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User's Manual

Project name: TrueLoaded

Module: Customers

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version 1.2

o s C o m m e r c e m o d u l e s
I n t e g r a t i o n w i t h E R P s y s t e m s
S e r v i c e s
S k i n s

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Introduction

From the Admin Panel > Customers page you can create a new customer or edit/delete an existent one. You can also send emails to every customer from this page, and view the customer's order details.

From the Admin Panel > Orders page you can view orders details, edit/delete/update orders, print orders invoices and packing slips.

Creating A New Customer

1. From the Admin Panel click the **Customers/Orders** link.



2. From the Customers page click the **Insert** button at the bottom of the list.

The screenshot shows the 'Customers/Orders :: Customers' page with a table of customer data. A red arrow points to the 'insert' button at the bottom right of the page.

| Last Name | First Name | E-mail | Account Created | Action |
|-----------|------------|------------------------|-----------------|--------|
| Koshelev | Vladislav | vkoshelev@holbi.co.uk | 06/29/2005 | ▶ |
| Krolivets | Andrew | akrolivets@holbi.co.uk | 06/16/2006 | ⓘ |
| Li | Lilia | inna.suprun@gmail.com | 08/21/2006 | ⓘ |
| Malyshev | Vladislav | vmalyshev@holbi.co.uk | 10/25/2004 | ⓘ |
| Shk | Bob | eshutenko@gmail.com | 08/22/2006 | ⓘ |
| Test | Ed | eshutenko@trianic.com | 05/15/2006 | ⓘ |
| Test | Inna | innatester@aim.com | 08/27/2009 | ⓘ |
| Test | Inna | innatester1@aol.co.uk | 08/27/2009 | ⓘ |
| Vasiliev | Igar | ivasiliev@holbi.co.uk | 08/17/2006 | ⓘ |

Displaying 1 to 9 (of 9 customers) Page 1 of 1

insert

3. Fill all the fields in with the customer's data. The fields marked with the asterisk (*) are required. If some of these fields are left blank, customer's information won't be saved. The following information should be specified on this page:

| Personal | |
|------------------------------|--|
| Gender: | <input checked="" type="radio"/> Male <input type="radio"/> Female |
| First Name: | <input type="text" value="John"/> * Required |
| Last Name: | <input type="text" value="Smith"/> * Required |
| Date of Birth: mm/dd/yyyy | <input type="text" value="12/12/1999"/> * Required |
| E-Mail Address: | <input type="text" value="yanablin@gmail.com"/> * Required |
| Company | |
| Company name: | <input type="text"/> |
| Address | |
| Street Address: | <input type="text" value="Luna 5"/> * Required |
| Suburb: | <input type="text"/> |
| Post Code: | <input type="text" value="12345"/> * Required |
| City: | <input type="text" value="London"/> * Required |
| State: | <input type="text" value="Berkshire"/> * Required |
| Country: | <input type="text" value="United Kingdom"/> |
| Contact | |
| Telephone Number: | <input type="text" value="777-777-77"/> * Required |
| Fax Number: | <input type="text"/> |

4. Default **Status** of a new customer is *Inactive* (unavailable on the website). To make customer available in the web-shop, select the **Active** radio button.

Options

Status: active inactive

Newsletter:

You can also subscribe the customer to Newsletters. To do this, select the **Subscribed** item in the **Newsletter** dropdown list.

Options

Status: active inactive

Newsletter:

- 6. To save a new customer, click the **Insert** button at the bottom of the page. *Note: You can cancel saving of a new customer on any stage of creation, but to save the customer, all the required fields must be filled in.*

Contact

Telephone Number: * Required

Fax Number:

Options

Status: active inactive

Newsletter:

A new customer will show up in the Customers list.

| Customers | | | | | |
|-----------|--------------|-------------|---------------------------|-------------------|--------|
| | Last Name | First Name | E-mail | Account Created | Action |
| | Koshelev | Vladislav | vkoshelev@holbi.co.uk | 06/29/2005 | |
| | Krolivets | Andrew | akrolivets@holbi.co.uk | 06/16/2006 | |
| | Li | Lilia | inna.suprun@gmail.com | 08/21/2006 | |
| | Malyshev | Vladislav | vmalyshev@holbi.co.uk | 10/25/2004 | |
| | Shk | Bob | eshutenko@gmail.com | 08/22/2006 | |
| | Smith | John | yanablin@gmail.com | 08/27/2009 | |
| | Test | Ed | eshutenko@trianic.com | 05/15/2006 | |

