

8. Customer Accounts

Overview

iNETstore supports the creation of user groups. This feature can be used to:

- Create a database of actual and prospective customers to whom you can actively market your store.
- Offer different content to different groups. For example, you could offer products at a discount to resellers or use a different currency for international customers.
- Target special offers at specific user groups.
- Provide the convenience of not having to enter their details every time a customer places an order.
- Set up a feature where the shopping basket content is stored between sessions. For example, this is useful for grocery stores where customer orders are similar every week.

User Table

Users information is stored in a table called `USRstorename`. For example, if your store is called 'bookshop', the name of your user table is 'USRbookshop'.

User Types

iNETstore has several types of users. These are:

Guest Users	This is the default user group that has access to the 'public' section of your store. If you wish to give anybody access to your store, without requiring them to register, you must set up a user with the login name 'guest' and a blank password. When you initially set up iNETstore, such a user should already exist. Every customer who doesn't supply a valid login name and password should be logged into the store as 'guest' by default. If required, you can set up additional guest accounts. To do that, set up an account with the value -1 (minus one) in the 'acceptorder' field. Any user who tries to place an order through an account that is flagged in this way is prompted to register a new account.
Admin Users	These are users who have access to your BBMS (browser based maintenance system). You should be careful about setting up admin users, since they have direct access to your database and can make any changes they desire.
Affiliates	Users who are members of the affiliate group. They receive a commission on orders that were referred by them.
Other Users	You can set up as many other user groups as you like. These can be used for special customer categories, such as government customers, resellers, corporate customers, etc.

In the store, each user has access to the set of directories that belongs to his or her user group. More details are available in one of the following chapters.

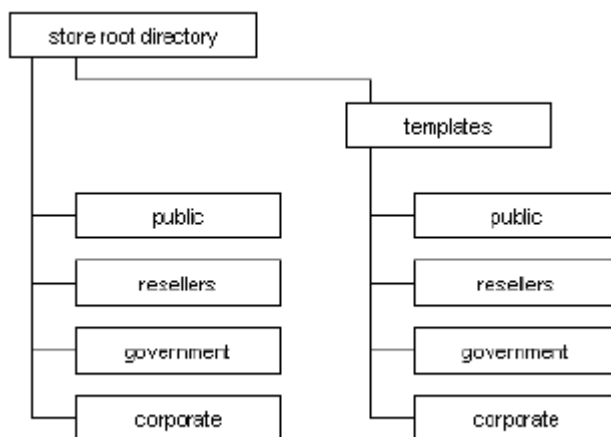
Setting Up User Groups

Users can be grouped into groups such as public, resellers, government customers, corporate customers, etc. It is possible to set up different profiles for each of these groups, so that customers see customised information that is only applicable to members of the group they belong to.

For example, you might want to show resale pricing only to registered resellers, where guest users (public group) can only see recommended retail prices of your products. Similarly, you might want to show ex. tax prices to government customers and maybe offer extended services to corporate customers.

With iNETstore, each user group has their own set of directories. As shown below, two directories are required for each group. One directory directly under the root directory of the store that will contain all static html files and dynamic ehtml files. Another directory in the templates folder will contain templates used by the iNETstore commands.

The figure below shows a sample directory structure of a store with four user groups: public, resellers, government and corporate customers.



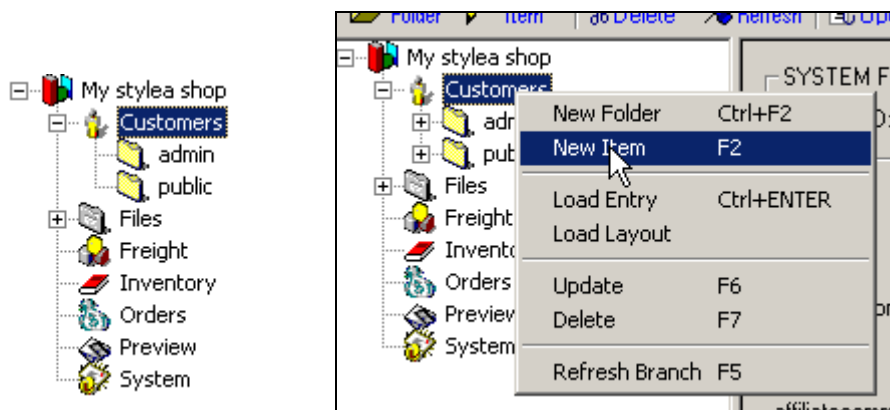
Setting Up a New User Group

Below are step-by-step instructions that explain how you can set up a new user group. For the purpose of this example, we assume you want to set up a user group called 'resellers'.

