



**webEdition**  
manage your content

## Customer Management





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# The Customer Management Module

## User Guide

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Standard 4.1.1  
October 2006

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# About this document

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## Purpose of this document

This document treats the webEdition Customer Management and Customer Management PRO Modules and how to use them.

You can use this manual to learn:

- what the Customer Management Modules are
- how to install the modules
- how to use these modules to build and maintain a customer database
- how to create customer registration forms to manage external visitors to your Web site

## Audience

This document is intended for personnel in the following groups:

- Web administrators
- Web editors

## The webEdition customer documentation suite

The documentation team publishes new webEdition documents to support the release of all webEdition features, modules and enhancements.

You can consult our documentation suite for detailed information about the modules you have purchased or about webEdition products that you may wish to purchase in the future. All customer documentation is available in portable document format (PDF) on the webEdition documentation Web page.

## On-line reference documentation

The webEdition customer documentation suite comprises the following books, all of which you can obtain at URL: <http://www.living-e.de>

### Standard webEdition documentation

The following books support the webEdition Standard suite:

- *The webEdition User Guide*
- *The webEdition Installation Guide*
- *The webEdition Tag Reference*

### Documentation for webEdition modules

The following books support the webEdition modules:

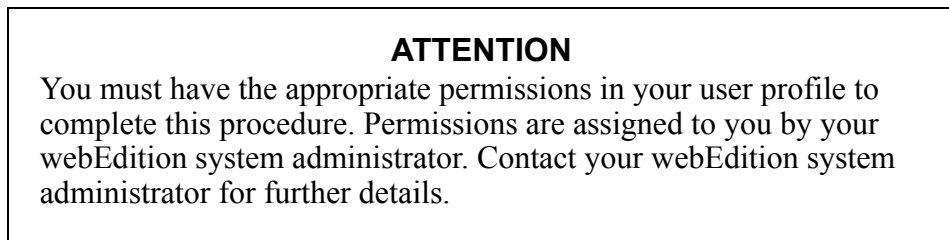
- *The Customer Management and Customer Management PRO Module User Guide*
- *The Database/Object Module User Guide*
- *The Editor Plug-in User Guide*
- *The Newsletter Module User Guide*
- *The Scheduler and Scheduler PRO Module User Guide*
- *The Shop Module User Guide*
- *The Task Messaging Module User Guide*
- *The User Management and User Management PRO Module User Guide*
- *The Workflow Module User Guide*

### What precautionary messages mean

webEdition documents include attention and caution messages, which are designed to draw your attention to important instructions.

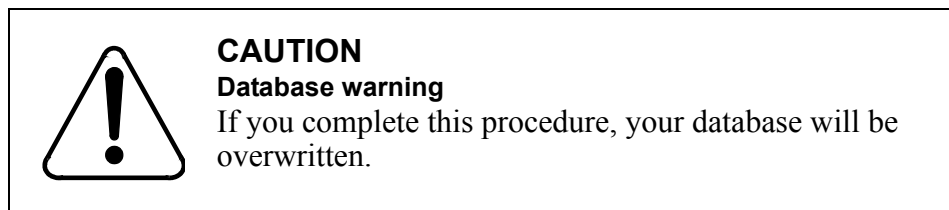
#### Attention boxes

An attention box identifies information that is necessary for the proper performance of a specified task. For example:



#### Caution boxes

Caution messages indicate that there are possible risks to your software or database if you perform a specified task without taking the suggested appropriate precautions. For example:



### How commands, system responses and we:tags are represented

The commands, system responses and webEdition tags (called we:tags) used in this document conform to the following conventions.

## Web interface commands

Commands performed through a Web browser are shown in *italic* typeface. For example:

Click on the *Save* button.

Menu-based commands performed in a Web browser are shown in *italic* typeface. Drop-down or nested menu commands are separated by an input prompt (>). For example:

Select *Customers > New* from the main menu of the Customer Management Module.

## webEdition tags and template code

The webEdition templates use a specialized set of programming tags based on the PHP programming language. These webEdition tags or `we:tags` are displayed in *courier* typeface and in angled brackets:

Opening tags appear thus: `<we:tag/>`

Closing tags appear thus: `</we:tag>`

The programming code used in webEdition templates is also represented in this document by *courier* typeface:

```
<we:sessionStart/>
<we:ifRegisteredUser>
Hello: <we:sessionField Last name="user name" type="print"/><br>
Logged in
</we:ifRegisteredUser>
```

## Attribute variables

Attributes and variables appear in *courier italic* typeface. For example:

```
<we:hidden name="attribute1">
```

## How to check the document version and issue

The information on the title page of this document indicates the version and issue for this publication. The version and issue also appear in the footer on every even-numbered page.

The first two digits in the document numbering scheme indicate the version. The version number increases each time the document is updated to support a new software release. For example, the first release of a document is 01.01. In the next software release cycle, the first release of the same document is 02.01.

