Dealer Management Information System (DMIS) Documentation

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1 Overview

1.1 DMIS and Seagull

DMIS (which stands for Dealer Management Information System) is the name given to the overall software system but it also used as the name for one of the modules within the system.

The DMIS system was built using the Seagull framework. Seagull included a lot of functionality that we could make use of without any modifications. Most of the Seagull functionality is found in the administrative area.

The Seagull framework arranges functionality into sections it calls modules. Administrative users can see a list of the modules in by following the instructions in section 4.2.1. The only two modules that have been developed by the UCSA Dealer Co-op are the DMIS and Shop modules. All the other modules already existed within Seagull.

This manual will explain what an administrator needs to know. If the reader wants to know more about the Seagull framework from a software developers perspective, visit the following web pages:

- http://seagullproject.org/ - the main Seagull web site. A copy of Seagull can be downloaded from here.
- http://trac.seagullproject.org/wiki – documentation on how to develop using the Seagull framework.
- http://api.seagullproject.org/ - Detailed documentation on the various classes that are part of the Seagull framework.

1.2 How to use this manual

The manual attempts to explain how to use the system but it does not include pictures to show what the many screens look like. The manual is written from the perspective of someone who is navigating the menus within the system. So we strongly recommend that the reader active the menu items and buttons being discussed in each section as you go through the manual. This will help the readers understanding of what is being discussed.

1.3 Conventions used in this manual

This manual uses nomenclature that looks like this:

Admin Menu → General → Configuration

This nomenclature describes what menu items and sub-items are being discussed. This example is discussing the “Configuration” submenu within the “General” submenu within the Admin Menu. In some cases, the last element in this kind of nomenclature will mean click on a button or link by that name within a screen. For example, Admin Menu → DMIS → Customer → New Customer refers to a New Customer button on the Customer Screen within the DMIS module.

1.4 Things to do when your site first come up

Here is a list of things you should do when your web site is first installed. Do these steps in the order shown below. Doing them in another order could adversely affect your web site.

1. Configure the DMIS module (see section 4.2.1.2) .Pay special attention to the following values: coopDealerID, dealerIDs, defaultUpline, and defaultAffId.
2. Configure the Shop module (see section 4.2.1.3). Pay special attention to the following values: acceptPayPal, payPalEmailAddress, payPalReturnLabel, acceptAuthnet, authorizeNetID, authNetTxnKey, companyPay, companyName, companyAddress1, companyAddress2.
3. Customize various HTML articles using the Publisher module. Section 4.9.1 describes Articles in the Publisher module and subsection 4.9.1.3 describes how to edit an article. Customize the following articles (by article ID) which refer to your company name, web address, hyperlinks, or PICC affiliate ID: 1, 3, 12, 23, 26, 27, 38, 39. Other pages may also contain things that need to be modified for your web site. Before editing any articles, you may want to increase the session timeout value (see section 4.5.3 for details).
4. You may want to disable some of the menu items in the user and member menus (see section 4.3.1.5).
5. You may want to disable some of the items available for purchase in your Shop. To do this, turn off the "For Sale" flag on the products you may want to remove. See section 4.11.1.2 for details. If you want to add products that are not supplied by UCSA dealers, follow the instructions in section 4.11.1.1.
6. If you think you will need additional user records to permit more than one person to be a site administrator, the time to do create these additional user records is now, before you import your customer records. The interface to create a new user record without creating a corresponding customer record has been disabled for a guest. It does still exists for an admin user which his described in section 4.4.1.3. This step should be done before you import your customer records because a user record will be created for each new customer and the admin users should already be in the user table before the customers are imported. If you do not add other admin users before importing customers, there is a very real possibility that they will be deleted if you every have to re-import your customer records.
7. Import your Customer records (see section 4.10.1.9).
8. Import your Certificate records (see section 4.10.5.2).
9. Import your Registrant records (see section 4.10.7.3).
10. If you wish to use affiliate IDs on your web site, create the affiliate IDs for the customers you want to make affiliates (see section 4.10.2). Be sure to create an affiliate ID for the person who will be the default affiliate ID. Only after doing these things, can you modify the DMIS configuration parameter called defaultAffID (see section 4.2.1.2).

After performing these steps, your site should be fully customized with your own data and you are ready to do business.

1.5 Where DMIS Was Installed

Various sections of this manual require that you know where DMIS was installed. Web sites are installed within a directory structure on the host machine. The directory where the web site is installed is often called the web root directory. There are two locations where DMIS will be installed relative to this web root directory.

1) Installed is in the web root directory. The full path of this directory looks like this:

/home/_your_cpanel_login_id_/public_html/ where "_your_cpanel_login_id_" is the user ID you use to login to the cpanel (control panel) of your web site. The basic URL to refer to get to DMIS for this kind of installation would look like this "http://www._your_domain_name_" where "_your_domain_name_" is the domain name (including the extension like .com, .us) of your web site.

2) Install in a "seagull" folder within the web root directory. The full path of this directory looks like this: /home/_your_cpanel_login_id_/public_html/seagull/ where "_your_cpanel_login_id_" is the user ID you use to login to the cpanel (control panel) of your web site. The basic URL to refer to get to DMIS for this kind of installation would look like this "http://www._your_domain_name_/seagull" where "_your_domain_name_" is the domain name (including the extension like .com, .us) of your web site.

This manual will refer to the directory where DMIS is installed by using this string, "**_dmis_install_path_**". When you see this string in this manual you will know you need to substitute the actual path used on your web site. You can find the actual directory your web site uses by looking at the value for "Install root" on the General tab of the General → Configuration screen (see section 4.2.2.1 for details).

When this manual need to refer to base URL for your web site (the URL use to access Seagull), it will use this sting, "**_dmis_base_url_**". When you see this string in this manual you will know you need to substitute the actual base URL used on your web site. You can find the actual base URL for your web site uses by looking at the value for "Base URL" on the General tab of the General → Configuration screen (see section 4.2.2.1 for details).

Do not confuse the term "web root directory" as has been used here with the value of "Web root" on the General tab of the Configuration screen. The "Web root" configuration parameter tells the root directory for the Seagull install rather than for the web site.

1.6 Creating URLs

Seagull refers to two different kinds of URL: 1) URLs for programs, 2) URLs for documents such as image files.

Seagull expects URLs for programs to contain the following elements: the module name, the name of the manager program within the module, the action being performed (optional in some cases), and pairs of parameters and their values. Seagull has a convenient way of generating URLs from either a program or a template but the are only used by software developers. So the rest of this discussion will relate to what URL strings would look like to reference programs that that might be referenced by static HTML pages that you might create (see section 4.9.1.2). Here is a list of typical programs that might be referenced by static HTML pages an administrator might create.

- /publisher/articleview/action/view/frmArticleID/_num_/ - this URL string will display static HTML pages. The "_num_" would be replaced with the article ID that is going to be displayed. The article IDs of all article can be seen by viewing the ID column in the Article Manager screen (see section 4.9.1.1 for details).
- /publisher/file/action/view/frmAssetID/_num_/ - this URL string will display documents that have been uploaded such as a PDF files. The "_num_" would be replaced with the document ID that is going to be displayed. The document ID can be found following the instructions in section 4.9.2.1.
- /dmis/custregister/action/add/ - this URL string displays a page that allowing a customer to

register by purchasing some product or paying a fee.

- /dmis/custregister/action/addFree/ - this URL string displays a page that allowing a customer to register without paying any fee whatsoever.
- /dmis/custregister/action/addRecruiter/ - this URL string displays a page that allowing a customer to register as a recruiter.
- /shop/action/details/pid/_num_/ - this URL string displays a product details page where a customer can add a specific product to their shopping cart. The "_num_" would be replaced with the product ID. Currently there is no way to put a link in a page that adds the product to the shopping cart and then displays the cart.

The URL shown above are incomplete. The first portion of the URL would depend upon where Seagull was installed. The publisher should add "/index.php" or "/seagull/index.php" automatically depending on where Seagull was installed.

Seagull uses a different scheme for the URLs for documents. First, Seagull provides a means of uploading documents to the system. The most common type of document that will be uploaded and referenced within a static HTML page is an image file. The name of this kind of URL is an Image URL. When building a static HTML page, the administrator will need to know how to build Image URLs. The first part of the Image URL depends upon how Seagull was installed. If Seagull was installed in the web root directory, nothing would be added to the URL. If seagull was installed in a "seagull" directory, then the first part of the URL would be "/seagull/". See section 1.4 for details on how to determine where Seagull was installed. The next part of the URL is the directory where all uploaded files are stored which "/var/uploads/". The last part of the URL is the name of the file that was uploaded. This can be found by looking at the name column on the Document Manager screen (see section 4.9.1.1). So a complete Image URL for a file that is a picture of a home electrical unit where Seagull that was installed in a "seagull" folder might look like this "/seagull/var/uploads/Homeunit.jpg".

1.7 Multilingual support in DMIS

DMIS supports multiple languages by design. Most of the programs that make up DMIS are multilingual (exceptions will be discussed in a moment). The screens these programs produce are multilingual. This means the headings, field labels, buttons, instructions, etc are multilingual. This accounts for most of the functionality in the DMIS system.

There are two modules that are not multilingual, Navigation and Publisher. The implication of the Navigation module not being multilingual is that when a user switches from on language to another, the navigation menus remain in the language they were created in. The fact that the Publisher is not multilingual means that web content you create can only be viewed in the language in which the page was originally written. The only suggestion we have to deal with this is to design your menus and web content using the primary language for your web site. If you really want to support articles and menus in other languages our best suggestion is to create a web site for each language you want to support. However, this will cause some other problems which we would be happy to discuss with you by sending a question to support@ucsacoop.org.

The data that is stored in the database tables is not multilingual. For example, if a screen displays customer names and one customer's name is 'Fred Smith', his name would be displayed as 'Fred Smith' not matter what language was being used.

DMIS does not supports all languages. In fact, it only fully supports English as of the first release. The

reason English is the only language supported is because that it the only language the software developer speaks. It is fairly easy to add support for another language if we have someone who knows the target language and who speaks English. If such a person is available, the programmer who developed DMIS will be happy to work with dealers to one or more languages to the system.

Here is a brief description of what is required to add a new language. Each module has its own language translation files. To know what files have to be added you must understand something about the directory structure used by DMIS. The directories we are referring to exist on the web server where your DMIS system was installed.

Each module in the system has it's own directory, [_dmis_install_path_]/modules/module_name, where “module_name” is the name of the module. For example, the directory for the Shop module is [_dmis_install_path_]/modules/shop. Within each module directory, there is a directory called /lang where the language files are stored. The language files in this directory contain a many pairs of strings of text in English and then the translation or meaning of that string. All of the language translation files for English are called english-iso-8859-15.php. The name of the file is based upon the language name and the character set used to define the language. Here are the names of the files used for some other languages:

- brazilian_portuguese-iso-8859-1.php
- chinese-big5.php
- chinese-gb2312.php
- chinese_simplified-utf-8.php
- chinese_traditional-utf-8.php
- czech-iso-8859-2.php
- dutch-iso-8859-1.php
- english-iso-8859-15.php
- french-iso-8859-1.php
- french-utf-8.php
- german-iso-8859-1.php
- italian-iso-8859-1.php
- japanese-euc-jp.php
- japanese-utf-8.php
- norwegian-iso-8859-1.php
- polish-iso-8859-2.php
- portuguese-iso-8859-1.php
- russian-utf-8.php
- russian-windows-1251.php
- spanish-iso-8859-1.php
- spanish-utf-8.php
- spanish-utf-8.php

- swedish-iso-8859-1.php
- turkish-iso-8859-9.php
- turkish-utf-8.php

If a dealer wanted to create the language files for new language, s/he would need to follow these steps:

1. Download the language file for English for each module to his local computer. Use an FTP program (beyond the scope of this manual) to perform the downloads. Care should be taken to know which file belows to each module since all the language files are called the same thing. The best approach is probably to create a directory structure on your home computer that matches the directory structure on the web host.
2. Make a copy of each English language file for each module and name the new file appropriate for the language it will contain. Use the file names shown above.
3. Use a text editor such as NotePad to open each file you created in the previous step.
4. Most lines of the file contain a string surrounded by a single or double quote, a '=>', another string surrounded by single or double quotes and finally a comma. As you edit this file, it is critical to make sure that you do not disturb the single or double quotes, the '=>' or the ending comma. The string on the left of th e'=>' is the string that is being translated. The string to the right of the '=>' is the translation. Here is very small sample of what these files look like.

```
<?php
   $defaultWords = array(
      'Welcome to' => 'Welcome to',
       'Maintainer' => 'Maintainer',
       'State' => 'Status',
      'WARNING: This will drop your database' => 'WARNING: This will drop your database and
create your Seagull environment from discovered data files. It will only work correctly if your
current database user has full privileges, ie to drop and create databases.',
      'authorisation failed' => 'You do not have sufficient privileges to view this area.',
      'session timeout' => 'Your session has timed out, please login again',
      'remote interface problem' => 'There was a problem querying the remote interface',
   );
?>
```

You will notice that even in English the string on the left does not always match the string on the right. In order to provide the translation you will translate the string on the right and replace the string on the right. The example below shows the German translation of the file shown above.

```
<?php
   $defaultWords = array(
      'Welcome to' => 'Willkommen bei',
       'Maintainer' => 'Betreuer',
       'State' => 'Status',
      'WARNING: This will drop your database' => 'ACHTUNG: Die bestehende Datenbank wird
gel►scht',
      'authorisation failed' => 'Authorisierung fehlgeschlagen',
      'session timeout' => 'Ihre Sitzung ist abgelaufen. Bitte loggen sie sich erneut ein.',
      'remote interface problem' => 'Problem beim Remote-Interface',
   );
?>
```

In some cases, the translation file will look somewhat different. Each line will start with $defaultWords[, a string enclosed in single or double quotes that is to be translated, an equal

sign, the string that is the translation enclosed in single or double quotes, and finally a semicolon. The following small example example is an equivalent match for the first example except that it uses the alternative syntax.

```
<?php
$defaultWords['Welcome to'] = 'Welcome to";
$defaultWords['Maintainer'] = 'Maintainer';
$defaultWords['State'] = 'State';
$defaultWords['WARNING: This will drop your database'] = 'WARNING: This will drop your
database and create your Seagull environment from discovered data files. It will only work
correctly if your current database user has full privileges, ie to drop and create databases';
$defaultWords['authorisation failed'] = 'You do not have sufficient privileges to view this area.';
$defaultWords['session timeout"] = 'Your session has timed out, please login again';
$defaultWords['remote interface problem'] = 'There was a problem querying the remote interface';
?>
```

In order to provide the translation you will still translate the string on the right and replace the string on the right.

5. One all of the files have been translated, you will upload them to your web site using an FTP program (describing how to use an FTP program is beyond the scope of this manual).

Here is a link to a page on the Seagull support site that gives additional information on internationalization: http://trac.seagullproject.org/wiki/Howto/Internationalisation.

If you need additional help creating language files, send an email to support@ucsacoop.org.

1.8 Sections of this manual

The next three sections (number 2 through 4) of this manual has been organized based upon the way the menus appears as of the when the system is installed. Since an administrative user can change the entire structure of the menus, your menus may have a different structure.

Knowing this, the reader can get an overview of what the system is capable of by looking at the subject headings in sections 2 through 4 of the manual. Every function the system supports is listed in the table of contents.

The reader may want to skip directly to the Administrative section since that is where most important section to understand when managing and using this system.

2 User menu

The menu items in this section are available to a guest to the web site or a registered user before they have logged into the web system.

2.1 Home

Clicking User menu → Home will take the user to the home screen for the web site.

2.2 FAQ

Clicking the User menu → FAQs displays the FAQs (Frequently Asked Questions) screen. The top of the screen has a drop down list of FAQ categories. When the user selects a FAQ category all of the FAQs for that category are displayed. The display of FAQs is broken down into two major area:

Question and Answers. The user can click on a question in the Questions section and the screen will scroll to the answer for that question.

2.3 Shop

Clicking the User menu → Shop menu item allows the user to shop for products. The shop functionality for the guest is identical to what a Member see with one exception. When a guest clicks on the checkout button, a login screen is displayed. A message appears on the screen telling the user to login or register if they have not registered. If they customer logs in or registers, they can go back shopping and complete the check out process. For a full discussion of the shopping functionality, see section 3.2.

2.4 Find Username

Clicking User menu → Find username menu item allows the user to search for their username. They have their username, they can login to the system. The reason this function exists is because we assume that many dealers will have a lot of customers who registered for free electricity or became a customer of a dealer before this system was created. These users will have no idea that they have a username and password. So this facility was designed to allow them to search for their username.

