# Andale Checkout Getting Started Manual

# Chapter 1 : Getting Started

**Welcome to Andale Checkout!!**

This manual will take you through the step-by-step process of setting up your Andale Checkout Settings. Each section will cover a section of the Checkout Setting, which you can use to follow along with as you set up our Andale Checkout product

As you read through this manual, you will notice tips that will assist you in determining your options, but these are not required.

Once you have completed your Set Up, you can begin using the other areas of Checkout to their fullest. If you are just getting started, once you have completed your settings, you may wish to select to ADD CHECKOUT to your existing auctions.

## 1. Settings

This section will take you through the settings involved in checkout. For the purposes of this manual, we are assuming you will be also using the Andale Lister or Lister Pro. If you are using Checkout as a stand-alone product, you will need to view the ADD CHECKOUT link under your checkout Tab for specific instruction relating to Checkout as a stand-alone product.

Having the Lister or Lister Pro with checkout allows you to create many of these settings on the fly, and if you have already created your first listing using Lister and Checkout many of your setting would have been completed as you did your first listing.

The Settings you create in your Andale Checkout will reflect in your Lister and Lister Pro as you create your Listings.



*FIGURE I.  Select Settings from your Checkout Tab*

## 2. Customize Emails

In the Customize Emails section you will be able to customize the variety of emails that Andale Provides for you. Once you have them customized to your liking, you can send them in bulk from your Pending or Closed Sales pages.

To customize or preview any email, select the customize link on the right.

You may begin to utilize Andale Checkout without customizing the emails, as working examples exist for each email.

Fields that are available are in brackets, and will place the data into the brackets. For example, [Winning Bidder] will be replaced with the winning bidders name. The fields on the left that are in brackets are available for you to use in that email.



*FIGURE II.   Example of your view when select Customize*

**Tip**: Spend time initially setting up all your emails, so that you can take advantage of the ability to send bulk emails to your customers. If you do this, you can manage all your emails with one click from your Pending or Closed Sales Page.

## 2.1  Winning Bidder Email

      Select how you wish to handle Winning Bidder Emails. To send the Winning Bidder Notifications from Andale, leave this box checked. You will also need to select to send HTML or Text Emails. Click on the What's This? Link to view how the emails will appear to your bidders.

If you wish to edit this email, select CUSTOMIZE on the right or select Preview to view how the email is displayed to your buyer.

**Winning Bidder Email:** ☑ (Send Winning Bidder emails) **NEW!**
(Use this settings if you have Checkout redirect enabled for your listing. With the checkout redirect eBay will route your buyers to Andale Checkout.)

Format: [ Graphic Email ▼ ] What's this?

☐ For shopping carts with multiple items, send a separate email for each item.

**Note:** Enabling this setting sends multiple Winning Bidder Emails to your buyers for each Items in the Shopping cart.

*FIGURE III.   Set Your Winning Bidder Email Options*

**Tip:** Most sellers utilize Graphic (HTML) emails. If your buyer has a mail reader that does not support HTML emails, there is a plain text link included in each mail so that the bidder is able to read your email.

## 2.2  eBay Stores Buyer Notification Email

      Select how you wish to handle your eBay Store Sales Notifications. It is not necessary to send an email when a user wins an eBay store item.  Selecting Redirect to Andale Checkout (which is the default) will ensure you buyers enter your Checkout.

      If you wish to edit this email, select CUSTOMIZE on the right or select Preview to view how the email is displayed to your buyer.

**eBay Stores Buyer Notification Email:**
○ Send automatically after eBay Checkout
◉ Manual
Format: [ Plain Text ▼ ] What's this?

*FIGURE IV.   Select Your Stores Notification Preferences*

## 2.3  Shopping Cart Closed Email

You will be setting SHIPPING CART rules in a subsequent setting. This email will allow you to send your buyer a notification when their shopping cart open time has expired.

If you wish to edit this email, select CUSTOMIZE on the right or select Preview to view how the email is displayed to your buyer.

**Shopping Cart Closed Email:** NEW!
- ○ Send automatically after close of shopping cart
- ◉ Do not send email

*FIGURE V.   Select Your Shopping Cart Email Preferences*

**Tip**: When users are making multiple purchases, a reminder is always helpful. Customize your Shopping Cart Email to personalize it so that your buyer is comfortable and encourage them to purchase additional items from you in the future.

## 2.4  Checkout Reminder Email

Use this Setting to determine if you would like to automatically send a Checkout Reminder to a buyer who has not completed your Checkout. Choose the number of days after the auction ends before the reminder is sent, or opt to send them manually. If you select to send these manually, you may send Checkout Reminders from your Pending Sales Page. You may send them one at a time, or in bulk.

If you wish to edit this email, select CUSTOMIZE on the right or select Preview to view how the email is displayed to your buyer.

