

# Upload File Attributes for Miva Merchant<sup>TM</sup>

An Attribute Enhancement

**Product Manual** 



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## Module Description

The Upload File Attribute module allows you to collect file attachments from your customers. With it, you can add an upload file attribute to individual products so the product can accept attachments from the customer. Your customers can then add attachments to their order when they select that product for purchase, and the store administrator can easily access the attachment in the Miva admin.

#### **Key Benefits**

- Allow your customers to add attachments to products in their order
  - Customers can add multiple attachments to the same product in the order
- Store Administrator controls the file type and file size permitted for upload
- Store Administrator can easily access the attached files through the Miva admin

#### **Example Usage**

A storefront owner sells cakes online and wants to create a new product line. He wants to sell birthday cakes with a picture of the person celebrating their birthday on the cake. He has an artist on staff who can re-create a photo on a cake using icing! Now, he needs to allow customers to select the cake they want and let them upload a photo of the person celebrating his/her birthday.

Solution: The Upload File Attributes product allows the storefront owner to create attributes for products so customers can upload a file to add as an attachment to the product they are purchasing. The Upload File Attribute behaves as a standard attribute, so the storefront owner can even add an additional fee for the customized birthday cake to help him cover the cost of the artwork. The customer sees the name of the file they have uploaded in their basket as an attribute and on their invoice, so they can rest assured the upload succeeded. The storefront owner also sees the uploaded file as an attribute to the product on the order notification he receives, so he knows to look for the file in that order's folder. The storefront owner has found his customers really like having customized cakes using their own photos and are keeping his artist very busy to keep up with their orders!



#### **Product Requirements:**

The Upload File Attributes module can work in any Miva Merchant v4.00+ store that uses either OpenUI<sup>TM</sup> or the DynamicTemplate<sup>TM</sup> Engine for MMUI v4.14+.

#### **Feature Matrix**

Feature	MMUI 4.00-4.13	OUI 4.00-4.13	OUI 4.14+	MMUI/DYNTMPL 4.14+**
Collect Upload File Attributes for any product on the Product Display screen	N*	X	X	X
Collect Upload File Attributes for products on the Missing Product Attributes Screen	N	X	X	X
Mark Upload Files as Required	N	X	X	X
Collect Fees for each upload	N	X	X	X
Automatic Display of all Upload File Attributes	N	X	X	
Token and Template Instructions Provided for display of all Upload File Attributes	N			X

<sup>\*</sup>Note: Use of this module in an MMUI store without the DynamicTemplate Engine is not supported. Copernicus does not supply MMUI modification instructions. However, custom modifications to your MMUI will can be performed to add this feature to MMUI based stores. Contact Copernicus support for a customization partner referral (support@copernicusllc.com).

<sup>\*\*</sup>Note: DynamicTemplates v4.53 or greater required.



## Theory of Operation

#### **General Theory**

The use of product attributes allows the storefront owner to obtain additional information about the particular product a customer wants to purchase. Attributes are commonly used to determine the size and color of the product the customer is purchasing, but with the attribute enhancing products available from Copernicus, you can collect much more information from the customer than ever before!

#### **Module Theory**

The Copernicus Upload File Attribute module allows the storefront owner to create an attribute for a product so a customer can upload a file specific to that product. The storefront owner determines beforehand what kind and size of files will be accepted – for example, a .wav file with a sound stream for a custom-made music box, or a .jpg with a photo of the customer's pet for a personalized (and very special) coffee mug. The storefront owner can also set a file size minimum and maximum, so customers are not able to upload files that are too big (or too small).

The upload file attribute can be required or optional for the product, as set by the storefront owner. Likewise, the storefront owner can create multiple upload file attributes for a single product, for example to allow two files to be attached to the product, one with a picture for the front of a shirt and the second for a picture for the back of the shirt.

The upload file attribute is displayed to the customer on the product page in the same way a standard attribute is. The storefront owner specifies the prompt to be given for the upload file attribute. The customer simply clicks the upload button and is given a pop-up to type the file path and name for the desired file, or they can browse to find and select it. The file name is shown as an attribute for that product in the customer's basket and in their invoice upon checkout.

The storefront owner can immediately tell the customer has uploaded a file by looking at the order notification, because the uploaded file's name is listed as an attribute on the merchant's notification as well. To obtain the file, the storefront owner goes into the Miva Merchant administration, where they can download the file and process the order.

