

# ***SmithDirectory***

Business Directory Software  
with Payment Checkout  
v. 1.3



Users Manual

## Table of Contents

I.	Introduction .....	4
II.	Smith Directory Modules.....	5
III.	Prerequisites.....	5
IV.	Installing the Business Directory Module.....	6
V.	Smith Directory Signup Module.....	10
A.	Configuring the Signup Module Settings.....	10
B.	Moderation Setup .....	11
C.	Listing Setup .....	12
D.	Image Setup.....	15
E.	Gateway Setup.....	16
F.	Gateways Supported .....	16
G.	Authorize.Net .....	16
H.	PayPal Website Payments Standard.....	17
I.	TransFirst.....	19
J.	Show PayPal Checkout Option.....	19
K.	User Roles Setup .....	22
L.	Subscription and Recurring Billing Setup.....	23
M.	Confirmation Page Setup .....	24
N.	Email Setup .....	24
VI.	Directory Admin Menu.....	26
VII.	Manage Listings.....	27
A.	Sorting the Directory Listing Grid .....	28
B.	Filtering Listings by Date Range .....	28
C.	Filtering Listings using Custom Criteria.....	28
VIII.	Viewing Listing Details and Payment History.....	29
IX.	Category Management.....	30
A.	Add New Category.....	30
A.	Edit and Delete Categories.....	31
X.	Custom Listing Fields .....	31
A.	Adding a Custom Field .....	32
XI.	Moderate Listings .....	35
A.	Approving Listings.....	36
XII.	Registration Signup and Checkout Screens .....	37
A.	Signup Page – Free Listings.....	37
B.	Signup Page – Standard Listings.....	38
C.	Signup Page – Premium Listings .....	39
D.	Checkout Payment Screen.....	40
E.	Checkout Confirmation Page .....	41
F.	Show Feedback Option.....	42

XIII.	Smith Directory Search Module.....	43
A.	Filtering listings by category using the query string .....	44
XIV.	Smith Directory Glossary Module .....	45
A.	Premium Listing Detailed Profile.....	46
B.	Standard and Free Listings .....	47
XV.	Smith My Listings Module .....	48
XVI.	PCI Compliance.....	49

## I. Introduction

Thank you for purchasing the Smith Directory module for DotNetNuke (DNN). You will find the module very user friendly and a great way to Ecommerce enable your business directory and subscriptions in your DNN Portal.

The Smith Directory module provides an easy way to professionally publish a comprehensive, online business or organization directory in your DotNetNuke portal.

Alongside a wide assortment of built in directory features, Smith Directory offers both administrator and user control panels to view and administer business listings, support for Authorize.Net automated recurring billing (ARB), PayPal checkout or register free listings. The module is fully integrated with DNN membership. Smith Directory is a complete listing automation and is extremely easy to install and customize.

Smith Directory can be used for many applications including:

- Business Listings
- Classifieds
- Company Directories
- Press Releases
- School Listings
- Job Listings
- Yellow Pages
- Shopping directories
- Catalogues
- Tourism Guides
- and many more

## II. Smith Directory Modules

There are five modules that are included with Smith Directory:

Module Name	Module Description
Signup Form Module	The Sign Up module includes three levels of registration; free, standard (paid level 1) and premium (paid level 2) and is used for users to sign up and enter their listing information and credit card information. It also includes a custom form generator for you to enter an unlimited number of custom fields to your sign up page.
Search Module	The Search module allows users to search for directory listings by location, keywords or no filter and returns a page able list of directory listings.
Glossary Module	The Glossary module allows the user to filter directory listings by keyword or clicking the letters A-Z
My Listings Module	The My Listings module allows the user to login to your portal and view or edit their directory listing.
Admin Console Module	The Admin Console module is used by the portal administrator to manage the directory listings. Directory listings can be filtered by listing type, keyword and date range.

## III. Prerequisites

Type	Requirement
DNN Version	DNN 4.x.x – DNN 5.x.x
Database	MS SQL Server 2005/2008
Operating System	Windows 2000/2003/2008
.Net Framework	.Net Framework 2.0/3.0/3.5
Ajax	Ajax toolkit 2.0 or greater

## IV. Installing the Business Directory Module

The Smith Directory module is delivered as a standard DNN installable zip or PA (Private Assembly). You install the Smith Business Directory just like you would install any other DNN module. Before installing any module it's a good idea to backup your DNN database and DNN installation folder. This is very important, as you can always roll back to previous status easily if installation goes wrong.

**Step 1** - Log in to your DNN site using Host account. From the host menu you'll use Module Definitions to install the module. In order to do that, you should login as host, or an administrator account with module upload permissions.

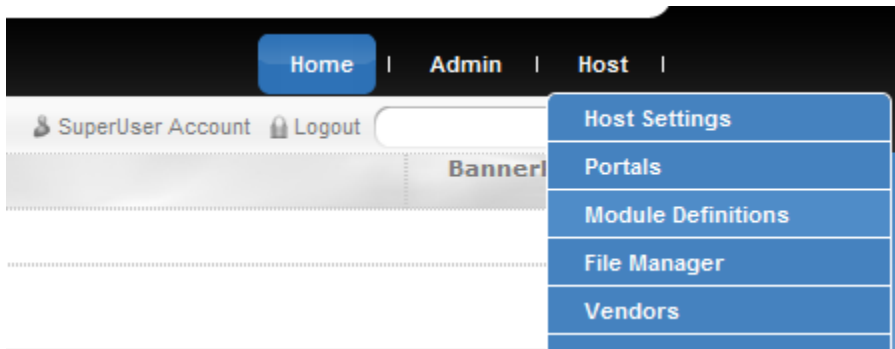


Figure 1 - DNN Host Menu

You can reach Module Definitions from the Host menu item as show in figure 1 above. Install the new module from the Host -> Modules menu in DNN.

### Step 2 - Install New Module

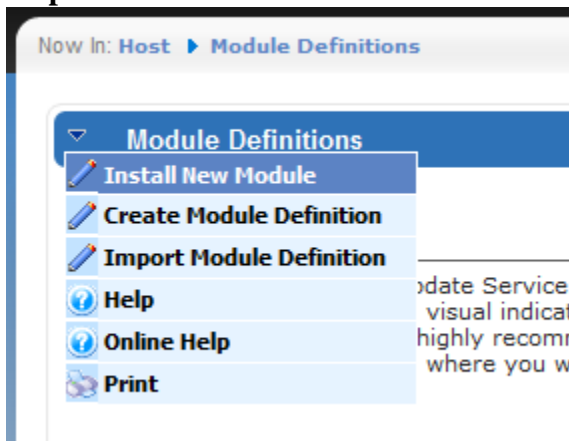


Figure 2 - Module Definitions screen

On Module Definitions screen (figure 2), choose Install New Module from the actions menu. This action menu can be either left or right side of the main container. It depends on the layout of your current DotNetNuke skin.

### Step 3 - Browse the ZIP File

Remember the place where you saved the module ZIP file you downloaded? Then browse it.