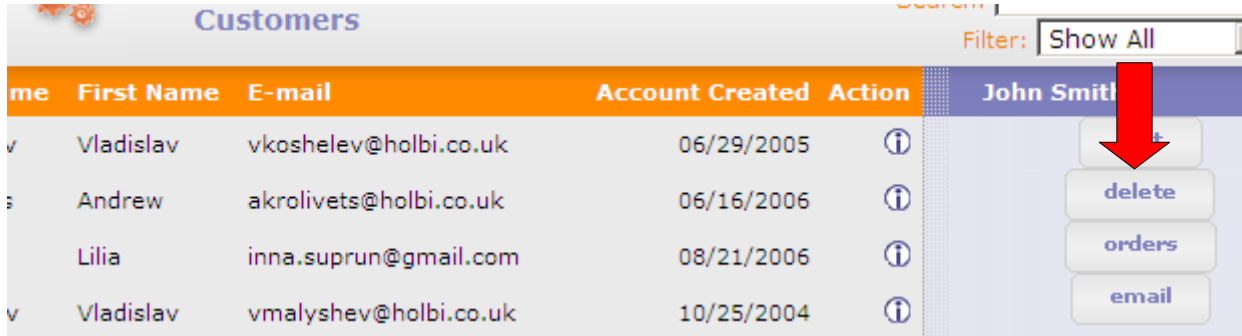
Note: If the customer is inactive, it is displayed *crossed out*.

| | | | |
|--|--------------|-------------|---------------------------|
| | Smith | John | johnsmith@mail.com |
|--|--------------|-------------|---------------------------|

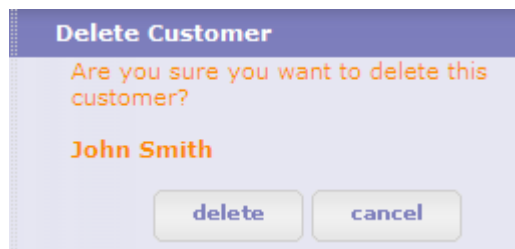
Deleting Customers

This option allows the store owner to delete inactive customers. *Note: The orders for this customer will not be removed after deleting a customer.*

1. To delete a customer, you should select it in the list and click the **Delete** button on the right.

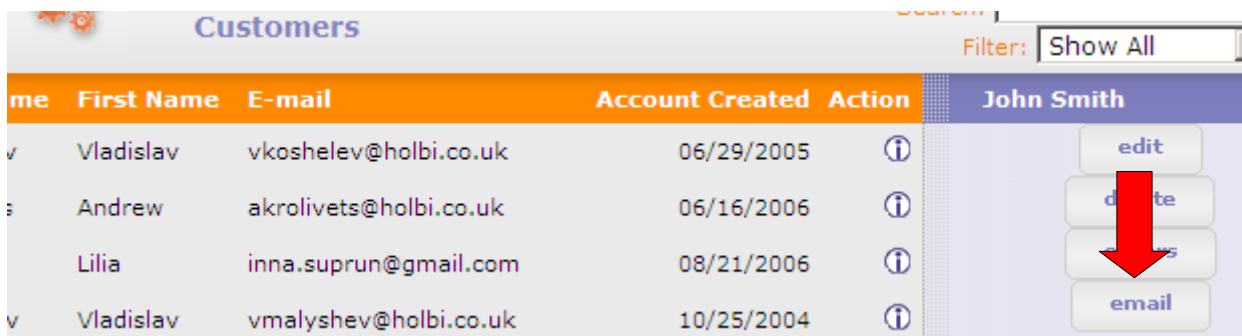


2. Then either click the **Delete** button again to confirm deletion or the **Cancel** button if you don't want to delete it.



Sending Email To A Customer

1. From the Customers page of the Admin Panel you can send emails to any of the active customers. To do this, select a customer and click the **Email** button on the right.



- From the Send Email to Customers page you should just specify **Subject** and **Message** of your email and click the **Send Mail** button. (Customer Name and “From” Address are selected by the system).

Customer:

From:

Subject:

Message:

Arial 1 (8 pt) Heading 1 **B I U**

Decimal numbers

Your content here

Path: [body](#) > [html](#)

- On the next page, click the **Send Mail** button again to send the email.

Customer:
yanablin@gmail.com

From:
Holbi TrueLoaded < vmalyshev@holbi.co.uk>

Subject:

Message:
Your content here

- You can select another customer in the **Customer** dropdown list.
- You can send your email to All Customers or All Newsletter Subscribers if an appropriate item is selected in the list.