Note: Do not allow customers to upload executable script files. Customer uploads are placed in a web directory that may be viewable. Allowing customers to upload executables such as PHP, MivaScript or ASP files may compromise your server security. Optionally, you may want to password protect the upload file directory. Contact your hosting provider for upload directory security assistance.

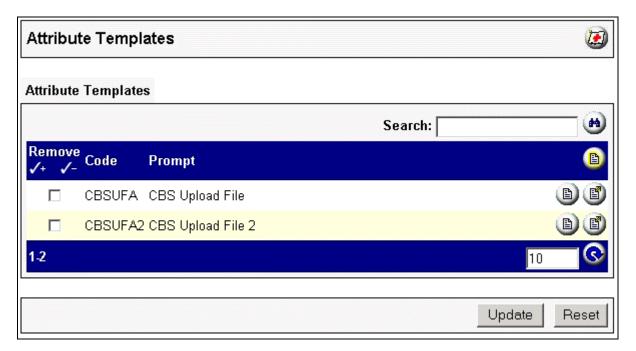


Note: There are several differences in the manner in which the administration of Upload File Attributes is handled between MMUI and OpenUI based stores. Please review one of the two sections below based on what user interface your store runs.

#### MMUI/DynamicTemplate Based Upload File Attributes

When used in an MMUI based store, the Upload File Attributes themselves are defined through Attribute Templates. The module identifies Upload File Attributes based upon the Attribute Template Code. Any attribute template code that begins with CBSUFA will be treated as an attribute template that contains upload file attributes. Any Text Field type attribute within this attribute template will be treated as an Upload File Attribute; an upload image will then be placed next to this Text Field attribute for any products that use this attribute template. The use of these special attribute templates makes it easy to identify and configure a product that permits upload files; it also means that once the Upload File Attribute templates are created, further configuration of the module is consistent between OpenUI and MMUI based stores. Note, however, that Miva Merchant does not allow one to use the same attribute template within a product more than once. Therefore, two different Upload File Attribute templates are initially provided; one with a single upload file attribute, and a second with two upload file attributes. You may configure as many upload file attribute templates as required for your store.

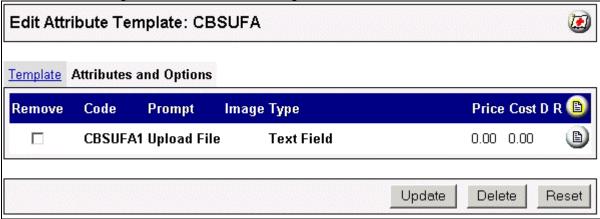
Following installation of the module in a MMUI store, you will find two new Attribute Templates defined in your store, "CBS Upload File (CBSUFA)" and "CBS Upload File 2 (CBSUFA2)" as shown below:





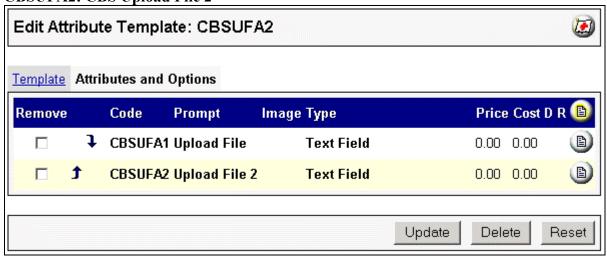
The attributes defined in these templates are shown below. It is *extremely important* that you do *not* modify the <u>Attribute Template Code</u> (CBSUFA and CBSUFA2), as this code indicates to the module that the Text Field attributes within this template are Upload File Attributes. You *can* modify the Attribute Code within the attribute template, as this is the code that is displayed on the customer invoice. You *can* create additional attribute templates (CBSUFA3, CBSUFA4, etc) that also define other Upload File Attribute templates.

**CBSUFA: CBS Upload File Attribute Template** 



The CBSUFA Attribute Template defines a single text field attribute that becomes an Upload File Attribute when this attribute template is applied to any product in your store.

CBSUFA2: CBS Upload File 2



The CBSUFA2 Attribute Template defines **two** text field attributes that both become Upload File Attributes when this attribute template is applied to any product in your store.