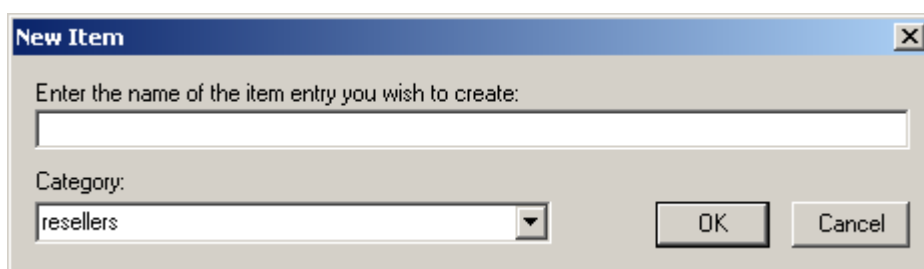
1. You will need to set up a new set of templates that are to be used by the newly created user group.
 - In the store root directory, duplicate the group folder called 'public'. Call the duplicate folder 'resellers'.
 - In the 'template' folder, within the store root directory, duplicate the group template folder called 'public'. Call the duplicate 'resellers'.

If required, you can now customise the reseller templates.

2. Before the newly created user group appears in BBMS, you will need to add the first user through the iNETstore Maintenance application.
 - In the left pane of iNETstore Maintenance, right-click on 'Customers' and select 'New Item' from the pull-down menu.



- In the pop-up window that appears, enter the name of a new user, e.g. 'sampleuser' and enter the group name in the category drop-down box. For the purpose of this example, we'll enter 'resellers'. Then, click on the 'OK' button to close the window. If 'resellers' does not appear in the category menu then select 'newgroup'. The user will then be created and you will be given the opportunity to rename the value 'usergroup' field.



- Finally you should set a value for the field 'framemain' in the User record. This field controls the home page that is displayed to the user when they login to the store. The value in this field would normally be:
<usergroup>/home.ehtml
Or in our example:
resellers/home.ehtml
- The 'reseller' group should now have been added to the tree. From now on, you can administer users in the new group through BBMS.

Protecting access to a user group

Often you will want to ensure that users are not able to view the data being displayed within another user group.

For example, you would not want members of the 'public' user group being able to view data available within the 'admin' user group.

To protect a user group from unauthorized access you can enter the following tag at the top of any EHTML page:

```
<!--[DBxPERMIT(userGroup)]-->
```

where userGroup = the name of the user group that a user must be a member of

i.e. in the example above the tag to restrict access to the 'resellers' user group would be:

```
<!--[DBxPERMIT(resellers)]-->
```

Managing Users

Users are best managed using the browser based maintenance system (BBMS) of iNETstore 2003.

Log into BBMS with your admin login name and password. User management options are contained in the menu called 'Customers'. This heading contains three options:

- Customers
Allows you to register new and edit existing customer accounts.
- New Registrations
Use this option to approve new customers that have applied to be registered.
- Reports
Generate simple reports, such as about the number of sales in a particular month.

Editing Customers

Select Customers | Customers. You will see the following screen:



You have two options:

- Register New Customer
Register a new customer who has not been previously registered within the system.
- Edit Existing Customer
Edit an existing customer account.

Creating a New Customer Account

Let's click on 'Register New Customer'. You will see the following screen:



The screenshot shows a blue background with the title 'Register New Customer' in orange. Below the title are four input fields: 'Email Address', 'Confirm Email', 'Password', and 'Confirm Password'. At the bottom left is a button labeled 'Register >>'.

You will need to enter the customer's email address and password. The email address serves as the login name of the customer.

After you have entered these details, click on the 'Register >>' button.

The next screen will show an error message if the login name you have entered is already used. If not, you will see this screen:



The screenshot shows a blue background with the title 'Register New Customer' in orange. Below the title, the text 'Login is available.' is displayed. Underneath, the 'Login Name: test100@test.com' and 'Password: *****' are shown. At the bottom left is a button labeled 'continue >>'.