Clicking User menu → Find username menu item displays th Username :: Search screen . The screen has the following search fields:

- Physical Zip/Postal Code – the customer must enter the physical zip or postal code as one of the search criteria. This would be the one that was in place when they first registered. Requiring this field keeps prying eyes who might know certificate number
- Customer ID – the customer can enter their customer ID if they know it.
- Certificate Num – the customer can enter their free electricity certificate number if they know it.
- First Name – the customer's first name
- Last Name – the customer's last name
- Email – the customer's email address

After entering at least two criteria, select the “Search” button to perform the search. If no matching record is found or if multiple matching records are found, an error message is displayed.

If one matching record is found a confirmation page is displayed with the following information: Username, email address, name, customer ID, physical street, physical city, physical state, physical zip and physical country. The screen also has a link to the login screen and a link they can press to reset their password if they have forgotten it (of if they never knew it).

2.5 Login

Clicking User menu → Login displays the Login screen where the user can login. When the login is successful, if the user is a “member” then a Member menu is displayed. When the login is successful and the user is a administrative or root user then an Admin menu is displayed.

2.6 User Menu Items You Add

The system includes the ability to add additional menu items (see section 4.3.1). Since we don't know what kinds of menu items an administrative user might add, we are unable to document them. However, we do believe that most of the menu items will be to static HTML articles that an administrative user will create (see section 4.9.1).

3 Member Menu

The menu items in this section are available to a member who has logged in to the system.

3.1 My Account

Clicking User menu → My Account menu item allows the user to view and manage their own account information. The information in this section is the same as section 4.5, so please see that section for details.

3.2 Shop

The Member menu → Shop menu item is the entry point the shopping functionality available to members. Shopping involves three basic activities: browsing among the products, selecting products to purchase, and checking out. The other subtopics in this section discuss these activities.

3.2.1 List Products

Clicking on the Member menu → Shop menu item displays the Shop :: List Products Screen. The screen has two area. The top are of the screen contains a drop down list product categories. Product are organized into categories. All the products in a category are displayed when a category is selected.

The second part of the screen is the list of products within the selected category. The list includes Name, Description (short description) and price. This particular list is always in order by product name. If more than one page of data is available to be displayed, the header are of the list will have navigation links that permit the user to browse forward and backward among pages.

3.2.2 Product Details

Clicking on a product name in the Shop :: List Products Screen displays the Product Details screen. This screen contains most of the information about the product. The information that is displayed includes: a picture (or “No Image Available”), product name, price and currency, status (in stock, sold out, etc), warranty, manufacturer, balance in warehouse, link to product datasheet, and link to manufacturer's datasheet. The only fields that are displayed are those that contain data.

Clicking the “Continue Shopping” button at the top of the screen displays the previous screen which should be the last products list screen the user saw. The “View Cart” button displays the Cart :: List Cart screen (see section 3.2.2).

The screen also contains a quantity field and an “Add to Cart” button. If the users enters a quantity they wish to purchase and the clicks the “Add to Cart” button, the Cart :: List Cart screen is displayed.

3.2.3 View Cart

The Cart :: List Cart screen is displayed when the user clicks the “View Cart” button or whey the user

clicks the “Add to Cart” button. This screen lists the products currently in the user's shopping cart. The information listed for each product includes: a check box, product name, quantity, unit price and extended price. The screen also lists the total item count, total extended price, tax for the order, shipping and handling for the order, and the total price for the order. If the shopping cart is empty, a message will say “Your cart is empty!”.

The quantity field can be modified by the user. If the user modifies the quantity for one or more products and then clicks the “Recalculate” button, the totals are recomputed.

The first column for each product in the cart is a check box. If the user clicks one or more check boxes and clicks the “Delete” button, those products are deleted from the cart.

Clicking the “Continue Shopping” button at the top of the screen displays the two screens back which should be the last products list screen the user saw. Clicking the “Check out” button on the screen displays the Cart :: Select Payment Method screen (see section 3.2.4).

3.2.4 Select Payment Method

The Cart :: Select Payment Method screen is displayed when the user clicks on the “Check Out” button. This screen lists the products currently in the user's shopping cart. The information listed for each product includes: a check box, product name, quantity, unit price and extended price. The screen also lists the total item count, total extended price, tax for the order, shipping and handling for the order, and the total price for the order. The screen contains a field called “Payment Method” with a drop down list of payment methods accepted by the web site. After the user selects a payment method and clicks the “Set Payment Method” button, the 3.2.5 screen is displayed (see section 3.2.5).

3.2.5 Make Payment

The Make Payment screen is displayed when the user pressed the “Set Payment Method” button on the Cart :: Select Payment Method screen. The exact configuration that is displayed depends upon the type of payment the users selected in the previous screen. The information on any of the Make Payment screen allows the user to make the payment type they selected.

If the user selected to make a “Check/Money Order”, the screen tells them where to mail their payment. In this case, the order should not be shipped until the site administrator receives the payment. When the payment has been received, the site administrator can use the

If the user selected to make a “PayPal”, the screen contains a “PayPal Payment” button. The screen also tells the customer where to mail a check or money order if they decide they do not want to pay with PayPal. When the user clicks the button they are taken to the PayPal site where they can complete the payment process. When the payment has been made the user can click a button that will take them back to the web site where they were shopping. If there was an error, in the transaction, they will see a Payment Error screen that tells them there was an error along with a link to try the transaction again and instruction on how to mail a check or money order. If the transaction completed OK, they will see a Payment Complete screen telling them their payment has been received and will be shipped as soon as possible and a confirmation email will also be sent.

If the user selected to make a “Credit Card”, the screen contains a “PayPal Payment” button. The screen also tells the customer where to mail a check or money order if they decide they do not want to pay with a credit card. When the user clicks the button they are taken to the authorize.net web site where they can complete the payment process. When the payment has been made the user can click a button that will take them back to the web site where they were shopping. If there was an error in the

transaction, they will see a Payment Error screen that tells them exactly what the error was along with a link to try the transaction again and instruction on how to mail a check or money order. If the transaction completed OK, they will see a Payment Complete screen telling them their payment has been received and will be shipped as soon as possible and a confirmation email will also be sent.

When the user selects a payment type of PayPal or Credit Card (via authorize.net), the system takes the user to a screen on anther web site (the PayPal site for PayPal and the authorize.net site for credit cards). You may wonder why the system sends the user to another system. The reason has to do with the techniques used to provide security for these types of transactions. Web sites that accept and process secure information such as account information for PayPal or credit card process need to protect that information. The technology used on the Internet to protect this kind of data is called Secure Socket Layer (SSL). Web sites that implement this layer have a URL that starts with “https” rather than “http”. Companies that want to implement SSL have to pay an annual license fee for that service. A decision was made while designing this system to not require SSL on the web site where the system will be installed. This decision implied that when it came time to collect sensitive payment information, it would need to be done on another web site. Fortunately, both PayPal and authorize.net provide services that include an SSL connection.

As a result of this design decision, this system collects everything it can that does not require SSL and then it transfers control over to another web site where the financial information can be collected. When the transaction is complete on PayPal and authorize.net, a link is displayed that allows the user to return to the web site from which they came. This begs the question, what happens if the user never returns to your web site? If this happens, there is no way for this system to know that the payment was received. However, the site administrator should receive an email notification that a payment has been received. That notification should contain the order number. In order to mark the order as being paid, follow the steps in section 4.11.3.3.

3.3 FAQ

The Member menu → FAQ menu item is the same as section 2.2 so please refer to that section.

3.4 Downline

The Member menu → Downline menu item displays the Referral Manager :: Downline screen which is very similar to the screen in section 4.10.3 with one key difference. By providing this screen to members, it helps motivate their free electricity recruiting since they can use this screen to see how many people they have recruited. The “member” level user can only see customers that they recruited. At this point, only one level of downline is supported. The following fields are displayed: Cust ID, Lvl (level), Name, Cert Num (certificate number), Upline (customer ID of person who recruited them which in this case will be the customer ID of the currently logged in user), physical City, physical State, physical Zip, physical Country. If more than one page of data is available to be displayed, the header are of the list will have navigation links that permit the user to browse forward and backward among pages.

3.5 Logoff

The Member menu → Logoff menu item logs the current user off and returns them to the home page that is seen by guests to the web site.

3.6 Member Menu Items You Add

The system includes the ability to add additional menu items (see section 4.3.1). Since we do not know what kinds of menu items an administrative user might add, we are unable to document them. However, we do believe that most of the menu items will be to static HTML articles that an administrative user will create (see section 4.9.1).

4 Administrative Functions

The menu items in this section are available to root (administrative) users who have logged into the web site.

In the section on Users and Security the reader will discover that there are three kinds of users: guest (also called user), member and root. Root users are administrative users. Usually, a root user will be the owner of the site and his/her administrative staff.

4.1 Manage Blocks

Seagull uses a concept called blocks. Blocks are sets of functionality or screen content that can be placed in various areas of the screen. The Block Manager allows an administrative user to define the layout of where blocks are place on the screen.

4.1.1 Screen Layout

The areas of the screen that are used in the the Block Manager are shown in the diagram below. The areas in italics are part of the system but they do not have a corresponding name that is used by the Block Manager. Top and Bottom

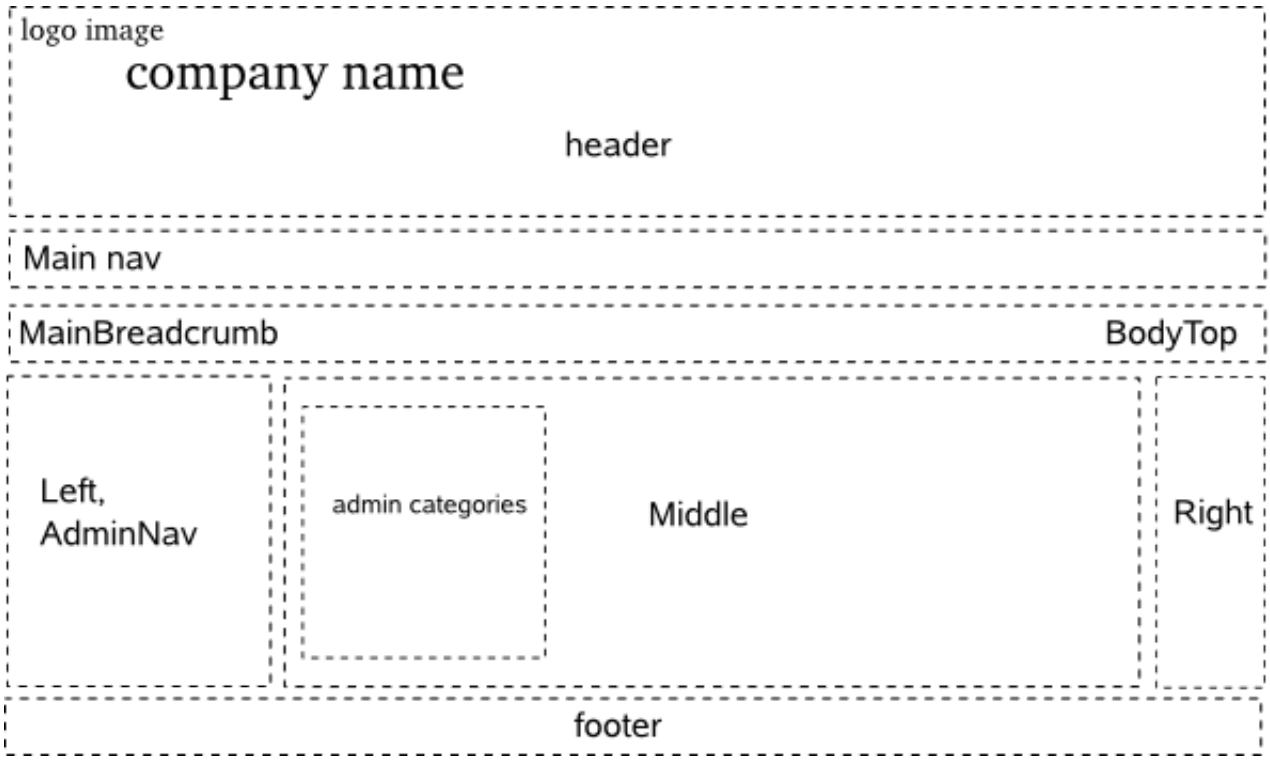

Figure 1

4.1.2 Standard Blocks

Based upon the functionality that most dealers seem to need, and the fact that very few Blocks are needed, a decision has been made to shrink the Right area of the screen. Therefore, it is strongly suggested that no block be assigned to the right area since it will not display there.

The subsections below list the various types of blocks that are available in the system.

4.1.2.1 Admin menu

The block contains the navigation menus for administrative users (users who have logged in to the system and whose user record is marked as a root user). This block should always be enabled. The best location for this block is AdminNav.

4.1.2.2 Member menu

The block contains the navigation menus for the members(users who have logged in to the system and whose user record is marked as a member) This block should always be enabled. The best location for this block is Left.

4.1.2.3 User menu

The block contains the navigation menus for the users who are guests (have not logged in to the web site) This block should always be enabled. The best location for this block is Left.

4.1.2.4 Categories

The block contains a hierarchy of categories (see section 4.3.3 for details). This block should always be enabled. The best location for this block is AdminCategory. This block location is unique in that is within the center section. No other block really belongs in this area.

4.1.2.5 Login

This block contains an area where a use name and password are entered. The best location for this block is Left. This is not the only login area. If the user clicks on the Login link in the User menu, then a login screen appears in the center area.

4.1.2.6 Language Switcher

This block allows a user to switch between languages. Seagull supports multiple languages. Several of the Seagull modules have files defined for several languages. The DMIS and Shop modules currently only have support for English because that is the only language the developer speaks. If one of our French speaking dealers would like to provide the French translation for these modules, please contact support@ucsofa.net. Since most dealerships operate in the US, this block can be disabled.

4.1.2.7 Newsletter subscription

The block allows users to subscribe to your newsletter. This may be a useful feature but since all dealers may not use this feature it will initially be disabled. The location for this block is Left.

4.1.2.8 User breadcrumbs

This block displays the navigation location of the current screen. This does not appear to be a very helpful feature so it is initially disabled. The best location for this block is BodyTop.

4.1.2.9 Site News

Site news allows an administrative user to publish little news items about the web site. The name of the block manager to publish site news must be “Publisher_Block_SiteNews”. The site news items can be created and managed by selecting Admin menu → Publisher → Article with an article type of “News item”. See section 4.9.1 for details on this subject.

4.1.2.10 Recent articles

This block displays a list of recent HTML articles that have been added to web site using the Publisher module. This block will initially be disabled. The best location for this block is Left. There are two types of HTML articles: HTML articles and static HTML articles. This block manager uses only the HTML article type. Said another way, HTML articles can't be accessed via the menus which are built and controlled by Navigation module. This is another way to publish HTML content to your web site. There are two manager names that can be selected for this type of block managers: Publisher_Block_RecentHtmlArticles and Publisher_Block_RecentHtmlArticles2. The first block manager lists only the title of the article in the block. The title is a hyperlink to the content of the article. The second block manager lists the date of the article, the title of the article and the first part of the article in the block. The design of the HTML content will be affected by which block manager the administrative user chooses. For example, if the administrator chooses the second block manager,

administrative users who create HTML content would do not want to use any large fonts (like headings) because they will not display very well in the block. An administrative user can create and manage HTML articles by selecting Admin menu → Publisher → Article with an article type of “News item”. See section 4.9.1 for details on this subject.

4.1.2.11 Sample Right Block

It is not clear how to use this block, so it is suggested that it be left in the initial state which is not activated.

4.1.2.12 Calendar

This block displays a calendar of the current month. At this point, this does not seem to be a feature most dealers will want so it will initially be disabled. The best location for this block is Left.

4.1.2.13 Online

This block displays a list of users who are currently logged in to the web site.

4.1.3 Editing Blocks

To view a list of the blocks that are currently defined, click on Manage Blocks in the Admin menu. A list of block will be displayed. To edit an individual block click on the block Title. A screen will display the block editing screen. The editing screen can have two or three tabs depending on the Block Class Name that is currently selected.

On the block details tab, the most likely value an administrator may want to change is the Status check box. Changing this box will enable or disable the block. You probably will not need to change other settings.

For a full description of each field in each tab, see the section on Adding Blocks

4.1.4 Adding Blocks

Seagull provides quite a few block features that can defined. You may find some of these useful. To find out the additional blocks that are available, we suggest an administrator try adding a block and try various Block Class Name values (described below) to see what functionality he/shemay want to add.

The Edit Block screen has two or three tabs. Below is an explanation of each tab and the fields that can appear on the tab:

1. Block Details tab
    - Display Title – This is the title that is displayed within the block header. You can enter whatever makes sense to you.
    - Block Class Name – This the name of the class that provides the block functionality. Select one from the list. You might experiment with various values to see if they provide and functionality you might want to add to your site.
    - Title Class – this should normally be left blank unless the system provides a value.
    - Body Class - this should normally be left blank unless the system provides a value.

