CUSTOMERManager
USER GUIDE

INTERNET Marketing Toolkit

internet marketing

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Welcome to Customer Manager!

Manage Customers

Customer Manager allows you to centrally and globally manage all users who have registered with your site or via one of your modules. While each OpenSites module can support its own registration process, if you are using more than one module that supports user registration, it can become cumbersome to enter each module to edit, manage, and delete users.

Customer Manager maintains all module registrations in a single database and allows you to manage users regardless of what module they have used for registration.

As well, you can use Customer Manager to create one custom registration page, complete with custom fields, which can then be used across all modules.

Powerful Search Capabilities

Customer Manager provides administrators the ability to create highly granular searches. You can filter your customer database using an unlimited number of and/or filters based on customer information and activities.

Customer Manager also allows you to save search results, allowing you to create "snapshots" of your customer base. You can use these snapshots for later comparisons. You can even search saved snapshots, allowing you to tease out interesting customer metrics for marketing purposes or ways to improve customer service.

Campaign Manager Integration

Campaign Manager is a module in your Internet Marketing toolkit that gives you the ability to mount email campaigns. Saved searches and saved results created in Customer Manager offer an excellent basis for targeted email campaigns. Hence, any search you save or results you generate with Customer Manager are immediately available in Campaign Manager.

Section 1: Managing Customers

Customer Managers allows you to view, edit, and delete customers (users) who have registered via one or more of your modules.

Figure 1-1 The Customer Search page

Searching Customers

1) Click the **Customer Search** tab. You will see the **Customer Search** page (see Figure 1-1).

2) To view all your customers, click the **View All Customers** link. Customer Manager will display a list of all users who have registered with one or more of your modules (for example Career Manager, News Manager, or Web Board).

3) To filter the list, select the filter type from the **View saved Search in** drop-down box and click the **Go** button.

4) To create a new filter type, click the **Create New Search** link.

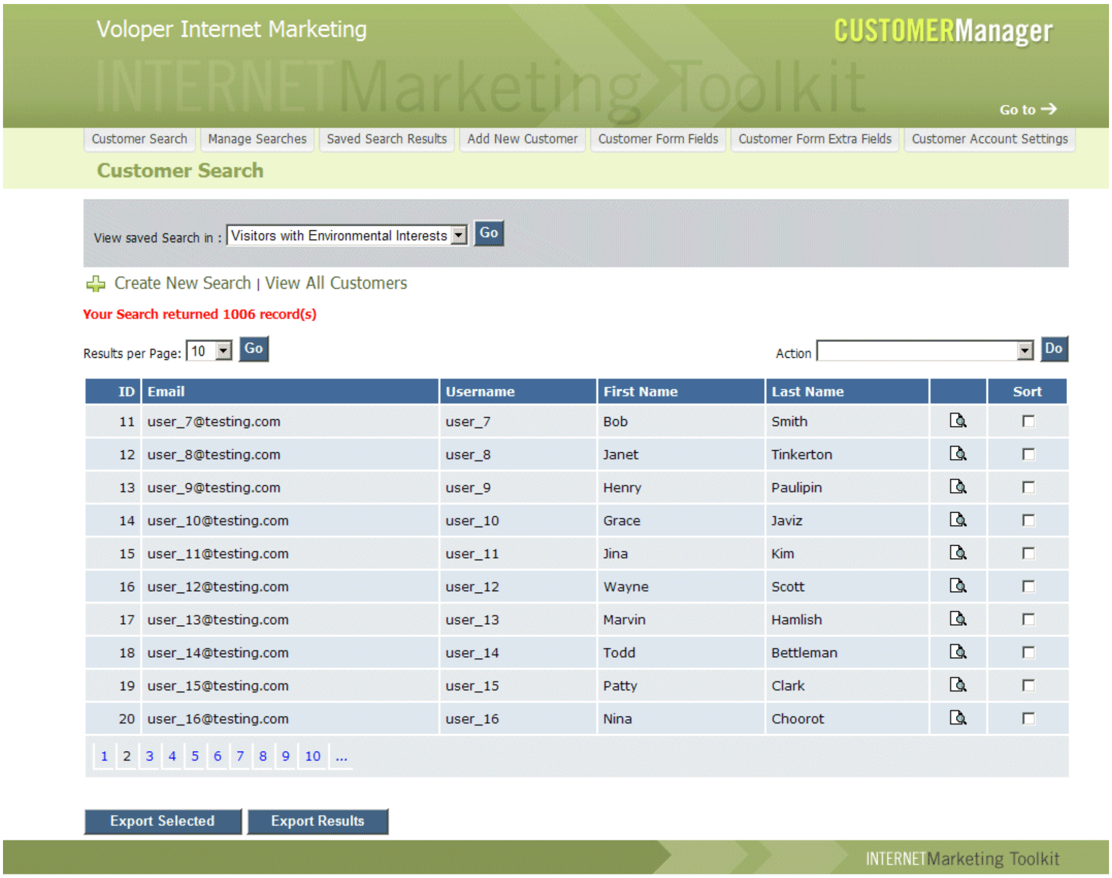


Figure 1-2 Customer Search results

Results per page

By default Customer Manager will display 25 results per page. To increase the number of results, select the appropriate number from the **Results per Page** drop down box. To see all your customer records on one page select **All**. If you have several thousand records, trying to view all your records on one page might result in a slow population of the list.