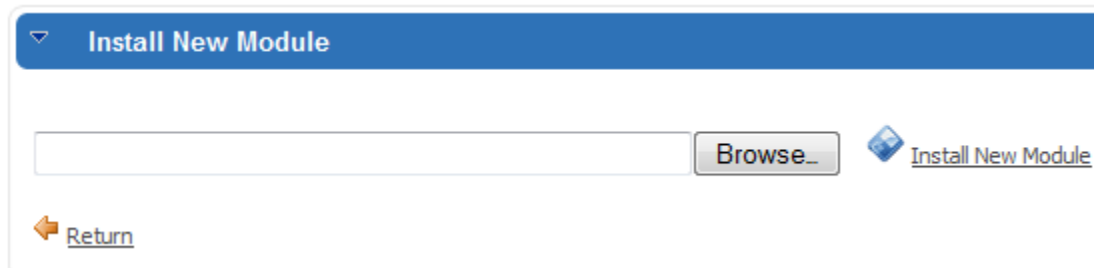


Figure 3 - Browse for the module

### Step 4 - Pick the file

After you accessed the file, choose it and press Open.

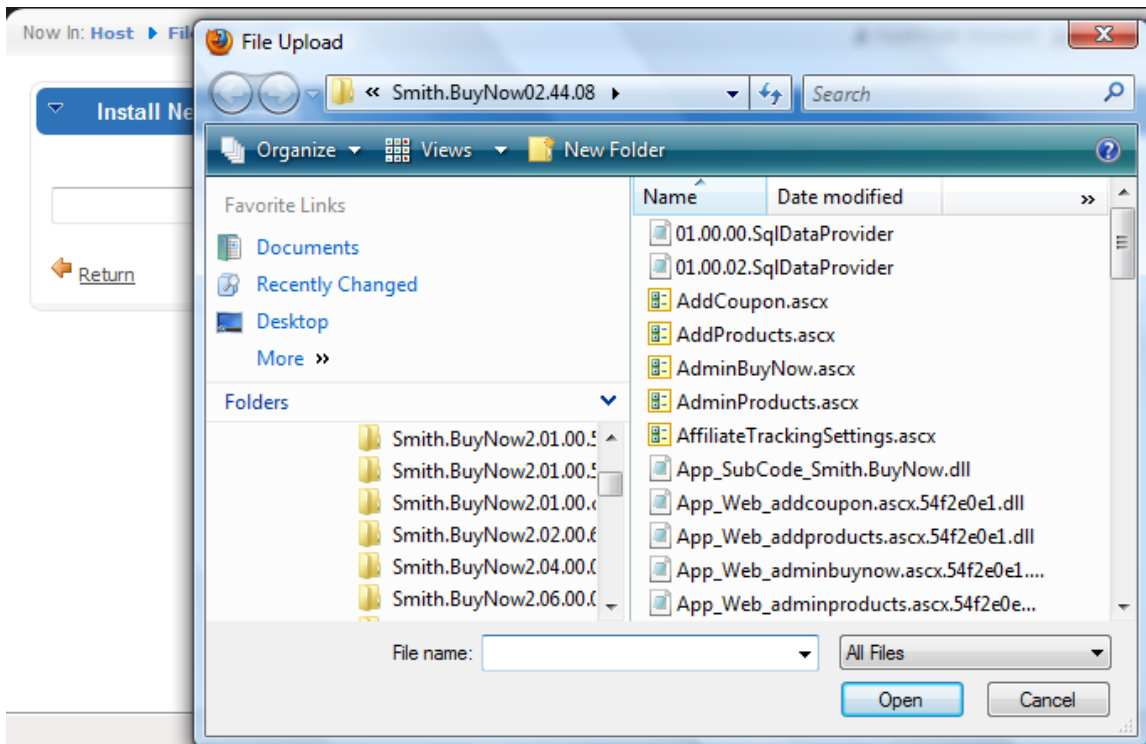


Figure 4 - Pick your module

**Step 5 - Add the File**

The file (with complete physical location) appears in the textbox. Check it once again and then click Install New Module.

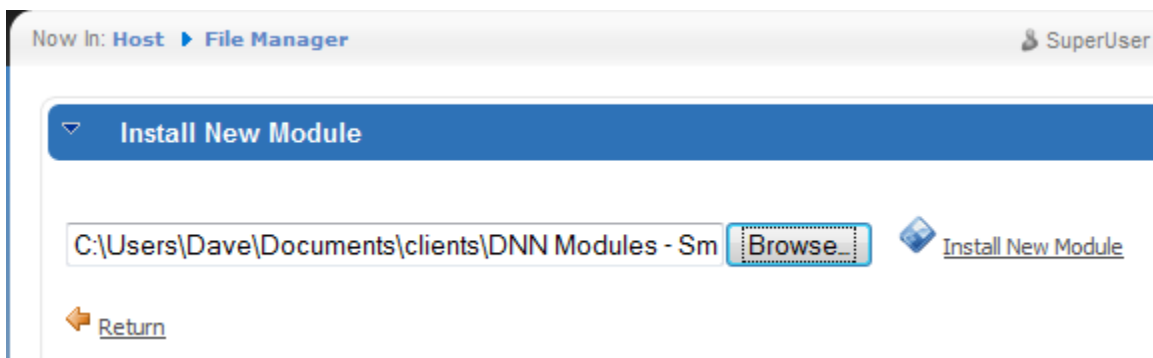


Figure 5 – Install New Module



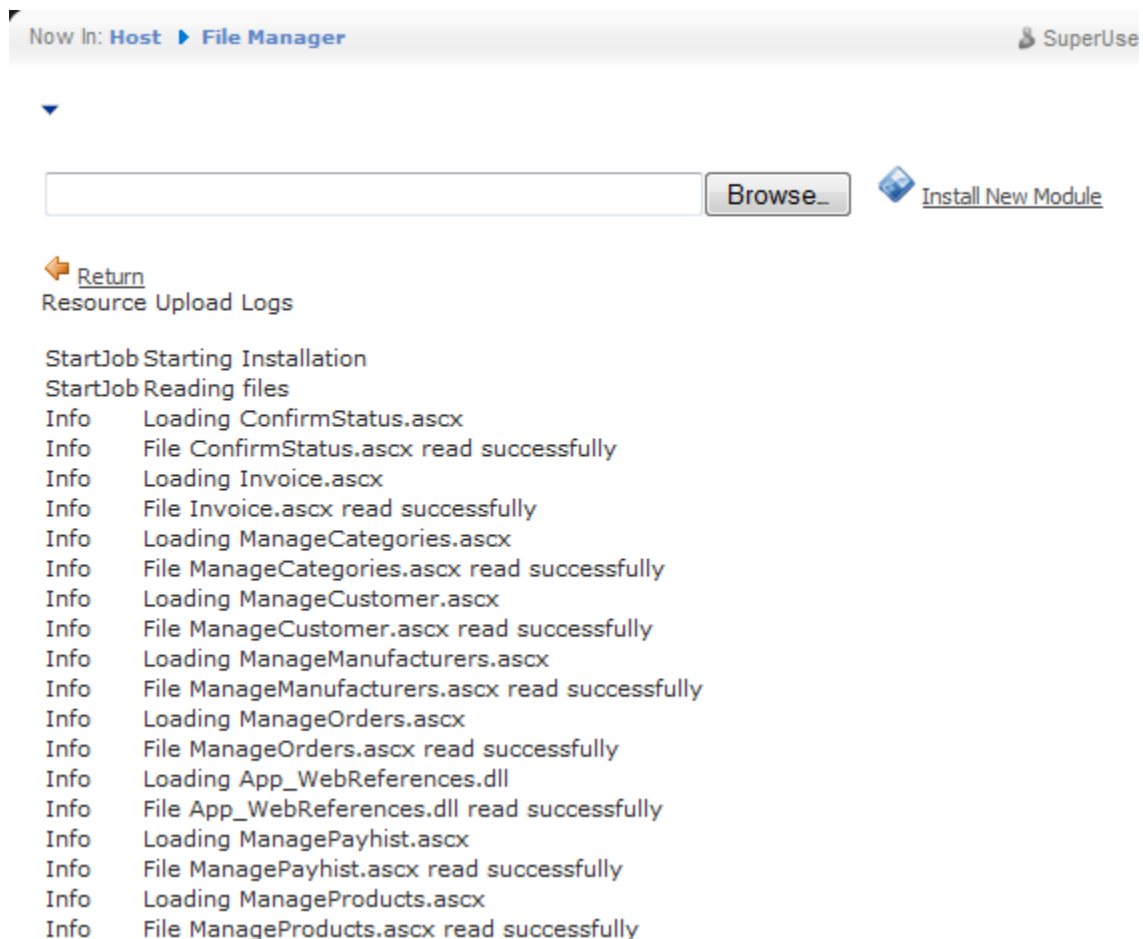
### Step 6 – Install it Now!