- Status – This enables and disables the block. When the check box is checked, the block is enabled.
- Cache status – If a block is enabled, this should normally be checked. System performance is improved when it is checked.

2. Block Parameters tab – This tab is not always present. When it is present, the fields that are displayed depend upon which Block Class Name was selected. It is suggested that the default values that the system displays be used rather than trying to use your own values.
3. Publishing tab
   - Position – The position determines where the block will be displayed. Refer to figure above to see where various positions are located. Note that some positions have a name but in fact do not have a location on the screen including: Top and Bottom.
   - Sections – This determines the Navigation sections that will be displayed. This relates primarily to the Admin menu and User menu blocks. We strongly recommended that the administrator select the first entry, “All sections”, in most cases since selecting specific sections can result in unexpected behavior. If the administrator needs to select two or more items in a row, click on the first items and then hold the shift key down when the administrator selects the last item. If the administrator needs to select multiple items that are not next to one another, click on the first item, then hold the control key down and click on each additional item.
   - Can view – The items in this list are the three roles defined in the system. A “guest” is someone who has not logged in. Guests have access to the Section (menu) items in the User Menu. A “member” is someone who has logged in but does not have root authority. Members have access to the Section (menu) items in the Member Menu. A “root” is someone who has logged in and is defined as having administrative authority. Root users have access to the Section (menu) items in the Admin Menu. For a more thorough explanation of the three roles, see the section on Users and Security. For a more thorough explanation of Sections, see the section on Navigation Section.

4.2 General

When this menu item is selected, it opens its submenu and then activates the “Manage Modules”

4.2.1 Manage Modules

This screen allows the administrator to see the modules that are installed. Modules can be added that are not presently installed and modules can be deleted. The system will come pre-configured with all the required modules. We strongly suggest that you not attempt add or remove any modules using this screen.

This screen does provide access to modify configuration parameters for the individual modules and this is something that can and should be done for some modules. When a user clicks on the modules name, i.e. DMIS, a screen will display with the configuration parameters for the configuration parameters in that module.

You should **not** attempt to modify the parameters for most modules and program. Therefore we will **only** document the programs parameters that an administrator might need to modify. Below is a list of modules that a site administrator should configure along with a explanation of each parameter.

4.2.1.1 Publisher Module

ArticleViewMgr – do not change any of the values for this program.

ArticleMgr – do not change any of the values for this program.

DocumentMgr - Only change the values of the parameters listed below.

allowedFileTypes – this list contains all of the file type extensions that you might want to upload using the Publisher → Documents and the New Document function. The list is just the 3 and 4 character file type extension. For example, the following file type extension are graphic files: gif, jpg, jpeg, pgn. If you try to upload a file type that is not defined in this list, the upload will fail.

DocumentViewMgr – do not change any of the values for this program.

FileMgr – do not change any of the values for this program.

ContentTypeMgr – do not change any of the values for this program.

WikiScrapeMgr – do not change any of the values for this program.

4.2.1.2 DMIS Module

CustRegisterMgr – do not change any of the values for this program.

CustomerMgr – do not change any of the values for this program.

CustomerImportMgr - do not change any of the values for this program.

CustomerSearchMgr - do not change any of the values for this program.

CertificateMgr - do not change any of the values for this program.

AssignCertMgr - do not change any of the values for this program.

RegistrantMgr - do not change any of the values for this program.

RegCustMgr – Only change the values of the parameters listed below.

defaultUpline – this is the customer ID that the web site will use as the default referring customer when no referring customer number is provided by the user. In most cases this will be the customer ID of the dealer. This implies that the dealer should have a customer record in the customer table.

defaultSignupMethod – As the system is currently defined, there are two ways of creating a customer record that will custom money including: “Free Electricity Processing Fee”, and “Basic Club Membership”. The value that you enter in this field must match one of these two values exactly and these two values must match the names of two products in products table. The cost of these options are defined in the products table which can be altered using the Shop Admin menu time. Be very careful if you decide to modify this value. It would even be a good idea to make the dealer's customer record the first record in the table.

AffMgr - do not change any of the values for this program.

ReferralMgr - do not change any of the values for this program.

GuestSearchCustMgr - do not change any of the values for this program.

dealer – The values in the area should be modified by the dealer or his web administrator. These

values permit a single web site to manage the certificates, registrants and customers for more than one dealership.

coopDealerID – The DMIS software communicates with the co-op web site under certain conditions. In order for the DMIS software to properly work, the dealer must be an active co-op member. The dealer ID in this field is the dealer ID that is an active co-op member. If the dealer owns multiple dealerships, he/she only need to have one active co-op membership in order for this software to work properly.

dealerIDs – This is a comma separated list of dealer Ids that can issue certificates. If the dealer only owns one dealership, then only list one. If the dealer owns and operates multiple dealerships, enter each dealer ID separated with a comma but no spaces.

table - do not change any of the values for this area.

dir - do not change any of the values for this area.

site

baseWebUrl – This is the URL for the base web site. If your domain name was called "discountclub .com" then the URL would look like this: "http://www.discountclub.com".

defaultAffId – This is the default affiliate ID. DMIS supports affiliate Ids in much the same way as the PICC web site does. There is one major difference however. A DMMIS web site uses the customer number as the affiliate ID. The dealer should have a customer record for himself and use the customer number on that record as the default affiliate ID. Warning – Do set this value until you have imported your customer records (see section 4.10.1.9) and used the DMIS → Affiliates function (see section 4.10.2 to create an affiliate ID for the customer ID who will become the default affiliate ID. If you do this out of order your web site could become non-functional.

affIdCookiename – DMIS stores the default affiliate ID in a cookie. This is the name of the cookie. It is strongly suggested that an abbreviation of the web site name followed by "_AffID". For example, if the web site name is "My Discount Club", a good cookie name might be "MDC_AffID".

4.2.1.3 Shop Module

ShopMgr

requiresAuth - do not change this value.

adminGuiAllowed - do not change this value.

rootCatID – this is the category ID of the item in the category table that is the the root (top level) of the tree structure of categories for types of products. This should probably not be changed unless the administrator completely alters the category structure for the shopping cart.

showCart – indicates if the items available for sale should be shown. A value of 1 indicates they should be shown and a value of 0 indicates they should not be shown.

defaultTax – the default sales tax rate charged in our state. This tax rate is only applied if a product is marked as taxable. The system currently only supports one tax rate rather than a tax rate for each state.

defaultDiscount – the default discount rate off the retail product price for customers (those who have registered and therefore have a role of member).

multiCurrency – indicates if multiple currencies are supported. The value is 0 indicating that it does not currently support multiple currencies. This value should not be changed since the system currently doesn't support multiple currencies.

defaultExchange - this value should not be changed since the system currently doesn't support multiple currencies.

defaultCurrency – the default currency used for the web site. For US dealers the value should remain 'USD'. For Canadian dealers, the value can be changed to 'CAD'.

onlyMembersOrder – indicates if members only can shop or if guest can also shop. A value of 0 indicates guests can shop and a value of 1 means only members (customers) can shop. If a guest shops, they must register before they can actually check out since the only place in the system where addresses are collected is in the registration process.

ShopAdminMgr - do not change any of the values for this program.

statusOpts - do not change any of the values for this section.

imageUpload - do not change any of the values for this section.

PriceMgr - do not change any of the values for this program.

PriceAdminMgr - do not change any of the values for this program.

price - do not change any of the values for this section.

CSV - do not change any of the values for this section.

UploadMgr- do not change any of the values for this program.

ShopConfigMgr - do not change any of the values for this program.

CartMgr - do not change any of the values for this program.

CartAdminMgr - do not change any of the values for this program.

Cart - do not change any of the values for this program.

PopularMgr - do not change any of the values for this program.

PaymentListMgr - do not change any of the values for this program.

MyorderMgr - do not change any of the values for this program.

PaymentMgr – these parameters define what method of payment will be supported on the web site. While the DMIS module supports more than one dealership, this module only supports one company. This means that all of the payments for products must flow through only one company.

requiresAuth - do not change this value.

adminGuiAllowed - do not change this value.

acceptPayPal – indicates if the web site accepts PayPal payments. A 0 indicates the site does not accept PayPal and a 1 indicates it does. If this value is 1, then the next two values should also be set.

payPalEmailAddress – the email address of your PayPal account. This should be set if the site has a PayPal account and wants to accept PayPal payments.

payPalReturnLabel – the label that will be displayed after a PayPal payment has been completed in order to return to your web site. The label should be changed to reflect the name of your web site. For example if your web site is call “My Club” then the label should read “Return to My Club web site” or something similar. See the first two parmeters in the “site” section of the Shop module which is where you enter the company name that receives the payments.

acceptAuthnet – indicates if your web site accepts credit card payments via an authorize.net payment gateway. A 0 indicates the web site does not accept payment through authorize.net and a 1 indicates it does. If this value is 1, then the next two values should also be set.

authorizeNetID – if the site accepts credit card payments via an authorize.net payment gateway, enter the authorize.ent ID here, otherwise this field should be blank.

authNetTxnKey - if the site accepts credit card payments via an authorize.net payment gateway, enter the authorize.net transaction key here, otherwise this field should be blank.

authNetCurrencyCode – the default currency code to be use with authorize.net payments. For the U.S. the value should be “USS”.

emailConfCopyToAdmin – indicates if a confirmation email should be sent to the site administrator when an email is sent to the customer when a payment is received.

observers - do not change this value.

Shipping

weightTableMethod – indicates if the site will to use the weight table to compute shipping rates. Since this is the only method currently supported, this value should always be set to 1.

weightTableRates – contains a list of pairs of weights and rates. Each pair of weights and rates should be separated by a comma and there should be a colon between a weight and the associated rate. The values supplied with the system based upon U.S. Postal Service rates fro first class mail. The default values are in whole numbers but decimal numbers are also supported. The rate associated with a weight is applied up to the weight. For example, anything heaver than 1 pound but up to 2 pounds will use a rate of 5.50.

weightTableUnits – indicates the unit of measure for the weights in the weightTableRates setting above. The default value is “pounds”

Handling

perOrderMethod – indicates if the web site will charge a handling fee for each order. A 1 indicates an order handling fee will charged and a 0 indicates it will not. The perItemMethod and perOrderMethod can both be used.

perOrderAmount – indicates the amount the site will charge for handling of each order. If the perOrderMethod is 0, then this value is ignored.

perItemMethod - indicates if your web site will charge a handling fee for each item in the order. A 1 indicates the site will charge a per item handling fee and a 0 indicates it will not. The perItemMethod and perOrderMethod can both be used.

perItemAmount - indicates the amount the site will charge for handling of each item in an order. If the perItemMethod is 0, then this value is ignored.

site

companyPay – indicates the company name customers should put on a check or money order.

companyName – indicates the company name where the customer would send mail when mailing payments.

companyAddress1 – indicates the first address line to be used when customers want to mail a check or money order.

companyAddress2– indicates the second address line for the city, state and zip to be used when customers want to mail a check or money order.

table - do not change any of the values for this section.

4.2.2 Configuration

The configurations screen contains the system wide configuration values for the web site. The screen is broken down into the a number of tabs representing different areas. Each tab contains its own values. Clicking the "Save" button at the top of the screen to applies the changes. In general, the administrator should not need to modify the values in the configuration area. All of the tabs can be modified but great care should be exercised since setting certain values incorrectly can have rather dramatic and undesired results. Here are some tabs that contain data that you might need to modify: email. Here are some tabs we would suggest that you not modify: Debug, DB, Navigation, MTA.

Below is a list of tabs and the values within the tabs you might be most interested in changing:

4.2.2.1 General

Base URL – The basic URL is the URL used by the web hosting software to execute Seagull software. This string will look something like this "http://www._your_domin_name_" where "_your_domin_name_" is the domain name (including the extension like .com, .us) of your web site. It this string ends in "/seagull", it means Seagull is installed in a seagull subfolder. See section 1.4 for more information on this topic. Other portions of this manual call this value "_dmis_base_url_".

Site name – This is the name of your web site. This value is used to populate the top banner area of your screen while on the web site. So if you put "My Glorious Web site" then that is what would appear at the top of every page while in Seagull whether in guest, member or admin mode.

Show logo - This is the graphics file that is displayed in the upper left of every screen in a web browser window while browsing your site. The graphics file you use should be 60 x 60 pixels in size. The file will have to uploaded to the web site probably using an FTP program (explaining how to FTP a program to your web site is beyond the scope of this manual). The location where the file goes depends upon the value in the "Default theme" field (see below in this section of the manual). The beginning part of the directory path where the file will be uploaded to depends upon where Seagull is installed. See the value for "Install root" for the first part of the path. We will use the string "_dmis_install_path_" to designate that portion of the path. If "Default theme" is set to "default" then the full directory path of where to upload the file would be _dmis_install_path_/themes/default/images/. If "Default theme" is set to "custom" then the full directory path of where to upload the file would be _dmis_install_path_/themes/custom/images/.

Keywords – These are the keywords use to index your web pages by search engines. You will probably want to change these values from the default values to something like "free electricity,

HAFC, PICC, energy independence". Use your imagination here. Unfortunately, these keywords are site wide so every page on your site will use the same keywords. That is a limitation of the Seagull framework that is not likely to change anytime soon.

Admin GUI theme – This defines the set of style sheets that define the overall look and feel of the screens an admin user sees. The system comes with only one such theme. You can create your own theme but this is for very advanced users. If you want to creating your own theme, the best source of information can be found on these page on the Seagull web site, http://trac.seagullproject.org/wiki/Howto/CSS, http://trac.seagullproject.org/wiki/Howto/CSS/Handling, http://trac.seagullproject.org/wiki/Howto/CSS/Palette, http://trac.seagullproject.org/wiki/Howto/Navigation/LookAndFeel, and http://trac.seagullproject.org/wiki/Howto/Templates/WorkingWithTemplates (which has a section on creating new themes).

Default theme - This defines the set of style sheets that define the overall look and feel of the screens an guest and members see. The system comes with only one such theme. You can create your own theme but this is for very advanced users. If you want to creating your own theme, look at the links under Admin GUI theme.

Install root – This value gives the full directory path where Seagull is installed on your web server. The full path of this directory looks like this: "/home/_your_cpanel_login_id_/public_html" where "_your_cpanel_login_id_" is the user ID you use to login to the cpanel (control panel) of your web site. The path may also end in "/seagull" which means Seagull was installed in a subfolder. Other portions of this manual refer to this value as "_dmis_install_path_".

4.2.3 Maintenance

The maintenance screen is primarily for a developer who uses the Seagull framework. A dealer will not normally need to use this screen.

4.2.4 Module Generator

The module generator screen is primarily for a developer who uses the Seagull framework. A dealer will not normally need to use this screen.

4.2.5 Translations

The Seagull framework is designed to be multi-lingual All constants and messages that are displayed on the screens are actually values that are translated using translation tables. The translations interface allows the administrator to modify the translation values for a given language.

To edit the language file for a given module select the module name on the left, select a language on the right, click on the "edit" radio button and then click th e"Process" button. The next screen will contain a list of labels (in English) on the left and the corresponding field on the right is the translation. If the translation for various values are not correct for your desired language, the administrator should use this screen to edit the values.

All of the modules have an English translation file but not all modules have all language files. If the language file that you need for a given module are missing, send an email to support@ucsacoop.org and request that we create a dummy language file for your to customize.

4.2.6 PEAR Packages

Seagull uses quite a few PEAR (PHP Extension and Application Repository) modules. PEAR Package screen is primarily for a developer who uses the Seagull framework. A dealer will not normally need to use this screen.

4.3 Navigation

The navigation module controls the navigation interface for Seagull and DMIS. With it, the admin user can modify the style of navigation menus, create menu items, change menu items and delete menu items.

4.3.1 Navigation Section

A Navigation Section is a menu item that can be used to perform certain functions in the system. The navigation section is where the navigation menus are defined for the Seagull and DMIS environment. The system comes with 3 sets of navigation menus predefined: Admin menu, Users menus, and Members menu.

Here is a web page on the Seagull documentation site that may be helpful: http://trac.seagullproject.org/wiki/Howto/Navigation.

4.3.1.1 Display Navigation Sections

Clicking the Admin menu → Navigation →Navigation Section menu item displays a Section Manager :: Browse screen. The screen contains a list of the currently defined navigation sections is displayed. The list includes all navigation sections (menus and sub-menus) that are defined in the system. The list contains the following columns: a delete check box, ID (section record ID), Move (arrows to move sections up and down), Title (of the menu item), Resource, Parent ID, Order (in the list), Status (red dot means disabled and green dot means enabled).

4.3.1.2 Delete Navigation Sections

The first column in th e Section Manager :: Browse screen is to mark items for deletion. Clicking on the check box in the first column for a Navigation Section item and then click on the “delete selected” button.

4.3.1.3 Reorder Navigation Sections

The third column of the Section Manager :: Browse screen allows the administrator to move items up and down in the list. Clicking on the up arrow moves the item up one position within its section. Clicking on the down arrow moves the item down one position within its section.