If there are more records than the configured view, Customer Manager will paginate the results list. Click on a page number below the results list to view more results.

Selecting

You can select individual records for sorting or exporting by clicking on the checkbox associated with the customer record. Selections are persistent if you click to another page. The **Action** drop-down box provides additional selection options:

- To check all items, select **Select All** from the Action drop down box and click **Do**.
- To uncheck all items, select **Unselect All** and click **Do**.
- To check all items on the current page only, select **Select all in page** and click **Do**.

- To uncheck all items on the current page only, select **Unselect all in page** and click **Do**.

Sorting

To sort records by their column heading simply click on the column heading. You can reverse the sort (ascending to descending or descending to ascending) by clicking on the column heading a second time. You can also sort records based on whether they are checked or not. Click on the Sort column header to sort checked records either to the top or bottom of your results.

Deleting Customers

You can remove items from the list or the actual database with the Action drop down box.

- To remove items from the search results, select **Remove selected from list** and click **Do**.
- To remove items from the actual database, select **Remove selected from Database** and click **Do**. *Use this with caution as it will permanently delete the customer account.*

Saving Your List

At time you might want to save a list of results. You might want to, for example, create snapshots of your customer base at periodic intervals. You can save items from the list or the actual database with the Action drop down box.

- To save only the checked items. select **Save selected** and click **Do**.
- To save all items, irrespective of their checked condition, select **Save list** and click **Do**.

Exporting

You can export your results as a Microsoft Excel file.

- To export all the results, click the **Export Results** button and save the XLS file to an appropriate directory.
- To export only the results that have been checked, click the **Export Selected** button and save the XLS file to an appropriate directory.

Add/Remove Columns

The results display a default set of pertinent customer information. If you would like to add additional customer information (for example country or company name) to the results grid, click the **Add/Remove Columns** button. A pop-up window will appear. Check the desired columns to add (or uncheck the columns you wish to remove) and click the **Save** button.

Editing a Customer

1) Click the **Customer Search** tab.
2) Filter the list if necessary.
3) To edit a customer, click on the **Edit** icon associated with the customer. You will see the **Customer Detail** page (see Figure 1-3).
4) You will see three tabs: **Personal Info**, **Customer Activities**, and **Communicate with Customer**. See below for more information on editing and configuring these sections.

5) After making any changes, click the **Update** button.

