry owner has quick links to modify the quantity of each item they want (or remove entirely) and to make comments about the desired item. This is especially useful if the registered item comes with options such as color or size.

Field Definitions

Quantity Limit – Max quantity registrant would like purchased for any givin sku.

Quantity Purchased – Calculated field based on aggregate sales in the order detail table:

- Total Items Sold (minus) Total Items Refunded

The following 2 fields allow for adjustment of quantity purchased:

1. Qty Adjustments
2. Qty Refunded

Comments - Comments for each item in the registry

VI. Purchasing Items from a Registry

If registrant clicks add to registry from the product listing or product detail page the product will be added to the registry and redirect the user to the dnn page with the "Manage Registry" module and the product will be added to the registry

If registrant clicks add to registry from the product listing or product detail page and the product is already in their registry the cart should display the message "Product Already in Registry" and the product will not be added to the registry.

The registrant will use the existing search, sort and navigation of the buynow module to locate and add products to their registry.

When a BUYER buys a qty of an item from the registry the qty of the item is deducted from the REGISTRANT's registry.

Category Module
Provides the ability for the category module to filter within registry when a registry is already filtered.

VII. Filtering and Searching a Registry

The dropdown in buynow module lists all registrant names sorted alphabetically by last name that allows the buyer to filter products by registrant.

A.   Querystring Filtering

Provides the ability to pass the "RegistrantID" in the querystring to filter products in the the buynow module by registrant id.

The registrant id filter is persistent while the user is navigating around the store and site. A buyer has the ability to remove the registrant filter and look at all the items in the product catalog by changing the registrant dropdown list to All or another registry.

VIII. Extensions/Customizations

The SmithCart Gift Registry can be extended to fit your business model. If you're interested in modifying your registry, we can help. Please visit http://www.smith-consulting.com and contact sales@smith-consulting.com.