**Checkout Reminder Email:** NEW!
- ○ Send automatically when checkout not completed for [1 day ▼]
- ◉ Manual

*FIGURE VI.   Select your Checkout Reminder Email Preference*

**Tip**: Most of your "Checkout Time" will be spend on your Pending Sales Page. All emails that you send are tracked in Pending Sales. When you view your Pending Sales Details Dashboard all emails are tracked by date, which provides you with a complete history of your buyer contacts.

## 2.5  Shipping Address Request

Use this email when you require a shipping address from your Buyer. Shipping address requests can be sent from your Pending Sales Page. You may send them one at a time, or in bulk.

If you wish to edit this email, select CUSTOMIZE on the right or select Preview to view how the email is displayed to your buyer.

**Shipping Address Request:**          Always Manual

*FIGURE VII.   Customize Your Shipping Address Request Email*

## 2.6  Invoice

The Invoice email is similar to the Winning Bidder Notification, but can be sent manually from your Pending Sales Page

If you wish to edit this email, select CUSTOMIZE on the right or select Preview to view how the email is displayed to your buyer.

**Invoice:**          Always Manual

*FIGURE VIII.   Customize Your Invoice Email*

**Tip**: If you have a buyer who says they did not get a winning bidder notification or have lost their notification, send them an invoice. It contains all the information that is also in the Winning Bidder Notification.

## 2.7  Payment Request

The payment request email is sent from your Pending Sales Page and is typically used when you have already sent a Checkout Reminder and the buyer has not paid or contacted you.

You may send Payment Requests one at a time, or in bulk from your Pending Sales Page.

If you wish to edit this email, select CUSTOMIZE on the right or select Preview to view how the email is displayed to your buyer.

**Payment Request:**    Always Manual

*FIGURE IX.   Customize Your Payment Request Email*

## 2.8  Payment Receipt

The Payment Receipt Email lets your buyer know that you have received payment. You may choose to have this sent automatically when an item is marked Paid.

If you opt to send Payment Receipts manually, you may send them one at a time or in bulk from your Pending Sales Page

If you wish to edit this email, select CUSTOMIZE on the right or select Preview to view how the email is displayed to your buyer.

**Payment Receipt:**    ◯ Send automatically when shopping carts are marked paid
                        ⦿ Manual

*FIGURE X.   Select Your Payment Receipt Option*

**Tip**: If you use PayPal, your item in Pending Sales is automatically marked PAID when the PayPal Payment is cleared, which will trigger the automatic email if you have that option selected. This is a time - savings and your buyer will know you have received their payment.

## 2.9   Item Shipped Notice

The Item Shipped Notice will let your buyer know when you ship the item. You can bulk change the status of your items to SHIPPED which will trigger these emails if you have it set to automatic.

If you wish to edit this email, select CUSTOMIZE on the right. Select Preview to view how the email is displayed to your buyer.

**Item Shipped Notice:**  ○ Send automatically when shopping carts are marked shipped
⊙ Manual

*FIGURE XI.   Select Your Item Shipped Notice Option*

Tip: Your buyer's appreciate it when you let them know that their item has been shipped. If you select automatic, the email will be sent whenever your mark your item shipped. All emails sent, along with the date sent are kept in the Pending Sales Details page.

## 2.10 Feedback Reminder

The Feedback reminder will send your buyer an email to remind them to leave your feedback. You can change your Shopping Cart Status in bulk from your Pending Sales Page, which will trigger the automatic Feedback Reminder if you have chosen the send automatically

If you wish to edit this email, select CUSTOMIZE on the right. Select Preview to view how the email is displayed to your buyer.

**Feedback Reminder:**  ○ Send automatically when shopping carts are marked shipped
⊙ Manual

*FIGURE XII.   Select Your Feedback Reminder Options*

## 2.11 Carbon Copy

Choose this option to receive a carbon copy of all emails sent through your Andale Checkout.

Carbon Copy:   ☐ Carbon copy seller on all emails

*FIGURE XIII.   Select Your Carbon Preference*

**Tip**: Set up a filter in your email program to have all the carboned emails placed in a separate folder. This will save you time as typically, you would not need to read all the carbons, but if you need to reference them, you have them in a separate folder.

## 2.12 Set Email Sender

When an email is sent from Andale Checkout, it will indicate you as the sender. Use the Set Email Sender option to choose how you wish the FROM section in outgoing emails to appear to your buyers.

Set Email Sender:   ◯ Business Name ()
⦿ First Name, Last Name

*FIGURE XIV.   Select Your Sender Preference*

## 2.13 Neutral/Negative Feedback Alert

Select the Neutral/Negative Feedback alert to have an email sent to you if you receive a negative or neutral feedback comment in your eBay Feedback.

Neutral/Negative
Feedback Alert:   ☐ Send me an email when I receive neutral or negative feedback.