4.3.1.4 Add a Navigation Section

The Section Manager :: Browse screen has a button called “New Section”. Clicking on this button allows the administrator to add a Navigation Section. The administrator may want to add Navigation Sections (menu items), especially to provide navigation to static HTML pages that he/she has added to your the web site. So what follows will be a brief explanation of how to add a navigation menu.

Clicking on the “New Section” button at the top of the screen displays an “Section Manager :: New

Section" screen which has three tabs.

The "Section info" tab has the following fields:

- Section Title – This is the string that will appear in the menu.
- Parent Section – This is a drop-down list of multi-level menu items that can be selected as the parent for the menu item being adding. The new menu item will appear in the menu under the parent menu item.
- Target – This is the type of web page that will be displayed. In almost every case "pre-existing static content" should be selected. Other values are possible but they are beyond the scope of this manual.
- Static Article Title – if Target is set to "pre-existing static content", this will be the name of static HTML page that has been defined using the Admin Menu → Publisher → Articles screen.
- Anchor – This is a hot spot or anchor within an article. This will usually be left blank.
- Add as alias – Click this box causes a search engine friendly name will be created for the static HTML page.
- Automatic alias – Checking this box will automatically create a unique name for the page being referenced.
- Alias URI – this is the alias name that is generated when the previous two check boxes are checked.

The "Editing Option" tab is where describes who can see the menu item being defined and if the menu item should be displayed. It has the following fields:

- Publish – click on this box to make the menu item appear in the menu.
- Can View – indicates what level of user can view this menu item.

The "Accessibility" tab allow defines hot keys for menu items. It has the following fields:

- Access Key – enter any number which can be pressed in combination with the Alt key to select the menu item.
- Rel Marker – Additional navigation aids such "home", "prev" and "next".

4.3.1.5 Editing a Navigation Section

Clicking on the title of any item on the Section Manager :: Browse screen displays a Section Manager :: Edit Section screen that displays the definition of the item that was clicked. The contents of each of the three tabs and the meaning of each field in each tab are described in section 4.3.1.4 (above).

4.3.2 Navigation Style

Clicking Admin menu → Navigation → Navigation Styles displays the Navigation Styles Manager :: Browse screen. This screen allows an administrator to preview the navigational style for root (admin), members and guests. This functionality is part of Seagull and it seems somewhat fragile. We strongly suggest that the administrator not make changes on this screen.

4.3.3 Categories

Clicking Admin menu → Navigation → Categories displays the Category Manager screen which allows an administrator to manage categories. Categories can be used for a variety of purposes. The current main uses of categories are to define categories of FAQ (Frequently Asked Questions) and categories of products in the shopping cart.

An administrator can easily add categories under FAQ and Shop without any negative impact to the system. You can also rename FAQ, Shop and PublisherRoot though there is no advantage to doing so. We would suggest that a administrator not delete FAQ, Shop and PublisherRoot as this would negatively impact certain system functionality.

4.3.3.1 Display/Edit Category

Clicking Admin menu → Navigation → Categories displays a Category Manager screen. This screen has a hierarchical view of the current categories on the left. In this list, each category is represented by a folder icon. Categories that are not within another category are called "root" categories. Categories that have other categories (children) within it have a plus mark next to them. If the user clicks on the plus sign next to a parent category, the list expanded to reveal the names of the children categories within it. Clicking on the name of one of the categories in the list permits the user to edit the properties of that category.

The properties of the currently selected category are shown to the right of the categories list. Here are the attributes that can changed for a category.

- Target Parent Category – select a new parent from a drop down list. This is how to move a category from one sub-list to another sub-list.
- Current Category Name – the name of the category.
- Has Permissions – root – click the yes and now buttons to give a root user access to the category.
- Has Permissions – member - click the yes and now buttons to give a member user access to the category.
- Has Permissions – guest - click the yes and now buttons to give a guest user access to the category.

Clicking the "save" button stores the changes.

4.3.3.2 Add Category

Clicking on the "Add Category" button on the Category Manager screen creates a new category under the category that is the currently selected when the button is created. Then the user can edit the attributes of the newly created category. The meaning of the various attributes are described in section 4.3.3.1.

4.3.3.3 Add Root Category

Clicking on the "Add Root Category" button on the Category Manager screen creates a new root category (a category with no parent). Then the user can edit the attributes of the newly created category. The meaning of the various attributes are described in section 4.3.3.1.

4.3.3.4 Reorder Categories

Clicking on the “Reorder Categories” button the Category Manager screen lists all of the categories listed. The following columns are shown for each category: ID (of the category), Move (buttons to move up and down), Label (category's name), Parent ID (ID of the parent category), Order (within the list). Clicking on the up arrow for a category move the item up one position in the list. Clicking on the down arrow for a category moves the item down owe position in the list.

4.3.3.5 Delete Category

Clicking on a category on the left side of the Category Manager screen makes the selected category the current category. Once a category is selected, clicking the “Delete” button will deleted the category.

4.4 Users and security

The Admin menu → Users and Security → Manage menu item opens a submenu containing the items shown below. It displays the same screen as if you had selected “Manage users”.

Here are some web pages on the Seagull documentation site that may be helpful:
http://trac.seagullproject.org/wiki/Modules/User, and
http://trac.seagullproject.org/wiki/Howto/RolesAndPermissions,

4.4.1 Manage users

The Admin menu → Users and Security → Manage menu item allows a user to manage user records. The user record contains name, phone number, email address, username and password used to login to the member area and permissions. Do not confuse user records with customers and registrants which are covered under the DMIS section of this document.

4.4.1.1 Browse Users

Clicking on Admin menu → Users and Security → Manage users displays the screen which allows the administrator to browse through all of the users. The fields in the screen includes: delete check box, user ID, username (the name the user uses to login to the member area), email, role, status button, reset password button, logins list link. If more than one page of data is available to be displayed, the header are of the list will have navigation links that permit the user to browse forward and backward among pages. The ID and Username column headers can be clicked to sort the list using those columns. Clicking one of these fields twice you will notice that the list can be sorted in ascending or descending order. Clicking on a username in the list an edit user screen will be displayed for that customer.

The top area of the screen contains buttons that allow you to add a new user, search for a user and import users.

4.4.1.2 Edit a User

Clicking on a username in the User Manager :: Browse screen displays a User Manager :: Edit screen which permits most of the fields in the user record to be edited. Only the user record is changed when these fields are modified and then the “Save” button is pressed. Editing this record does not affect the customer record. It is far better to edit a customer record because both the customer and user records are updated. For this reason, we would suggest that administrators normally edit most of the fields in the user record by updating the customer record.

The only reason to edit a user record form this screen is if the following fields need to be modified: Is

Active, Security Question, Answer, Role. If “Is Active” is checked, the customer can login to the members area. The “Security question” field is a drop down list of choice and the “Answer” field is the answer to the security question. The “Role” field is a drop down list of roles which include “member” and “root” as choices. You can change a user from a member to a user but it would generally not be a good idea to do this. You certainly need to be careful changing from “root” back to “member” because if this change is made to the last user who has a “root” role then no one will be able to perform any of the administrative functions on the web site.

Clicking on the “change” button in the Permissions column allows an administrator to access the Edit User Permissions function described below.

Clicking on the “list” link in the “Logins” column allows an administrator to access the List User Logins function described below.

4.4.1.3 Add a User

Clicking the “New User” button on the User Manager :: Browse screen displays a User Manager :: Add screen in order to add a user record. Generally it is a bad idea to add user records in this fashion. It would be better to add a customer record which also creates a user record.

4.4.1.4 Delete a User

The first column in the User Manager :: Browse screen is a check box. Click on the check box for a given user and then click on the “delete selected” button deletes the user. Since most user records are tied to a given customer record we would suggest that administrator not delete a customer using this technique. We suggest that administrator delete the customer which will in turn delete the user.

4.4.1.5 Change a User's Status

Clicking on the Status button for a given user in the User Manager :: Browse screen permits the user to change their status from inactive (shown using a red dot) to active (shown using a green dot). Only active users can login to the members area.

4.4.1.6 Reset User's Password

Each line in the User Manager :: Browse screen contains a “reset” button. Clicking this button allows an administrator to reset a user's password. A users passwords is stored in the file as an an encrypted string. No screen in the system allows an administrator to display the unencrypted value of the password because it can not be displayed. Clicking the reset button for a user generates a new password, stores it in the files in an encrypted fashion and then emails the new password to the user using the email address in their user record.

4.4.1.7 Edit User Permissions

This screen lists all of the modules and permissions (one for each program in that module). To turn a permission on just check the box next to the module. In most cases, an administrator will not need to set user permissions because the software sets correct permissions when a user record is created. Great care should be given lest a user permissions be granted that the user should not have and therefore allow them to do things they should not have permission to do. Here is a list of permissions by module that are typical for a user.

- Blocks – none
- Default – defaultmgr_cmd_list
- Navigation – none
- Users and Security – all starting with accountmgr, all starting with loginmgr, preferencemgr_cmd_edit, preferencemgr_cmd_update, profilemgr_cmd_view, registermgr_cmd_add, registermgr_cmd_insert, userpasswordmgr_cmd_edit, userpasswordmgr_cmd_update, userpasswordmgr_cmd_editAll, userpasswordmgr_cmd_updateAll
- Media Manager – fileassocmgr, mediamgr
- Newsletter – none
- FAQs - faqmgr_cmd_list
- Contact Us – all beginning with contactusmgr
- Guestbook – none unless the administrator hasactivated this module.
- Publisher – articleviewmgr_cmd_summary, articleviewmgr_cmd_view
- DMIS – referralmgr_cmd_downline
- Shop – everything starting with cartmgr, everything strating with myordersmgr, everything starting with paymentmgr, everything starting with shopmgr

4.4.1.8 List User Logins

This screen lists the user's logins to the members area. You can delete selected login records from the list by checking the box next to the time stamp and then pressing the “delete selected” button.

4.4.1.9 Search for User

Clicking on the “Search” button on the User Manager :: Browse screen displays the User Manager :: Search screen which supports searching for user records using the following search fields: user ID, username, first name, last name, email, role, and register date.

4.4.1.10 Import Users

Clicking on the “Import user” button on the User Manager :: Browse screen displays the User Import Manager screen. It would not be a good idea to use this function. Instead, use the Import Customers function described in section 4.10.1.7.

4.4.2 Manage permissions

Clicking on the “Import user” button on the User Manager :: Browse screen displays User Manager :: Edit Permissions screen. This screen allows an administrator to define various permission flags. Generally this is not something that an administrator will need to do since this will already be done when the site is installed for you.

4.4.3 Manage roles

The system comes with 4 roles defined and that is all there need to be at this time. Therefore an administrator should not need to use this function.

4.4.4 Manage preferences

Clicking on Admin user → Users and Security → Manage Preferences allows an administrator to manage global preferences.

4.4.4.1 List Preferences

Clicking on Admin user → Users and Security → Manage Preferences displays the Preference Manger :: Browse screen. The screen lists the following columns for each preference: a delete check box, preference ID, Name and the Default value. This screen lists about 9 individual preferences that an administrator can customize. The most likely values that an administrator might want to change are the following:

- sessionTimeout – the amount of time (in minutes and seconds) of inactivity by the user before a timeout occurs. After a timeout occurs, the user will have to log in again.
- timezone – the timezone for your web site. The valid values are an expression your time zone in terms of the country and major city in the time zone. The default value set when the software is installed is 'American/Chicago' for Central Standard Time. A list of valid values can be found in seagull/lib/data/ary.timezones.en.php.
- theme – the theme used for this web site. A theme is a definition of how everything about the web site will look including but not limited to such things as foreground colors, background colors, fonts, text sizes, the colors used for links, etc. A customized, named “custom”, has been created and this the value that should be used. A theme as something that only someone familiar with PHP and CSS should attempt to alter. If an administrator want to try to modify the theme for our web site, look in the directory seagull/themes/custom.
- dateFormat – the format for dates expressed in terms of a two character country code. The default value is 'US' which is 'mm/dd/yyyy'. Valid values include: FR (French 'dd/mm/yyyy'), DE (German 'dd.mm.yyyy'), UK (United Kingdom 'dd.mm.yyyy'), US (United States 'mm/dd/yyyy').
- language – the default language for your web site. The default value will be set to 'en-iso-8859-15'. A list of all valid choices can be found in seagull/lib/data/ary.languages.php. An easier place to see all the choices is in Admin Menu → My Account → Edit Preferences in the 'Interface language' field which has a drop down list of choices. Use the value in the parentheses.
- resPerPage – the number of items listed in a page. In most if not all of the lists that the system produces this value is used to determine the items that are listed on each page. If there are more items to list than the value in this field the the header of the list will include links to allow the user to navigate to other pages. A good value seems to be 20.
- showExecutionTimes – indicates if the site will show how long it takes to execute each screen. A value of '1' means execution times will be shown and a value of '0' means execution times will not be shown.
- locale – this code indicates the country where your web site resides. The locale setting determines thing like the currency symbol and the decimal point symbol. The initial value will be 'en_US'. Valid value settings include the following: 'af_ZA', 'de_DE', 'en_US', 'fr_FR', 'it_IT', 'es_ES', 'pt_PT', 'sv_SE', 'nb_NO', 'nn_NO', 'no_NO', 'fi_FI', 'is_IS', 'da_DK', 'nl_NL', 'pl_PL',

'sl_SI', 'hu_HU', 'ru_RU', 'cs_CZ'.

- discountPrefId – is the percentage discount that members receive off of the retail price of products. The default value is '15'.

4.4.4.2 Edit Preference

Clicking on the preference name in the Preference Manager :: Browse screen displays the Preference Manager :: Edit screen where a preference value can be changed.

4.4.4.3 Delete Preference

The Preference Manager :: Browse screen allows an administrator to delete a preference. Click on the check box at the beginning of a line and then click the “delete selected” button to delete a preference. We would suggest that administrators not delete any of the predefined preferences

4.5 My Account

Clicking on Admin menu → My Account allows the administrator who to is currently logged in to view and edit their user record, and preferences. This menu item opens a submenu containing the items shown below. It displays the same screen as if the user had selected “Summary”.

4.5.1 Summary

This function shows a My Account screen which contains the current user's role, date registered, last login time and the current IP (Internet Protocol) address from which the web site is being accessed.

4.5.1.1 Change Password

The Admin menu → My Account → Summary menu item shows the My Account screen. This same screen can be accessed by members via one of the items in their menu. The screen has a button called “change password”. Pressing this button displays the Change Password screen. The screen has fields for the “Original password”, “New password”, “Confirm“(reenter the new password), and a check box to “Notify me by email”. The current user can fill in these fields and change their password. Clicking the “Save” button stores the changes.

4.5.2 View Profile

This menu item displays information from the current user's user record. It also contains a button that allows the user record to be edited. For details on editing the user record see the section on Member section 3.1.2.1 Edit Account Profile.

4.5.3 Edit Preferences

This function allows the current user to edit the preference values shown below:

- Theme - the theme used for this web site for this user selected from a drop down list. A theme is a definition of how everything about the web site will look including but not limited to such things as foreground colors, background colors, fonts, text sizes, the colors used for links, etc.
- Date format - the date format for expressed in terms of a two character country code selected

from a drop down list. Valid values include: FR (French 'dd/mm/yyyy'), DE (German 'dd.mm.yyyy'), UK (United Kingdom 'dd.mm.yyyy'), US (United States 'mm/dd/yyyy').

- Interface language - the default language for the current user selected from a drop down list.
- Session timeout - the amount of time (in minutes) of inactivity by the user before a timeout occurs. After a timeout occurs, the user will have to log in again.
- Locale - indicates the country where your web site resides selected from a drop down list.
- Timezone - the timezone this user sees on your web site selected from a drop down list.
- Results per page - the number of items listed in a page selected from a drop down list. In most if not all of the lists that the system produces this value is used to determine the items that are listed on each page. If there are more items to list than the value in this field the the header of the list will include links to allow the user to navigate to other pages.
- Show execution times - indicates if this user want to show how long it takes to execute each screen.

Clicking the “Save” button stores the changes.

4.6 Newsletter

Clicking Admin menu → Newsletter access the Newsletter module which permits an administrator to manage subscribers, newsletter lists, and newsletters.. This set of features is a powerful yet simple way to stay in contact with your customers and guests (who subscribe). Clicking this menu item produces the same results as if the Admin menu → Newsletter → Manage Subscribers menu item had been clicked.

4.6.1 Manage Subscribers

Clicking Admin menu → Newsletter → Manage Subscribers displays the Subscriber List screen. Subscribers are individuals who want to receive newsletter from the web site.

4.6.1.1 Subscriber List

The Subscriber List screen displays a list of subscribers to your newsletters. The following columns are displayed: check box, ID (unique record ID), List (the list they subscribed to), Email (address of subscriber), Name (name of subscriber), Status, Pending, Updated, Created.

