

Customer Management

EcomStor + InterpriStor

The screenshot shows the EcomStor / InterpriStor Demo Website Administration interface. The top navigation bar includes tabs for Store, Catalog, Customers, Orders, Shipping, Marketing, Content, SEO, CRM, Data, Tools, and Admin. The left sidebar contains a 'Customers' menu with options like Customers, Customers Groups, Create Account, Customer Details, Pending Customers, Send Email, Recover Carts, Recover Cart Sales, and Recover Cart Sales - Settings. The main content area is divided into several sections: 'Email Templates' (Overall Header, Overall Footer, Order Process Template, Quote Process Template, Order Update Template, New Account Template, Recover Carts Template, Gift Voucher Template), 'Recover Carts' (Recover Cart Sales, Recover Cart Sales - Settings), 'Products (Manage) [?]' (Total Number of Categories: 55, Total Number of Products: 359, Active Products: 332, Out of Stock: 0), 'Customers (Add/view) [?]' (Total Customers: 79, Subscribed: 76), 'Reports [?]' (Products Viewed, Products Purchased, Customer Orders-Total, Monthly Sales/Tax, Articles Viewed, Customer Wishlist, Order Listing, Customers Not Validated, Sales Report, Daily Products Report, Customer Statistics, Customer Zip/State Mismatch, Product Notifications), and an 'IM' (Instant Message) window showing 'Ecomstor is online' and a 'getmeebop' button. The bottom of the page displays 'All rights reserved © 2010 Logistica Solutions Inc.'

MENU

Customers

Customers
 Customers Groups
 Create Account
 Customer Details
 Pending Customers
 Send Email

Recover Carts

Recover Cart Sales
 Recover Cart Sales - Settings

Email Templates

Overall Header
 Overall Footer
 Order Process Template

Quote Process Template

Order Update Template
 New Account Template
 Recover Carts Template
 Gift Voucher Template

Store	Catalog	Customers	Orders	Shipp
Customers		Email Templates		
Customers		Overall Header		
Customers Groups		Overall Footer		
Create Account		Order Process Template		
Customer Details		Quote Process Template		
Pending Customers		Order Update Template		
Send Email		New Account Template		
Recover Carts		Recover Carts Template		
Recover Cart Sales		Gift Voucher Template		
Recover Cart Sales - Settings				

3.1. Customers

If you bring your cursor on **Customers** tab you will see a menu as shown above.

Under Customers label you will get Customers, Pending Customers, Customers Groups, Create Account and Customer Details as shown below in two ways.

Customers | Customers

After clicking on Customers You will see a window as shown below

Customers Search:

Company Name:	Last Name	First Name	Customer Group	Email Address	Account Created	RA	Action
	Tester2	Test2	Retail	user2@user2.com	02/22/2008		▶
The Moore Buildi...	Jereb	Bill	Retail	bjereb@hotmail.com	08/15/2007		ⓘ
	parker	scott	Retail	parkersk@mchsi.com	08/15/2007		ⓘ
The Shoe Box	Schlimgen	Paul	Retail	schlim44@hotmail.com	06/14/2007		ⓘ
	villa	marti	Retail	musicbymartin@yahoo.com	06/06/2007		ⓘ
Roto Ind.	VARGAS	DIANA	Retail	dianav@rotoind.com	05/31/2007		ⓘ
	erwerwe	ewrwrw	Retail	wer@oscommerce4you.com	05/22/2007		ⓘ
	rwerwerve	dsefwerwe	Retail	ewrwe@oscommerce4you.com	05/22/2007		ⓘ
	etewer	tese	Retail	test@oscommerce4you.com	05/22/2007		ⓘ
Brad & Angelie B...	Pitt	Brad	Retail	james@warehousestor.info	05/21/2007		ⓘ
	Maertens	Sarah	Retail	purchasing@compleware.com	05/21/2007		ⓘ
	werwerve	werr	Retail	werwer@wfer.com	05/18/2007		ⓘ
Acme Fabrication	Farentino	James	Retail	james@rotoind.info	05/15/2007		ⓘ
	Tester2	Test2	Retail	test@hotmail.com	05/14/2007		ⓘ
US Trading Team	Smith	James	Retail	james@rotoind.us	05/08/2007		ⓘ
Secret Garden Pr...	Taylor	Elizabeth	Retail	james01@rotoind.com	05/08/2007		ⓘ
Chemical Supplie...	Miller	Rick	Retail	james@ecomstor.us	04/30/2007		ⓘ

Test2 Tester2

edit delete orders

email create order

Account Created: 02/22/2008



Last Modified:

Last Logon:

Number of Logons: 0

Country: United States

Number of Reviews: 0

You will see eight columns there like Company name, Last name, First name, Customer group, Email Address, Account created, RA and Action. On the upper portion of every column name you will find symbol like  and .