*FIGURE XV.   Select Your Feedback Alert Notice*

## 2.14 Refund Summary

When you request a refund from your Pending Sales Page, the Andale Refund Manager will file the appropriate information with eBay to ensure that receive your listing fee credited for non-paying bidders. This information is available under your Refund Manager link in your Andale Checkout. Use the option below to choose how often (if ever), you would like to receive a report of your pending refunds.



*FIGURE XVI.   Select Your Refund Summary Preferences*

## 3. Insurance Rates

The shipping carrier provides insurance rates and you are able to utilize the carriers' current rates. Some sellers, however, prefer to utilize their own insurance rates and Andale has provided this rate chart to allow a seller to create their own insurance rates.

To utilize this chart, and charge rates not provided by the carrier, add the item value and the insurance cost in the Insurance Rate Table.



*FIGURE XVII.   Create Your Insurance Table*

## 4. Invoices and Labels

The Invoices and Labels section allows you to set the height of your Labels and Invoices as well as specify how your Invoice is displayed.



**Label Options**

| Set label height: | 185 ∨ pixels | Preview |

**Invoice Options**

| Set invoice height: | 900 ∨ pixels | Preview |
| Customer Service Policy: | ☐ Show on printable invoice |
| Logo: | ☐ Show on printable invoice |

*FIGURE XVIII.   Set Your Invoice and Label Preferences*

## 5. Shopping Cart Rules

The Shopping Cart Rules Settings will determine how your Checkout will handle multiple item purchases as well as the length of time a buyer is able to continue shopping from you before you close the cart and request payment.



**Shopping Cart Rules**
Define how your shopping cart handles multiple
items. Discounts and Dutch options are here.

*FIGURE XIX.   Select the Shopping Cart Rules link*

**Tip**: Spend the time setting up your Shopping Cart rules for multiple purchases. This will ensure that you will not have to do much manual work or manual calculations when your buyer has made multiple purchases.

## 5.1 Shopping Cart Duration

The Shopping Cart Duration will determine the length of time a buyer is able to continue shopping from you before you close your cart and request payment.

**Shopping Cart Duration:** Keep shopping cart open for 7 days after the first item is added. See Example

*FIGURE XX.   Set Your Shopping Cart Duration*

**Tip**: The typical time to keep your Shopping Cart open is 7 days. If you are constantly adding new items, you may wish to extend the time past 7 days and encourage your buyers to make additional purchases.

## 5.2 Shipping Discounts for Multiple Items

The Shipping Discounts for Multiple Items will determine how your Andale Checkout handles multiple items.

Selecting No Discount will not discount any multiple purchases. The amount charged to your buyer is the total shipping for the auctions they have won.

**No Discount Example:**

When the shipping cost for item 1 is $10.00, and the shipping cost for item 2 is $10.00 your buyer will be charged $20.00

Selecting a Fixed Discount will allow you to deduct either a set amount or percentage off each item a buyer purchases.

**Fixed Discount Example**:

When the shipping cost for item 1 is $10.00, and the shipping cost for item 2 is $10.00, choosing to deduct $2.00 for each item will result in your buyer being charged $16.00

**Fixed Discount Percentage Example:**

When the shipping cost for item 1 is $10, and the shipping cost for item 2 is $10.00, choosing to deduct 10% will deduct $1.00 per item. Your buyer would be charged $18.00.

Selecting the Weight Based Discount will combine the weight of your items and charge based on total weight.

**Weight Based Discount Example:**

When the weight of item 1 is 10 pounds and the weight of item 2 is 10 pounds the buyer will be charged for 2 packages at 10 pounds. Selecting the weight based discount will charge the buyer for 1 package at 20 pounds.

Selecting the Dutch or Fixed Price (Store) discounts will determine how shipping is calculated for these types of items

**Dutch Auction Charge Shipping for Every Multiple Item Example:**

When your shipping cost is $5.00 if the bidder wins 1 item, the shipping cost for 4 items would be $20.00.

**Dutch Auction Discount Charge for First Multiple Items Example:**

When your shipping cost is $5.00 if the bidder wins 1 item, the shipping cost for 4 items would be $5.00

Shipping Discounts for Multiple Items: You can offer a shipping discount to charge lower combined shipping rates when selling multiple items.

○ No Discount
○ Fixed discount
   ○ Deduct $ [____] from the shipping cost of each item
   ○ Deduct [____] % from the shipping cost of each item
   ☑ Do not apply a discount to the item with the greatest shipping cost
○ Weight based Discount NEW!
   **Note:** This applies only to combined items which buyer pays actual shipping. Tell me more

If you sell mulitple quantities of the same item using Dutch auctions or store/fixed price sales, select the applicable shipping rule.