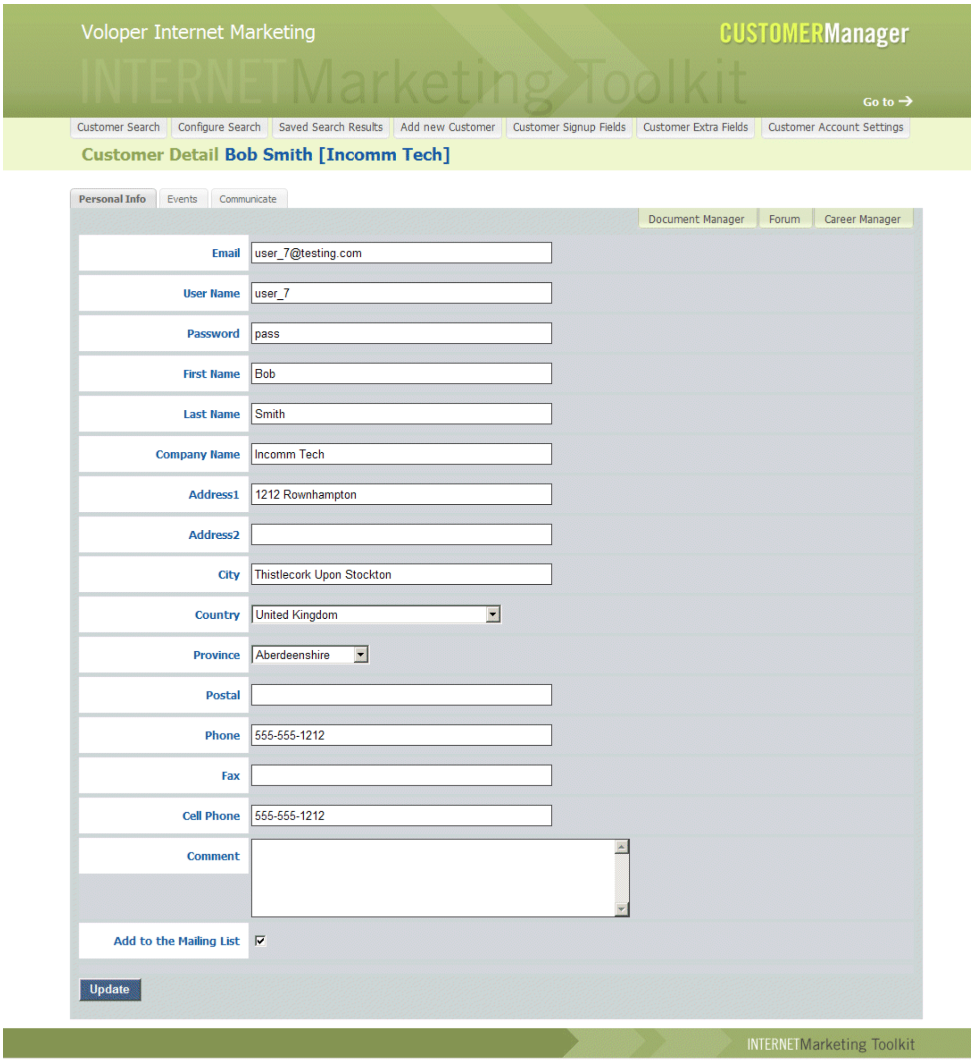


Figure 1-3 The Customer Details page

Personal Info Tab

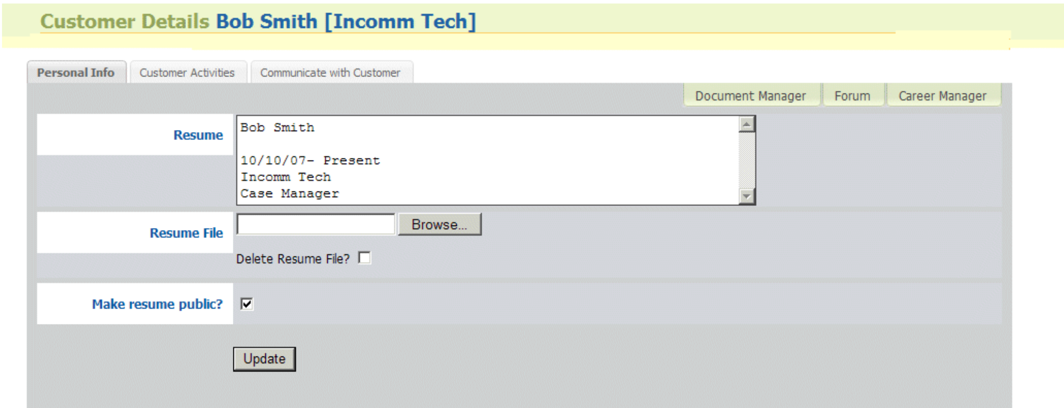


Figure 1-4 Personal Info: Career Manager Module sub-tab.

The **Personal Info** tab allows you to view and edit the registration information the customer supplied. You will also see a group of tabs representing which modules the user has subscribed to. You can click on these tabs to customize module specific information (see Figure 1-4). If you make any changes, click the **Update** button.

Customer Activities Tab

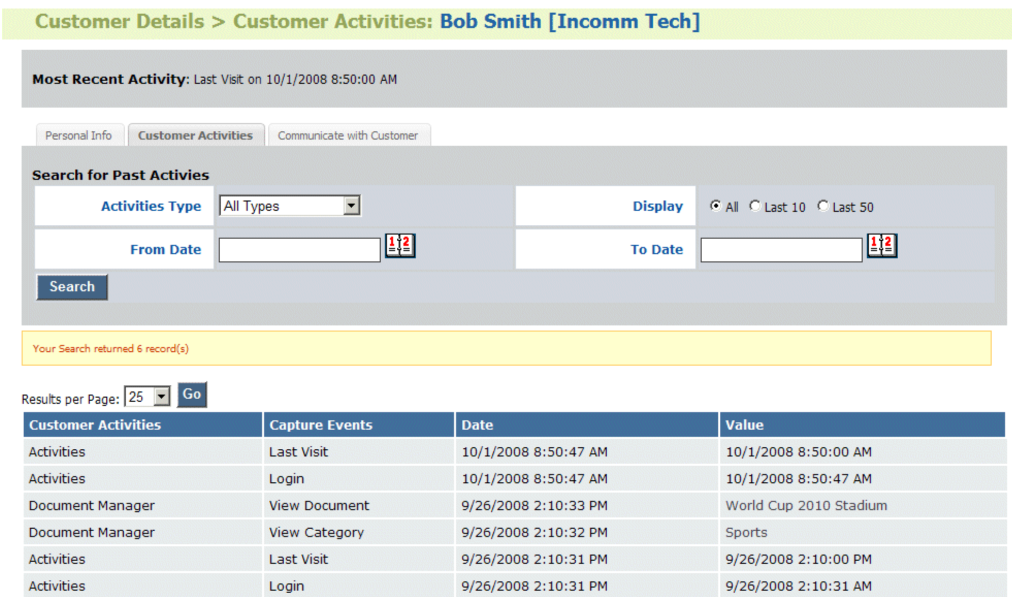


Figure 1-5 Customer Activities tab.

The **Customer Activities** tab allows you to see all actions that user has taken via the modules. To view activities use the **Search for Past Activities** dialog:

1) Select which module you wish to narrow the results to with the **Activities Type** drop down box.
2) If you wish to reduce the number of items displayed, select an appropriate value with the **Display** radio buttons.
3) If you wish to narrow the events to a range of dates, use the **From Date** and the **To Date** calendar icons to create the range.
4) Click **Search** when you're ready.

Communicate with Customer Tab

The **Communicate with Customer** tab allows you to send Emails to a customer or create notes about the customer. Emails go to customers and notes remain internal for administrator eyes only.