Customer:

From:

Subject:

Select Customer

All Customers

To All Newsletter Subscribers

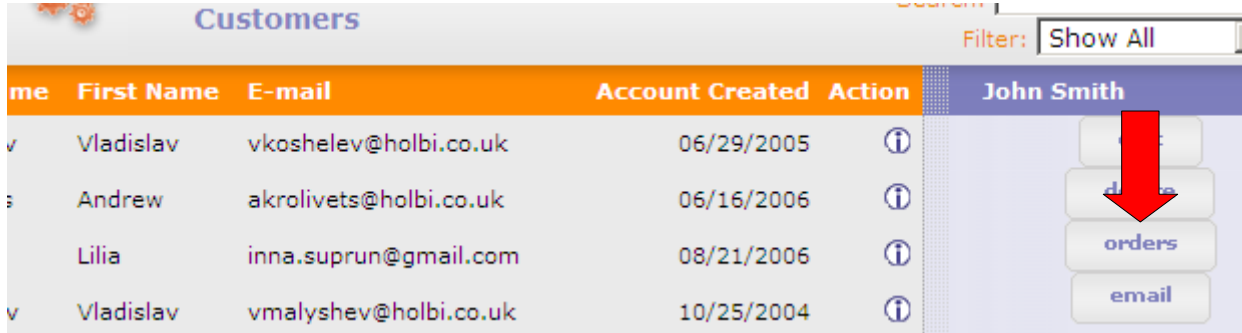
Dmitriev, Max (mdmitriev@holbi.co.uk)

Koshelev, Vladislav (vkoshelev@holbi.co.uk)

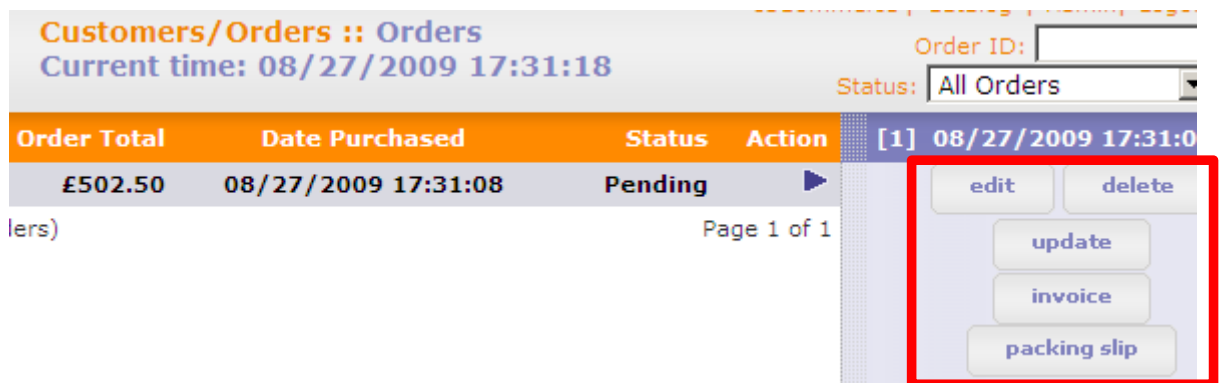
Li, Lilia (inna.suprun@gmail.com)

Viewing Customer Order

1. To view customer's order, from the Customers page select a customer and click the **Orders** button on the right.

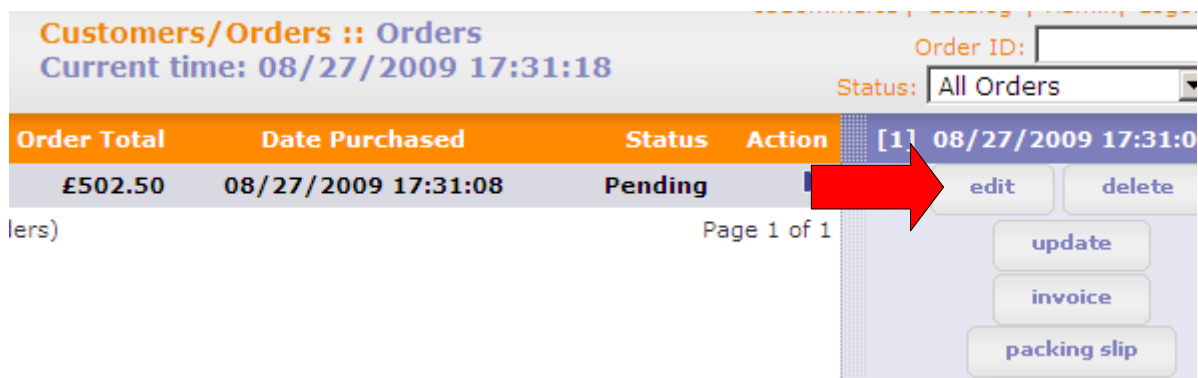


2. On the Orders page you can view the order's details, edit/update/delete an order, print invoice or order history using the appropriate buttons in the right column.