4.6.1.2 When a user subscribes

A user (guest or member) subscribes to one or more of the newsletter lists (the Newsletter subscription block must be enabled, see section 4.1.2.7) an administrator has defined. When a user subscribes, the system will email them a confirmation. As a precaution against people being subscribed by others, the confirmation contains the email address that was enrolled and an authorization code (a long sting of random characters). In order for the subscription to remain valid, the subscriber must click on a link and then fill in one or two fields (the email address and the authorization code) which can be copied from the email. This will activate their subscription.

4.6.1.3 Add a Subscriber

Clicking the “Add Subscriber” button on the Subscriber List screen displays a screen where you can add a subscriber. Generally speaking your members and guests should add themselves to the subscriber list. The option to do this is available when the Newsletter block is enabled (see section 4.1.2.7). There is no connection between the user records and the subscriber record in the add screen. This means you can not select users to add to the list. This is not a limitation since you can send newsletters to members without them subscribing. The fields that are displayed include the following:

- Name – the subscribers name.
- Email – the subscribers email address.
- List – a check box for each subscriber list that has been created. Check to box for the list to which the subscriber wants to be added.
- Status – select from the drop down list. For a subscriber to receive a newsletter, the status must be set to “Active”.
- Action request - select from the drop down list. For a subscriber to receive a newsletter, the status must be set to “Active”.
- Key and Generate Key button – a long string of random characters use to confirm a subscription. Click on the “Generate Key” button to fill this field.

Clicking the “Save” button stores the subscribe information.

4.6.1.4 Edit a Subscriber

Clicking the email address of a subscriber on the Subscriber List screen displays a screen where you can edit a subscriber. The fields available to edit include a subset of those described in section 4.6.5.2.

4.6.1.5 Delete a Subscriber

Clicking the check box in the left column of the Subscriber List screen and then clicking the “Delete Selected” button will delete a subscriber from a list.

4.6.1.6 Export Subscriber

Clicking the “Export Subscriber” button on the Subscriber List screen products a list of unique email address that have subscribed to any of the newsletter lists. Once the list is displayed, copy it from this screen and paste it into any application or file where it might be useful.

4.6.2 Manage Lists

Clicking Admin menu → Newsletter → Manage Lists displays the Newsletter List screen. A newsletter list is a newsletter on a particular topic. You may just want to have one general topic since managing multiple topics could get tedious.

4.6.2.1 Newsletter List

The Newsletter List screen displays all of the newsletter lists that have been defined by the administrator. The fields listed include: check box, ID (of the newsletter), List (name of list), Description (description of the list), Updated, Created.

4.6.2.2 Add a Newsletter

Clicking the “Add Subscriber” button on the Subscriber List screen displays a screen where you can add a subscriber. Generally speaking your members should add themselves to the subscriber list. The option to do this is available when the Newsletter block is enabled (see section 4.1.2.7). There is no connection between the user records and the subscriber record in the add screen. This means you can not select users to add to the list. The fields that are displayed include the following:

- List Name – the name of the list.
- Description– the description of the list.

Clicking the “Save” button stores the subscribe information.

4.6.2.3 Edit a Newsletter

Clicking on a List name in the Newsletter List screen displays a screen where the List Name and Description can be edited. Clicking the “Save” button stores the changes.

4.6.2.4 Delete a Newsletter

Clicking the check box in the left column of the Newsletter List screen and then clicking the “Delete Selected” button will delete a newsletter from the list.

4.6.3 Compose Newsletter

Clicking Admin menu → Newsletter → Compose Newsletter displays a screen where you can compose a newsletter and send it to various groups of people. The following fields are displayed on the screen:

- From – the email address of the sender of the email. It will default to Admin contact that the administrator defined in the Configuration screen (see section 4.2.2).
- To – enter a recipient email address. The field can be left empty. At lest one recipient must be specified in some combination of this field, the To groups field or the To newslists field.
- To groups – a check box for the “member” group. Checking this box will send this newsletter to the members. This implies that members do not have to subscribe in order to “opt in” to your newsletters.
- To newslists – a check box for each newsletter list the administrator has created. A copy of the newsletter will be sent to all members of the newsletter list.
- Subject – the subject of the newsletter.
- Message – the message body for the newsletter. In order for the message to be formatted correctly, it should contains some HTML tags. Carriage returns in the message do not have any affect. The simplest formatting would be to use <br> for a newline. Any other HTML tags could be used as well.

Once the form has been filled out, click the “Send” button at the top of the screen and the message will be sent to all of the recipients who have been designated.

4.7 Manage FAQs

Clicking on Admin menu → Manage FAQs permits an administrator to manage FAQs (Frequently

Asked Questions). Clicking this menu displays the FAQ Manager screen.

4.7.1 List FAQs

Clicking on Admin menu → Manage FAQ displays the FAQ Manager screen. The fields listed on the screen include: the FAQ ID, the FAQ question, the date it was created, the category, and the display order within the category. By clicking on a FAQ question in the list, displays a FAQ Manager :: Edit screen you can edit the FAQ. To delete a FAQ, click on the check box at the beginning of each row and the click on the "delete selected" button. You can add a FAQ by clicking on the "new faq" button. You can reorder the display order of FAQs by clicking on the "reorder" button.

One weakness of the FAQ module is that it is not multi-lingual. A FAQ is created in one language and it will only be displayed in that language.

4.7.2 Add a FAQ

Clicking on the "new faq" button on the FAQ Manager screen screen permits a FAQ to be created. Enter the text of the FAQ question in the "Question" field. Enter the text of the FAQ answer in the "Answer" field. Select a category for the FAQ by selecting a category from the "Category" list. Click on the "Save" button to add the FAQ.

If an administrator wants to add new categories, go to Admin Menu → Navigation → Categories. Be sure to add the new FAQ category below the root level category called "FAQ".

4.7.3 Edit FAQ

Clicking on the FAQ name (the FAQ question) on the FAQ Manager screen displays a allows you to edit the FAQ that you selected from the FAQ list. You can change the FAQ question, the answer and the category. Click the "Save" button to commit your changes.

4.7.4 Reorder FAQ

Clicking on the "reorder" on the FAQ Manager screen screen displays a FAQ Manager :: Reorder screen where FAQs can be reordered. At the top of this screen select a FAQ category from the drop down list. Once this is done, all of the FAQs in the selected category are displayed in a list. The FAQs are listed in the current order. To change the position of a FAQ in the list, click on the FAQ question that needs to be moved and then click the "move up" or "move down" links below the list. When all the changes have been made, click on the "Save" button.

4.8 Manage Media

Clicking on Admin menu → Manage Media displays the Media Manager screen where media can be managed. Media files can be viewed and the attributes of the media file can be edited. Media files include spreadsheets, Word documents, Power Point presentations, image files, etc. An administrator can also search for media and add media from this screen. This is not a feature that we can envision an administrator needing.

4.9 Publisher

The Publisher module allows you to add your own content to your web site. Clicking on the Admin

menu → Publisher → Articles menu item allows an administrator to manage various types of web content.

Here is a web page on the Seagull documentation site that may be helpful: http://trac.seagullproject.org/wiki/Modules/Publisher.

4.9.1 Articles

Clicking on the Admin menu → Publisher → Articles allows an administrator to manage three types of articles: HTML article, static HTML article and News item. All three types of article can contain any type of material that can be defined using HTML. This can include plain text (formatted with HTML mark up tags), pictures, audio, video, etc.

A News Item is accessed via the Site News block. See section 4.1.2.9 for information on the Site News block manager.

An HTML Article is access via the Recent articles block. So if an administrator creates this type of HTML content, the only way to access it is if the Recent articles block is enabled. See section 4.1.2.10 for information on the Recent articles block manager.

A Static HTML Article is accessed via menu item. The bulk of most web sites is made of this kind of content. Once a static HTML article is created, a menu item (via the Navigation Section, see section 4.3.1) can be created that allows the user to navigate to or display the article. You can also create hyperlinks to a static HTML article.

Several of the Articles screens use an embedded WYSIWYG (What You See Is What You Get) editor called TinyMCE. Here are some sources for additional information on TinyMCE:

- When you are in the Add or Edit window for an Article, click on the icon This will open a help window that will explain most of the editors functionality.
- http://wiki.moxiecode.com/index.php/TinyMCE:Compatibility – a list of browsers that are compatible with TinyMCE.
- http://wiki.moxiecode.com/index.php/TinyMCE:FAQ – frequently asked questions about MCE. Many of the questions are for software developers but there are also questions for those who use it on a web page.

4.9.1.1 Article List

Clicking on the Admin menu →Publisher → Articles menu item displays a Article Manager screen which contains a list of articles. The top portion of the screen contains an article filter that allows an administrator to filter articles by type and category. The bottom portion of the screen contains a list of the articles that have been created.

The article filter allows an administrator to choose the category and article type being displayed in the article list. Clicking the hyperlink “all categories” causes all categories to be included. Click on the “choose” link causes a pop up box to be displayed where a category can be selected. All defined categories are displayed in this list but in reality the only categories that relate to articles are those within “PublisherRoot”. If an administrator has not defined any categories below PublisherRoot, then there is no point in choosing any sub-category. The article type select includes: all (all three type), “Html article”, “News Item”, and “Static Html article”.

The following fields are displayed: article ID, article name, start date, expiry date, the user who last

modified the article, view button, status, and action link. There is a check box in the left most column for each item. The article ID is particularly important when the administrator wants to link a static HTML article to another static HTML article. The article ID is one of the pieces of information that is passed in the

When an article is first created the status column will contain a large red dot and the action link will contain the word “approve”. Clicking on the word “approve” changes the status to a large blue dot and the action link changes to “publish”. Clicking on the word “publish” changes the status to a large green dot and the action link changes to “archive”. Clicking on the word “archive” changes the status to a large pink dot and the action link changes to “use edit” but it is not a clickable phase. Any time an administrator adds a new article he/she should click on the action words until it says “archive”.

Four column headers in the list can be clicked to sort the article by that key: Article Name, Start, Expiry, View and Status. Clicking a a column heading twice in a row will switch from ascending to descending order.

4.9.1.2 Add an Article

Click on the “New Article” button at the top of the Article Manager screen will display a pop up box so the type of article can be selected: Html Article, News Item or Static Html Article. Once the type of article is selected, the Add Article screen will be displayed.

The Add Article contains two tabs: Content and Editing Options. The Editing Options tab allows an administrator to set the start date, expiry (end) date and No expire (article never expires). By default, articles start on the current date and expire after 5 years.

The Content tab contains two fields. The “Title” is the title of the page. The title of the page is displayed at the top of the screen. The “HTML text” field is an edit area where an administrator can build the page content. There is a palette of tools above the “HTML text” field to help an administrator build the page content. Administrators do not have to know or understand HTML tags to use these tools but a user understand HTML tags, there is a tool in the pallet that will display the HTML tags that the other tools generate. When the cursor is moved over a tool, the name of the tool or function is displayed. We suggest you play with the tools to see what each tool does. Once you have mastered the tools you should be able to build a page and format it appear precisely the way you want it.

To create text, just type the text in the editing area. If you have text you want to include, you can copy the text from its source location (strip over the desired text and click the control and “c” keys at the same time) and paste it (click the control and “v” keys at the same time or by clicking the “paste” icon in the tool bar) in the edit area. A carriage return (enter key) signals the end of a paragraph. The alignment, type of paragraph (Header 1, Header 2, etc), font, and font size can be altered using various tool icons. The attributes of characters in a paragraph can be altered by stripping over the text and clicking on the bold, underline and italics icons in the tool area.

Administrator can insert a picture into an article (static HTML page, etc). The image file would have to uploaded to the web site first by following the instructions in section 4.9.2.2. Then set the location where you want the image by clicking on the text next to where the image will be inserted. It is usually a good idea to put the cursor at the beginning of the paragraph. Then click on the image tool (the icon looks like a tree and the description of the tool is “Insert/edit image”). A dialog will appear where you can fill in the attributes of the image. Enter the URL to access the image in the “Image URL” field (see section 1.5 for details on the naming conventions for document files). You can experiment with changing other values on the image dialog. Click on the “Update” button to save the changes and close the image dialog.

Administrators can insert a hyperlink in an article (static HTML page, etc). Links will usually be to static HTML articles which have been published (see this section). The article ID of the page for which a link is being created must be known in order to create the link. The article ID can be found on the List Manager screen (see section 4.9.1.1). To create the link, click and stripe over the text that you want to be the hyperlink in the edit area of the screen. Then click the link icon (looks like two chain links linked together). A dialog box will open that contains four tabs: General, Popup, Events, Advanced. Refer to section 1.4 to determine where Seagull was installed on your web site. The value of the "Link URL" field will be relative to the web root directory. To link to a static HTML article, a reference to the Publisher module, the Article View manger program and pass the article ID that is to be displayed. The portion of the URL string that refers to this portion would look like this "publisher/articleview/frmArticleID/_num_/" where "_num_" is the article ID of the static HTML article for which the link is being created. . How all you need to know is the first part of the Link URL string. If Seagull was installed in the web root directory, then the first part of Link URL will be "/index.php/" and the entire string would look like "/index.php/publisher/articleview/frmArticleID/_num_". If Seagull was installed in a "seagull" folder within the web root directory, then first part of the Link URL would be "/seagull/index.php/" and the entire Link URL wold look something like "/seagull/index.php/publisher/articleview/frmArticleID/_num_/".

After an administrator has built the screen, he/she should save it by pressing the "Save" button and then sets it to publish status. At this point, the administrator can use the Admin Menu → Navigation → Navigation Section and then click the "New section" button to build a menu item to allow the page to be displayed (see section 4.3.1). Give the menu item a name, set the Target to "pre-existing static content" and select the article's name that was just created from the "Static article title" drop down list.

Care should be taken when creating a new article because you could loose your work. If it take s a long time to edit a new page and you do not save your work periodically, your session can time out and all the work could be lost. We suggest that you set the session timeout length to an hour or more your your administrative user ID. See section 4.4.4.2 for how to change the session time out parmeter.

4.9.1.3 Edit an Article

Clicking on an article name in the Article Manager screen allows the user to edit the article. The edit screen is just like the Add Article screen so see the above section for details..

4.9.1.4 View an article

The View column of the Article Manager screen contains an icon. Clicking on the icon opens a window that shows the content of the article formatted just like it will appear when the article is displayed by the user.

4.9.1.5 Change Article Status

The Action column of the Article Manager screen contains various hyperlink words: "approve", "publish", "archive". or "use edit". These words present the status that the article will become if the user click the link. As a link is clicked, the color of the dot in the Status is changed. Articles are not displayed until they are in the "green" status.

4.9.1.6 Delete an Article

The first column on each row within the Article Manager screen is a check box. Clicking on a check

box for an article and then clicking the “delete selected” button deletes an article.

4.9.2 Documents

Clicking the Admin menu → Publisher → Documents menu item accesses the Document Manager screen which allows document files to be managed. Document files include PDF file, a Power Point presentation, Excel spreadsheet, Word document, an image file, a sound file, a video file.

4.9.2.1 List Documents

The Admin menu →Publisher → Documents menu item displays a Document Manager screen which contains a list of documents. The top portion of the screen contains an article filter that allows permits articles to be filtered by type and category. The bottom portion of the screen contains a list of the articles that have been uploaded.

There are two reasons why an administrator would want to upload a document. The first reason to upload a file that is to be imported into one of your tables (i. e. customers, registrants or certificates). Before a file can be imported, it must first be uploaded using this function. Files that are going to be imported should be CSV (Comma Separated Variable) files. The second reason to upload a file that an administrator wants to display as static content on your web site (i. e.) a Power Point presentation or a PDF file.

The Document filter allows an administrator to choose the category and article type to be displayed in the article list. Clicking the hyperlink “all categories” permits all categories to be included. Clicking on the “choose” link causes a pop up box to appear so the category can be selected. All defined categories are displayed in this list but in reality the only categories that relate to articles are those within “PublisherRoot”. If an administrator has not defined any categories PublisherRoot then there is no point in choosing any sub-category.

The following fields are displayed in the document list: document name, the size of the file, the type of file, the date it was added, the user to owns the document, a view button and a download button. A document in the list can be deleted by clicking on the check box in the first column and the clicking the “delete” button. Clicking the view button (looks like a magnifying glass) a separate window will open displaying the contents of the document. Clicking the download button (looks like an arrow pointing down to a line) allows you to download the file to your local computer. Clicking on the document name allows you to edit some of the characteristics of the file. Clicking on the folder icon next to the word “choose” allows you to display only documents for a particular category. In most cases you will want to define all documents as being part of PublisherRoot.

The Document number is not shown in the list but this can be an important piece of data when creating an URL to view a file. To determine the Document number, put your mouse over the Document name. Most browsers will display the “link to” address at the bottom of the window when the mouse is placed over a hyperlink. Look at the full URL and you will see the document number between two “/” after the string “frmAssetID”.