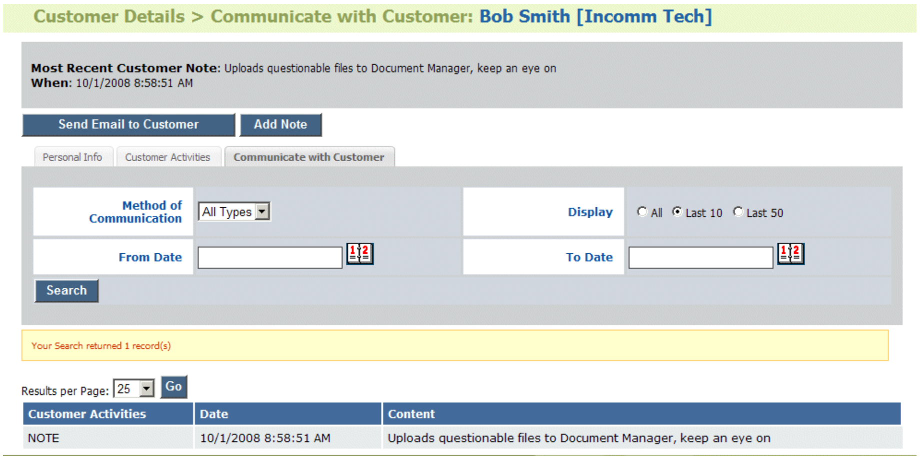


Figure 1-6 Communicate with Customer tab.

To send an Email:

1) Click the **Send Email to Customer** button. A webmail type page will appear.
2) In the **From Email** field enter your Email address.
3) In the **Subject** field enter the subject of the Email.
4) In the **Content** field enter the text of the Email.
5) Click the **Send Email to Customer** button when you're ready.

To create a note:

1) Click the **Add Note** button.
2) In the **Content** field enter the text of the note.
3) Click the **Add Note** button when you're ready.

Adding a New Customer

1) Click the **Add New Customer** tab.
2) Complete the customer details as appropriate.
3) Click the **Add** button.

Section 2: Saved Searches

If you have many customers you might want to create custom searches that filter the results. A custom search lets you display only customers who match a desired set of conditions. For example, you might want to only display customers from a particular country (for example, the UK) or customers who have taken a particular action (for example, customers who have clicked on a banner). You can then save the search parameters or even save the actual results to create snapshots of your user base.

Figure 2-1 Manage Searches tab

Managing Saved Searches

Creating a Filter

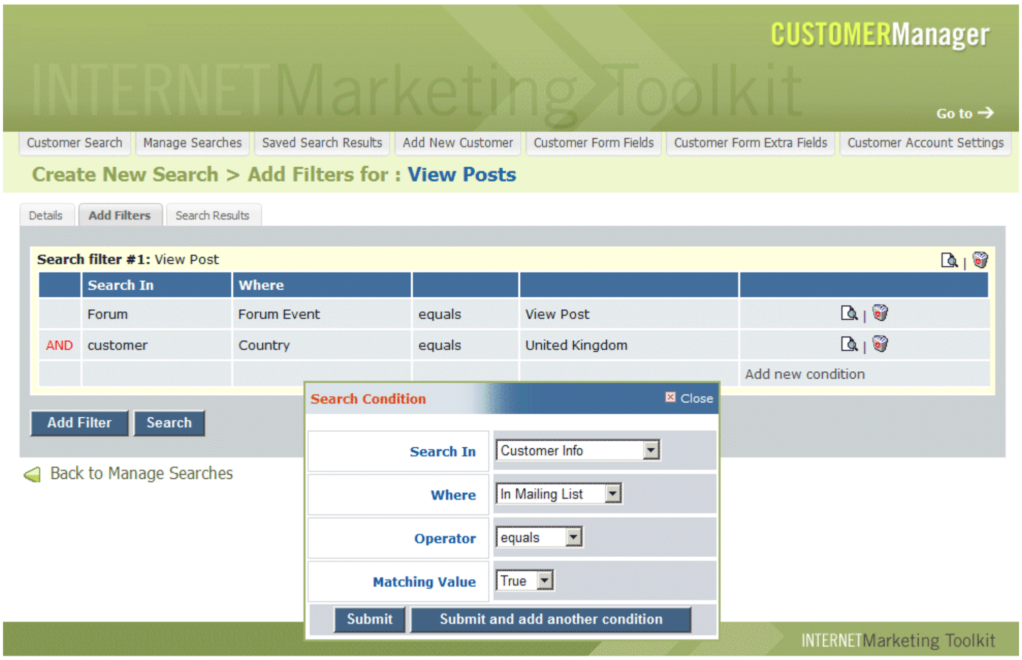


Figure 2-2 Adding a search filter

1) Click the **Manage Searches** tab. You'll see the **Manage Searches** page (see Figure 2-1).
2) Click the **Create New Search** button.
3) The **Details** tab will be displayed.
4) In the **Search Name** field, enter a name for your search.
5) In the **Note** field, enter some text to help you remember the intent of the search
6) Click the **Add New Info** button. You will be taken to the **Add Filters** tab.
7) Click the **Add Filter** button.
8) In the pop-up window, enter a name for your filter and then click **Submit**.
9) After creating your filter, you need to specify the actual conditions. To enter a condition, click the **Add new condition** link in the filter table. You will see the **Search Condition** pop-up (see Figure 2-2).
10) In the **Search In** drop-down box, select which module you want the search to be limited to. You can also select **Customer Info** to search in only the customer information or can select **Save Search** to search previously saved search results.