Editing Customer's Order

1. To edit customer's order data, select a customer in the list and click the **Edit** button on the right.



- On the Order Details page the following data is shown: customer's billing address, shipping address, and purchases list.



Customers/Orders :: Orders
 Current time: 08/27/2009
 17:33:48

osCommerce | [Catalog](#) | [Admin](#) | [Help](#)
 Order ID:
 Status:

| | | | | | |
|-------------------------------|--|--------------------------|--|-------------------------|--|
| Customer: | John Smith Luna 5 LONDON BERKSHIRE 12345 UNITED KINGDOM | Shipping Address: | John Smith Luna 5 LONDON BERKSHIRE 12345 UNITED KINGDOM | Billing Address: | John Smith Luna 5 LONDON BERKSHIRE 12345 UNITED KINGDOM |
| Telephone Number: | 777-777-77 | | | | |
| FAX #: | | | | | |
| E-Mail Address: | yanablin@gmail.com | | | | |
| Order # | 1 | | | | |
| Order Date & Time | 08/27/2009 17:31:08 | | | | |
| Manager: | Internet | | | | |
| Customer sales person: | Internet | | | | |
| Payment Method: | Cash on Delivery | | | | |

| Products | Model | Tax | Price (ex) | Price (inc) | Total (ex) | Total |
|---|----------|-----|------------|-------------|----------------------|-------|
| 1 x DCR-HC46 MiniDV Handycam® Camcorder | DCR-HC46 | 0% | £500.00 | £500.00 | £500.00 | £5 |
| | | | | | Sub-Total: £5 | |
| | | | | | Per Item (Best Way): | |
| | | | | | Total: £5 | |

- You can specify some comments for a customer in the **Comments** box. Make sure the **Append Comments** check box is selected. Click the **Update** button after you have finished. Your comments will be included into the order's update notification email which is sent to a customer automatically.

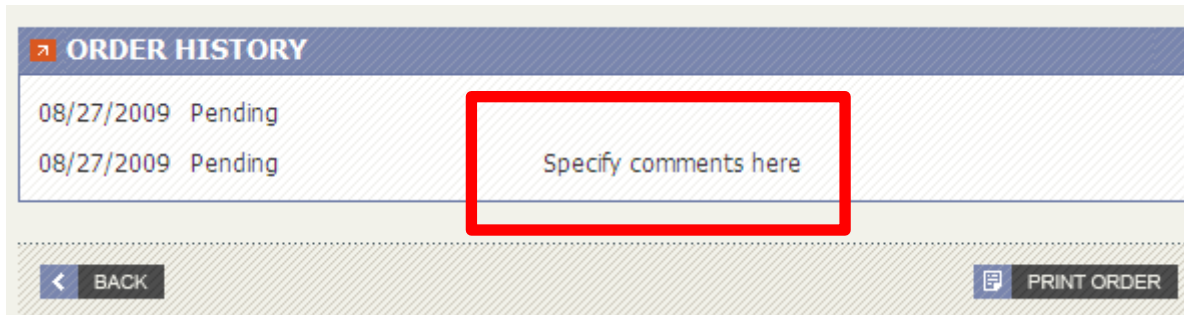
Comments
 Specify comments here

Status:

Notify Customer:

Append Comments:

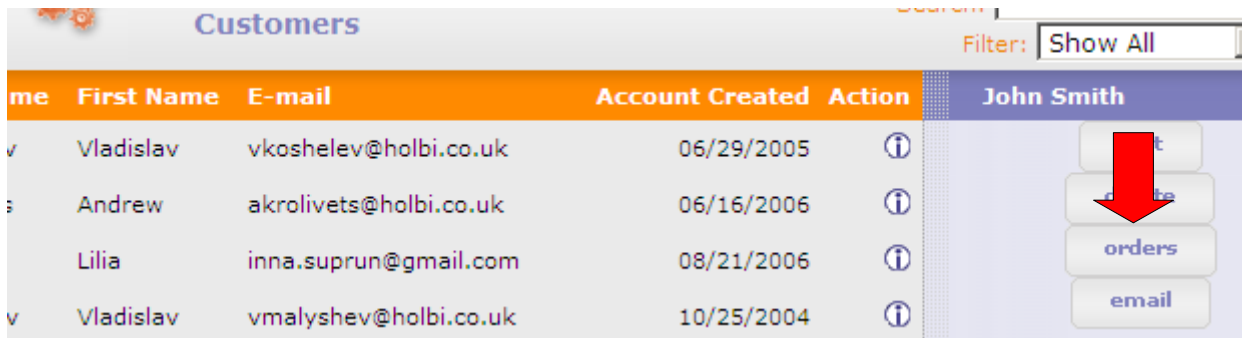
The comments will also show up on the Account History Info page on frontend, in the **Order History** box