The function of is

The function of is

Under Action column you will see a symbol like , it means that the row is selected. If you want to select any row simply click on any row it will be selected.

After clicking the any row one pane will appear on your right hand side, shown bellow

marti villa

Account Created: 06/06/2007

Last Modified:

Last Logon:

Number of Logons: 0

Country: United States

Number of Reviews: 0

If you click on 'edit' you will get a pane as shown bellow

Customers

<div style="border: 1px solid #ccc; padding: 5px;"> <p>Your Personal Details</p> <p>Gender: <input checked="" type="radio"/> Male <input type="radio"/> Female</p> <p>First Name: <input type="text" value="marti"/> * Required</p> <p>Last Name: <input type="text" value="villa"/> * Required</p> <p>E-Mail Address: <input type="text" value="musicbymartin@yahoo.com"/> * Required</p> </div>	<div style="border: 1px solid #ccc; padding: 5px;"> <p>Options</p> <p>Newsletter: <input type="text" value="Subscribed"/></p> <p>Customer Group: <input type="text" value="Retail"/></p> <p>Email Validated: <input type="checkbox"/> Require E-mail confirmation on account creation is set off.</p> <p>Account Validate: <input type="checkbox"/> Require Account confirmation on account creation is set off.</p> </div>
<div style="border: 1px solid #ccc; padding: 5px;"> <p>Company Details</p> <p>Company Name: <input type="text"/></p> <p>Company's tax id number: <input type="text"/></p> <p>Switch off alert for authentication: <input checked="" type="radio"/> Alert off <input type="radio"/> Alert on</p> </div>	<div style="border: 1px solid #ccc; padding: 5px;"> <p>Payment Modules</p> <p><input type="radio"/> Set payment modules for the customer <input type="radio"/> Use settings from Group or Configuration</p> <p><input type="checkbox"/> Credit Card : Authorize.net</p> <p><input type="checkbox"/> Echeck</p> <p><input type="checkbox"/> Fax/phone your Credit Card Info</p> <p><input type="checkbox"/> Check/Money Order</p> <p><input type="checkbox"/> PayPal</p> <p><input type="checkbox"/> Bank Transfer or Deposit</p> <p>If you choose Set payment modules for the customer but do not check any of the boxes, default settings (Group settings or Configuration) will still be used.</p> </div>
<div style="border: 1px solid #ccc; padding: 5px;"> <p>Your Address</p> <p>Street Address: <input type="text" value="1843 Hamer Dr."/> * Required</p> <p>Suite/Apt: <input type="text"/></p> <p>Zip Code: <input type="text" value="92870"/> * Required</p> <p>City: <input type="text" value="Placentia"/> * Required</p> <p>State/Province: <input type="text" value="California"/></p> <p>Country: <input type="text" value="United States"/></p> </div>	<div style="border: 1px solid #ccc; padding: 5px;"> <p>Shipping Modules</p> <p><input type="radio"/> Set shipping modules for the customer <input type="radio"/> Use settings from Group or Configuration</p> <p><input type="checkbox"/> Federal Express</p> <p><input type="checkbox"/> FREE SHIPPING!</p> <p><input type="checkbox"/> United Parcel Service</p> <p>If you choose Set shipping modules for the customer but do not check any of the boxes, default settings (Group settings or Configuration) will still be used.</p> </div>
<div style="border: 1px solid #ccc; padding: 5px;"> <p>Your Contact Information</p> <p>Telephone Number: <input type="text" value="714-310-6406"/> * Required</p> <p>Fax Number: <input type="text"/></p> </div>	

Enter your desire data here then click update for sure.

If you click on delete then your row will be deleted.

If you click on order you will get a pane as shown bellow

Orders

Order ID:

Status:

Customers	Order Total	Date Purchased	Status	Action
Displaying 0 to 0 (of 0 orders)				

Order ID:

Status:

- All Orders
- Pending
- Processing
- Delivered
- Allow Download
- On Hold
- Canceled
- Awaiting CC Processing
- Abandoned Shopping Cart

You choose status from here.

You can find the data using order id also.

If you click on email you will get a screen bellow

Send Email To Customers

Customer:

From:

Subject:

Message:

Paragraph Font Name Size **B** *i* U

From here you can send email to customer.

If you click on create order you will get a pane shown bellow

STEP 1 - Choose a customer & check their details

next

Select a Customer:

villa , marti

or Customer ID:

Check Customer Details

If this is the right customer, press the Confirm button below.

ID: required

First Name: *

Last Name: *

E-Mail Address: *

Your Address

Street Address: *

Suite/Apt:

Zip Code: *

City: *

State/Province: *

Country: *

Company Details

Company Name: *

Your Contact Information

Telephone Number: *

next

Enter the desire data here then click next to proceed.