#### **OpenUI Based Upload File Attributes**

No special configuration is necessary for OpenUI stores. OpenUI provides a special interface for module developers to define new types of attributes for a Miva Merchant store. In an OpenUI based store, the Upload File Attribute will appear as an attribute type automatically when you are adding an attribute to a product. Simply follow the instructions provided in the Product Configuration section.

#### Upload File PopUp and Form Name

Upload File Attributes utilizes a popup window that the shopper can use to upload a file to your web server. Your customers may need to ensure that they do not have a popup blocker installed in order for the upload box to appear. The upload popup window is created and destroyed using JavaScript, so your customers will need to have JavaScript enabled in order for the upload to succeed.

Further, the <FORM> element on the screen that is to accept the upload must have the NAME attribute set to FORM. In stock OpenUI based stores, this is already the case. Other OpenUI based modules have been created that modify the product screen form; if you have a module that removes the NAME="FORM" attribute from the <FORM> tag, the uploads will not appear to be successful. Contact the module vendor of the offending module for assistance. In MMUI stores that utilize DynamicTemplates, the templates provided with this module insert the necessary FORM NAME attribute.



## Module Installation and Upgrading

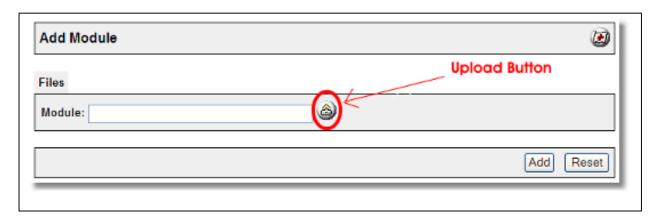
#### **Domain Installation of Module**

If you are using OpenUI, you must have OpenUI v4.79 or higher prior to product installation. Uncompiled OpenUI users **must** install the OpenUI Admin Extensions in order for this product to work properly. Please visit http://www.openui.org for further information.

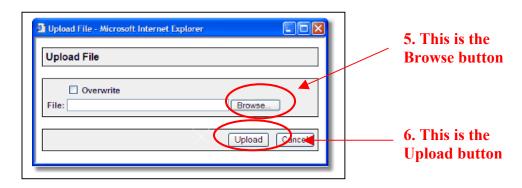
You must first install the module in your Miva Merchant domain. After that you will need to follow the steps for installing the module in the store for which you have purchased the license.

#### Module Domain Installation

- 1. Go into the Miva admin (*admin.mv*)
- 2. Open the **Modules** branch
- 3. Click on the **Add Module** link and the screen pictured below will appear
- 4. Click the **Upload** button

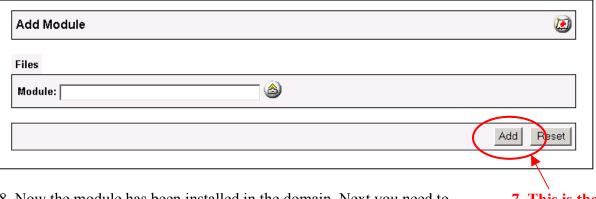


- 5. A Pop-Up window, like the one pictured below, appears and allows you to either **Browse** to find the module on your local drive or enter the filename of the module.
- 6. Press the **Upload** button.





7. Once you press the Upload button, the Upload File PopUp box disappears and the Add Module box is again visible. Press the **Add** button