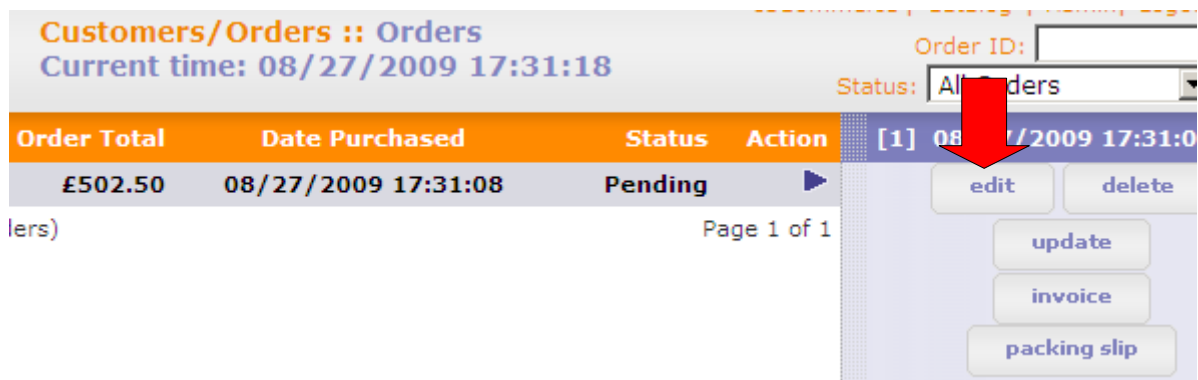
Changing Order Status

You can change the Status of any order in the web-store database.

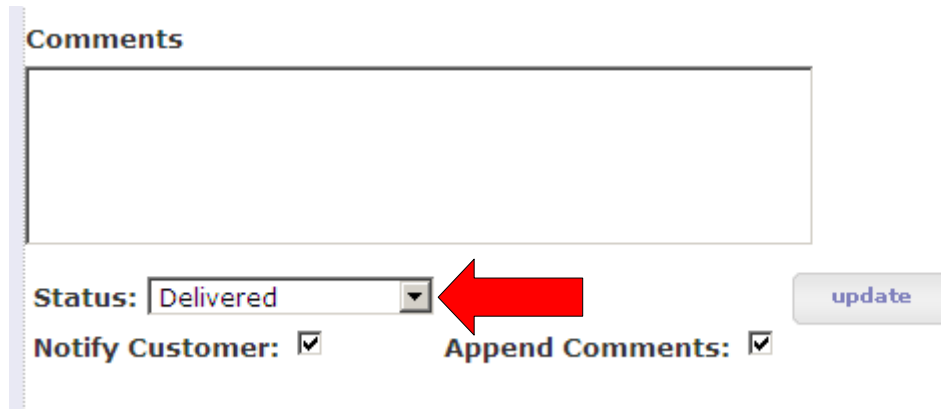
1. Go to the Admin Panel > Customers/Orders section and select a customer in the list.
2. Click the **Orders** button on the right.




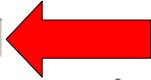
3. On the Orders page, select an order and click the **Edit** button.



4. On the Order Details page, click the *down* arrow adjacent to the **Status** field and select an item in the dropdown list. For example, change **Pending** status to the **Delivered** one.



Comments

Status:  

Notify Customer: Append Comments:

4. Click the **Update** button on the right.

*Note: The Order Update information will be emailed to a customer if the **Notify Customer** checkbox is selected. (see image below)*



Comments

Status: 

Notify Customer: Append Comments:

Printing Customer Invoice

You can print invoice for a customer from the Order Details page.

1. Go to the Admin Panel > Customers/Orders section and select a customer in the list.
2. Click the **Orders** button on the right.
3. On the Orders page, select an order and click the **Edit** button on the right.