11) The **Where** drop down will populate with the fields or actions specific to the selected module. Select the field or action you wish to search on (for example "Country" or "Click Banner").

12) From the **Operator** drop down select one of the following

Value	Description
Equals	Select **equals** if you wish the search to return results specified in the **Matching Value** field. For example "Country equals Canada" will return all customers who have Canada in their Country field.
Not equals	Select **not equals** if you wish the search to exclude such matches. For example "County not equals Canada" will return all customers who do not have Canada in their Country field.
Starts with	Select **starts with** if you wish to search the designated field (from the **Where** drop-down) for a **Matching Value** that begins with the text entered in **Matching Value**. For example "Last Name starts with *A*" will return all customers who have a last name that begins with the letter A.
Contains	Select **contains** if you wish the search to return customers whose field contains the text entered in **Matching Value**. For example "First Name contains *at*" will return matches on "Pat", "Matt", "Atwater", etc.

13) In the **Matching Value** field, select the value you wish to use with your search operator.

14) Click the **Submit** button to add the condition and return to the filter table. If you want to add this condition to the filter table but immediate add another, click the **Submit and add another condition** button.

And and Or

Figure 2-3 Two OR Filters

You will notice if you add multiple conditions they are joined by an **And** condition. Your search will only return results if both the conditions are met. If you create two different filters (via the **Add Filter** button), these filters are treated as **Or** conditions. The search will only return the results that match either filters. For example, if you want to create a filter that returns customers from France and the

UK who have uploaded a document to the document module, you would create one filter with a condition where the country field matches the UK and the user has performed an upload action in the Document Manager module (so two conditions joined by an And). You then would create another filter with a condition where the country field matches France and the user has performed an upload action in the Document manager module.

Running a Saved Search

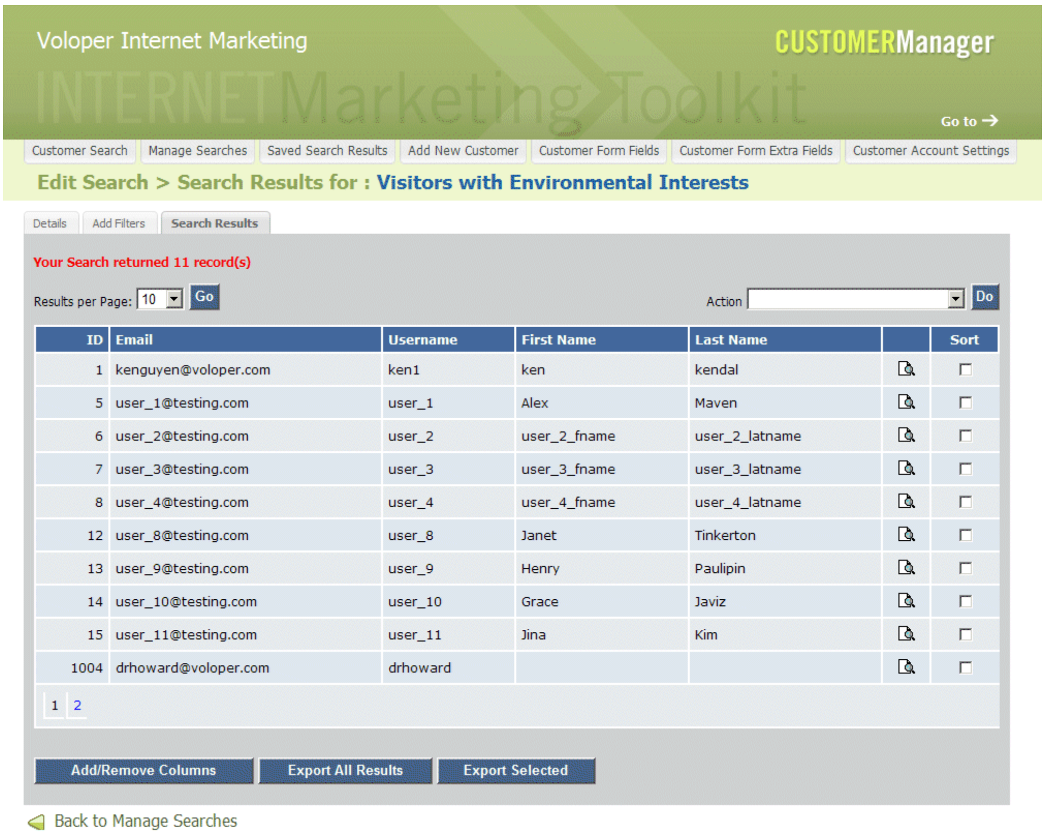


Figure 2-4 Editing a Search: Search Results tab

1) Click the **Manage Searches** tab. You will be taken to the Manager Searches page (see Figure 2-1).
2) You will see a list of created filters.
3) Click the **Edit** icon associated with the search you wish to run (for example "UK Customers Filter"). You will see the **Detail** tab.
4) Click the **Search Results** tab . A list of results will appear at the bottom of the screen (see Figure 2-4).