When you see it appear on text area box, click Install New Module link and go through the DNN install module wizard.


### Step 7 - Module Installed


If you do not see any error messages, it means that the module is installed correctly.

Click the Return link.



Now In: [Host](#) ▶ [File Manager](#) SuperUse

 [Install New Module](#)

 [Return](#)  
Resource Upload Logs

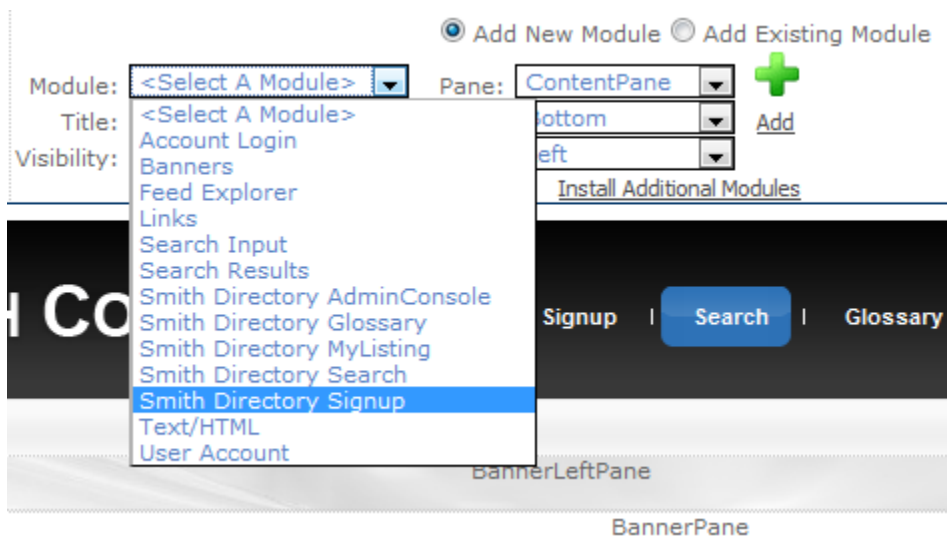
```
StartJob Starting Installation
StartJob Reading files
Info Loading ConfirmStatus.ascx
Info File ConfirmStatus.ascx read successfully
Info Loading Invoice.ascx
Info File Invoice.ascx read successfully
Info Loading ManageCategories.ascx
Info File ManageCategories.ascx read successfully
Info Loading ManageCustomer.ascx
Info File ManageCustomer.ascx read successfully
Info Loading ManageManufacturers.ascx
Info File ManageManufacturers.ascx read successfully
Info Loading ManageOrders.ascx
Info File ManageOrders.ascx read successfully
Info Loading App_WebReferences.dll
Info File App_WebReferences.dll read successfully
Info Loading ManagePayhist.ascx
Info File ManagePayhist.ascx read successfully
Info Loading ManageProducts.ascx
Info File ManageProducts.ascx read successfully
```

### Step 8 – DNN Install New module log

When everything is OK, you should see the Smith Buy Now module on the Module list on upper panel. Now you can use the module.

**Step 8 - See it on the List**

When everything is OK, you should see the Smith Business Directory module on the Module list on upper panel. Now you can use the module.



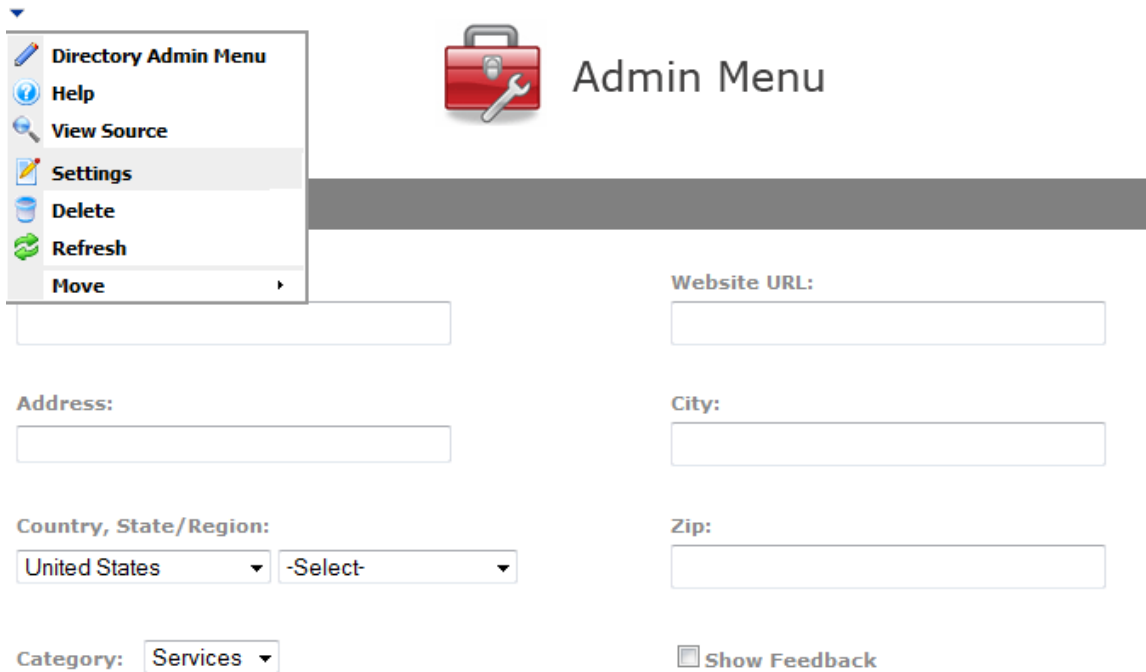
**Step 8** – Create a new page in your DNN portal and add the Smith Directory Signup module to the page.

## V. Smith Directory Signup Module

After you add the Smith Directory Signup module on your page you will see a signup page where users can submit their directory listings.

### A. Configuring the Signup Module Settings

Hover your mouse over the drop down arrow in the upper corner of the Smith Directory Signup module container and choose settings.



Scroll to the bottom of the screen and click the plus sign next to the “Signup Settings” section to open up the settings.