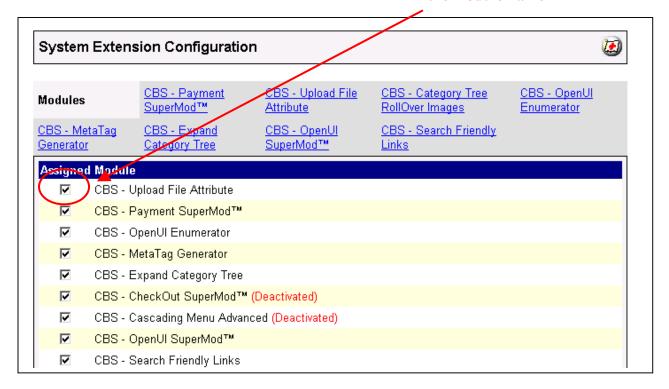


8. Now the module has been installed in the domain. Next you need to install the module in the store



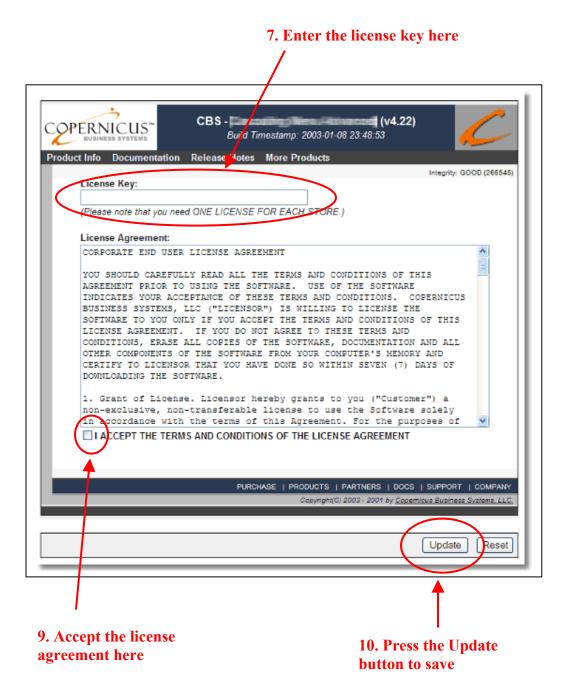
#### Store Installation of Module

- 1. Go to the Miva admin (admin.mv)
- 2. Open the **Stores** branch
- 3. Click on the arrow next to the store name
- 4. Click on System Extension Configuration
- 5. Check the checkbox next to the module name. (For this module it is *CBS Upload File Attribute*)
- 6. Press the **Update** button at the bottom of the screen.
- 5. Click the checkbox next to the module name



- 7. A PopUp box appears that looks like the picture below. Enter the *Upload File Attribute* license key you got when you purchased the module license.
- 8. Read the *License Agreement*
- 9. Check the box next to I ACCEPT THE TERMS AND CONDITIONS OF THE LICENSE AGREEMENT
- 10. Press the **Update** button. Now you have successfully installed the module in the storefront and you are ready to use it!







#### **Module Upgrading**

Copernicus publishes updates to its modules when there are significant feature enhancements. Copernicus also publishes upgrades to its modules for clients who are moving from uncompiled Miva Merchant to compiled Miva Merchant. Both updates and upgrades are added to the storefront in the same way. Once you have saved the update or upgrade to your local hard drive, please follow these instructions to add them to your storefront.

#### **Domain Module Upgrading**

- 1. Go to the Miva admin. (*admin.mv*)
- 2. Open the **Modules** branch
- 3. Click on CBS Upload File Attribute module
- 4. Click on the **Files** link in the content area of the screen

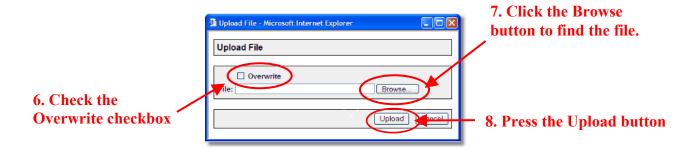
#### 4. Click on the Files link Edit Module: CBS - Upload File Attribute Information Files Type of Module: System Extension Code: CBS-OUIUFA Name: CBS - Upload File Attribute Provider: Copernicus Business Systems, LLC -- http://www.cbstech.com/ Version: 4.06 Usage Count (Number of Stores): 3 ✓ Active Update Delete



5. Click the Upload graphic button

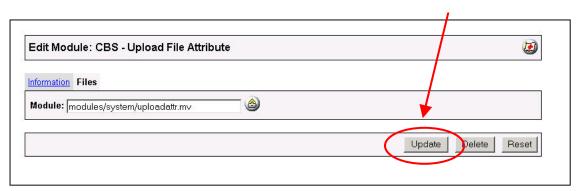
5. Click on the Upload button

6. The Upload file PopUp box will appear. Check the **Overwrite** box so that the updated module will overwrite the old version.



- 7. Enter the filename of the module on your local drive or use **Browse** to find the file.
- 8. Press the **Upload** button this will take you back to the "Files" screen.
- 9. Press the **Update** button and you are finished!