4. Click the **Invoice** button at the bottom of the page.

| Date Added | Customer Notified | Status | Comments |
|---------------------|-------------------|---------|-----------------------|
| 08/27/2009 17:31:08 | ✓ | Pending | |
| 08/27/2009 17:37:31 | ✓ | Pending | Specify comments here |

Comments

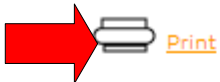
Status: Delivered

Notify Customer:

Append Comments:



5. In the **Print Order** popup window, click the **Print** button to print the order invoice for a customer. To close the window, click the **X** button in the right top corner.



[Print](#)



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OC313972)
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Park
Aldermaston, Reading
Berkshire RG7 8NN
United Kingdom
tel. 0208 1234 799

TRUE LOADED
OSCOMMERCE YOUR BUSINESS

Print Order #: 1

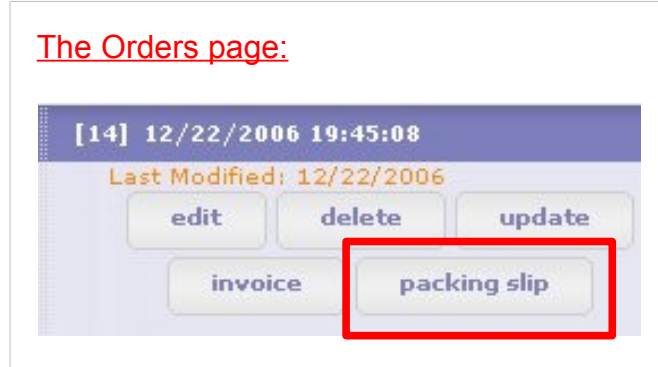
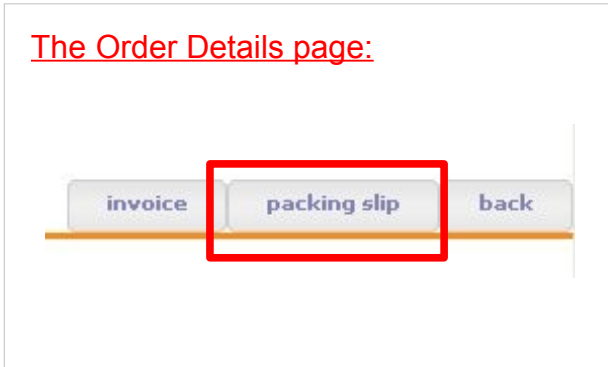
Payment Method: Cash on Delivery

| | |
|--|--|
| SOLD TO: | SHIP TO: |
| John Smith Luna 5 LONDON BERKSHIRE 12345 UNITED KINGDOM | John Smith Luna 5 LONDON BERKSHIRE 12345 UNITED KINGDOM |

| Products | Model | Tax | Price (ex) | Total (ex) | Total (inc) |
|---|----------|-----|------------|------------|-------------|
| 1 x DCR-HC46 MiniDV Handycam® Camcorder | DCR-HC46 | 0% | £500.00 | £500.00 | £500.00 |

Sub-Total: £500.00
Per Item (Best Way): £2.50
Total: **£502.50**

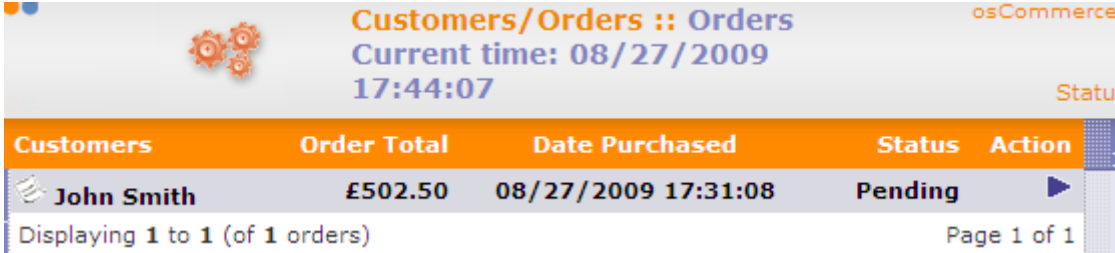
6. You can also print information about customer and his/her purchases by clicking the **Packing Slip** button (either at the bottom of the Order Details page or in the right column of the Orders page).