After clicking next button you will get a pane as shown bellow

STEP 2 - Add Products

1:

- Top
- Hauler 65 Gallon
- Hauler 96 Gallon
- PLR 40 Gallon
- Hauler 35 Gallon
- 4 Wheeled Carts
- PLR 58 Gallon
- PLR 40 & 58 Gallon Recycle
- Hauler 300 Gallon
- Plastic Pallet Containers
- Mobile Plastic Pallet Containers
- 3 Yard Bin Liner
- Plastic Bin Lids

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Select any category from here.

Next

STEP 2 - Add Products

1:

2:

Next

STEP 2 - Add Products

1:	<input type="text" value="Hauler 96 Gallon"/>	<input type="button" value="Select this category"/>
2:	<input type="text" value="Configure - Hauler 96 Gallon Cart"/>	<input type="button" value="Select this product"/>
3:	<ul style="list-style-type: none">- <input type="text" value="Black"/>- <input type="text" value="Standard - 2 Wheels"/>- <input type="text" value="Standard - Linear Med Polyethylene"/>- <input type="text" value="Standard"/>- <input type="text" value="Standard - No Locking"/>- <input type="text" value="Standard - Compressed Plastic"/>	<input type="button" value="Select These Options"/>

Next

STEP 2 - Add Products

1:	<input type="text" value="Hauler 96 Gallon"/>	<input type="button" value="Select this category"/>
2:	<input type="text" value="Configure - Hauler 96 Gallon Cart"/>	<input type="button" value="Select this product"/>
3:	<ul style="list-style-type: none">- <input type="text" value="Black"/>- <input type="text" value="Standard - 2 Wheels"/>- <input type="text" value="Standard - Linear Med Polyethylene"/>- <input type="text" value="Standard"/>- <input type="text" value="Standard - No Locking"/>- <input type="text" value="Standard - Compressed Plastic"/>	<input type="button" value="Select These Options"/>
4:	<input type="text" value="1"/> Quantity	<input type="button" value="Add Now!"/>

After selecting the desire data select the quantity then click on 'add now' button.

Customers | Pending Customers

After clicking on Pending Customers You will see a window as shown bellow

Pending Customers

Pending

Search:

Company Name:	Last Name	First Name	State	Phone	Email	Account Approval	Action	Test2 Tester2
	Tester2	Test2			user2@user2.com	Pending		
The Moore Buildi...	Jereb	Bill			bjereb@hotmail.com	Pending		
	parker	scott			parkersk@mchsi.com	Pending		Account Created: 02/22/2008
The Shoe Box	Schlimgen	Paul			schlim44@hotmail.com	Pending		Last Modified:
	villa	marti			musicbymartin@yahoo.com	Pending		Last Logon:
Roto Ind.	VARGAS	DIANA			dianav@rotoind.com	Pending		Number of Logons: 0
	erwerwe	erwerw			wer@oscommerce4you.com	Pending		Country: United States
	rwerwerwe	dsefwerwe			erwe@oscommerce4you.com	Pending		Number of Reviews: 0
	etewer	tese			test@oscommerce4you.com	Pending		
Brad & Angelie B...	Pitt	Brad			james@warehousestor.info	Pending		
	Maertens	Sarah			purchasing@compleware.com	Pending		
	werwerwe	werr			werwer@wfer.com	Pending		
Acme Fabrication	Farentino	James			james@rotoind.info	Pending		
	Tester2	Test2			test@hotmail.com	Pending		
US Trading Team	Smith	James			james@rotoind.us	Pending		
Secret Garden Pr...	Taylor	Elizabeth			james01@rotoind.com	Pending		
Chemical Supplie...	Miller	Rick			james@ecomstor.us	Pending		
Ecomstor	Bond	James			sales@ecomstor.com	Pending		
Ecomstor	Bond	James			james@ecomstor.com	Pending		
Urstadt Biddle P...	Murray	Mary			mmurray@ubproperties.com	Pending		
	Chotibut	Sean			garbageboy684@aol.com	Pending		
Dreamworks	Spielberg	Steven			admin@rotoind.com	Pending		

On the right side of the selected row you will find the 'edit' button.

After clicking on the edit button you will get a screen as shown below

Customers

Your Personal Details

Gender: Male Female

First Name: * Required

Last Name: * Required

E-Mail Address: * Required

Company Details

Company Name:

Company's tax id number:

Switch off alert for authentication: Alert off Alert on

Your Address

Street Address: * Required

Suite/Apt:

Zip Code: * Required

City: * Required

State/Province:

Country:

Your Contact Information

Telephone Number: * Required

Fax Number:

Options

Newsletter:

Customer Group:

Email Validated: Require E-mail confirmation on account creation is set off.

Account Validate: Require Account confirmation on account creation is set off.