The list can be sorted in ascending or descending order based upon a sort key. Any of the following column headings can be selected (clicked) to be a sort key: name, size, type, added, owner.

Clicking on the “New Document” button on the screen allows you to upload a new file.

4.9.2.2 Add a Document

Clicking the “New Document” button on the Document Manager screen causes the New Document screen to be displayed. Select a category for the new document. In most cases, the “Change Category” field can remain “PublisherRoot”. The initial system will on have this category for documents. If an administrator wants to add his/her own categories below “PublisherRoot”, he/she can do this via the Admin Menu →Navigation → Categories menu. Then select the file you want to upload, click the “Browse” button and navigate to the file on your computer that you want to upload. Click on the “Upload” button to upload the file.

The next screen allows you to enter a “Description” for the file. Enter the “Description” and then click the “Save” button to store the file and its attributes.

Files that are uploaded to this system are stored in the “var/uploads” directory. The full path depends upon where Seagull was installed. You can check this out by looking at the value of “Install root” on the General tab of the Configuration window (see section 4.2.2). If the “Install root” ends in “seagull” and looks something like “/home/_your_domain_name_/pubic_html/seagull”, then it means Seagull was installed in a seagull folder in the web root directory and the path to your uploads directory is “seagull/var/uploads/”. If the “Install root” didn't end in “seagull” but ended in something like “public_html”, this means Seagull was installed in the web root directory and the path to your uploads directory is “var/uploads/”. When the administrator wants to include an uploaded image file into an article (static HTML page, etc), he/she would give the URL of the upload directory plus the name of the file he/she uploaded.

4.9.2.3 Edit a Document

Clicking on the Document name allows on the Document Manager screen displays the Document Manager Edit screen. This screen permits the attributes of the document to be edited. The category, the document name and the description can be changed. You are not able to actually edit the content of the document. This would have to be done on your own computer and then a new copy uploaded. Before upload a new copy of a document, delete the old copy or at least change the name and/or description to indicate that it is outdated.

4.9.2.4 Delete a Document

The first column on each row within the Document Manager screen is a check box. Clicking on a check box for an document and then clicking the “delete selected” button deletes an article.

4.9.2.5 View a Document

The View column of the Document Manager screen contains an icon. Clicking on the icon opens a window will show the content of the document. CSV documents do not display properly.

4.9.2.6 Download a Document

The Download column of the Document Manager screen contains an icon. Clicking on the icon opens a dialog box that allows the user to download the document and save it in the location on his/her computer.

4.9.3 Content Type

Clicking the Admin menu → Publisher → Content Type menu item displays a screen where the user

can add, change or delete content types. It is strongly suggested that you not delete or edit any of the predefined types (Html Articke, News Item, Static Html Article).

4.9.4 Document Viewer

Clicking the Admin menu → Publisher → Document Viewer displays the Document Browser screen. This screen displays a list of files very similar to what the Admin Menu → Publisher → Documents menu item does. The difference is that this interface is intended to be used by guests and members. It is only provided here as a convenient way to show an administrator what non-administrative users can see. The document list includes the document name and description. Documents in the list can be edited, viewed and downloaded.

4.10 DMIS

This is the main menu item for the DMIS module. The DMIS module is where an administrator can manage the customer, registrant and certificate records. The customer record is the central and most important type of record in this system. A customer record should exist for virtually every person with whom a site owner does business. A customer can be someone who has purchased a product, someone who had registered for free electricity, someone who recruits for you. There will be an associated user record for every customer record since the DMIS software creates a user record every time a customer is created. The customer record has a field called user ID that points to the associated user record. If the customer has registered there should also be registrant record and the certificate number is the field that points to the associated registrant record.

The present version of DMIS does not differentiate between someone who is a customer and buys products at the retail price and someone who is a club member and buys products at a discounted price.

Clicking on this menu item has the same affect as clicking the Admin menu → DMIS → Customers menu item (see section 4.10.1).

4.10.1 Customers

The Admin menu → DMIS → Customers menu item allows an administrator to manage customer records.

4.10.1.1 Display Customers

When the Admin menu → DMIS → Customers menu item is selected, a Customer Manager :: Browse screen is displayed which lists customer records. The customer list contains the following fields: check box, view button, customer ID (the unique identified for each customer), user ID (the unique identifier for each associated user record), name, status, certificate number, upline (the customer ID of the person who referred this customer), physical city, physical state, physical zip, physical country.

You can click the ID and Cert Num column heads to sort the list by customer ID and certificate number respectively. Click either of these fields twice will switch between the list form ascending to descending order or vise versa.

4.10.1.2 Add a Customer

Clicking the “New Customer” button on the Customer Manager :: Browse screen permits a new customer (and associated user) record to be added. In most cases, the administrator will not want to add

customers since customers usually add themselves by clicking on the “Not Registered?” link on the users screen or by clicking some other hyperlink that you create (perhaps a link in a page that defines your free electricity offer).

Here are some of the situations in which an administrator will want to create a customer record:

- A customer mails an administrator a form requesting to register for free electricity or join a club. In most of these situations the customer will not have a computer.
- A customer requests a HAFC/PICC price quote. When this happens, an administrator gets an email with the all the information he/she needs to register the customer. We would suggest waiting to register the customer until they place an order for an HAFC or PICC.
- Here are the fields on the Add customer screen:
- Application date – the date the customer applied for free electricity or asked to become a customer. The format of this date must be 'YYYY-MM-DD'.
- Organization name – the name name of an organization. If this customer is to receive free electricity then the organization name should be a church.
- First name – the customer's first name. A middle initial may be included. If the customer is a husband and wife you can include both their names, e. g. “Bill or Beverly”. Titles, such as “Dr.”, can be included but we do not encourage this practice because it makes doing a search more difficult. If the customer is a church receiving free electricity, this can be the name of the contact person at the church, perhaps the pastor.
- Last name - the customer's last name. If the customer is a church receiving free electricity, this can be the name of the contact person at the church, perhaps the pastor.
- Email – the customer's email address.
- Home phone – the customer's home phone number. The format for this phone number is “999-999-9999 “where each “9” is any digit. If they do not have a home phone, we suggest putting a cell phone number here. Most people will have one or the other.
- Work phone - the customer's home phone number. The format for this phone number is “999-999-9999 “where each “9” is any digit. Optionally add an extension and more digits, e. g. “214-222-3000x1200”.
- Other phone – another phone number for the customer such as a fax or cell phone number.

The physical address is required. The physical address will be validated by using the US Postal Service if it is a US address. If the physical address is not valid it will pass inspection since we realize that some people live do not receive mail at their physical address but in this case they must enter a valid mailing address. We do not accept PO Boxes or Private Mail Boxes (PMB) in the physical address fields. If the address is validate, it will be altered to match whatever the US Postal Service returns. For example, entering “4531 Alta Mesa Blvd., Fort Worth, TX 76133” the US Postal Service returns “4531 ALTAMESA BLVD, FORT WORTH, TX 76133-6215” and this is what will get stored in the database.

- Physical address 1 – the first line of the physical street address.
- Physical address 2 – the apartment number, suite number or unit number. This filed is optional and most addresses will not use it.
- Physical city – the physical city.
- Physical state – the two character physical state code for the US or province code for Canada.

- Physical zip – the physical zip for the US or postal code for Canada.
- Physical country – the physical country, either “USA” or “Canada”.

The mail address is optional in most cases It should be left blank if it is the same as the physical address. The once case in which the mail address is required is when the physical address is a US address and can not be verified against the US Postal Service.

- Mail address 1 – the first line of the mail address.
- Mail address 2 - the apartment number, suite number or unit number. This filed is optional and most addresses will not use it.
- Mail city – the mail city.
- Mail state – the two character mail state for US or province code for Canada.
- Mail zip - the mail zip for the US or postal code for Canada.
- Mail country - the mail country, either “USA” or “Canada”.
- Username – a name that the customer will use to login to the members area of the web site. This username must be unique in that no other user in your files can have the same username. We suggest using the first initial, last name and zip code. For example, if the customer is John Smith with a physical zip of 76101, the username would be Jsmith75101. The username is store in the user record rather than the customer record.
- Password – the password the user will use to login to the members area of the web site. The password is store in the user record rather than the customer record. We suggest using the physical zip as the customer's password. The customer can always change their password when they login or they can request that their password be reset which will cause a new password to be generated for them and emailed to them.
- Confirm password – reenter the password again to make sure it matches what was entered the first time.
- Security question – a security question that can be used to further identify the customer when you speak with them.
- Answer – the answer to the security question.
- Customer type – the type of customer. The choices include: “Customer”, “Dealer”, “Recruiter”.
- Registration method – the method a customer is using to register. The default choices include: “Free Electricity Processing Fee”, “Basic Club Membership”, and “Gift”.
- Payment method – the choices include: “Check/Money Order”, “PayPal”, “Credit Card”.
- Referring Affiliate ID – the affiliate ID of the customer who is referring this customer. This is a required field. At this point, the system assumes that the system assigned customer ID is the field that is used for affiliate Ids. So enter an customer ID here. If the customer was not referred by anyone, use your own customer ID. This means there should be a customer record for the site owner.
- Referring Affiliate name or email – the name or email address of the person who is referring this customer. This is an optional field. This is an alternative way to try to find the person who recruited this customer. In theory, the name or email address entered here should match what is found on the customer record with the Referring Affiliate ID but the system does not enforce

this rule.

In this release of DMIS, there are three separate ways to add a customer. A person can sign up as a recruiter which is free, they can sign up as a free customer (pay no fee) or they can sign up as a customer and pay a fee or purchase some product. This means there is an interaction between the customer type, registration method, and payment method fields. If the customer type is “Recruiter”, then the registration method should be “Gift” and the payment method should be blank (we assume becoming a recruiter is free). If the customer type is “Customer”, then the payment method can not be blank unless the Registration Method is “Gift”.

The choices available under the “Registration Method” field are dependent upon the products in the product table. Each record in the product table has a flag called “isReg” which mean “is a registration product”. If this flag is set to true, then that product can be used to register as a customer. The system comes predefined with two registration products: “Free Electricity Registration Fee”, and “Basic Club Membership”. You may use the Shop module to ad additional registration products or use the Shop module to set the “isReg” flag to true for other products which have been predefined, e. g. Laundry Balls.

When all the customer data has been entered, click the “Save” button. The system will save the customer's record and assign a customer ID to the record. After the customer is added, if no payment is required (the registration was a gift), the customer list is displayed again. If a payment is required, an order record is also created (just as if the customer had use the Shop module to order a product) and a payment record appropriate for the payment type choice is also created and tied to the order record. Finally an appropriate payment screen is displayed. See the Shop module section for more information on this process.

When a customer record is successfully added, a confirmation email is sent. The email contains the customer ID number.

4.10.1.3 Edit a Customer

Clicking on a customer ID on a row in the Customer Manager :: Browse screen displays the customer edit screen. Most of the fields described in the Add a Customer section above can be edited on the edit screen. In addition, the following fields which are not available on the add customer screen are also available:

- Notes – You can store up to 65,500 characters of any text data in this field. One useful way to use this field is to record comments about any interactions an administrator have with the customer and to record changes you make to their record, e. g. address changes. We suggest that you enter a date followed by a carriage return (enter key), then your comments and anther carriage return each time you enter a note.
- Misc 1 through 4 – these four fields can store any data the site owner likes. Each field is 80 characters long. We would suggest that when the site owner decides to use these fields for a certain kind of data, e. g. an affiliate ID on the preignitioncc.com web site, that the fields be used for the same data for every customer.

4.10.1.4 View a Customer

Clicking on the view icon (looks like a magnifying glass) on a row on the Customer Manager :: Browse screen displays the Customer Manager :: View screen which includes most of the fields in the customer record.

4.10.1.5 Compare Customer and User

Clicking on the user ID field on a row on the Customer Manager :: Browse screen displays the Customer Manager :: Compare Customer and User screen which lists the fields that are in common between the customer and user records.

4.10.1.6 Delete a Customer

Clicking on check box in the left most column of the Customer Manager :: Browse screen and then clicking the “delete selected” button will delete a customer and the associated user record. We recommend that customer records not be deleted, especially if they have a certificate assigned to them.

4.10.1.7 Display Customer Registrant

Clicking on a Cert Num in the Customer Manager :: Browse screen displays Registrant-Customer Manager :: View screen. This screen is a side by side comparison of the data in the customer records vs. the corresponding data in the registrant record.

4.10.1.8 Customer Search

This function allows an administrator to search for customer by any of the following fields: customer ID, user ID, certificate number, organization name, first name, last name, customer type (select from a drop down list), email address, upline ID, physical city, physical state.

The customer ID, user ID, certificate number fields perform a search where the matching value is equal or greater what was entered. For example, searching for a customer ID of 100800 would list all reacord with a customer ID of 100800 or greater.

The organizational name, first name, last name and email address performs a search where the corresponding field is search for a match anywhere in the field. For example, a search in the first name field for “ill” could find matches for “Bill”, “Billy”, “William”, and “Phillip”. searches for records with equal or greater user IDs. A search for “hotmail.com” in the email field would find all customers that have hotmail.com email addresses.

The upline, physical city and physical state field perform a search for an exact match. Performing this kind of search using the upline field can result in a list of all customers directly recruiter by a specific customer. Doing a search for a city of “Ft. Worth” and “Fort Worth” would give different results.

If more than one search field is provided, the resulting matches must meet each of the criteria. For example, if “Smith” was entered in the last name and “TX” in the physical state, matching records would have to have a last name beginning with Smith who live in TX.

The results of the search are shown in a customer list screen. If more than one page of data is available to be displayed, the header are of the list will have navigation links that permit the user to browse forward and backward among pages.

4.10.1.9 Import Customers

The Customer Import function allows an administrator to load your customers into the customer table. The intention is that an administrator will load the data only once, when the web site is first created. If the data is in multiple files, the import may need to run more than one time. But after the data is all successfully load, it normally would not run an import again. Great care should be used when using this

function because it can mess up your data. If a good set of customer data loaded, it can overlay this data and cause any new data that existed in your current database to be lost if it does not also exist in the file being imported.

Before starting an import, the file must first be upload from your computer to the web site. The name of the file being import is not important except that the file name should end with ".csv". To do this, follow the instructions in the Admin Menu → Publisher → Documents → New Document section of this manual.

The file being imported must be a CSV (Comma Separate Variable) file. The file should not contain a first row that describes the field but rather the first row should be a customer record. All alpha numeric fields should be surrounded by double quote marks ("). Numeric fields (either whole numbers or decimal numbers) may be surrounded by double quote marks but it is not required. The separate between fields must be a comma (,). Each record should end with a carriage return. There are very few edits checks performed on the records so please be sure the file is properly formatted before beginning the import. A CSV file can be created by Microsoft Excel, Open Office Calc and a variety of other program. The list below shows the fields in their required order, the type of data, the length of the field, and whether it is required or not.

- Customer ID - A unique (no duplicate numbers) identifier that the site owner has assigned to each customer. The field is an integer (number without decimal places) up to 11 digits long. This is a required field. If a customer number has not been assigned, assign them one before importing the records. The beginning number can be any number you wish..If would be a good idea if the numbers being used in the file should be sequential without any breaks.
- Organization Name - he name of a church that has been registered for free electricity. It can be a text string up to 50 characters long. Optional and should be left blank it not needed. If this field is blank, the next two fields should contain data.
- First Name - Customer's first name. It may also contain a middle initial. It can be a text string up to 30 characters long. Optional only when the customer is a church.
- Last Name - Customer's last name. A text string up to 30 characters long. Optional only when the customer is a church.
- Mailing Street - Customer's mailing street. It can be a text string up to 50 characters long. If the mailing address is the same as the physical address, this field and all the other mailing address fields should be empty.
- Mailing Apartment - Customer's mailing apartment or suite number. It can be a text string up to 30 characters long. This field can be empty.
- Mailing City - Customer's mailing city. It can be a text string up to 30 characters long. It can be empty if the mailing street is empty.
- Mailing State - Customer's mailing state or province, in the case of Canada. It can be a text string up to 2 characters long. It can be empty if the mailing street is empty.
- Mailing Zip - Customer's mailing zip or postal code. It can be a text string up to 10 characters long. For US addresses, it can be a 5 digit zip or a 9 digit zip. If it is a 9 digit zip, it should have a dash after the first 5 digits but before the last 4 digits. If it is a Canadian address, it should be an upper case letter, a digit, an upper case letter, a blank, a digit, an upper case letter, and a digit. It can be empty if the mailing street is empty.
- Mailing Country - Customer's mailing country. It can be a text string up to 30 characters long. Valid values are 'USA' or 'Canada'. It can be blank if the mailing street is empty.
- Physical Street - Customer's physical street. The physical address may not contain a PO Box or a private mail box. The physical street can be a text string up to 50 characters long. All the physical address fields are is required except the Physical Apartment.