### ***B. Moderation Setup***

Moderation setup allows you to configure if a listing is automatically approved to be displayed in the directory or if it must be approved before showing up in the directory listing.

#### **Moderation Setup**

- Auto Approve New Listings
- Moderate New Listings

**Auto Approve New Listings** – Select this option if you want new listings to automatically be displayed in the directory listing.

**Moderate New Listings** – Select this option if you want to moderate new listings before they are displayed in the directory listing.

For more information on moderating listings and approving moderated listings [click here](#).

### ***C. Listing Setup***

When you add the Smith Directory module to your DNN page the default configuration of the module displays three signup levels, one free and two paid levels. The signup levels can be configured with a title and price. Each level can also be hidden.

#### Free Listing Setup

Free Listing Title:   
Hide Free Listing:

#### Standard Listing Setup

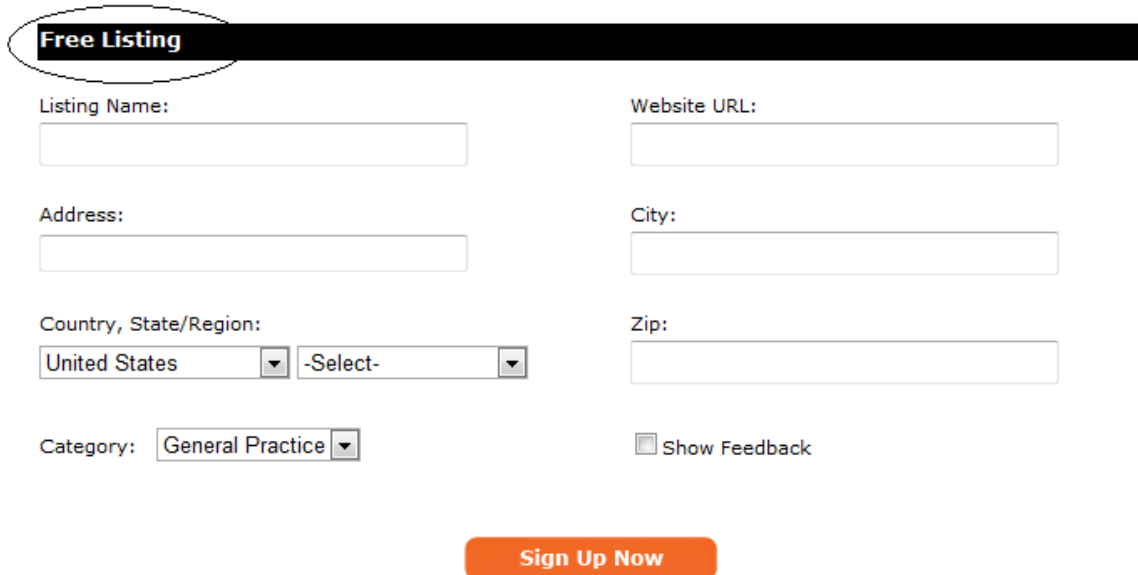
Standard Listing Title:   
Standard Price:   
Hide Standard Listing:

#### Premium Listing Setup

Premium Listing Title:   
Premium Price:   
Hide Premium Listing:

**Hide** – Check the “hide” box to hide the listing level.

**Free Listing Title** – Enter the title you want to be displayed at the top of the free listing sign up form.



The form is titled "Free Listing" in a black bar at the top. It contains the following fields and options:

- Listing Name:** Text input field
- Website URL:** Text input field
- Address:** Text input field
- City:** Text input field
- Country, State/Region:** Two dropdown menus. The first is set to "United States" and the second is "-Select-".
- Zip:** Text input field
- Category:** Dropdown menu set to "General Practice".
- Show Feedback

At the bottom center is an orange button labeled "Sign Up Now".

Figure 6 - Free Listing

**Standard Listing Title** – Enter the title you want to be displayed at the top of the standard listing (paid level 1) sign up form.

**Standard Price** - Enter the price you would like to charge for the standard listings,

**Standard Listing - \$25 Per Month**

Listing Name:  Website URL:

Address:  City:

Country, State/Region:   Zip:

Listing Description:

Category:   Show Feedback

[Sign Up Now](#)

Figure 7 - Standard Listing

**Premium Listing Title** – Enter the title you want to be displayed at the top of the premium listing (paid level 2) sign up form.

**Premium Price** - Enter the price you would like to charge for the premium listings,

**Premium Listing - \$100 Per Month**

Listing Name:	Website URL:
<input type="text"/>	<input type="text"/>
Address:	City:
<input type="text"/>	<input type="text"/>
Country, State/Region:	Zip:
United States <input type="text"/> -Select- <input type="text"/>	<input type="text"/>
Category:	Upload Picture:
General Practice <input type="text"/>	<input type="text"/> <input type="button" value="Browse..."/>

Listing Description:

Show Feedback

Figure 8 - Premium Listing

### D. Image Setup

**Image Width** – The Image Width textbox allows you to control the pixel width of images that are displayed in your directory listing.

**Image Height** - The Image Height textbox allows you to control the pixel height of images that are displayed in your directory listing.

## **E. Gateway Setup**

Smith Directory is integrated with the Authorize.Net and PayPal payment gateways for one time and recurring billing.

### **Payment Gateway Setup**

* Gateway:	<input type="text" value="Authorize.Net"/>
* API Login:	<input type="text" value="2Sht9m67PT"/>
* TransactionKey:	<input type="text" value="35J2rq5d6LtJ2Yg2"/>
Test Mode:	<input checked="" type="checkbox"/>

**Gateway** – The Gateway dropdown list is where you select the gateway provider you want to process credit cards through. The gateway is the server and software program that the Smith Directory module sends credit card transaction to for processing. Select the gateway that applies to you. If you do not have a gateway or merchant account setup, please contact Smith Consulting at 949-829-3020. We are certified resellers with Authorize.Net, Chase Merchant Services and TransFirst and can get you setup quickly and we offer competitive rates.

## **F. Gateways Supported**

The following gateways are supported:

- Authorize.Net
- PayPal Website Payments Standard
- TransFirst
- Manual or Offline Processing

## **G. Authorize.Net**

Smith Directory is integrated with Authorize. Net's Advanced Integration Method (AIM)

**API Login** - This is a required field for the Authorize.net gateway. API Login is a unique id that identifies you with the gateway provider.

**Transaction key** - This is the gateway password and is a required field.



Please Note: Authorize.Net expires their test accounts after 30 days. You can apply for an Authorize.Net test account using the following link

<http://developer.authorize.net/testaccount/>

Authorize.net requires an API login Id and a transaction key to communicate with the gateway. Please note that the API login Id and a transaction key are credentials for the gateway only. To login to the Authorize.net virtual terminal you will need a separate login id and password that is provided in your welcome email from Authorize.Net. Your Authorize.net API login Id and a transaction key can be obtained by following these steps:

- Log Into Authorize.net
- On the first page, look for the “Account” section at the bottom left hand side. Click on “Settings”.
- On the settings page, click on “API Login ID and Transaction Key”, which is located in the “Security Settings” section.
- Your API login Id should show on the API Login ID page, and to obtain a transaction Id, follow the instructions in the “Create New Transaction Key” section.

## ***H. PayPal Website Payments Standard***

If you use PayPal Website Payments Standard, when your customer checks out they will be directed to a page that allows them to log into their PayPal account or pay by credit card without having to sign up for a PayPal account.