The second two digits in the document numbering scheme indicate the issue. The issue number increases each time the document is revised and re-released in the same software release cycle. For example, the second release of a document in the same software release cycle is 01.02.

## Customer service

For further information about webEdition, please consult our Web page, or contact our customer service department:

- Web Page: <http://www.webedition.biz/>
- E-mail:
  - Technical support: [technik@living-e.de](mailto:technik@living-e.de)
  - Sales: [sales@living-e.de](mailto:sales@living-e.de)
  - Information/Help: [info@living-e.de](mailto:info@living-e.de)

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# 1 Customer Management: Introduction

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This introduction is intended to help you familiarize yourself with the webEdition Customer Management and Customer Management PRO Modules. This chapter treats what the modules do and how to install them. You can also find information here about the basic layout and command features for the Customer Management Module. These topics are treated in the following sections:

- Section 1.1, "What is the webEdition Customer Management Module?" on page 15
- Section 1.2, "Installation" on page 15
- Section 1.3, "General information and navigation" on page 15

The PRO Module builds upon the standard Customer Management Module and therefore the information in this book pertains to both webEdition applications. Supplementary material describing the particular features of the Customer Management PRO Module is found in 4, "The Customer Management PRO Module" on page 37.

## 1.1 What is the webEdition Customer Management Module?

The webEdition Customer Management Module is a database that allows you to register and manage external visitors to your web site. (These visitors are called "customers" in this document.) The Customer Management Module can manage customer data in two ways:

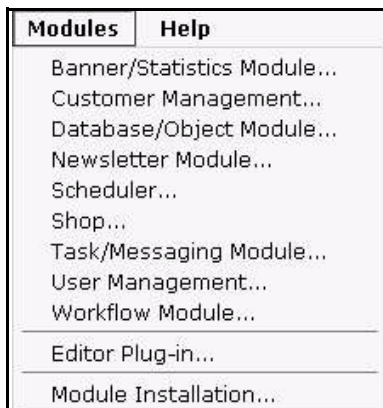
- You can enter customer data manually yourself.
- With the help of a registration form that you have designed for your Web site, customers can enter their data themselves. In this case, customers will log in by entering their user name and password. This feature allows you to offer registered customers an extended selection of information or give them access to areas from which non-registered users are barred.

## 1.2 Installation

The installation procedure for all modules is described in The webEdition Installation, Update and Backup Procedures. A .pdf version of this guide is available at the following URL: <http://www.living-e.de>

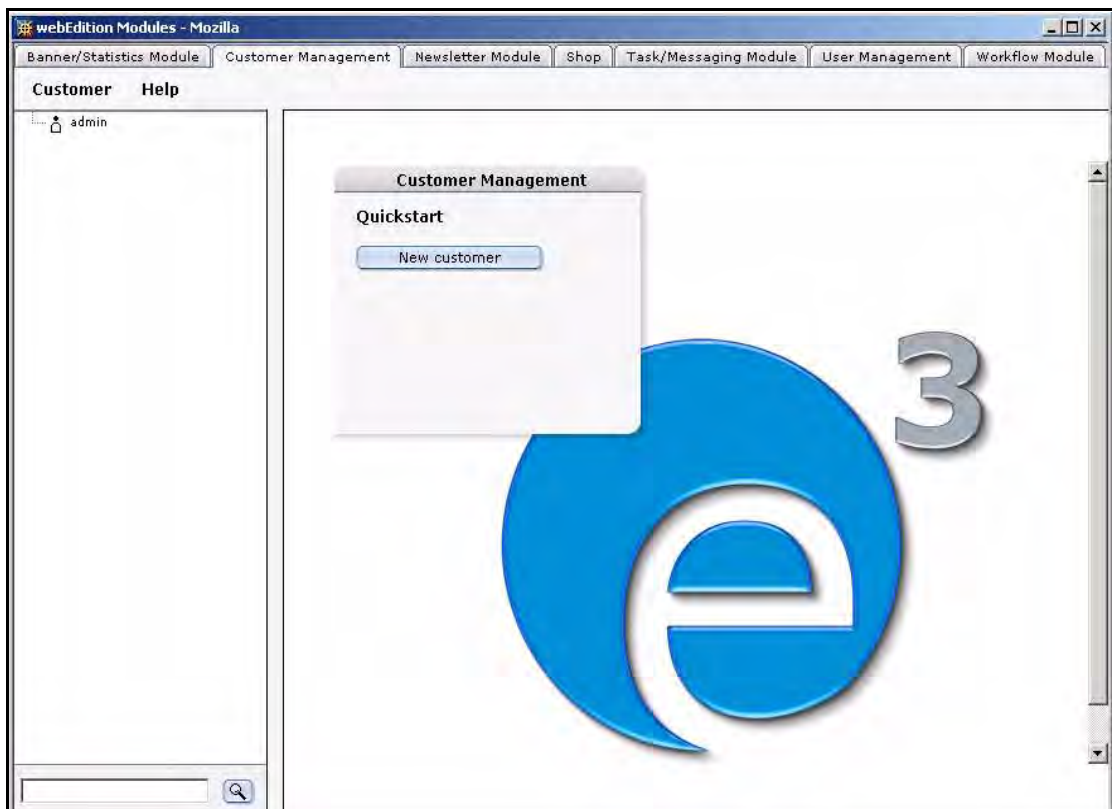
## 1.3 General information and navigation

After installation, you will find a new menu item in the main menu called *Modules*, which contains all the modules in your installation of webEdition (see Figure 1).