- Physical Apartment - Customer's physical apartment or suite number. It can be a text string up to 30 characters long. This field can be empty.
- Physical City - Customer's physical city. It can be a text string up to 30 characters long. This is a required field.
- Physical State - Customer's physical state or province, in the case of Canada. It can be a text string up to 2 characters long. This is a required field.
- Physical Zip - Customer's physical zip or postal code. It can be a text string up to 10 characters long. For US addresses, it can be a 5 digit zip or a 9 digit zip. If it is a 9 digit zip, it should have a dash after the first 5 digits but before the last 4 digits. If it is a Canadian address, it should be an upper case letter, a digit, an upper case letter, a blank, a digit, an upper case letter, and a digit. This is a required field.
- Physical Country - Customer's physical country. It can be a text string up to 30 characters long. Valid values are 'USA' or 'Canada'. This is a required field.
- Home Phone - Customer's home phone number. It can be a string of numbers and dashes up to 12 characters long. The format should be 3 digits, a dash, 3 digits, a dash and 4 digits. The field can be blank but it is strongly suggested that it contain a value.
- Work Phone - Customer's home phone number. It can contain a string up to 20 characters long. The format for the first 12 characters should be 3 digits, a dash, 3 digits, a dash and 4 digits. This can be followed by an 'x' (standing for extension number) and one to 5 additional digits. The field can be empty.
- Other Phone - Customer's other or alternative phone number. It can contain a fax number, mobile number or some other phone number. It can contain a string up to 20 characters long. The format for the first 12 characters should be 3 digits, a dash, 3 digits, a dash and 4 digits. This can be followed by an indicator of the kind of number the field contain with something like 'cell' or 'fax'. The field can be empty.
- Email - Customer's email address. It can contain a string up to 50 characters long. The field can be empty.
- Customer Type - the type of customer. It can contain a string up to 30 characters long. We suggest standardizing on these values: 'customer', 'recruiter', 'club member'. If the have recruiters, we strongly suggest that you put 'recruiter' in this field for these individuals. The field can be empty.
- Application Date - the date the customer applied to be a free electricity applicant, or a recruiter or the day they first bought a product from you, whichever is older. The format of the date must me a 4 digit year, a dash, a two digit month, a dash and a two digit day. The field is required.
- Upline Customer Number - The customer number of the customer who recruited this customer. This field is critical for tracking who will receive commissions for free electricity and other similar income. The field is an integer (number without decimal places) up to 11 digits long. The field can be blank but we strong suggest that every record have a value that points to a customer in your file. We strongly recommend that you create a customer record for your self (perhaps the first record in the file you are going to import) and any customer that was not referred by one of your recruiters should have to your customer ID in this field.
- Referred By - The name, or email address of the person who referred this customer. It is a less precise way of tracking who recruited this customer than using the upline customer number. It can contain a string up to 80 characters long. The field can be empty.
- Signup Method - The method used by the customer to apply for free electricity. It can indicate the program they used to apply. We suggest standardizing on certain values such as 'Club membership', 'Bought a CD-ROM', 'Bought a DVD', 'Bought Laundry Balls', '$10 processing fee' or whatever is meaningful to you. It can contain a string up to 80 characters long. The field

can be empty.

- Certificate Number - Certificate number assigned to this customer if any. This field must be a numeric value which means it can not contain text such as “void” or “NASDAC”. The field can be empty.
- Status - The status of the customer. We strongly suggest standardizing on at least these values: “signed up” (for someone who has a certificate), “applied” (for someone who has only applied for free electricity), “recruiter” (for recruiters who have not been issued a free electricity certificate), “certificate undeliverable” (for those who applied but their certificate was returned as undeliverable), “voided by ITEC” (for witnesses whose certificate has been voided as a duplicate), “seed unit lender” (for those who lent money but didn't get a certificate). The filed can contain 70 characters. The field can be empty.
- Custom 1 - A field that can any data the site own desires. We suggest that the field be used for the same data for all customers. The field can contain 80 characters. The field can be empty.
- Custom 2 - A field that can any data the site own desires. We suggest that the field be used for the same data for all customers. The field can contain 80 characters. The field can be empty.
- Custom 3 - A field that can any data the site own desires. We suggest that the field be used for the same data for all customers. The field can contain 80 characters. The field can be empty.
- Custom 4 - A field that can any data the site own desires. We suggest that the field be used for the same data for all customers. The field can contain 80 characters. The field can be empty.
- Notes - Notes relating to the customer. You may have tracked changes on the customer such as changes to address or phone numbers. Put whatever you wish here. This field (but no other field) can contain carriage returns. The The field can contain 65,500 characters characters. The field can be empty.
- Add Date - Date the customer record was first added to your files. The format of the date must me a 4 digit year, a dash, a two digit month, a dash and a two digit day. The field is required.
- Change Date - Last date the customer's record was changed. The format of the date must me a 4 digit year, a dash, a two digit month, a dash and a two digit day. The field can be empty.

Some dealers may have thousands of customers to import. If this is the case, you must break your records into groups of no more than 1000 records. If you fail to do this and you attempt to upload more than 1000, you can cause the program to terminate abnormally. If you have to split the file up, do so with your spreadsheet program before you upload the file to the web server.

The Import Customers screen just have two fields: “Input customer file”, and “Empty customer table”. If the CSV file has been uploaded, it will be listed in a drop down list in the “Input customer file” field otherwise there will be an error message that says “You should first upload at least one CSV file”.

The “Empty customer table” field has a drop down to select “yes” or “no”. If an administrator are uploading the customer data for the very first time, choose “yes” here. If there are multiple files to import (due to multiple dealerships or needing to break your records into groups of not more than 1000 records), choose “yes” for the first file and “no” for each of the others. If you going to use this function to load all of your leads that you have downloaded from the preignitioncc.com web site, select “no” here. If “no” is chosen, be very sure that the records that are about to be imported do not already exist in the database. Since very few edit checks are performed by this program, it may be possible to import the same file more than one time and therefore end up with duplicate customer records.

After the two fields have been correctly filled in, press the “Save” button to import and save the records. If you are importing a thousand records it can take several minutes, so be patient. When the upload is complete, a customer list will be displayed. You should be able to see your new records in the list or you may need to use the Customer Search function to find them.

4.10.2 Affiliates

The Admin menu → DMIS → Affiliates menu item allows an administrator to manage affiliate data for customers.

4.10.2.1 List an Affiliate

Clicking the Admin menu → DMIS → Affiliates menu item displays an Affiliate Manager :: Browse screen. The list contains customer for whom an affiliate ID has been created. In this system, the customer ID is used at the affiliate ID. When an affiliate ID is created, a small file is created that is called a symbolic link. This symbolic link makes it possible for it to look like an affiliate has a complete duplicate of the entire web site when in fact no duplicate exists.

The Add Affiliate screen just has one field, “Affiliate/Customer ID”. Enter the customer number you wish to make an affiliate (create a symbolic link) and then press the “Save” button.

4.10.2.2 Adding an Affiliate

Click on the “Add Affiliate” button in the Affiliate Manager :: Browse screen displays the Affiliate Manager :: Add screen. On the add screen, enter the customer ID of the customer you wish to have a new affiliate ID. Click the “Save” button to create the symbolic link .

4.10.2.3 Delete an Affiliate

Clicking on the check box in the first column for a customer in the Affiliate Manager :: Browse screen and then click on the “delete selected” button will delete the symbolic link for the affiliate. To add an affiliate ID, click on the “Add Affiliate” button.

4.10.3 Downline

The Downline function allows an administrator to display the customer recruited by one of your customers. The downline list is similar to looking at a family tree where the customer that was entered is the “parent” of the other customers that are listed. Enter the Target Customer ID for whom you wish to generate the list and then click the “Filter” button. A list of customer recruited by this customer will be displayed. If more than one page of data is available to be displayed, the header are of the list will have navigation links that permit the user to browse forward and backward among pages. Clicking on a customer ID on someone in the list will generate the list again using the new customer ID as the Target Customer ID.

The current release of this software only displays on level in the downline list. Perhaps a future release will support multiple levels.

Using the test data on the dmisdemo.com web site, more than 100 customers will be listed for customer ID 100135.

4.10.4 Upline

The Upline function allows an administrator to generate a upline list of the people above a given customer who recruited the target customer. This show the person who recruited this target customer and the person who recruited that person and so on up to 10 levels deep. Enter the customer ID of the

customer for whom the report is to be generated in the Target Customer ID field and click the “Filter” button.

Using the test data on the dmisdemo.com web site, 6 levels deep will be displayed for customer ID 106945.

4.10.5 Certificates

The Admin menu → DMIS → Certificates menu items allows an administrator to manage certificates data for the dealership(s).

4.10.5.1 List Certificates

The Admin menu → DMIS → Certificates menu items displays the Certificate Manager :: Browse screen. The screen has a set of filter parameters at the top and a list of certificates matching the filter parameters at the bottom.

The filter criteria include: dealer ID (selected from a drop down list), Issued (has the certificate been issued - yes or no), Upgraded (upgraded certificates cost $6.50 and none upgraded cost $2.50 - yes or no), Voided (has ITEC voided the certificate - yes or no), Pledged (is the certificate pledge to a Joint Venture program - yes or no). Change any combination of these criteria and the click on the “Filter” button to change the list of certificates that are shown.

The fields that are displayed for each certificate include: certificate number, dealer ID who owns the certificate, issued, upgraded, voided and pledged. You can click the Cert Num column header and sort the certificates list in ascending or descending order.

You control the dealer IDs that are displayed in the Dealer ID filter field by modifying the values on the “dealerIDs” parameter under the “dealer” section of the DMIS configuration settings. You can alter these settings by selecting Admin Menu → General → Manage Modules and then clicking on the “DMIS” module. If you own and manage more than one dealership on the web site where DMIS is installed, list each dealerIDs separated by comma. See section 4.2.1.2 of this manual for more details.

If more than one page of data is available to be displayed, the header are of the list will have navigation links that permit the user to browse forward and backward among pages.

4.10.5.2 Import Certificates

This system does not provide any way of modifying certificate records. All modifications to certificates are driven from changes that are done on the Co-op web site. You can however periodically import the most recent certificate data from the Co-op web site.

You can initiate an Import Certificates action by clicking on “Import certificates” button on the Certificates Manager :: Browse screen. This import function is intended to be performed many times. The reason for this is that this system does not attempt to remain synchronized with the certificates file on the UCSA Co-op web site. That system does a good job of keeping track of certificates and at this point there was not any point in duplicating functionality that already exists on that web site. The Co-op web site contains a facility for members to download their certificates in a CSV file. You should periodically download your certificates from the Co-op web site and then use the upload facility described in section 4.9.2.1 of this manual. Once the file has been uploaded, use this screen to import the records.

The is screen contains two fields: “Input certificate file”, and “Empty certificate table”. If there is no

CSV file that has been upload to the web site, a message will display next to “Input certificate file” that says”Upload certificates first”. Otherwise there will be a drop down list of files to select. In almost every case, “Empty certificates table” should be set to “yes”. The only circumstances where this will not be the case is when certificates need to be uploaded for multiple dealerships. Since the Co-op web site download certificates with only one dealer ID in a file, multiple uploads may be needed. In this case, the upload of the first dealership's certificates would use “Empty certificate table” set to yes and it would be set to “no” for the certificate file for each additional dealership.

Here is a list of the fields in the CSV file in the order in which they appear:

- Certificate Number - A unique number for each certificate issued by ITEC.
- Dealer ID - The UCSA Dealer ID of the dealer who owns a certificate.
- Upgraded - A flag ('Y' or 'N') indicating if the certificate is upgraded.
- Voided - A flag ('Y' or 'N') indicating if the certificate has been voided by ITEC
- Issued - A flag ('Y' or 'N') indicating if the certificate has been issued
- Paper Certificate - A flag ('Y' or 'N') indicating if the certificate was originally a paper certificate.
- Pledged - A flag ('Y' or 'N') indicating if the certificate has been pledged to the Joint Venture program
- Pledge Txn ID - The transaction number where the certificate was pledged to the Joint Venture Program.
- Add Date - The date when the certificate was first created
- Order ID - The order ID of the order when the certificate was purchased.
- Order Source - The source for the Order when the certificate was purchased.
- Change Date - The last date when the certificate record was changed in the Coop certificate table.

The certificates table should be exported from the Co-op site and imported to this web site when any of the following events occur on the Coop web site:

- You order new certificates (when the order is complete and the certificates have been created)
- You do a 3 for 1 swap for certificates (once the order is complete)
- You upgrade existing certificates (once the order is complete)
- Any time you issue certificates via the coop web site rather than using the features in DMIS to issue certificates.

4.10.6 Assign Certificates

The Admin menu → DMIS → Assign Certificates menu item opens the Assign Certificate :: List screen. The screen contains a list of customers who have a applied for free electricity but who have not been issued a certificate. There are two combinations of customers that will meet this criteria: 1) a status of “paid” which means they have paid for whatever product or fee they used to apply, or 2) a status of “applied” and a sign up method of “Gift”. In both cases, the customer will not have a certificate number.

To actually assign a certificate number to a specific customer, click on the customer number field. This will cause a Assign Certificate :: Assign screen to be displayed. This screen has three fields:

- Dealer ID – select the dealer ID from the drop down list of IDs.
- Assignment Method – select from two choices: “Assign Manually”, or “Assign Automatically”. If “Assign Manually” is selected, the Certificate Number will also have to be entered in the next

field. If “Assign Automatically” is selected, the system will use the first certificate number that is assignable.

- Certificate Number – if “Assign Manually” was selected, enter the certificate number that is to be assigned. The best way to find a certificate number to assign manually is to use the Admin menu → DMIS → Certificates menu item and the filters on the related to screen to locate a certificate that is upgraded, not void, not pledged and not issued.

When the fields have been filled in properly, click the “Save” button. The system will perform some validations. If “Assign Automatically” was selected, the system will check that there is a certificate that can be issued automatically. If not, you will get an error message and you be unable to issue a certificate. If you know you have purchased some new upgraded certificates the error will indicate that you need to re-import your certificate records from the Co-op. If “Assign Manually” was selected, the system will verify that the certificate you entered can be issued, and an error message will be displayed if the validation check fails. In this case, the error probably means an incorrect certificate number was entered or it could mean you need to re-import your certificate records from the Co-op.

Before issuing the certificate, the system will also check with the Co-op to make sure the customer's physical address is not already registered. If so, an error message will be displayed and you will be unable to issue the certificate.

If all the edits pass (no errors), several updates will occur. A registrant record will be created and stored on the Co-op site. A PDF file for the certificate will also be created and emailed to the customer and a copy emailed to you. The certificate record will be updated to indicate it has been issued. A registrant will not be created on your web site. To get the registrant record a fresh import of registrant records from the Co-op web site will need to be performed.

4.10.7 Registrants

The Admin menu → DMIS → Registrant menu item allows an administrator to manage registrant records.

4.10.7.1 List Registrants

The Admin menu → DMIS → Registrant menu causes the Registrant Manager :: Browse screen to be displayed. The screen has a filter area the top and a list of matching registrants at the bottom.

The filter registrants portion of the screen has the following filter attributes:

- Dealer ID – select the dealer ID from the drop down list.
- Application Date Search Modifier, Date 1 and Date 2 – select “before”, “after” or “between” from the “Applied Date Search Modifier” field. If “before” is selected, then a before date must be entered in the Date 1 field. If “after” was selected, the an after date must be entered in the Date 1 field. If “between” is selected, a starting date must be entered in the Date 1 field and the end date entered in the Date 2 field. Dates entered in either field must be in a “YYYY-MM-DD” format. The Application Date Search Modified field is optional. The two date fields should also be left empty if no selection is made here.
- Certificate Number Search Modifier, Certificate Number 1 and Certificate Number 2 – select “less than”, “greater than” or “between” from the “Certificate Number Search Modifier” field. If “less than” or “greater than” were selected, then a certificate number must be entered in Certificate Number 1 field. If “between” was selected, then a starting certificate number must

be entered in the Certificate Number 1 field and an ending certificate number entered in the Certificate Number 2 field. The Certificate Number Search Modifier field is optional. The two certificate number fields should also be left empty if no selection was made here.

After entering our search criteria, click on the “Filter” button to generate a list of matching registrants.

The registrants list includes the following fields: Cert Num, Name, Application Date, Physical City, Physical State, Physical Zip and Physical Country. You can click on the Cert Num column heading to sort the list in ascending or descending order. If more than one page of data is available to be displayed, the header are of the list will have navigation links that permit the user to browse forward and backward among pages.

4.10.7.2 Display Registrant

Clicking on a certificate number in the Registrant Manager :: Browse screen will display a Registrant Manager :: View screen. This screen displays all the data for the selected registrant.

4.10.7.3 Import Registrants

This system does not provide any way of modifying registrant records. All modifications to registrant records are driven from changes that are done on the Co-op web site. You can however periodically import the most recent registrant data from the Co-op web site.