#### 9. Press the Update button



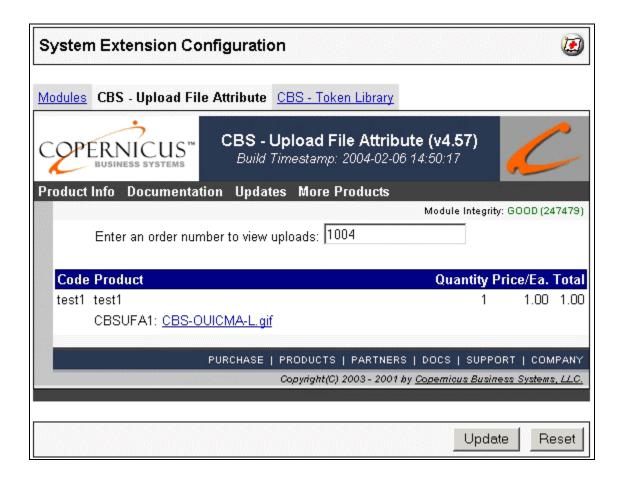


## Module Usage

#### **Module Configuration**

Once you have installed the Upload File Attribute, you'll want to configure it. The administrative interface for this module is located in the System Extension Configuration section of the Miva admin; however, you do not need to configure anything in this specific section for this module. Instead you will add a special "CBS-Upload File Attribute" attribute to the products you wish to allow attachments.

The System Extension Module Configuration section provides you a shortcut for viewing the uploaded files for specific order numbers. To view uploads from a specific order, enter the order number on this page and click "Update". Only order items with uploaded attributes are shown on this page, not the entire order. Simply click on the image link (or right-click) to download the file from your server to your computer.





#### **MMUI Template Installation – DynamicTemplate Engine Only**

If you are using the Copernicus DynamicTemplate Engine for MMUI, you will need to install the included template files into your mivadata directory or modify your existing files to include the changes. The following template files should be installed:

- 1. screen.prod.tmpl Modified Product Screen template that calls include.attributes.tmpl rather than using the %module|CBS|drawProductAttributes% token
- 2. screen.attr.tmpl Modified Missing Product Attributes Screen template that calls include.attributes.tmpl rather than using the %module|CBS|drawProductAttributes% token.
- 3. include.attributes.tmpl Modified attribute display template that calls the CBSUFA display token %module|CBSUFA|displayAttr% for displaying the necessary upload image and JavaScript for Upload File Attributes.

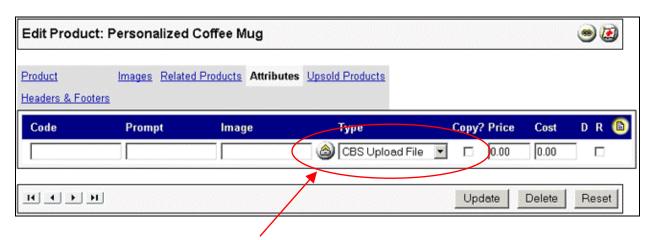
\*Note: If you utilize upsell for a product that includes upload attributes, you will also need to include the necessary token in the upsell attributes templates.

#### **Edit Products Tab**

For each product that you would like to add an "Upload File" attribute, navigate to that product in the Miva Admin and follow these steps.

- 1. Go to the Miva admin (admin.mv)
- 2. Click the arrow next to **Stores.** This will open up all of the stores you have in this domain.
- 3. Click on the arrow next to the name of the store in which you have installed this module.
- 4. Click on the product link and find the product to which you want to add the "upload file" attribute.
- 5. Click on the Attributes link for the product. (OpenUI Users click on OpenAttributes).
- 6. Add an attribute as described in the Miva Merchant documentation.
- 7. You will see an additional attribute option when you click on the Attribute "Type" drop down list called "CBS Upload File." When you choose this type you are adding an attribute to the product that allows customers to upload a file associated with this product.





From the Type drop down list, choose the CBS Upload File

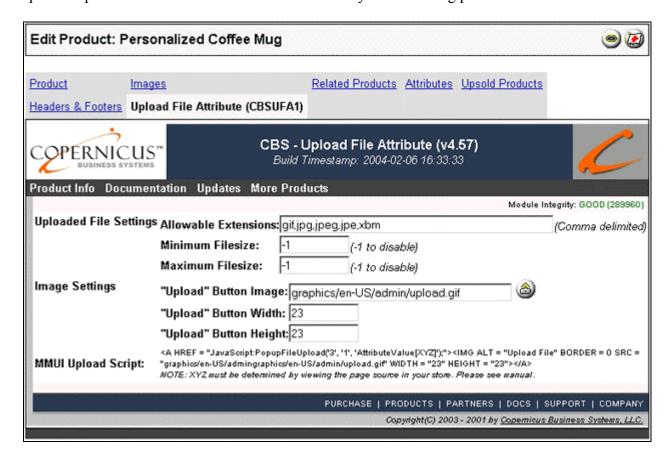
**OpenUI Users:** You can configure this attribute just like you would any other attribute.