Before you can use PayPal Website Payments Standard you need to sign up for a PayPal account.

Create a PayPal personal or business account at PayPal. We recommend you create a business account in order to keep your personal and business PayPal accounts separate. Opening a business account is preferable because it allows you to use a business name on the PayPal checkout pages and in theory allows you to keep your private name separate. Presenting a business name to customers will help build customer confidence. Additionally, a PayPal business account will allow you to configure a return URL which is required for proper configuration in the Smith Directory.

Go through the approval process to verify your account. This will require a bank account and correct contact information. You can contact PayPal customer service if you have questions here.

### Configuring the return URL at PayPal

1. Go to the PayPal website and login to your personal or business account.
2. Select Profile menu (Click on Profile link)
3. Under Selling preferences, select website Payment Preferences

The following the screen will be displayed:

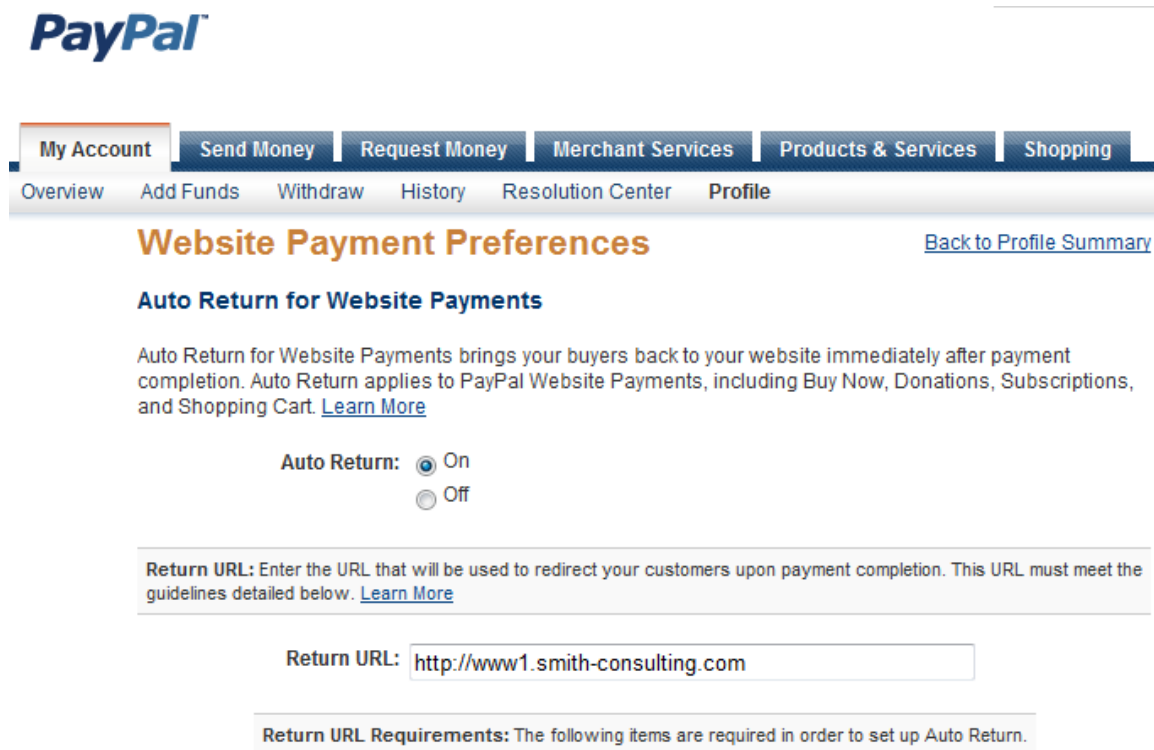


Figure 9

4. Click the “Auto Return” radio button to “On”
5. Enter the “Return URL” of your website home page. See Figure 7 above.

### Configuring Smith Directory Module Settings for Paypal Website Payments Standard

Gateway – Choose "PayPal Website Payments Standard" from the dropdown box under the "Gateway Setup" section in your Smith Directory module settings.

Merchant (Required) – Enter your PayPal email address you created when you signed up with PayPal.

Merchant Logo URL (Optional) – Enter the path to your company logo. Your company logo will show up on the PayPal checkout screen as the user checks out on PayPal.

### ***I. TransFirst***

**Merchant ID** - This is a required field for the gateway. Merchant ID is a unique id that identifies you with the gateway provider.

**RegKey** - This is the gateway password and is a required field. Authorize.net refers to this as a Transaction Key.

### ***J. Show PayPal Checkout Option***

The show PayPal checkout option allows you to give your customers the option to checkout using PayPal standard in addition to the gateway option that you configured above under gateway settings. If you have configured PayPal standard under the gateway settings above you should NOT check the show PayPal checkout option checkbox. If you have configured PayPal Websites Payments Pro or PayPal Payflow Pro under the gateway settings above you should ONLY check this box if you want to give your customer the additional option at checkout to pay using PayPal standard.

#### **Smith Directory Settings**

When "Show PayPal Checkout Option" is checked two additional fields called "Merchant" and "Merchant Logo URL" will be displayed. See the following screen shot:

Show Paypal Checkout Option:

Merchant:

Merchant Logo URL:

**Merchant (Required)** – Enter your PayPal email address you created when you signed up with PayPal.


**Merchant Logo URL (Optional)** – Enter the path to your company logo. Your company logo will show up on the PayPal checkout screen as the user checks out on PayPal.

## User Checkout

When “Show PayPal Checkout Option” is checked the user is presented with the option to pay on your website using the payment gateway you configured from the gateway dropdown or checking out on the PayPal website using PayPal Website Payments Standard.

See the following screen of the Directory checkout for an example:

### Step 2. Enter Payment Information

Credit Card   Paypal, the safer easier way to checkout

Name on Account: \*

Street Address of Card Holder: \*

City: \*

Country: \*

State/Region : \*

Zip Code: \*

When the user clicks the PayPal radio button the Directory module hides the credit card fields because the user will be entering their credit card information on the PayPal site.

When the user clicks the “Next” button they will be taken to a confirmation page.

**CONFIRM REGISTRATION**

**LISTING INFORMATION**

Listing Name: Mandys Candy  
Address: 200 Main St  
City: Laguna Beach  
State: California  
Country: United States  
Zip: 92456

**ORDER DETAILS**

Listing Type: Standard Listing - \$25 per month  
Total Price: \$25  
Payment Method: PAYPALSTD

**CUSTOMER INFORMATION**

First Name:    
Last Name:    
Email:  

**CREATE PASSWORD ( Email will be your UserName )**

Password:    
Confirm Password:  

**Process Payment**

## ***K. User Roles Setup***

### **User Roles Setup**

Role(s) to add after successful payment:

- Administrators
- Registered Users
- Subscribers

Role to remove on successful payment:

- Administrators
- Registered Users
- Subscribers

**Role(s) to Add after Successful Payment** – The Directory module allows you to select multiple roles to add a user to upon successful registration and credit card authorization, the user will be placed in the roles that you choose here. All the currently defined roles in your DNN portal will be available as checkboxes.

To add new roles, go to the DNN Admin menu - user roles menu option. Default DNN roles are Administrators, Content Manager, Registered Users, Subscribers.