◉ Charge shipping costs for every multiple item.
   **Note:** You can apply deductions to each item.
○ Charge shipping for the first multiple quantity item only.
   **Note:** Deductions will apply to one item in this case. Tell me more

*FIGURE XXI.   Set Your Shopping Cart Discounts*

## 5.3 Insurance Rates

The insurance rate setting allows you to select how insurance is calculated. You may choose to have the insurance calculated for each item separately, or total the items and base the insurance based on the price total.

**Insurance Rates for Multiple Items:**
◉ Calculate insurance for each item seperately.
○ Calculate insurance based on the total price of all insured items

*FIGURE XXII.   Select Your Insurance Rate Option*

## 5.4 Test Drive

Choose the Test Drive link to view how all the shopping cart rules you have selected will function. Andale will display a typical invoice based on the settings you have selected.

**Test Drive** your shopping cart based on the above rules.

*FIGURE XXIII.   View Your Shopping Cart with Test Drive*

**Tip**: When creating your shopping cart rules, always do a test drive. This will display where your settings are being applied and will quickly show if you have made an errors when creating your Shopping Cart Rules.

## 6. Tax Table

The Tax Table settings will allow you to set your tax rate. Choose the State and enter the tax rate.



**Tax Table**

| Country | | |
|---|---|---|
| Select Country: | United States ▾ | |

| Taxes | | |
|---|---|---|
| **Specify Taxes:** | **State** | **Tax Rate** |
| | Alabama (AL) | [      ] % |
| | Alaska (AK) | [      ] % |
| | Arizona (AZ) | [      ] % |
| | Arkansas (AR) | [      ] % |
| | California (CA) | [      ] % |
| | Colorado (CO) | [      ] % |
| | Connecticut (CT) | [      ] % |

*FIGURE XXIV.   Set Your Tax Amount*

## 7. Feedback Messages and Automation

Feedback Messages and Automation allows you to create rules and automate your feedback. Enter up to 6 positive feedback comments. To automate your feedback, choose one of the following options:

When the item is marked paid

When the item is marked shipped

When the item is marked paid and shipped

When the buyer leaves positive feedback

When you choose to automate your feedback, you will only have to leave negative and neutral comments, all your positive feedbacks are left automatically.

Select if you would like to rotate the feedback or always start at the first message. Enter your negative and neutral comments to complete your Feedback Messages and Automation Settings.
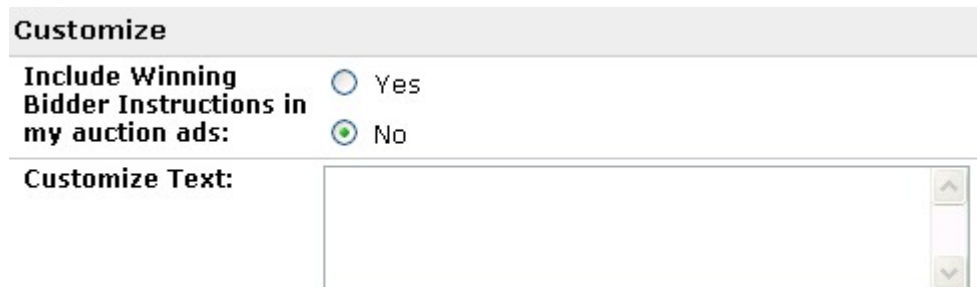


*FIGURE XXV.   Set Your Feedback Automation Options*

**Tip**: Your Feedback Manager is available from your Checkout Tab. You can view whom you owe feedback to, and who owes you feedback from the Feedback Manager.

## 8. Winning Bidder Instructions

The Winning Bidders Instructions (optional) is where you would create special instruction to your buyer that is placed in your Listing.



*FIGURE XXVI.   Add Information to Your Listing*

**Tip**: Utilize this feature if you require additional information from your buyer. For instance, if you sell items that require a buyer to send you a logo, or the name they wish embroidered, you could use this section to specify what you require.

## 9. Other Andale Checkout Pages

Now that you have completed setting up your Andale Checkout, you can begin to view some of the other Andale Checkout features. The sections below will give you a general outline of the functions of the various Andale Checkout Pages.

### 9.1 Pending Sales

Your Pending Sales page is your dashboard to your Andale Checkout. From this page you can print invoices and labels, manage your emails, combine and uncombined sales, leave feedback and manage your refunds.

### 9.2 Closed Sales

Once your sales are closed they will be moved to closed sales and will contain the historical data of your transactions.

## 9.3 Add Checkout

Add Checkout is used to add checkout to existing auctions or to create checkout anywhere buttons for your website or storefront.

## 9.4 Feedback Manager

Your Feedback Manager will display all your feedback left and received. You may manage your feedback either though the feedback manager, in setting or from Pending Sales.

## 9.5 Refund Manager

Your Refund Manager will display all your refund information. You may manage your refunds either though the Refund Manager, in setting or from Pending Sales.