<u>MMUI Users:</u> Since this is an Attribute Template you cannot edit it here. Simply click "Update" after selecting the CBS Upload File attribute template. Do **not** copy the attribute template when creating this attribute.



#### **Edit Product: Upload File Attributes**

Once you have created an attribute that is a CBS Upload File attribute you will see a new tab for each Upload File Attribute associated with the product. Click on this tab and set the parameters that are specific to the files that you want to permit to be uploaded with this product using this specific upload attribute. The storeowner can modify the following parameters:



- Allowable Extensions: Create a comma-separated list of all the file types you want to permit to be uploaded with this product. Do not include the "." (dot) before the file extension name. The Upload File Attribute module is programmed to default to a few common extension types but you can edit this as needed. Here is an example of the syntax you should use when you create this list of file types: "jpg,gif,png"
- **Minimum File Size:** Type here the minimum size of a file that you want to permit to be uploaded by a customer. This is only a numeric field; therefore, if you want to limit the size to 10KB you will type in the number "10000". If you do not want to set a limit, type in "-1".



- **Maximum File Size:** Type here the maximum size of a file that you want to permit to be uploaded by a customer. This is only a numeric field; therefore, if you want to limit the size of 10KB you will type in the number "10000". If you do not want to set a limit, type in "-1".
- **Upload Button Image:** This module comes with a standard "Upload File" button preinstalled. If you would like to replace this with one that matches your store look and feel, click on the upload file button to the right of the text box, and browse to upload the image you would like to use.
- **Upload Button Width:** You can set the width of this image in pixels here. The module comes pre-formatted with a width of 23, which matches the default image. If you upload a new image, make sure to specify the new image width in order to ensure the image displays properly.
- **Upload Button Height:** You can set the height of this image in pixels here. The module comes pre-formatted with a height of 23, which matches the default image. If you upload a new image, make sure to specify the new image height in order to ensure the image displays properly.

Finally, there is an information section called "MMUI Upload Script". DynamicTemplate and OpenUI users can ignore this section. This information is provided for Copernicus customization partners that are installing the module in an MMUI store through MMUI customizations.



#### **Viewing Uploaded Image Files**

When a customer checks out of your store and has added an attachment to his order, the invoice will include an attribute with the image title and type spelled out. This is your indication that a product has been purchased that included an uploaded file and you need to go into your Miva Admin to retrieve that file.

When a customer uploads images, they are temporarily stored in your mivadata directory. The path will be similar to: mivadata/Merchant2/0000001/CBS-OUIUFA/uploads/[session\_id]. The session\_id is a 32 character string that uniquely identifies customers in your store while they are shopping.

Once the order is completed, the uploaded images are transferred to your httpdocs (web) directory so you can view them via the web, and will appear in your documents folder in a path similar to the following: httpdocs/Merchant2/0000001/uploads/[order#]. The order# will be set to the actual order number that appears on the customer and merchant email notifications. If for any reason you cannot view the uploaded file through the Miva Admin, it's possible that the images could not transferred from the temporary (mivadata) directory to your web (httpdocs) directory, or the permissions in your web directory could not be set appropriately.

If the files were transferred correctly but you still cannot view them, you may need to change the directory and file permissions manually. If the files were not transferred to the httpdocs folder, you may need to check with your hosting provider for proper permissions of your Miva Merchant installation. In the case when the order has been completed but the images were not transferred from your mivadata to your httpdocs directory properly, the images will remain in your mivadata directory; however, the session\_id will be removed from the directory name, and it will be replaced with the order number. This allows for easy identification of images from completed orders versus those images in your mivadata directory that are from current customers (orders in progress) or customers that did not complete their order (abandoned shopping cart).