**Figure 1 Modules drop-down menu**

### 1.3.1 Opening the module

To open the module, select *Customer Management* from the *Modules* drop-down menu on the webEdition main screen. The Customer Management Quickstart screen opens as seen in Figure 2.

**Figure 2 Customer Management Module: mainscreen with Quickstart option**

Using the *Quickstart* screen, you have the option of going directly to a new customer configuration screen.

#### 1.3.1.1 Customer Management explorer menu

The explorer menu displays a list of icons representing the customer data you have in your customer database (see Figure 3). You can access and modify the profile for a particular customer by double clicking on the icon for that customer.



**Figure 3 Customer Management explorer menu**

### 1.3.1.2 Permissions to modify the customer database

The default user has all of the permissions to create, modify and delete the data and data fields in the Customer Management database. Additional flexibility is available with the User Management Modules.

**1.3.1.2.1 Interaction with the User Management Modules** If the Standard User Management Module is installed, permission to set up new customers (registered visitors to your site), or to modify the fields in the customer database are limited to the administrator. If you have installed the User Management PRO Module, the administrator can assign to any user the permission to create, delete, edit customer or edit customer fields. For more information on the User Management Module, see the *User Management Module User Guide* from the webEdition web site.

## 1.3.2 The Customer Management menus

The Customer Management Module main screen (as seen in Figure 2, "Customer Management Module: mainscreen with Quickstart option" on page 16) has two drop-down menus: *Customer* and *Help*, each of which is described in the subsections that follow.

### 1.3.2.1 The *Customer* drop-down menu

The Customer drop-down menu has the following items (see Figure 4, "Customer drop-down menu" on page 17):

**Figure 4 Customer drop-down menu**

- *New*. This option opens a window that allows you to enter data about a new customer.
- *Save*. Use this command to save your data.
- *Delete*. Use this command to delete your data.

- *Administration > Fields administration*. This item opens a window that allows you to modify the database parameters used to define your customers.
- *End*. Use this command to exit the application.

If you have installed the Customer Management PRO Module, you will see additional items in the *Customer* menu. For details, see 4, "The Customer Management PRO Module" on page 37.

### 1.3.2.2 The *Help* drop-down menu

The *Help* drop-down menu has the following items (see Figure 5, "Help pull-down menu" on page 18):

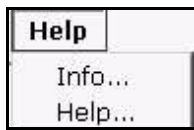


Figure 5 *Help* pull-down menu

- *Info*. This command provides information about the application.
- *Help*. This command gives you access to the webEdition help system.

### 1.3.3 About fields and views in the customer database

You can use the customer database to store and maintain all of your data about your customers. Typically such a database would include information under such categories as customer name, E-mail address, street address, telephone number, etc.

#### 1.3.3.1 About views

The webEdition Customer Management Module software is pre-programmed to provide you with the following default categories, which are displayed in the module's interface in the following views: *General*, *Other*, and *All*. You are not limited to the foregoing default settings. You can modify the database to meet your own needs by adding new types of information. You can add, for example, a view for a salutation or contact information (see Section 2.4, "Working with customized views" on page 25). In this manner you are free to customize the database to meet the needs of your business or organization.

**1.3.3.1.1 The *General* view** The *General* view provides the basic interface to your customer database. You use this view to enter user data about a new customer.

Select *Customer > New* from the Customer Management Module menu to access the default *General* view (see Figure 6):

The *General* view has the following fields, each of which allows you to enter a customer's basic data:

Figure 6 *General* view

- *Username*
- *Password*
- *Forename*
- *Surname*
- *Member since*. This is a read only-field which tells you the date and time the

user was created in the system.

- *Last login*. This is a read only-field which tells you the date and time the user was last logged into the system.
- *Last access*. This is a read only-field which tells you the date and time the user last accessed data from the system.

**1.3.3.1.2 Other view** This view is included so that you can add miscellaneous field types to a default view without having to create additional views.

**1.3.3.1.3 All view** This view displays all your views in succession.

### 1.3.3.2 About fields

Within each of these categories (views) are the data fields which contain specific information about your customer. You can customize these fields to meet your own needs. You have the option of expanding all fields and views (with the exception of the *General* data). You can give names to your field, define the field type, and assign default values to those fields. (These activities can be performed using the *Fields administration* command, which is discussed in detail in Section 2.3, "Working with fields in the customer database" on page 22).