Clicking on the “Import Registrants” button at the top of the Registrant Manager :: Browse screen will display a Import Registrants screen.

You can initiate an Import Registrants action by clicking on “Import Registrants” button on the Registrant Manager :: Browse screen. This import function is intended to be performed many times. The reason for this is that this system does not attempt to remain synchronized with the registrants file on the UCSA Co-op web site. That system does a good job of keeping track of registrants and at this point there was not any point in duplicating functionality that already exists on that web site. The Co-op web site contains a facility for members to download their registrants in a CSV file. You should periodically download your registrants from the Co-op web site and then use the upload facility described in section 4.9.2.1 of this manual. Once the file has been uploaded, use this screen to import the records.

The is screen contains two fields: “Input registrant file”, and “Empty registrant table”. If there is no CSV file that has been upload to the web site, a message will display next to “Input registrant file” that says”Upload registrants first”. Otherwise there will be a drop down list of files to select. In almost every case, “Empty certificates table” should be set to “yes”. The only circumstances where this will not be the case is if you need to upload registrants for multiple dealerships. Since the Co-op web site download registrants with only one dealer ID in a file, you may need to do multiple uploads. In this case, the upload of the first dealership's registrants would use “Empty certificate table” set to yes and it would be set to “no” for the registrants file for each additional dealership.

Here is a list of the fields in the CSV file in the order in which they appear:

- Cert Num - The certificate number that has been issued to the registrant.
- Application Date - the date the customer applied to be a free electricity applicant, or a recruiter or the day they first bought a product from you, whichever is older. The format of the date must me a 4 digit year, a dash, a two digit month, a dash and a two digit day. The field is required.
- Dealer ID - The dealer ID that issued the certificate.
- Dealer Rights - Flags that indicate what rights the Dealer ID has for the customer record.

- JV Dealer ID - The Joint Venture Dealer ID associated with the registrant. This will be blank if there is no JV Dealer.
- JV Dealer Rights - Flags that indicate what rights the JV Dealer has for the customer record.
- Organization Name - he name of a church that has been registered for free electricity. It can be a text string up to 50 characters long. Optional and should be left blank it not needed. If this field is blank, the next two fields should contain data.
- First Name - Customer's first name. It may also contain a middle initial. It can be a text string up to 30 characters long. Optional only when the customer is a church.
- Last Name - Customer's last name. A text string up to 30 characters long. Optional only when the customer is a church.
- Mailing Street - Customer's mailing street. It can be a text string up to 50 characters long. If the mailing address is the same as the physical address, this field and all the other mailing address fields should be blank.
- Mailing Apartment - Customer's mailing apartment or suite number. It can be a text string up to 30 characters long. It can be blank.
- Mailing City - Customer's mailing city. It can be a text string up to 30 characters long. It can be blank if the mailing street is blank.
- Mailing State - Customer's mailing state or province, in the case of Canada. It can be a text string up to 2 characters long. It can be blank if the mailing street is blank.
- Mailing Zip - Customer's mailing zip or postal code. It can be a text string up to 10 characters long. For US addresses, it can be a 5 digit zip or a 9 digit zip. If it is a 9 digit zip, it should have a dash after the first 5 digits but before the last 4 digits. If it is a Canadian address, it should be an upper case letter, a digit, an upper case letter, a blank, a digit, an upper case letter, and a digit. It can be blank if the mailing street is blank.
- Mailing Country - Customer's mailing country. It can be a text string up to 30 characters long. Valid values are 'USA' or 'Canada'. It can be blank if the mailing street is blank.
- Physical Street - Customer's physical street. The physical address may not contain a PO Box or a private mail box. The physical street can be a text string up to 50 characters long. All the physical address fields are is required except the Physical Apartment.
- Physical Apartment - Customer's physical apartment or suite number. It can be a text string up to 30 characters long.
- Physical City - Customer's physical city. It can be a text string up to 30 characters long. This is a required field.
- Physical State - Customer's physical state or province, in the case of Canada. It can be a text string up to 2 characters long. This is a required field.
- Physical Zip - Customer's physical zip or postal code. It can be a text string up to 10 characters long. For US addresses, it can be a 5 digit zip or a 9 digit zip. If it is a 9 digit zip, it should have a dash after the first 5 digits but before the last 4 digits. If it is a Canadian address, it should be an upper case letter, a digit, an upper case letter, a blank, a digit, an upper case letter, and a digit. This is a required field.
- Physical Country - Customer's physical country. It can be a text string up to 30 characters long. Valid values are 'USA' or 'Canada'. This is a required field.
- Home Phone - Customer's home phone number. It can be a string of numbers and dashes up to 12 characters long. The format should be 3 digits, a dash, 3 digits, a dash and 4 digits. The field can be blank but it is strongly suggested that it contain a value.
- Work Phone - Customer's home phone number. It can contain a string up to 20 characters long. The format for the first 12 characters should be 3 digits, a dash, 3 digits, a dash and 4 digits. This can be followed by an 'x' (standing for extension number) and one to 5 additional digits.

The field can be blank.

- Other Phone - Customer's other or alternative phone number. It can contain a fax number, mobile number or some other phone number. It can contain a string up to 20 characters long. The format for the first 12 characters should be 3 digits, a dash, 3 digits, a dash and 4 digits. This can be followed by an indicator of the kind of number the field contain with something like 'cell' or 'fax'. The field can be blank.
- Email - Customer's email address. It can contain a string up to 50 characters long. The field can be blank.
- Add Date - the date the registrant record was added to the coop registrant file.
- Change Date - the last date when the registrant record was modified in the coop registrant file.

You may want to import records from the Co-op site when any of the following events occur on the Co-op web site:

- You manually add registrants to the Co-op site.
- You modify a registrant record on the Co-op site.
- You import a batch of registrant records to the Co-op site. The process of batches takes a little while so wait until a confirmation email stating that all the records have been processed.
- Another dealer assigns one of pledged certificates to one of their customers.

4.10.8 Reg-Cust matching

The Admin menu → DMIS → Reg-Cust matching menu item allows an administrator to manage the combination of registrant and customer records.

4.10.8.1 Registrant-Customer List

The Admin menu → DMIS → Reg-Cust matching menu item displays the Registrant-Customer Matching :: List screen which allows an administrator to display combinations of customer and registrant records. The screen is divided into two parts. The top part of the screen allows the Matching Criteria to be set and the bottom part of the screen displays a list of customer and/or registrants.

The matching criteria permits three choices:

- Customers with matching Registrants – selects all customers that have a matching registrant record. For our customers this would be considered the “normal” situation.
- Registrants without matching Customers – selects all registrant records where there is no matching customer record. The most likely cause of this situation is when you have allowed UCSA to maintain your data or you have maintained your registrant data using the Co--op site but you have not maintained or imported any customer records. The good news is that DMIS makes it easy to generate customer records form registrant records.
- Customers without matching Registrants – selects all customer records where there is no matching registrant record. The most likely cause of this situation is when you had added customers on your web site and have issued certificates to the new customers but you have not done a recent Import Registrants operation. The simplest correction is to import registrants. Another possible reason for these records is that you have a record of having registering the customer but for some reason the data provided to the Co-op by the UCSA was not complete. There are several possible ways to get the missing data created. If you know the certificate number for the customer and the certificates table shows that your dealership owns the certificate and the certificate is upgraded, you can use the functionality in DMIS to issue the

certificate to the customer and then re-import the registrant records. If you know the certificate number for the customer and the certificates table shows that your dealership owns the certificate and the certificate is not upgraded, you will have to ask UCSA to add the registrant record for you since dealers are precluded from adding registrant records for non-upgraded certificates. If you do not know the certificate number but you believe a certificate has been issued (perhaps via the NUAF program or the NASDAQ program), you will have to ask UCSA to add the registrant record.

The bottom part of the screen displays a list of customers and/or registrants depending upon which matching criteria was selected.

- Customers with matching Registrants – the list includes Cust ID, Cert Num, Name, Physical City, Physical State, Physical Zip and Physical Country. Clicking on a certificate number in this list displays a Registrant-Customer Comparison.
- Registrants without matching Customers – the list included a check box, Cert Num, Name, Physical City, Physical State, Physical Zip and Physical Country. Clicking on a check box and a button allows a customer record to be created from the registrant record. Clicking on a certificate number in this list displays a Registrant-Customer Comparison.
- Customers without matching Registrants – the list includes Cust ID, User ID, Name, Physical City, Physical State, Physical Zip and Physical Country. There is no way to just display a customer record. However, the Admin menu → DMIS → Customers menu item does provide a customer list and then clicking on a customer will display an edit screen.

4.10.8.2 Registrant-Customer Comparison

Clicking on a certificate number in the Registrant-Customer Matching :: List screen while matching criteria is set to “Customers with matching Registrants” displays the Registrant-Customer Matching :: View screen which is a side by side comparison of a customer record and matching registrant record.

4.10.8.3 Create a Customer from a Registrant

Clicking on the check box in the left column of the Registrant-Customer Matching :: List screen while matching criteria is set to “Registrants without matching Customers” and then clicking on the “Create customer for selected” button at the bottom of the screen, creates a customer record using the data from the registrant record.

4.10.8.4 Display Registrant

Clicking on a certificate number on the Registrant-Customer Matching :: List screen while matching criteria is set to “Registrants without matching Customers” is selected displays the Registrant Manager :: View screen which shows all the data for a given registrant.

4.11 Shop

This is the main menu item for the Shop module. The Shop module is where an administrator can define products, set their prices, and view customer's orders. Clicking Admin menu → Shop displays the same screen as if Admin menu → Shop → Shop Admin had been selected.

4.11.1 Shop Admin

Clicking on Admin menu → Shop → Shop Admin displays the Products :: Browse screen. This screen lists the products that are defined for the web site. The fields that are listed include: check box, product ID, Cod1, Manufacturer, Product name, For Sale, Price. You can click on any of the following column headers to sort the list by that field: ID, Cod1, Manufacturer, Product, Price. If more than one page of data is available to be displayed, the header are of the list will have navigation links that permit the user to browse forward and backward among pages.

4.11.1.1 Add a Production

Clicking on the "Add" button at the top of the Products :: Browse screen displays a Product :: Add screen. The following editable fields are available on this screen:

- Name – The name of the product.
- Category – The category that the product falls under.
- Manufacturer – The company that supplies the product.
- Price and currency – The retail price of the product and the currency that the price is in. The system does not support multiple currencies at this point in time.
- Status – Select a status from the drop down list.
- Short description – The sort description for the product. We strongly suggest this field be keep t to no more than 255 characters so the description will display nicely on the Product List screen. However, the description can be as long as 65,500 characters long.
- Cod1 – The product ID used by the manufacturer.
- Cod2 – Any product identifier an administrator want to use or leave it blank.
- Warranty – A description of the warranty no longer than 100 characters.
- Is Reg. Prod. - An "on"/"off" flag indicating if the product can be used to register customers. A product can be both For Sale and Is Reg. Prod. Products where this flag on will be one of the choices available when a customer registers to get free electricity.
- For Sale – An "on"/"off" flag indicating if the product is currently for sale. Products where the flag is off the product will not be visible to customer. We suggest that this flag be set to off rather than delete a product since it takes some time to add a product back once it has been deleted.
- New Product - An "on"/"off" flag indicating if the product is new. The value is currently not used by the system. In a future release me may implement some display options to show the customers new products.
- Bargain - An "on"/"off" flag indicating if the product is a bargain (had the price reduced). The value is currently not used by the system. In a future release me may implement some display options to show the customers products flagged as a bargain.
- Datasheet link – Enter the complete URL of a web page where the customer can view a datasheet on the product. You can leave this field blank. The datasheet link would probably be a page on your web site. We suggest making the long description the equivalent of a datasheet rather than using this field.
- Manufacturers link - Enter the complete URL of a web page where the customer can view the manufacturer's datasheet on the product. You can leave this field blank. The datasheet link

would probably be a page on the manufacturer's web site. We suggest making the long description the equivalent of a datasheet rather than using this field.

- Taxable - An “on”/”off” flag indicating if the product is taxable. If the flag is off, no tax will be computed for the product. If the flag is on, tax will be computed at the rate specified in the ShopMgr defaultTax configuration value. See section 4.2.1.3 for details.
- Method Calc Shipping – Select a method for calculating shipping for this product from the drop down list. “None” means no shipping will be charged and the Ship Value field can be 0. “By Weight” means shipping will be calculated by weight and the Ship Value field should contain the weight of the product. “Flat Rate” means shipping will be a fixed amount of money and the Shipping Value will contain the amount that will be charged.
- Shipping Value – Either the weight of the product or the amount to charge for shipping depending upon the value of Method Calc Shipping field.
- Upload image and Browse button – To upload an image for the product from your local computer, click on the browse button. A dialog box will open that will allow you to select the file from you computer that will be uploaded. The upload does not occur until the “Save” button is clicked.
- Description – The long description of the product. The description can be 65,500 characters long. This field can contain HTML tags to format the description.

In addition to editable fields, all of the fields are displayed again as display only in order to provide a preview of how the data may look when the customer views it.

The system comes predefined with two registration products: “Free Electricity Registration Fee”, and “Basic Club Membership”. An administrator may use the Add Product function to add more registration products or he/she can use the Edit Product screen to set the “Is Reg. Prod.” flag to “on” for other products which we have predefined, e. g. Laundry Balls.

4.11.1.2 Edit a Product

Clicking on a Product name in the Products :: Browse displays a Products :: Edit screen where an administrator can edit product attributes. The fields are the same as when a product is added. So refer to section 4.11.1.1 for more details.

4.11.1.3 Delete a Product

The first column of the Products :: Browse screen is a check box. Clicking on this box for one of more products and the clicking on the “delete” button will delete the select products. Since adding a product back once is has been deleted is someone tedious, we suggest that the For Sale flag be turned off for a product rather than delete.

4.11.2 Price Admin

Clicking on Admin menu → Shop → Price Admin allows an administrator to manage price discounts for users.

4.11.2.1 List User Discounts

Clicking on Admin menu → Shop → Price Admin displays the General Discount :: List screen. The

screen lists general discounts off retail prices for each user. The fields listed include: a check box, ID (of the discount record), Username, Email address, Status and Discount %. You can sort the list in order of any of the following column headers by clicking any of these column headers: ID, Username, Email, Status and Discount. Clicking on any of the column headers twice switched between ascending and descending order. If more than one page of data is available to be displayed, the header are of the list will have navigation links that permit the user to browse forward and backward among pages.

4.11.2.2 Add a User Discount

Select a username from the drop down list at the top of the General Discount:: List screen. Then fill in the Discount field and click the "Add" button.

4.11.2.3 Delete a User Discount

Clicking on the check box in the first column of the a record in the General Discount :: List screen and then clicking on the "delete" button deletes the discount record.

4.11.3 Cart Admin

Clicking on Admin menu → Shop → Price Admin allows an administrator to manage customer orders.

4.11.3.1 List Orders

Clicking on Admin menu → Shop → Price Admin displays the Cart Admin :: List Orders screen. The screen is has two areas. The top area allows orders to be filtered that are displayed in the list. The bottom of the screen is a list of orders.

Orders can be filtered on the following fields:

- Stage – An order has a stage which indicates where the processes the order is. The stages that an order can go through is listed in order of occurrence in this drop down list.
- Purchase Date Modifier – Select from the modifiers in the drop down list. This field is optional.
- Date 1 – If the "Purchase Date Modifier" is "before" then enter the before date here. If the "Purchase Date Modifier" is "after" then enter the after date here. If the "Purchase Date Modifier" is "between" then enter the start date here.
- Date 2 - If the "Purchase Date Modifier" is "between" then enter the end date here.

Once the desired filter criteria have been set, press the "Filter" button to display the resulting orders.

The fields shown in the Order list include the following: Order ID, User ID, Name, Created, Total, Stage, Payment Method. You can sort the list in order of any of the following column headers by clicking on any of these column headers: Order ID, User ID, Name, Created, Total, Stage. Clicking on any of the column headers twice switched between ascending and descending order. If more than one page of data is available to be displayed, the header are of the list will have navigation links that permit the user to browse forward and backward among pages.

4.11.3.2 View an Order

Clicking on an Order ID on the Cart Admin :: List Orders screen will display a Cart Admin :: View Order screen that displays the details of the order.

4.11.3.3 Mark Order as Paid

Clicking on the check box in the left column on the Cart Admin :: List Orders screen and the clicking the “Mark selected paid” button will mark the order as paid. This is how a payment that has been received in the mail can be accepted. It may also be necessary to use this technique if the interface to the PayPal or Credit Card processing systems fail to mark an order as paid when in fact payment has been received.

4.11.3.4 Delete an Order

Clicking on the check box in the left column on the Cart Admin :: List Orders screen and the clicking the “Delete selected” button will delete the order.