**Note:** The Upload File Attributes module does not receive any indication from Miva Merchant that you have deleted or processed an order. Uploaded files will **not** be automatically removed from your web server. You may need to periodically clean out both of the "uploads" folders in your mivadata and httpdocs directories once the images are no longer required.

#### MMUI - Viewing Uploads from a Specific Order

As described on page 15 above, you may view the customer uploads for a specific order using the System Extension Module configuration page. Simply enter an order number and all uploaded files will be shown.

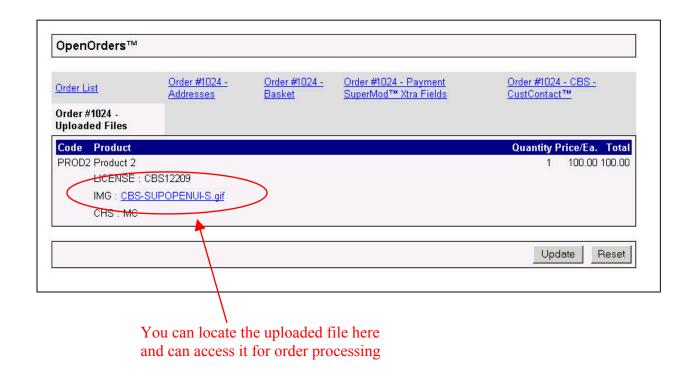


#### Edit Order "Uploaded Files" Tab – OpenUI Only

In addition to the method described above, you can retrieve the uploaded file in your OpenUI Store with the following steps:

- 1. Go to the Miva Admin
- 2. Open the arrow next to Utilities
- 3. Click on Open Orders
- 4. Search for or locate the order that includes an uploaded file
- 5. Click the "Edit Order" button
- 6. Click on the Order #XYZ Uploaded Files link and you will see a view of the order (similar to the one depicted below) that allows you to click on the image that was uploaded by the customer. You can then save this image to your harddrive or server so that your order fulfillment team can use the image when completing the order.

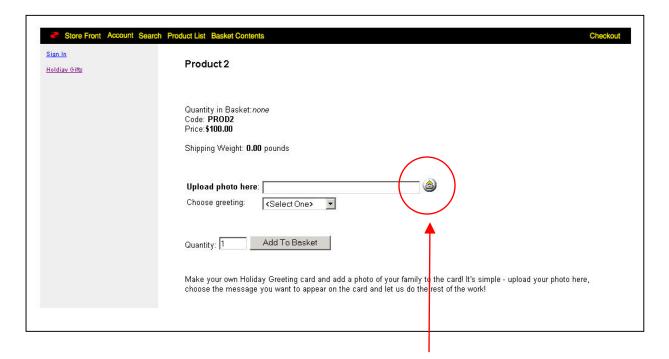
\*Note: If you are using uncompiled OpenUI (Miva Merchant 4.00-4.13), ensure you have installed the OpenUI Admin Extensions. For more information, visit http://www.openui.org.





## **Shopper Screens**

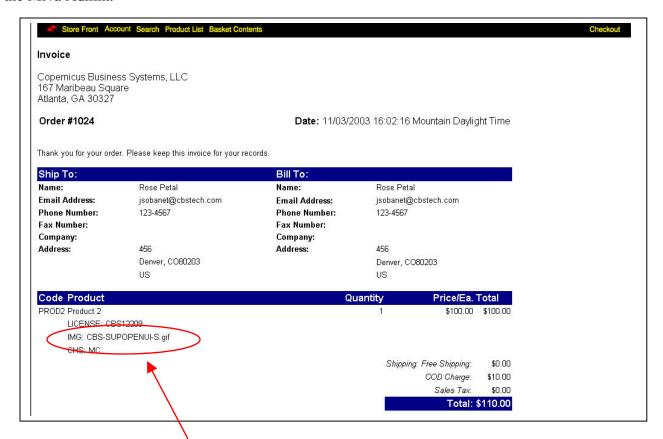
This is a display of the screens that the shopper will see as he purchases a product that allows an image to be uploaded with the product. This is only an example.



The customer can click on this upload file button and browse to add the file to this product.



The customer then can view the name and type of image added to this product in their basket and upon checkout. Additionally, when the storeowner views the order after checkout, the listing of a filename and file type alerts the storeowner to the collection of a file so that he can retrieve it in the Miya Admin.



The customer can view his file name and type upon checkout.



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