See "Searching Customers" on page 5 for information on how to manipulate the results.

Editing a Filter

1) Click the **Manage Search** tab.
2) You will see a list of created filters.
3) To edit a filter's name, click on the **Edit** icon above the table of conditions.
4) To edit a filter's condition, click on the condition's associated **Edit** icon.
5) Edit the **Search Condition** pop-up box as necessary.
6) Click the **Submit** button.

Deleting a Filter

1) Click the **Manage Search** tab.
2) You will see a list of created filters.
3) Click the filter's associated **Delete** icon.

Managing Saved Search Results

There may be times when you want to create periodic snapshots of your user base. For example, you might want to create monthly lists q of the users registered in the UK and save these lists.

Creating and Saving Search Results

1) Click the **Manage Searches** tab. You will be taken to the Manager Searches page (see Figure 2-1).
2) You will see a list of created filters.
3) Click the **Edit** icon associated with the search you wish to run (for example "UK Customers Filter"). You will see the **Detail** tab.
4) Click the **Search Results** tab . A list of results will appear at the bottom of the screen (see Figure 2-4).
5) From the **Action** drop-down box select the **Save List** item.

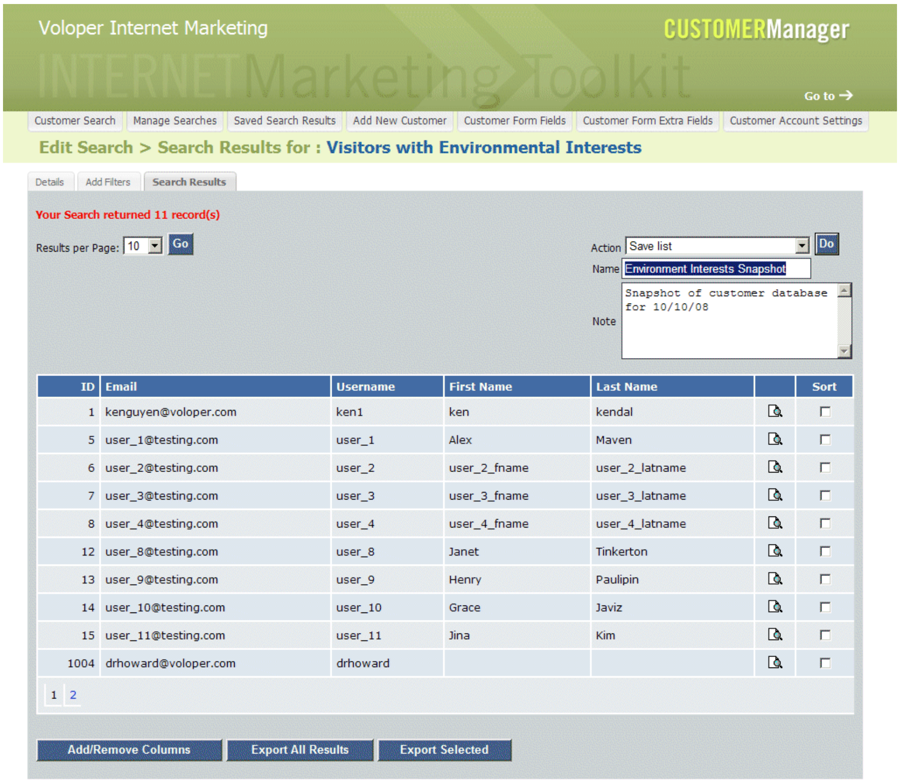


Figure 2-5 Save list action

6) A **Name** and **Note** field will appear (see Figure 2-5). Enter a name for the saved list in the **Name** field (for example, "Environment Interests Snapshot").

7) In the **Note** field put some descriptive text (for example a date when this was saved).

8) Click the **Do** button.

Your results can be found under the **Saved Search Results** tab.

Note: These lists do not automatically update. Consider them a snapshot. For example, if you create a filtered list of all customers in the UK and save it, any customers from the UK that register after you saved your search will not be included in the saved search.