**Role(s) to Remove after Successful Payment** – The Directory module allows you to select one or more roles to remove a user from upon successful registration and credit card authorization; the user will be removed from the roles that you choose here. All the currently defined roles in your DNN portal will be available as checkboxes.

## L. **Subscription and Recurring Billing Setup**

### **Subscription and Recurring Billing Setup**

Subscription Length(days):  (Applies to one time payments only)

Recurring Billing:

Subscription Interval:

Total Occurrences:  ("9999" = Infinite recurring billing)

Show Recurring Billing Start Date:

**Subscription Length (days)** - This field only applies to registrations of one time payments, not recurring. The purpose of this field is to calculate the expiration date for the user's membership and remove them from the DNN role they were added to when registered. The calculation to determine the expiration date is the date the user registered plus the number of days entered in this field. The Directory module will automatically remove the user from the custom role on their expiration date. Subscription Length (days) is for one time payments only and cannot be used with recurring payments. Leave the field blank if you want the user's membership to your portal to never expire.

**Recurring Billing** - Check this box if you want to enable recurring billing in the payment Directory module. .

**Subscription Interval** – This dropdown box is where you configure the subscription interval for recurring payments. The options available are weekly, monthly and yearly. For example, if you choose monthly and the user registers on 1/1/09, the first payment will be automatically billed on 1/1/09 at midnight. Their second payment will be billed on 2/1/09 and so on.

**Total Occurrences** - This setting only applies if you have checked the box for recurring billing above. Enter a numeric value for the number of times that you want the recurring billing to charge the customer. Enter "12" to bill the customer's card 12 times. Enter "9999" to have the recurring billing continue indefinitely.

## ***M. Confirmation Page Setup***

The following settings allow you to configure custom option to the confirmation page of the Directory module.

### Confirmation Page Setup

Successful Payment Page:

Show User Name:

**Successful Payment Page** - Choose the page that you want to direct the user to after they have successfully completed their online payment and registration.

**Show User Name** – When checked the user will be prompted during their payment registration to enter a user name that will be used as their DNN user name to login to the website. When unchecked the user will not be prompted to enter a user name and their email address will be used as their DNN login.

## ***N. Email Setup***



**Email Setup**

\*To Email:

\*From Email:

\* User Email Confirmation Subject:

Your Order

\* User Email Confirmation Header:

Thank you for your order.<br>Your Order Total is : [ORDERTOTAL]

\* Admin Email Confirmation Subject:

New Order on Website

\* Admin Email Confirmation Header:

New order from website for order total of [ORDERTOTAL]

**Store To Email Address** – Enter the email address for your store administrator that you want the order email notifications to be sent to.

**Store From Email Address** – Enter the email address that you want the order email notifications to the customer be sent from.

**User Email Confirmation Subject** - Enter the subject line for the email that will be sent to the customer upon successful registration and payment.

**User Email Confirmation Header** - Enter the text for the header of the email that will be sent to the customer upon successful registration and payment. The header will be displayed at the top of the invoice. Html is supported.

**Admin Email Confirmation Subject** - Enter the subject line for the email that will be sent to the portal admin upon successful registration and payment.

**Admin Email Confirmation Header** - Enter the text for the header of the email that will be sent to the portal admin upon successful registration and payment. Html is supported.

**Email Tokens** - The following tokens can be entered in the User Email Confirmation Header and Admin Email Confirmation Header to customize the email message.

[FIRSTNAME]

[LASTNAME]

[USERNAME] - Customer's DNN User ID

[EMAIL] – Customer's email address

[ORDERTOTAL] – Total order amount

Note: All email tokens must be entered in uppercase and be enclosed in square brackets as shown above.

**Save your settings** - When you are finished configuring the settings above click the “Update” button at the bottom of your screen.

To further customize the confirmation email to add your company logo, custom message, etc. you can modify the email html template located off your portal root directory in /desktopmodules/smithdirectory/

- OrderTemplate.htm – standard email template that can be customized

Congratulations, your new Directory Module is almost ready for use!

## VI. Directory Admin Menu

The Directory Admin Menu is used to manage and moderate directory listings. To access the admin menu you must be logged in with the DNN “Host” or “Admin” accounts or a DNN login that is the member of the “SDManager” role. To load the admin menu click the “Admin Menu” button at the top of the directory signup module.



## Admin Menu

When you click the “Admin Menu” button the following screen is displayed:

### Directory Admin Menu



Manage Listings



Manage Categories



Custom Fields



Moderate



Reports



Exit

## VII. Manage Listings

To view, edit or delete directory listings click the “Manage Listings” button on the Directory Admin Menu.



Manage Listings

The following screen will be displayed:

Manage Directory Listing

From Date:  31 To Date:  31

< Prev Next >							
<input type="button" value="Filter"/>		<u>Listing Name</u>	<u>Category</u>	<u>Listing Type</u>	<u>Listing URL</u>	<u>Date Created</u>	<u>Description</u>
<input type="button" value="Select"/>	<input type="button" value="Delete"/>	Georges Cigar Shop	-Select-	Standard	georgescigars.com	3/23/2011	Georges Cigar Shop sells a wide and around the world!
<input type="button" value="Select"/>	<input type="button" value="Delete"/>	Sammys Flower Shop	Services	Free	sammysflowers.com	3/23/2011	
< Prev Next >							

The manage directory listing screen displays a grid view listing of your directory listings for quick viewing and by default is sorted showing newest listings first.

### **A. Sorting the Directory Listing Grid**

Each column heading in the grid is a hyperlink, if you click the column heading in the grid it will sort on the field heading clicked in ascending order, if you click the column heading again the grid will sort in descending order on the field heading clicked.

### **B. Filtering Listings by Date Range**

From Date:  31 To Date:  31

To filter the listings by date range just click on the calendar icons for “From Date” and “To Date” and choose the date range you want and then click the filter button and the listing grid will filter all the directory listings by date range on the listing create date field. To remove the filter click the “Show All” button and all the listings will be displayed again.

### **C. Filtering Listings using Custom Criteria**

In the header of the listing grid are textboxes and dropdown lists that allow you to filter the grid by listing name, category name and listing type.

<input type="button" value="Filter"/>	<input type="text"/>	<u>Listing Name</u> <input type="text"/>	<u>Category</u> -Select- ▼	<u>Listing Type</u> -Select- ▼	<u>Listing URL</u>
---------------------------------------	----------------------	---	-------------------------------	-----------------------------------	--------------------

Simply enter the value in the textbox or select the item from the dropdown list you want to filter on and click to the filter button and the sting grid will filter on the criteria you entered. To remove the filter and show all listings click the “Show All” button.

## VIII. Viewing Listing Details and Payment History

Click the “Select” button in the left margin to view the listing detail and payment history of the order you want to view.

### Listing Info

ListingID: 2

Listing Name:

Category:

Listing Type:

Listing URL:

Listing Address:

Listing City:

Listing Country:

State/Region:

Postal Code:

Email:

Phone:

Enable Ratings:

Approved:

Date Created: 3/23/2011 7:18:23 PM

### Billing Info

Billing Name:

Credit Card No:

Exp. Date:

Amount:

Billing Address:

Billing City:

Billing Country:

State/Region:

Billing Zip:

TransactionID:

Auth Code:

Payment Msg:

Pay Status:

### Listing Description:

Georges Cigar Shop sells a wide variety of cigars from Cuba and around the world! Great prices too.