**1.3.3.2.1 Field types** There are five default field types from which you can choose. Each can be assigned default values:

- *input*. This field type creates a text input field suitable for short text entries. You can enter a default value in the *Default* field.

**Figure 7 Input text field**

The screenshot shows a dialog box titled "Add field" with three input fields. The "Name" field contains the text "Input". The "Type" field is a dropdown menu with "input" selected. The "Default" field contains the text "Enter text here.".

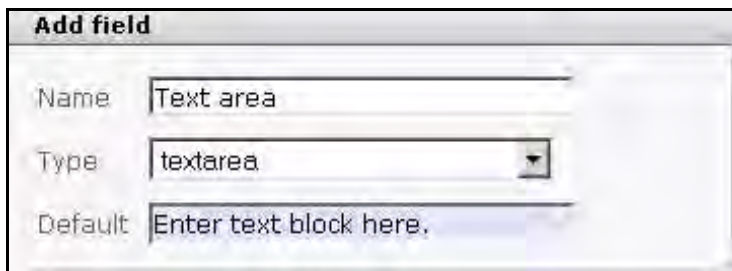
- *select*. This field type creates a select box. The default values that you enter in the *Default* field must be separated by a comma. Each of the comma-separated values will appear as an item in your select list.

**Figure 8 select field type**

The screenshot shows a dialog box titled "Add field" with three input fields. The "Name" field contains the text "Select box". The "Type" field is a dropdown menu with "select" selected. The "Default" field contains the text "1,2,3,4".

- *textarea*. This field type creates a box in which text can be written.

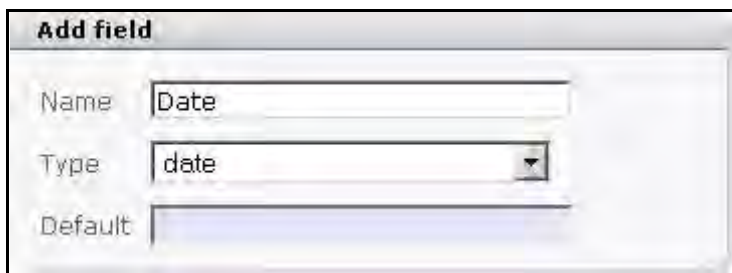
**Figure 9 text area field type**



The screenshot shows a dialog box titled "Add field" with three input fields. The "Name" field contains the text "Text area". The "Type" field is a dropdown menu with "textarea" selected. The "Default" field contains the text "Enter text block here,".

- *date*. This field type creates date and time select boxes.

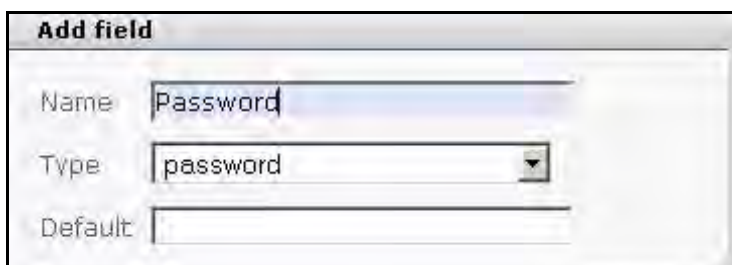
**Figure 10 Date field type**



The screenshot shows a dialog box titled "Add field" with three input fields. The "Name" field contains the text "Date". The "Type" field is a dropdown menu with "date" selected. The "Default" field is empty.

- *password*. This field type creates a text input box. For reasons of security, characters typed by a user in this field are masked.

**Figure 11 Password field type**



The screenshot shows a dialog box titled "Add field" with three input fields. The "Name" field contains the text "Password". The "Type" field is a dropdown menu with "password" selected. The "Default" field is empty.

## 2 Using the customer database

This chapter describes how to use the Customer Management and Customer Management PRO Modules to create and manage a customer database. This chapter describes how to modify the database to meet the needs of your business or organization by adding new fields and views to accommodate different types of customer information.

This chapter describes how to work with the customer database under the following sections:

- Section 2.1, "Creating a new customer using the Customer Management Module" on page 21
- Section 2.2, "Modifying customer data" on page 22
- Section 2.3, "Working with fields in the customer database" on page 22
- Section 2.4, "Working with customized views" on page 25

### 2.1 Creating a new customer using the Customer Management Module

Use the following procedure to create a new customer.

#### Procedure 1 Creating a new customer

##### *In the Customer Management Module main screen*

- 1 Click *Customer > New*.

*The system opens the General view, where you can enter basic data about your customer (see Figure 12).*

**Figure 12 New customer: General view**

Customer:		
General	Salutation	Contact
<b>General</b>		
Data	Username	Password
	Customer2	*****
	Forename	Surname
	Mary	Smith
	Member since	Last login
	2004-02-04 - 00:06	-
	Last access	

- 2 Enter all the customer data in the prescribed fields.
- 3 Save the data by clicking on the Save button at the bottom of the page.

