

Setup Guide

Site Launch Checklist

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Enterprise

GeoClassifieds
Enterprise Version

Enterprise

Site Launch Checklist

Introduction

Thank you for purchasing GeoClassifieds Enterprise version. Now that you have completed the installation process and input the initial configuration settings, you are ready to set up your site and prepare it for your launch date. This guide is intended to help you in addressing at least the minimum settings necessary to set up your site and feel confident in releasing your site to the public. It is intended only as an abbreviated checklist and should be used in conjunction with your product's User Manual, which can be downloaded from the Support Center on the Geodesic Solutions website. Some steps are written with the assumption that you are planning to use the default html templates that we provide to you during setup. Although all steps below should be reviewed prior to launch, many of them may be entirely optional depending upon your business model. We have specifically marked some of these steps as [optional].

[] STEP 1: Site Genre / Text Changes

[] Template Colors/Fonts/Text Changes [TEMPLATES MENU]

[] Open each template and replace the logo image with your own.

[] Open each of the Signs and Flyers templates and edit the text as necessary...specifically, input your site's domain name in place of the default domain name.

[optional] There is a .css document at the root directory of your software's distribution files on your server. This document controls a variety of background colors and text fonts associated with the templates. Open the .css file and make changes to these settings as desired, and then ftp that file back into the root directory.

NOTE: We have set up several .css documents that you can use if you would like. These .css files are located in the 'css' folder within the root directory of your software's files. Do not change the name of these css files. Simply overwrite the file at your site root to view your changes.

[] Dynamic Colors/Fonts/Text Changes [PAGES MENU – PAGE MODULES MENU]

[] There is dynamic site text associated with every page of the site. This site text is stored within the database and is therefore editable within your admin pages through the PAGES MENU or through text associated with each of the PAGE MODULES. For the default templates that came with your installation we used various html modules [PAGE MODULES > HTML MODULES] to display certain areas of your site. For instance, the footer is controlled by LOGGED_IN_OUT_HTML_4 module. Because of this, you can simply access this module, change the text as you wish, click "save display changes" and every html template that uses that module (which should reflect on every page) will instantly be updated. This same principle applies for the other html modules.

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[] Text “fonts” and “colors” associated with the software’s Pages Text can be changed by accessing the desired page in the PAGES MENU of the Administration.

NOTE: The various modules within the program have their own properties, including CSS. So, if there is dynamic text or colors you want to change, you need to first determine if it is associated with the “Page” or a “Page Module”.

[] Edit the <TITLE_MODULE> to display the desired page title text on those pages that are not dynamically populated with the page title.

NOTE: The top of each ‘User Management (My Account) Page’ and ‘Place An Ad Page’ contains dynamic pieces of text named “Section Title” and “Page Title”. By default, each has been assigned a “background image” through the “Pages” section of the admin. Save yourself time by substituting the images out through the images folder rather than having to call up every page and changing it individually.

[] STEP 2: Logo Image Replacement

[] Site Logo

The Front and Subpage templates each have a default logo assigned to them through each template’s html. There is a logo in the header and footer (smaller) that needs to be replaced. You can do this by simply overwriting each logo in the ‘images’ folder with your own logo.

[] Signs & Flyers Logo

The Signs and Flyers Templates each have a logo assigned to them. Replace the default logo with your own, by either image substitution or by calling out your own image within the html templates for each.

[] STEP 3: Categories & Subcategories [CATEGORIES MENU]

[] Set up each category and subcategory

[optional] Give a description to each if desired.

[optional] Assign an image to display in front of each category name.

[optional] Assign “Category Specific Questions” to each category as described in the next step.

[] **STEP 4: Ad Display Page & Fields**

[] **Standard Fields**

These fields will display during the Place an Ad process and on the Ad Display Page. Choose whether or not you want each field displayed and set to 'required' [AD CONFIGURATION MENU > FIELDS TO USE].

[] **Category Specific Questions**

If used, these questions will automatically show up during the 'Place an Ad' process, and will become searchable criteria on the Advanced Search Page on a category-by-category basis. [CATEGORIES MENU > edit category questions]

[] **Optional Site Wide Fields [AD CONFIGURATION MENU > FIELDS TO USE]**

[optional] Add Optional Site Wide Fields that will be displayed and required during the Place an Ad process. They will automatically be displayed in every category, unless you turn "off" their display on an individual category by category basis within the CATEGORIES MENU.