Payment Modules

Set payment modules for the customer Use settings from Group or Configuration

Credit Card : Authorize.net

Echeck

Fax/phone your Credit Card Info

Check/Money Order

PayPal

Bank Transfer or Deposit

If you choose **Set payment modules for the customer** but do not check any of the boxes, default settings (Group settings or Configuration) will still be used.

Shipping Modules

Set shipping modules for the customer Use settings from Group or Configuration

Federal Express

FREE SHIPPING!

United Parcel Service

If you choose **Set shipping modules for the customer** but do not check any of the boxes, default settings (Group settings or Configuration) will still be used.

Enter your desired data here then click update for sure.

If you click on **Customers Groups** you will get a pane shown bellow.

Groups		Search:
Name	Action	Retail
Retail		<input type="button" value="edit"/> <input type="button" value="delete"/>
Distributor Tier 1		
Distributor Tier 2		

Displaying 1 to 3 (of 3 Customers Groups)

Page 1 of 1

Here you can edit, delete, insert a group.

If you click on 'edit' button then you will get a window as shown bellow

Groups

Your Personal Details

Group Name: Maximum length: 32 characters

Show prices with/without tax: This Setting only works when '\Display Prices with Tax\' is set to true in the Configuration for your store and Tax Exempt (below) to '\No\'.

Tax Exempt:

Payment Modules

Set payment modules for the customer group Use settings from Configuration

Echeck

Fax/phone your Credit Card Info

Check/Money Order

PayPal

Bank Transfer or Deposit

If you choose **Set payment modules for the customer group** but do not check any of the boxes, default settings will still be used.

Shipping Modules

Set shipping modules for the customer group Use settings from Configuration

Federal Express

FREE SHIPPING!

United Parcel Service

If you choose **Set shipping modules for the customer group** but do not check any of the boxes, default settings will still be used.

Choose your desired option here then click on update for sure.

If you click on create account you will get a pane as shown bellow.

Add a New Customer

Your Personal Details

Gender: Male Female *

First Name: *

Last Name: *

E-Mail Address: *

Options

Customer Group: ▼

Newsletter: ▼

Company Details

Company Name: *

Company's tax id number:

Payment Modules

Set payment modules for the customer

Use settings from Group or Configuration

If you choose **Set payment modules for the customer** but do not check any of the boxes, default settings (Group settings or Configuration) will still be used.

Your Address

Street Address: *

Suite/Apt:

Zip Code: *

City: *

State/Province: *

Country: ▼ *

Shipping Modules

Set shipping modules for the customer

Use settings from Group or Configuration

If you choose **Set shipping modules for the customer** but do not check any of the boxes, default settings (Group settings or Configuration) will still be used.

Your Contact Information

Telephone Number: *

Fax Number:

Enter your desire data here then click confirm for sure.

Customers | Customer Details

If you click on customer details then you will get a screen as shown bellow.

Customer Details

Title	Value	Action	Gender
Gender	true		<input type="button" value="edit"/>
Date of Birth	false		
Company	true		Display gender in the customers account
Suburb	false		
State	true		
Require E-mail confirmation	false		
Require accepted conditions of use	false		

If you click on edit button then you will get a pane as shown bellow.

Gender

Please make any necessary changes

Gender

Display gender in the customers account

true

false

Choose your correct option then click on update for sure.

3.2 Recover Carts

Under Recover Cart label you will get two options those are Recover Cart Sales and Recover Cart Sales - Settings.

Recover Carts | Recover Cart Sales

If you click on Recover Cart Sales you will get a pane as shown below.

Recover Cart Sales Show for last - days

CONTACTED	DATE	CUSTOMER NAME	E-MAIL	PHONE
ITEM	DESCRIPTION			
				Grand Total: \$0.00

Additional PS Message:

Recover Carts | Recover Cart Sales - Settings

If you click on Recover Cart Sales Settings you will get a pane as shown below.

Recover Cart Sales

Title	Value	Action	Look back days
View Carts			
Look back days	30		<input type="button" value="edit"/>
Skip days	5		Number of days to look back from today for abandoned cards.
Sales Results Report days	90		
Taxes			
Use Calculated taxes	false		
Use Fixed tax rate	false		
Fixed Tax Rate	.10		
Emails			
E-Mail time to live	90		
Friendly E-Mails	true		
E-Mail Copies to			
Autocheck "safe" carts to email	true		
Colors			
Current Customer Color	0000FF		
Uncontacted highlight color	CF00FF		
Contacted highlight color	FF00CF		
Matching Order Highlight	00FFFF		
Configuration			
Skip Carts w/Matched Orders	true		
Match orders from any date	true		
Lowest Pending sales status	Pending		
Show Attributes	false		
Ignore Customers with Sessions	false		

Click edit for Number of days to look back from today for abandoned cards.