Editing Saved Search Results

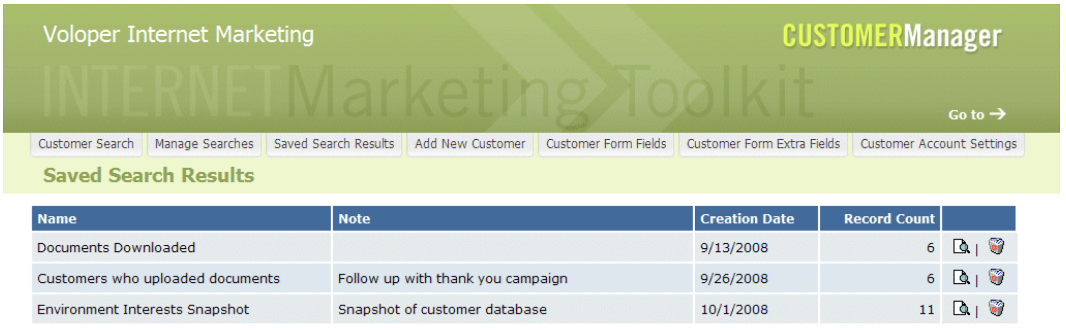


Figure 2-6 Saved Search Results tab

1) Click the **Save Search Results** tab. You will be taken to the Saved page (see Figure 2-6).
2) You will see a list of previously saved search results. The results grid will display the name and note information you previously supplied along with the creation date and how many results are actually in this saved search (found in the **Record Count** column)
3) Click the **Edit** icon associated with the saved search results you wish to edit.
4) Edit the **Name** or **Note** field as appropriate.
5) If you wish to edit customers on this list, click the **View Customers** button.
6) Click the **Edit** icon if you wish to edit an individual record.
7) Click the record's associated **Delete** icon if you wish to remove the record from the saved search results.
8) If you've made changes to the name or note or deleted customers, click the **Save Search Details** button to preserve these changes.
9) If you wish to export the saved search results as a MS Excel file, click the **Export All Results** button.

Filtering Saved Search Results

Search results you've saved using the procedure above may likewise produce lengthy results. You can filter saved searches to create a subset of your results. For example, a saved result of all customers from the UK you might want to then filter to find customers in London.

1) Click the **Manage Search** tab.
2) Click the **Create New Search**.
3) The **Details** tab will be displayed.
4) In the **Search Name** field, enter a name for your search.
5) In the **Note** field, enter some text to help you remember the intent of the search
6) Click the **Add New Info** button. You will be taken to the **Add Filters** tab.

7) Click the **Add Filter** button.

8) In the pop-up window, enter a name for your filter and then click **Submit**.

9) Click the **Add new condition** link in the filter table. You will see the **Search Condition** pop-up.

10) In the **Search In** drop down box select the **Save Search** item.

11) In the **Where** drop down box select the **Save Search List** item.

12) In the **Operator** drop down box select the **Equals** item.

13) In the **Matching Value** drop down box select the name of the saved search you wish to filter.

14) Click **Submit**.

15) You can now add one or more additional conditions to the filter to filter down your saved results list.

16) Click on the **Search Results** tab to see your filtered subset.

Section 3: Managing Form Fields

Customer Manager also allows you to modify what fields (name, address, etc.) will be presented during a new user registration. You can disable fields, make fields required, or even create your own custom fields (for example, "what is your household income?").

Default Customer Form Fields

Figure 3-1 Customer Form Fields tab

You can customize the fields that appear on a customer registration page.

1) Click the **Customer Form Fields** tab to open the **Customer Form Fields** page (see Figure 3-1).
2) Check the **Display in form** checkbox to allow the field to be displayed on a module's registration page. Check the **Required** checkbox to make the field required for custom.
3) Click the **Update** button.

Customer Form Extra Fields

Figure 3-2 Customer Form Extra Fields tab

Adding a Customer Form Extra Fields

You can customize the modules' registration pages through the **Customer Form Extra Fields** tab**.** You can add customized fields for customers to fill out when they register.

1) Select the **Customer Form Extra Fields** tab link from the right-hand menu. The **Customer Form Extra Fields Page** will be displayed (see Figure 3-2).

2) Click the **Add** button to add a field. Enter the needed information in the following fields:

Field	Function
Field Name	Enter a field name. A field name can be a question or a request for more information. If you have configured your website to display in multiple languages, the **Field Name** is required for each language.
Field Type	Select a field type from the drop-down menu. Each field type has size, row and column specifications. If non-applicable, these properties will be grayed out. **Text:** A single-line input field, suitable for short responses. **Textarea:** A multiple-line field, for longer answers. **Checkbox:** A small square box which displays an X when clicked. Users can click on more than one box to specify their choices.

Field	Function
	Radio: A list of choices that the user can click to make their selection. This option allows users to click on only one of the choices given. **Selection:** A drop-down menu presenting the user with a list of choices. The user can highlight an item to make a selection. **Date:** Creates a date field, allowing the user to enter date type information. *See "Adding a Field Option" on page 22 for information on how to populate checkbox, radio, and selection fields.*
Size	If enabled, enter a value for the field in pixels.
Column	If enabled, enter a value for the field column in pixels.
Row	If enabled, enter a numeric value for field row in pixels.
Num of column	If you've selected checkbox or radio fields, enter how many columns you wish to display your fields in.
Required	Check the Required checkbox to make the field a requirement. Uncheck the box to make the field an optional entry.
Sort order	If you wish to change the order in which the extra fields appear on the applicant's page, enter the desired order.

3) Click the **Update** button.

Editing and Deleting Customer Form Extra Fields Details

1) Select the **Customer Form Extra Fields** tab link from the right-hand menu. The **Customer Form Extra Fields Page** will be displayed.
2) Make any changes desired.
3) Click the **Update** button. The message ***Update Successful*** will appear.
4) To delete, click the **Delete** icon assigned to it.
5) Click the **OK** button. The selected **Extra Field** will be deleted from the list.