7. In the Print Order popup window, click the **Print** button at the left top corner to print the order history.

Managing Orders

1. Go to the Admin Panel > Customer/Orders > Orders section. The Orders page demonstrates all the orders ever made in your web-store. Here you can view orders of each customer, edit/delete/update orders, print invoice for the customer, and print customer's order history (packing slip).



| Customers | Order Total | Date Purchased | Status | Action |
|------------|-------------|---------------------|---------|--------|
| John Smith | £502.50 | 08/27/2009 17:31:08 | Pending | |

Displaying 1 to 1 (of 1 orders) Page 1 of 1

2. To edit an order, select a record in the list and click the **Edit** button on the right. The Order Details page shows information about customer, his/her billing address, shipping address and purchases list.

back
edit
back

| | | | | | |
|-------------------------------|--|--------------------------|--|-------------------------|--|
| Customer: | John Smith Luna 5 LONDON BERKSHIRE 12345 UNITED KINGDOM | Shipping Address: | John Smith Luna 5 LONDON BERKSHIRE 12345 UNITED KINGDOM | Billing Address: | John Smith Luna 5 LONDON BERKSHIRE 12345 UNITED KINGDOM |
| Telephone Number: | 777-777-77 | | | | |
| FAX #: | | | | | |
| E-Mail Address: | yanablin@gmail.com | | | | |
| Order # | 1 | | | | |
| Order Date & Time | 08/27/2009 17:31:08 | | | | |
| Manager: | Internet | | | | |
| Customer sales person: | Internet | | | | |
| Payment Method: | Cash on Delivery | | | | |

| Products | Model | Tax | Price (ex) | Price (inc) | Total (ex) | Total (inc) |
|---|----------|-----|------------|-------------|------------|-------------|
| 1 x DCR-HC46 MiniDV Handycam® Camcorder | DCR-HC46 | 0% | £500.00 | £500.00 | £500.00 | £500.00 |
| Sub-Total: | | | | | £500.00 | |
| Per Item (Best Way): | | | | | £2.50 | |
| Total: | | | | | £502.50 | |

3. The table under the Purchases List demonstrates the actions done with the Order:

- **Date Added** displays a date when an order was updated/edited.
- **Customer Notified** displays whether a customer was notified by email about updating (if the *green tick* is shown - the customer was notified).
- **Status** displays an order's status at the updating.
- **Comments** display a text of comments added to the order, if any.

| Date Added | Customer Notified | Status | Comments |
|---------------------|-------------------|---------|-----------------------|
| 08/27/2009 17:31:08 | ✓ | Pending | |
| 08/27/2009 17:37:31 | ✓ | Pending | Specify comments here |

4. To return to the Orders page, click the **Back** button either at the bottom or at the top of the page.

Updating Orders

1. You can also update order's information by clicking the **Update** button on the Orders List page.

Customers/Orders :: Orders
Current time: 08/27/2009 17:31:18

Order ID:
Status: All Orders

| Order Total | Date Purchased | Status | Action |
|-------------|---------------------|---------|--|
| £502.50 | 08/27/2009 17:31:08 | Pending | <input type="button" value="edit"/> <input type="button" value="delete"/> <input type="button" value="update"/> <input type="button" value="invoice"/> <input type="button" value="packing slip"/> |

Page 1 of 1

2. The Edit Order page will open. On this page you can change some customer's data: Billing address, Shipping address, Phone number, Email address, Shipping method (select an appropriate item in the dropdown list), and Payment method (select an appropriate item in the dropdown list).
3. In the Products lists you can add new products for a customer, change order's status (pending, delivered, processing, etc.), and add comments to an order.

Creating An Order

1. Open Admin Panel > Customer/Orders > Create Order page.

Vouchers/Coupons
Customers/Orders
Customers Orders
Create Order
Paypal IPN

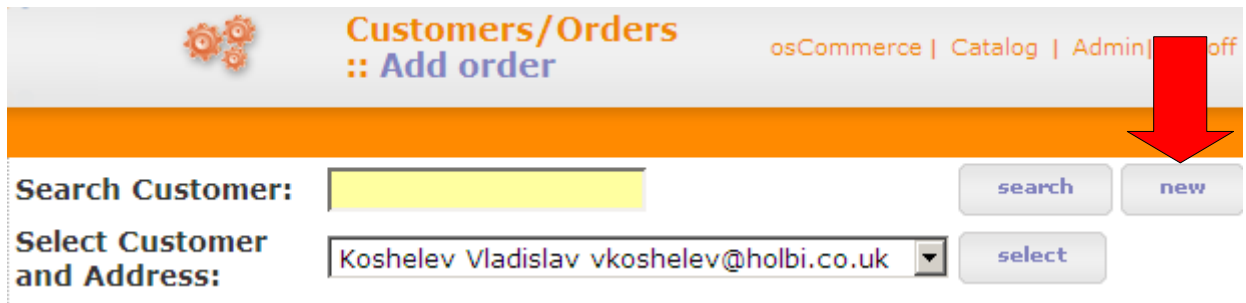
Last Name: Koshelev
Gender: Male Female
Company
Company name: Holbi
Address

2. On this page you can add a new order to a customer. To do this, select a customer's record (name and email) from the dropdown list.