*webEdition confirms that the customer data was saved. Click OK. An icon representing the newly created customer appears in the explorer menu. The customer can now log onto the home page using the login you have assigned.*

**Figure 13 New customer icon in the explorer menu**



**Note:** To find out how to create the login mask, go to our documentation page at <http://www.living-e.de>, and consult the publication titled *The webEdition User Guide*.

- 4 You have completed this procedure.

## 2.2 Modifying customer data

You can modify the data for a customer by double clicking the icon listed in the explorer menu that signifies your customer. Thereafter, you can toggle among the tabs on the main screen to add or access information about the customer.

## 2.3 Working with fields in the customer database

The Customer Management Module allows you to change fields using the *Fields administration* feature. The following sections describe procedures for working with fields.

### 2.3.1 Adding fields to the customer database

The following procedure shows you how to add new field names to the default customer management database so that you can customize it for your own needs.

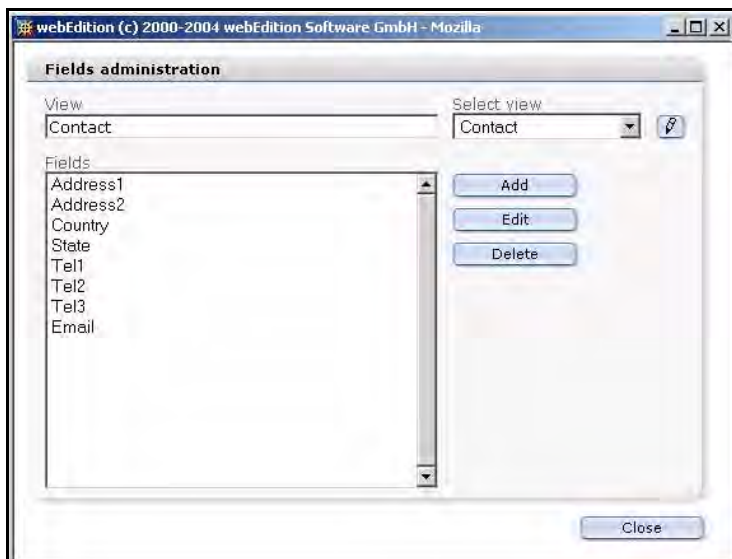
#### **ATTENTION**

Once you insert (or delete) field names, they will be accessible (or deleted) for all customers.

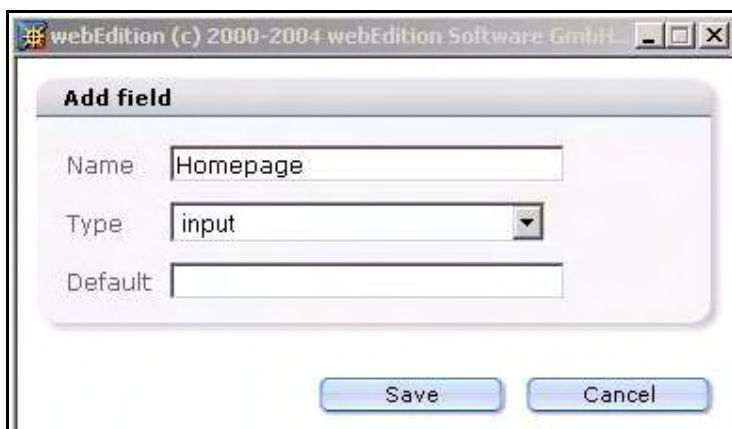
#### **Procedure 2 Adding field names to the default customer database**

##### ***In the Customer Management Module main screen***

- 1 Click *Customer > Administration > Fields administration*.  
*The Fields administration screen opens (see Figure 14).*

**Figure 14 Fields administration screen**

- 2 You must associate a field with an existing view. Use the *Select view* select box to choose a view. (If you wish to create a new view first, see Section 2.4, "Working with customized views" on page 25).
- 3 Click the *Add* button adjacent to the *Fields* area.  
*The Add field dialogue box appears.*

**Figure 15 Add field dialogue box**

- 4 Enter a field name, select a field type from the select box, and enter a default value. (For information about field types, see Section 1.3.3.2.1, "Field types" on page 19).
- 5 Click on the *Save* button.  
*The new field appears in the Fields list on the Fields administration screen.*

**Figure 16 New customer field**

6 You have completed this procedure.

### 2.3.2 Modifying fields in the customer database

#### Procedure 3 Changing the properties of a field

##### *In the Customer Management Module main screen*

1 Click *Customer > Administration > Fields administration*.

*The Fields administration screen opens (see Figure 14, "Fields administration screen" on page 23).*

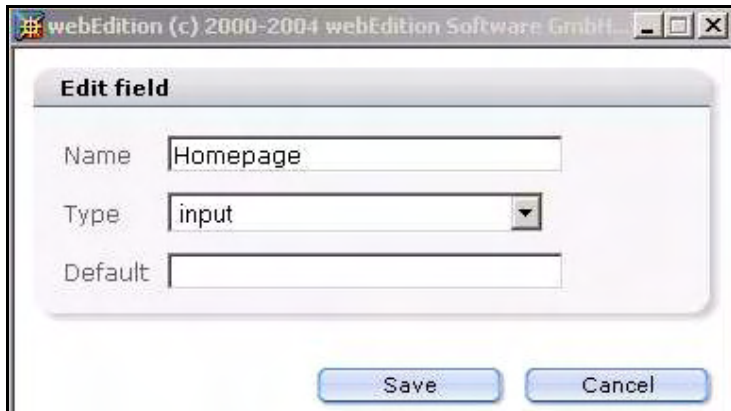
2 Use the *Select view* select box to choose the view which has the field you wish to change.