NOTE: Implementation of Optional Site Wide fields will cause these fields to display in the following areas:

- Place an Ad process
- Ad Display Page
- Advanced Search Page (as searchable criteria)
- Browsing Ad Pages (as sortable columns within browsing results tables)

NOTE: Unlike "category specific questions", each Optional Site Wide Field has a specific piece of text tied to it by system default. Therefore, every page that references a "used" Optional Site Wide Field must be accessed and edited in order for these fields to display appropriately. Please refer to the "Fields to Use Submenu" section of your User Manual for a list of pages that need to be edited.

[] **User Group Specific Fields [USER GROUPS MENU]**

[optional] These fields will be displayed during the Place an Ad process only to those users within the specific User Group.

IMPORTANT: Displaying fields on the Ad Display Page REQUIRES TWO STEPS:

1. You must designate the fields you want to display.
2. You must make sure each field's tag is placed within the html of the template that is assigned to template designated on the AD CONFIGURATION MENU > AD TEMPLATES Page in the admin. You will see a complete of tags that can be used on that same page. Optional Fields do not have individual tags. Instead, they are grouped together and displayed by a single tag. [see the User Manual for additional details]

[] STEP 5: Page Modules

[] Set up desired Page Modules [PAGE MODULES MENU]

[optional] Remove/edit Page Modules that we preset to display by default with your initial installation.

[optional] Enter additional Page Modules that you wish to display.

NOTE: Implementation of Page Modules is always a two step process:

1. **INSERT MODULE** - Insert the desired module's "tag" into the html template that is assigned to the PAGE you want the feature to show up on.
2. **ATTACH MODULE** - Navigate to that PAGE, in the PAGES administration and "attach" the tag to that page.

NOTE: The "removal" of modules requires that you simply remove the "tag" from the template's html. Don't forget to also "remove" the tag's "attached" status within the actual PAGE administration as well. Tags that are "attached" to a page, but aren't being called to display within the html templates cause unnecessary "calls to the database" which will slow down your site unnecessarily.

[] STEP 6: Payments & Price Plans

[] Payment Setup

[] If you are going to charge for ad placement, check "yes" on the PAYMENTS > CHARGE SUBMENU page. If "not", skip to the "Registration & User Groups" section below, since will not have to set up any Price Plans.

[] Choose the types of payments you are willing to accept. If allowing PayPal or one of the credit card merchants that the software is preconfigured to communicate with, you will need to create an account with that

merchant and enter the appropriate account details in this section of the admin. NOTE: You will only need an SSL certificate if you are using Authorize.net's AIM method as your credit card merchant service. Otherwise, all credit card collection takes place on your merchant's own secure socket layer pages. If an SSL certificate is necessary, we do NOT recommend using a server wide license which many hosting companies offer.

IMPORTANT: PLEASE TEST YOUR PAYMENTS AND MERCHANT SETUP WITH REAL TRANSACTIONS BEFORE GOING LIVE WITH YOUR SITE. SPECIFICALLY, CHECK TO ENSURE, WHEN USING OFFSITE MERCHANTS (PAYPAL, ETC.), THAT YOUR CUSTOMER IS HANDED BACK TO YOUR SITE PROPERLY WITH THE AD TURNED "ON". IN OTHER WORDS, VERIFY THAT THE "RETURN ADDRESS" IS CONFIRMED PROPERLY.

[] Price Plans Setup

[] Set up desired Price Plans [PRICE PLANS MENU]

[] You will always have at least one Price Plan in the system. By default, we have entered a Price Plan called "general price plan". You can implement as many other Price Plans as you wish, but you cannot delete the "general price plan". Price Plans are assigned to specific User Groups. That is to say that every User Group will have a Price Plan assigned to it.

[] There are two types of Price Plans:

Fee-Based – The seller will pay you each time they place an ad on your site based on the "cost specifics" you enter for that plan.

Subscription-Based – The seller will pay you a fee for a period of time to place ads. They may still be subject to certain other fees based on the "cost specifics" you enter for that plan.