Adding a Field Option

If you have configured a **Customer Form Extra Field** as a checkbox, radio button or a selection menu, you need to assign field options to each **Customer Form Extra Field**. An example field can be one asking for an annual income range with a drop-down selection menu giving a choice of income ranges. To add

1) From the Extra Fields page find a Extra Field designated as a checkbox, radio or selection. You will see an **Add** button next to the **Extra Field**. Click the **Add** button. A blank **Field Option** will appear.

2) Enter a name in the Name field. If you have configured your website to display in multiple languages, a name is required for each language.

3) The **Value** field text will only appear on the Back-end to the administrator. The **Value** field can be the same as the **Name** field or an alert text, flagging the customer in some fashion, such as "priority customer".

4) Click the **Update** button. The message ***Update Successful*** will appear on top of the page and the newly created **Field Option** will be displayed within the **Customer Form Extra Fields**s page.

Section 4: Customer Account Settings

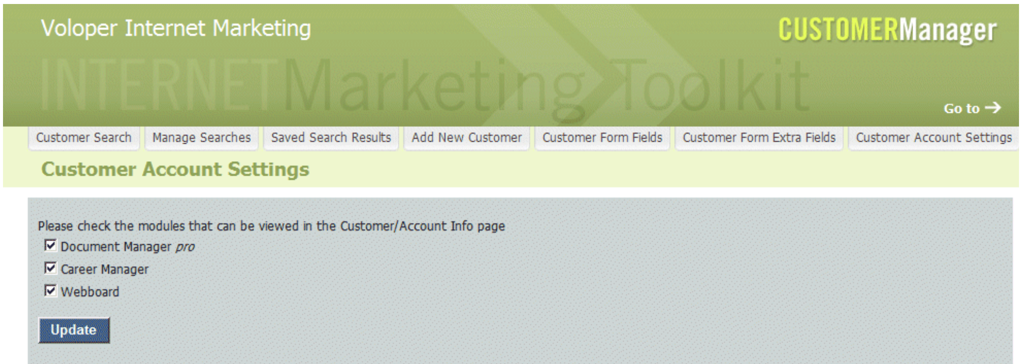


Figure 4-1 Customer Form Extra Fields tab

The **Customer Account Settings** tab allows you to enable/disable all users from seeing or modifying module-specific account information from their account page (the page the customer can access to modify his/her own personal information).

Editing My Account Settings

1) Select the **Customer Account Settings** tab.
2) Check the appropriate modules.
3) Click the **Update** button.

Section 5: Switching to Other Modules

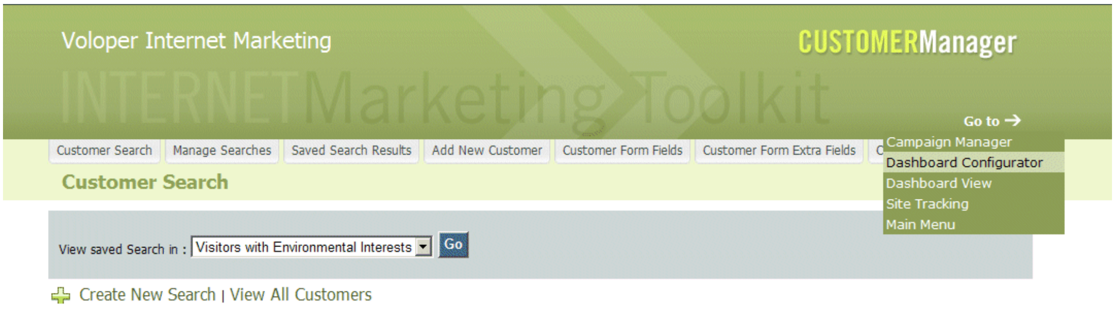


Figure 5-1 Go to -> menu

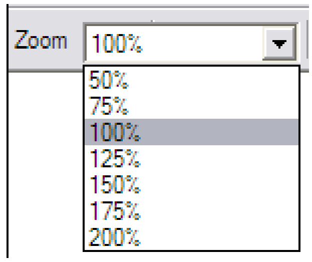
If you wish to change to another module in the Internet Marketing toolkit or return to the Admin main menu page, mouse over the **Go to ->** menu item. You will see a drop-down list. Select the appropriate item to navigate to.

Section 6: The Web Content Editor Toolbar Page

- Open File
- Save File
- Format
- Font
- Bold
- Italic
- Underline
- Color
- Align Left
- Align Center
- Align Right
- Align Center
- Number List
- Bullet List
- Decrease Indent
- Increase Indent
- Break
- Subscript
- Superscript

- Horizontal Line
- Special Character
- Cut
- Copy
- Paste
- Paste Text
- Paste from Word
- Undo
- Redo
- Find Text
- Insert Table
- Show Invisible Borders
- Insert Row
- Delete Row
- Insert Column
- Delete Column
- Insert Cell
- Delete Cell
- Merge Cell

- Split Cell
- Style Sheet Manager
- Apply Style



- Link
- Unlink
- Select All
- Remove Format
- Show Details
- Insert File
- Insert Image
- Insert Rollover
- Insert Thumbnail
- Insert Script
- Insert HTML Tag

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