3 In the *Fields* area, highlight the name of the field you wish to change. See, for example, Figure 16, "New customer field" on page 23.

4 Click the *Edit* button adjacent to the *Fields* area.

*The Edit field dialogue box appears.*

**Figure 17** *Edit field* dialogue box



5 Change a field name, field type or default value.

6 Click on the *Save* button.

*The modified field appears in the Fields area on the Fields administration screen.*

**Figure 18** Edited customer field



7 You have completed this procedure.



### 2.3.3 Deleting a field

#### Procedure 4 Deleting the name of a view

##### *In the Customer Management Module main screen*

- 1 Click *Customer > Administration > Fields administration*.

*The Fields administration screen opens (see Figure 14, "Fields administration screen" on page 23).*

- 2 Use the *Select view* select box to choose the view which has the field you wish to change.
- 3 In the *Fields* area, highlight the name of the field you wish to delete.
- 4 Click the *Delete* button.

*webEdition asks you if you want to delete the chosen field.*

- 5 Click the *OK* button to delete the field(s).

*The system confirms the action. Click the OK button again.*

**Note:** *If you delete the last field in a selected view, you will also delete the view.*

- 6 Click on the *Close* button.
- 7 You have completed this procedure.

## 2.4 Working with customized views

The Customer Management Module allows you to manage field types arranged in views. Using the *Fields administration* feature, you can create new views and new fields for each view. The following views are predefined and cannot be changed or deleted: *General, Other, All*.

### 2.4.1 Creating a new view

#### Procedure 5 Creating a new view

##### *In the Customer Management Module main screen*

- 1 Click *Customer > Administration > Fields administration*.

*The Fields administration screen opens (see Figure 14, "Fields administration screen" on page 23).*

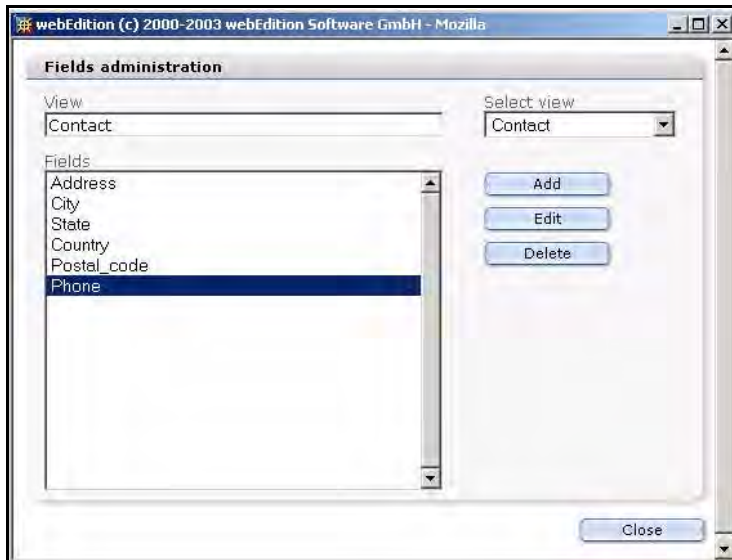
- 2 To create a new view, enter a name for the new view in the *View* field.
- 3 Click the *Add* button adjacent to the *Fields* area.

*The Add field dialogue box appears.*

- 4 Enter a field name, field type and default value and click *OK*.

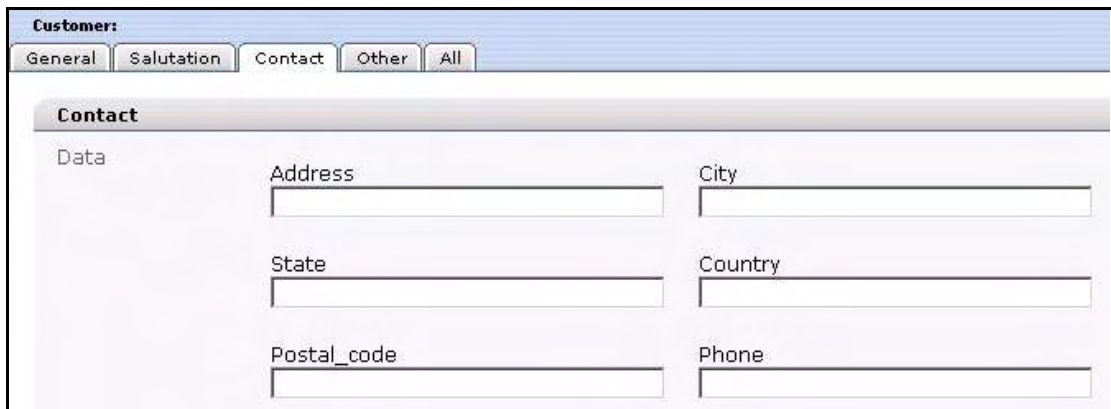
**Note:** You must create at least one field for your view.