IMPORTANT: Subscription Based Price Plans are "NOT" recurring billing plans. In other words, users that are in this type of Price Plan will not automatically be billed at the end of their subscription period. However, they "will" automatically be sent a "renewal email" that they can then voluntarily renew a new subscription period.

[optional] When setting up Price Plans (Fee-Based Only) you can designate "Category Specific Pricing" on a Price Plan by Price Plan basis.

NOTE: Check to make sure that these category specific price plans are working properly by placing test ads in the appropriate categories.

[] Additional Price Plans – Although there is a standard Price Plan that you associate with each User Group, you can also give users the ability to select another Price Plan during their Place an Ad process if you desire. The

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“Additional Price Plan” function is administered on a User Group by User Group basis within each User Group’s administration page [USER GROUPS MENU].

[] STEP 7: Registration & User Groups

[] Setup Registration [REGISTRATION CONFIG MENU > GENERALS]

- [] Select if you want to be notified of all new registrations via email.
- [] Select if you want to approve all new registrations.
- [] Select if you want to use the email verification process.
- [] Select any Optional Fields to be used during Registration Process (details below).

[] Setup User Group/s [USER GROUPS MENU]

[] “Every” registrant will be assigned to a User Group upon registration. Therefore, you will always have at least one User Group in the system. Furthermore, there will always be a “default” User Group. If you only have “one” User Group in the system, all users will automatically be placed into that User Group and be taken directly to the Registration Details page. Or, if there is more than one User Group in the system, the “Registration Code” page will be displayed to the registrant for them to enter a code. [see User Manual for details]

[] Edit the default User Group or create your own. You will assign a different Registration Code for each User Group you enter.

[] Each user can be moved to another User Group by the admin at a later time through the Admin Panel.

[] After a correct Registration Code has been entered by the registrant, he will be presented with one of the following two pages:

Registration Details Page - User will enter in the information you have designated to display:

[] Standard Fields – These fields are site-wide fields that will be used on every Registration Details Page, regardless of User Group.

[] User Group Specific Fields [optional] – These are fields you can set up that will only be used during the Place an Ad Process of a user within that User Group.

[] Optional Fields to use in Registration [optional] – These are additional site-wide fields you can set up that will be used on every Registration Details Page, regardless of User Group.

[] Unlike “User Group Specific Fields”, each Registration Optional Field has a specific piece of text tied to it by system default. Therefore, every page that references a “used” Registration Optional Field must be accessed and that piece of text edited in order for

those fields to display appropriately. Please refer to the “Optional Fields to use in Registration” section of your User Manual for a list of pages that need to be edited.

NOTE: IF YOU ARE USING REGISTRATION CODES, CHECK THAT EACH CODE IS WORKING AS EXPECTED AND ASSIGNING REGISTRANTS TO THE APPROPRIATE USER GROUPS.

Splash Page – Will be displayed to the registrant for that User Group only if you enter html into the Splash Page text area in the User Group Management area. User will then be directed to the Registration Details Page.

[] STEP 8: Special Pages

You will notice that there is a template assigned to every page of the site. A “template” is the vehicle that the software uses to display the information to visitors of your site.

In certain cases, some pages may actually require the assignment of two templates in order to display the appropriate information. For instance, the Ad Display Page has a primary template assigned to it through PAGES > BROWSING CLASSIFIEDS > AD DISPLAY PAGE which displays the overall html of the page. However, a second template must be assigned that will display the details of the ad. This secondary template is designated through AD CONFIGURATION > AD TEMPLATES. The two templates work together to display the appropriate information to the user. The secondary template gets displayed wherever the MAINBODY tag is located within the primary template.

Below are the two Special Pages currently in the program:

AD DISPLAY PAGE:

PRIMARY - PAGES > BROWSING CLASSIFIEDS > AD DISPLAY PAGE
SECONDARY - AD CONFIGURATION > AD TEMPLATES

USER MANAGEMENT PAGE:

PRIMARY – PAGES > USER MANAGEMENT > USER MANAGEMENT HOME
SECONDARY – SITE CONFIGURATION > USER MANAGEMENT TEMPLATE

Thank you again for choosing Geodesic Solutions products for your software needs.

If you have any questions or suggestions regarding this Setup Guide, please feel free contact us through our online Support Center via our website at:

www.geodesicsolutions.com/support/