All the fields in the Listing Detail screen above are available to edit, enter the new value for the field you wish to edit and click the “Save” button to save your changes.

## IX. Category Management

To view, edit or delete categories click the “Manage Categories” button on the Directory Admin Menu.



The following screen will be displayed when you click the “Manage Categories” button:

### Manage Categories

Sort Order:

Category Name:

CategoryID	Sort Order	Category Name		
1	2	Services	<a href="#">Edit</a>	<a href="#">Delete</a>
2	5	Jobs	<a href="#">Edit</a>	<a href="#">Delete</a>

### A. Add New Category

**Sort Order** - The sort order field controls the order in which the categories are displayed in the category dropdown in the sign up, search and glossary module. Enter a numeric number from 1 to 999. The list categories will be sorted in ascending order by the sort order field.

**Category Name** - Enter the listing category that you wish to add in the “Category Name” field.

## **A. *Edit and Delete Categories***

### **Edit Categories**

From the grid view that lists your categories click the edit link next to the category you wish to edit. Make the changes to the sort order or category fields and click the update button to save your changes. Click the cancel button to cancel your changes.

### **Delete Categories**

From the category grid that lists your categories click the delete link next to the category you wish to delete.

## **X. Custom Listing Fields**

Smith Directory includes a full form generator which allows you to create and manage an unlimited number of custom fields on your signup form and directory listings.

To view, add, edit, or delete custom fields click the “Custom Fields” button on the Directory Admin Menu.



**Custom Fields**

The following screen will be displayed when you click the “Custom Fields” button:

### Manage Custom Form Fields

Field Label: Phone

Field Type: TextBox

Field Value:

Listing Type:  Free Listing  Standard  Premium

Sort Order: 2



**Figure 10 - Manage Custom Form Fields**

**Edit Button** - Click the “Edit” link to modify an existing custom field on your signup form.

**New Button** – Click the “New” link to create a new custom field on your signup form.

**Delete Button** - Click the “Delete” link to delete a custom field on your signup form.

### ***A. Adding a Custom Field***

From the Manage Custom Form Fields screen in figure 10 above click the “New” button to create a new custom field on your signup form. The following screen will be displayed:



**Manage Custom Form Fields**

Field Label:

Field Type:

Field Value:

Listing Type:  FreeListing  Standard  Premium

Sort Order:

**Field Label** – Enter the label you want for your custom field on the signup page

**Field Type** – Select the field type from the “Type” dropdown box for your new custom field. The following custom field types are supported:

1. Textbox
2. Multiline Textbox
3. Hyperlink
4. Dropdown
5. File Upload (pictures, files, pdf, etc)

**Field Value** = The field value field applies to the dropdown control type only. If you have selected the “Dropdownlist” control type then you can enter the values you wish to appear in the dropdownlist. Enter the values separated by commas.

**Manage Custom Form Fields**

Field Label:

Field Type:

Field Value:

Listing Type:

Sort Order:

**Listing Type** – Check the listing type checkbox you would like the new custom field to be displayed in the Signup form; Free Listing, Standard Listing and/or Premium Listing.

**Sort Order** - The sort order field controls the order in which the custom fields are displayed on the sign up form and listing detail screens. Enter a numeric number from 1 to 999.

**Insert Button** - When you are finished entering the values for your custom field click the “Insert” button at the bottom of your screen to save your new custom field.

**Paging thru your custom fields** – The numbers at the bottom of the screen allow you to scroll thru your custom fields that you have already created. Click on a number to scroll thru your custom fields.

## XI. Moderate Listings

Smith Directory includes the ability to moderate listings before they are approved and displayed on the site. To turn on moderation navigate to the Directory Signup module settings under the “Moderation setup” section and click on “Moderate New Listings”.

### Moderation Setup

- Auto Approve New Listings
- Moderate New Listings

When “Moderate New Listings” is selected all new listings must be approved before showing up in the directory listing.

To moderate directory listings click the “Moderate” button on the Directory Admin Menu.



Moderate

The following screen will be displayed:

Moderate Directory Listings

Back

From Date:  3/1 To Date:  3/1 Filter Show All Approve Selected Listings

< Prev Next >								
Filter		Approve	Listing Name	Category	Listing Type	Listing URL	Date Created	Description
Select	Delete	<input type="checkbox"/>	Georges Cigar Shop	Services	Standard	georgescigars.com	3/23/2011	Georges Cigar and around the
Select	Delete	<input type="checkbox"/>	Renzos Grill	Services	Standard	renzos.com	3/23/2011	lkj lkjk jlkj
Select	Delete	<input type="checkbox"/>	Sammys Flower Shop	Services	Free	sammysflowers.com	3/23/2011	
< Prev Next >								

**Figure 11 - Moderate Listing Screen**

The Moderator” screen in figure 11 above displays all the listings that are not yet approved to be displayed on the web site.

### ***A. Approving Listings***

To approve listings the admin checks the “Approved” checkbox next to all the listings ready for approval and then clicks the “Save” button and the listing will become viewable in the live listings in the search and glossary modules.

The moderate listing screen also provides the following functionality:

- Select one or more listings or select all in one mouse click.
- Select – View listing detail
- Delete – Delete the listing
- Sorting and filtering

## XII. Registration Signup and Checkout Screens

### A. Signup Page – Free Listings

**Free Listing**

<b>Listing Name:</b> <input type="text"/>	<b>Website URL:</b> <input type="text"/>
<b>Address:</b> <input type="text"/>	<b>City:</b> <input type="text"/>
<b>Country, State/Region:</b> United States <input type="text"/> -Select- <input type="text"/>	<b>Zip:</b> <input type="text"/>
<b>Category:</b> Services <input type="text"/>	<input type="checkbox"/> Show Feedback

[Sign Up Now >](#)

## B. Signup Page – Standard Listings

**Standard Listing - \$25**

**Listing Name:**

**Website URL:**

**Address:**

**City:**

**Country, State/Region:**

**Zip:**

**Listing Description:**

**Category:**   **Show Feedback**

**Phone**

[Sign Up Now >](#)

### C. Signup Page – Premium Listings

**Premium Listing - \$50**










<b>Listing Name:</b> <input type="text"/>	<b>Website URL:</b> <input type="text"/>
<b>Address:</b> <input type="text"/>	<b>City:</b> <input type="text"/>
<b>Country, State/Region:</b> United States <input type="text"/> -Select- <input type="text"/>	<b>Zip:</b> <input type="text"/>
<b>Category:</b> Services <input type="text"/>	<b>Upload Picture:</b> <input type="text"/> <input type="button" value="Browse..."/>

**Listing Description:**

Show Feedback      Phone

## D. Checkout Payment Screen

### Step 2 - ENTER PAYMENT INFORMATION

Payment Method:	<input type="text" value="Credit Card"/>	
Credit Card Number:	<input type="text"/>	
	No spaces or dashes	
Expiration Date:	<input type="text" value="01"/> <input type="text" value="2011"/>	
Card Security Code:	<input type="text"/>	 <a href="#">What's this?</a>
Name on Account:	<input type="text"/>	
Billing Address:	<input type="text" value="24 Kendall St"/>	
Address2:	<input type="text"/>	
Country:	<input type="text" value="United States"/>	
State:	<input type="text" value="California"/>	
Zip Code:	<input type="text" value="92677"/>	



## E. Checkout Confirmation Page

### CONFIRM REGISTRATION

#### LISTING INFORMATION

Listing Name: Mandys Candy  
Address: 200 Main St  
City: Laguna Beach  
State: California  
Country: United States  
Zip: 92456

#### ORDER DETAILS

Listing Type: Standard Listing - \$25 per month  
Total Price: \$25  
Payment Method: PAYPALSTD

#### CUSTOMER INFORMATION

First Name:    
Last Name:    
Email:  

#### CREATE PASSWORD ( Email will be your UserName )

Password:    
Confirm Password:  

BACK

Process Payment

## ***F. Show Feedback Option***

In each of the directory listing types there is a checkbox titled “Show Feedback”. The show feedback checkbox option allows a registered user to provide a rating and comments on the directory listing. The following is a screen shot of the show feedback section of a listing.