*A new view has been created. The new view name appears in the View field and also in the Select view select box (see Figure 19).*

**Figure 19 Creating a new view**

- 5 Click on the *Close* button.

*A new tab for the view appears on the Customer Management main screen.*

**Figure 20 New customer tab and view**

- 6 You have completed this procedure.

## 2.4.2 Editing a view

### Procedure 6 Editing the name of a view

#### *In the Customer Management Module main screen*

- 1 Click *Customer > Administration > Fields administration*.

*The Fields administration screen opens (see Figure 14, "Fields administration screen" on page 23).*

- 2 Click the pencil icon adjacent to the *Select view* select box.

*The Edit view dialogue box appears.*

**Figure 21** *Edit view* dialogue box

- 3 Enter a new name in the *Name* field.
- 4 Click the *Save* button.  
*A new name for the view appears in the View field and in the Select view select box.*

**Figure 22** *Edited customer view tab*

- 5 Click on the *Close* button.  
*The newly-named tab for the view appears on the Customer Management main screen.*

**Figure 23** *Renamed customer view tab*

- 6 You have completed this procedure.

### 2.4.3 Deleting a view

#### Procedure 7 Deleting a view

##### *In the Customer Management Module main screen*

- 1 Click *Customer > Administration > Fields administration*.  
*The Fields administration screen opens (see Figure 14, "Fields administration screen" on page 23).*
- 2 Highlight each of the fields in the *Fields* area.
- 3 Click the *Delete* button.  
*webEdition asks you if you want to delete the chosen field.*
- 4 Click the *OK* button to delete the field(s).  
*The system confirms the action. Click the OK button again.*
- 5 Click on the *Close* button.

*Once you have removed all fields associate with the view, the view and its tab disappear from the Customer Management main screen.*

- 6 You have completed this procedure.

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## 3 Designing templates for the Customer Management Modules

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In order to make your website accessible to registered users (or customers as we refer to them), you must insert the appropriate we:tags into your templates. This chapter shows you how to use webEdition tags (we:tags) to do the following actions:

- create registration forms so that external users can register as "customers"
- create login areas for your customers on your web site
- make information accessible only to logged-in users or customers.

The we:tags discussed in this chapter pertain to both versions of the Customer Management Module, hence this chapter is intended for users of both the Customer Management and the Customer Management PRO modules.

Those using this chapter are expected to have a knowledge of template development and we:tags. Moreover, webEdition users must have either administrative privileges, or have the permissions to create and deploy templates in order to manage customer access.

### 3.1 Creating registration forms

You use a registration form to create registered users (or customers) on your web site. By registering visitors to your web site, you can make information available to them that unregistered users cannot see or access.

To create a registration form, you use the `<we:sessionField/>` tag. This we:tag works closely with the Customer Management Module. The `<we:sessionField>` tag draws fields from the Customer Management Module and places them on a Web page.

For example, in your Customer database, if you have the field "Contact\_Email", which is designed for the E-mail addresses of your customers, you can display this field value with the `<we:sessionField tag>` by adding the following variables: `<we:sessionField name="Contact_Email" type="textinput"/>`. This tag will produce one input box for the customer E-mail on the page. All field names that are in the Customer Management database can be used as variables with the `<we:sessionField/>` tag. These variables can be initially entered, changed or deleted by using a form containing the `<we:sessionField.../>` tag with the corresponding variable(s).

#### **Procedure 8 Creating a registration form**

##### ***In the Templates view of the webEdition main screen***

- 1 If you are not already in the *Templates* view, go there by clicking on the *Templates* tab.

- 2 Open a new template by selecting *File > New > Template*.
- 3 Go to the *Properties* view by clicking on the *Properties* tab (see Figure 24).