Click on continue to go to the next screen, where you can enter full customer details:



The screenshot shows a blue background with the title 'Customer Registration'. Below the title are three sections: 'Customer Details', 'Delivery Details', and 'Billing Details'. Each section contains several input fields for name, company, address, phone, fax, city, state, and country. A checkbox is checked under 'Billing Details (click check box if same as delivery details: [checked])'. At the bottom right is a button labeled 'Register'.

After clicking on register, you will see a status message that tells you that the customer details have been updated.

Editing Existing Customer Details

Select Customers | Customers from the top BBMS menu. On the resulting screen, click on 'Edit Existing Customer'.

You will see this screen:

Edit Customer

Find

Login Name Contact Name Company

Sort By Login Name

Search

OR

Browse by User Group public

Sort By Login Name

Browse

Search for the customer account you would like to modify. Search results are shown in a list:

Search Results

System ID	Login Name	Full Name	Company
7	support@inetstore.com	Abhi	2323
6	t@t.t	t	t
2	test@test.com	Bob Sample	Acme Corp
9	test100@test.com	George Sample	Acme Corp
3	test2@test.com		
4	test5@test.com		
5	test6@test.com		
8	test99@test.com	ljklj	kljkl

Simply click on a login name to go to a detailed customer screen.

User Import and Export

Importing User Data

To import user data, you can use the data import wizard included in iNETstore Maintenance. For more information, consult the data import/export section of this manual.

Exporting User Data through iNETstore Maintenance

To export user data through iNETstore Maintenance, follow the following steps:

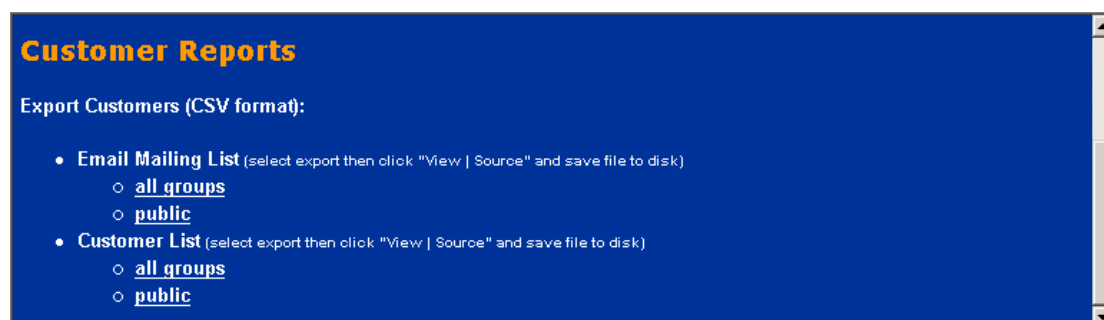
1. Download your user database from the web server using the get-from-server wizard.
2. Use the data export wizard to export all user data from your database.

Exporting Users through BBMS

Select Customers | Reports from the BBMS main menu. The following screen will be loaded:



Click on 'Export Customers'.



Now you can select the type of data you would like to export.

Note that all data will be exported in standard CSV format. The following output shows what a typical CSV file might look like. Most applications are capable of importing files that have been saved in CSV format.

```
id, login, description, usergroup, userpassword, tempaffiliateid, affiliatecomm,
enabled, acceptorders, framemain, sourceip, title, fullname, company, phone, fax,
email, address1, address2, city, state, postcodezip, country, saddress1, saddress2,
scity, sstate, spostcodezip, scountry, storedbasket, storedothertotal, createddt,
modifieddt, accesseddt "3", "david", "", "public", "asdfsaf", "", "0", "1", "1",
"public/home.ehtml", "127.0.0.1", "Mr", "David Smith", "Smith and Co", "02-
99991111", "02-99991112", "david@smith.com.au", "1 George St", "", "Sydney",
"NSW", "2000", "Australia", "Suite 101, 1 Pitt St", "", "Sydney", "NSW", "2000",
"Australia", "", "", "11-12-00 13:33:38", "11-12-00 13:33:38", "11-12-00 13:33:38"
"7", "davidbrown", "", "public", "pass", "", "0", "1", "1", "public/home.ehtml",
"127.0.0.1", "", "", "", "", "", "", "", "", "", "", "", "", "", "", "", "", "",
"1, test, 1, 0,
othersumfieldname(0)=priceinc&B1=Add to
cart&varconfig1=red&varconfig2=10&othersum(0)=44.00&othersum(1)=40.00
&othersum(2)=1.00|", "", "08-12-00 16:05:47", "08-12-00 16:05:47", "08-12-00
16:36:19"
```