Search Customer:

Select Customer and Address:

- From the Add Order page you can also create a new customer using the **New** button.




Customers/Orders osCommerce | Catalog | Admin | Logoff
 :: Add order

Search Customer:

Select Customer and Address:

- You can find any customer registered in the web-store using the **Search** button and **Search Customer** field. To do this, specify a correct name of customer in the field first, and then click the **Search** button. The name of the required customer will appear in the **Select Customer and Address** field.



Customers/Orders osCommerce | Catalog | Admin | Logoff
 :: Add order

Search Customer:

Select Customer and Address:

- After the customer has been selected, the fields will be pre-filled with the customer's information.

Customer: Bob Shk eshutenko@gmail.com

Billing Address:

First Name:

Last Name:

Gender: Male Female

Company

Company name:

Address

Street Address: * Required

Suburb:

Post Code: * Required

City: * Required

- Click the **Confirm** button at the bottom of the page. The system will offer to make detailed correction of the data – to correct the billing address and shipping address separately (if they are different).

| Customer: | Billing Address: | Shipping Address: |
|---------------------------------------|--|--|
| Customer: Bob Shk | Customer: <input type="text" value="Bob Shk"/> | Customer: <input type="text" value="Bob Shk"/> |
| Company name: | Company name: <input type="text"/> | Company name: <input type="text"/> |
| Street Address: 237 Warren Park Drive | Street Address: <input type="text" value="237 Warren Park Drive"/> | Street Address: <input type="text" value="237 Warren Park Drive"/> |
| Suburb: Fandao | Suburb: <input type="text" value="Fandao"/> | Suburb: <input type="text" value="Fandao"/> |
| City: Fonda | City: <input type="text" value="Fonda"/> | City: <input type="text" value="Fonda"/> |
| State: IL | State: <input type="text" value="IL"/> | State: <input type="text" value="IL"/> |
| Post Code: 19903 | Post Code: <input type="text" value="19903"/> | Post Code: <input type="text" value="19903"/> |
| Country: Antarctica | Country: <input type="text" value="Antarctica"/> | Country: <input type="text" value="Antarctica"/> |

Telephone Number:

E-Mail Address:

Here you can also specify the Shipping Method and Payment Method which will be offered to a customer by default, and edit the Credit Card data.

Best way

United Parcel Service United Parcel Service
 We are unable to obtain a rate quote for UPS shipping.
 Please contact the store if no other alternative is shown.

Zone Rates
 No shipping available to the selected country

Choose payment method:

Credit Card

Cash on Delivery

Credit Card Type:

Credit Card Owner:

Credit Card Number:

CVN:

Credit Card Expires:

Also, you can change an order's status and add comments to the order to notify customer about updates.

| Date Added | Customer Notified | Status | Comments |
|---------------------|-------------------|---------|----------|
| 08/28/2009 10:54:29 | X | Pending | |

Comments

Status:

Notify Customer:

Append Comments:

- After editing of details, you can start adding the new products. To do this, please click the **Add New Product** link.

Credit Card Type:

Credit Card Owner:

Credit Card Number:

CVN:

Credit Card Expires:

| Products | Model | Tax | Unit Price |
|---------------------------------|-------|-----|---|
| Add new product | | | Sub-Total |
| | | | <input type="text" value="Shipping"/> |
| | | | <input type="text" value="Tax"/> |
| | | | <input type="text" value="COD additional fee"/> |
| | | | <input type="text" value="Discount Coupons"/> |

- In the next page you can find a product using the Search feature. To do this, specify a product's name in the **Search** field and click the **Search** button. Or, you can just select the product from the dropdown list.

Search:

Product:

7. After choosing the product, click the **Select** button.

Search:

Product:

8. The system will open a page where you can specify the number of products in the **Quantity** field. The 1 is specified in the field by default.

Search:

Product:

Quantity:

8. Click the **Insert** button after specifying of product's quantity. The product will show up in the Products list. You can edit the quantity, model, tax, and unit price here.

| Products | Model | Tax | Unit Price |
|---|------------------------------------|---------------------------------------|------------------------------------|
| <input type="text" value="1"/> x <input type="text" value="Nokia 3510i"/> | <input type="text" value="3510i"/> | <input type="text" value="--none--"/> | <input type="text" value="80.00"/> |

[Add new product](#)

Sub-Tota

Tota

9. When you have finished editing the data, click the **Update** button at the bottom of the page.