### **Bobs Bikes**

9898 apple  
laguna, California 3444

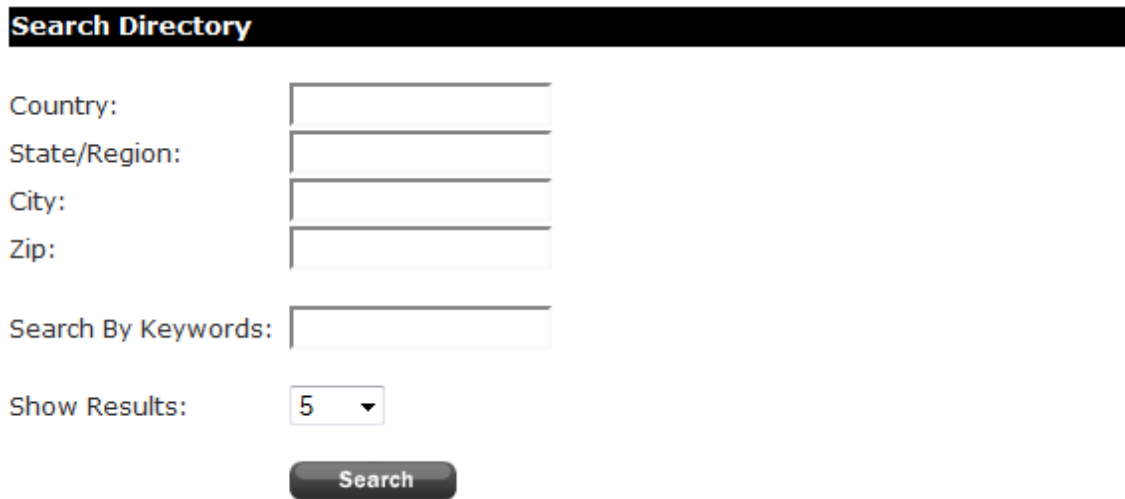
Rating  1  2  3  4  5

Average Rating: Not Rated

A registered user can rate a directory listing from 1 to 5 by clicking a radio button and can type in comments in the multi line text box. The user then clicks submit to save the rating.

### XIII. Smith Directory Search Module

The Smith Directory Search Module can be placed on any page and pane in your portal. The search module allows users to search for directory listings by location and by keyword. The following is a screen shot the search module after it is added to your portal page:



The screenshot shows a search interface titled "Search Directory" in a black header. Below the header are five text input fields: "Country:", "State/Region:", "City:", "Zip:", and "Search By Keywords:". Below these fields is a "Show Results:" label followed by a dropdown menu showing the number "5". At the bottom of the form is a dark grey "Search" button.

Figure 12 - Smith Directory Search Module

Enter your search criteria and click the search button and directory listings that meet the criteria entered will be displayed.

The search by keyword field will do a wildcard search on all listing fields including all custom fields that you have defined in the custom form generator.

**Note:** If you do not enter any criteria in the textboxes and click the search button then all the listings will be returned.

---

**Premium Links**

---

**Kathryn Web Works**

www.katweb.com  
20 Kendall  
Laguna, California 92677  
United States

[view](#)

---

**Bills Firewalls**

www.firewalls.com  
20 Kendall  
Laguna Niguel, California 92677  
United States

[view](#)

---

The search results screen has paging built in that allows the user to scroll forward and backward through the listings.

### ***A. Filtering listings by category using the query string***

The search module allows you to filter listings by category by passing the category id in the querystring. For example:

`http://www.mydomain.com/Home/Default.aspx?CategoryID=5`

When the category id is passed in the querystring the listings are filtered by category.

This feature will allow you to create your own separate category page or module of links or images similar to craigslist or business.com.

## XIV. Smith Directory Glossary Module

The Smith Directory Glossary Module can be placed on any page and pane in your portal. The Glossary module allows the user to filter directory listings by keyword or by clicking the letters A-Z. The following is a screen shot the Glossary module after it is added to your portal page:

Search:

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z ALL

Show Records:  ▼

---

**Premium Links**

---

**Kathryn Web Works**  
www.katweb.com  
20 kendall  
laguna, California 92677  
United States

---

**Bills Firewalls**  
www.firewalls.com  
20 Kendall  
Laguna Niguel, California 92677  
United States

---

The search field will do a wildcard search on all listing fields including all custom fields that you have defined in the custom form generator.

Premium listings have a button titled “View”. When the user clicks the “View” button the following detailed profile page will be displayed:

### A. Premium Listing Detailed Profile


PremiumListing

Jill's Flowers

2635 Bluebird Lane  
Laguna Beach, CA  
92677

[www.jillsflowers.com](http://www.jillsflowers.com)

949-234-3444



Rating  1  2  3  4  5

Average Rating: Not Rated

Figure 13 - Premium Listing Detailed Profile

## B. Standard and Free Listings

### Standard & Free Links

---

#### Bobs Bikes

20 kendall  
laguna, Arizona 92677

---

#### Lisas Flowers

9898 apple  
laguna, California 3444

Rating  1  2  3  4  5

Submit

Average Rating: Not Rated

---

#### Mikes Pub

test  
test, California 93933

#### Phone

333-333-3333

Rating  1  2  3  4  5

Submit

Average Rating: Not Rated

## XV. Smith My Listings Module

The My Listings module allows the user to login to your portal and view or edit their directory listing. The following is a screen shot the My Listings module after it is added to your portal page:

▼ Smith Directory My Listing

---

Coals Candy [view](#)

---

bobs tennis [view](#)

---

**Listing Name:**

**Address:**  **City:**

**State, Country:**   **Zip:**

Show Feedback



## XVI. PCI Compliance

Security of your customer's personal information and credit card data is number one priority for Smith Consulting and our modules are all built to be fully PCI compliant. The Payment Card Industry Data Security Standard (PCI DSS) is a set of requirements designed to ensure that ALL companies that process, store or transmit credit card information maintain a secure environment. The PCI DSS is administered and managed by the PCI SSC [www.pcisecuritystandards.org](http://www.pcisecuritystandards.org) an independent body that was created by the major payment card brands (Visa, MasterCard, American Express, Discover and JCB.).

1. Credit Card Encryption – The module stores credit card numbers in the database using RSA 256 bit encryption which is an approved encryption by PCI.
2. Card Security Code – CVV/CID on the back of a credit card is collected from the user and sent to the payment gateway for authorization but is never stored in the database.
3. SSL – The module fully supports SSL
4. The module supports validation for SQL injection and cross site scripting to prevent unauthorized access to the database