**Figure 24** The *Properties* view

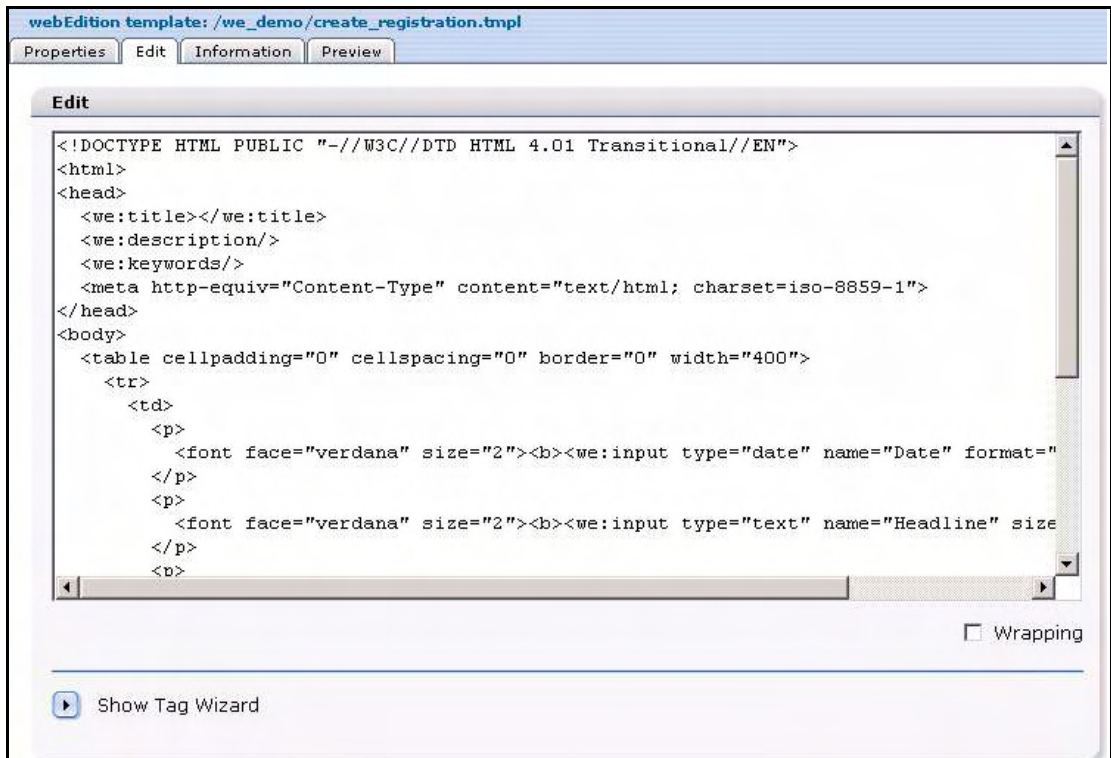


- 4 In the *Path* area, enter a name for the file in the *Filename* field, and select a directory.
- 5 Click *Save*.  
*Your new template appears in the explorer menu.*

**Note:** *Your template will have a .tpl file extension.*

- 6 Click the *Edit* tab to open the *Templates Edit* view (see Figure 25).

**Figure 25** Template *Edit* view



- 7 Click on the *Show Tag Wizard* arrow. In the *Tag Wizard* area, use the scroll bar to find *sessionField* tag (see Figure 26). Click the *sessionField* tag to highlight it.

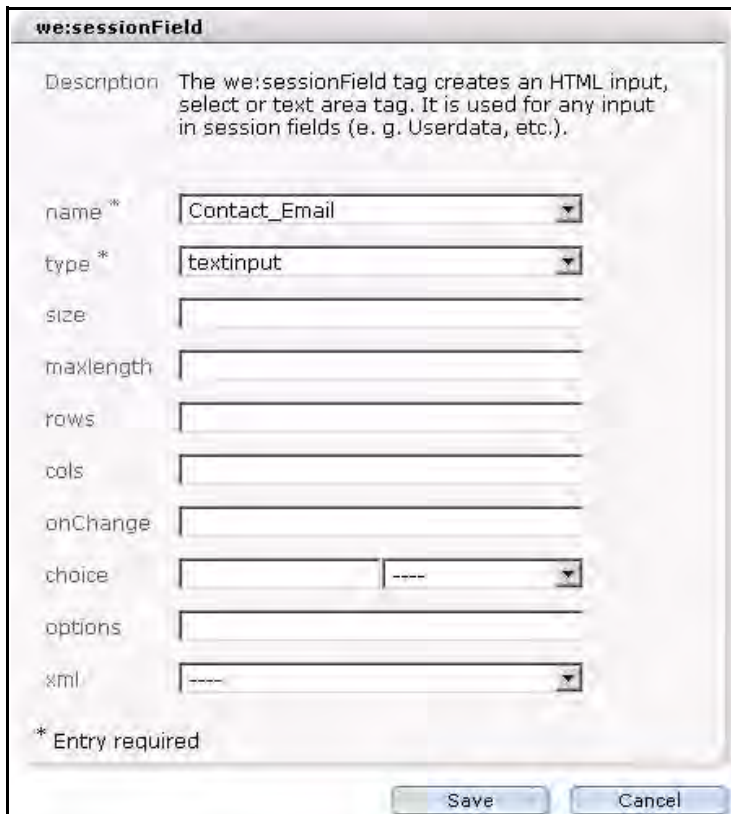
**Figure 26 we:Tag Wizard: sessionField**



- 8 Click the arrow to the right of the select box to open a dialogue box for the <we:sessionField> tag.

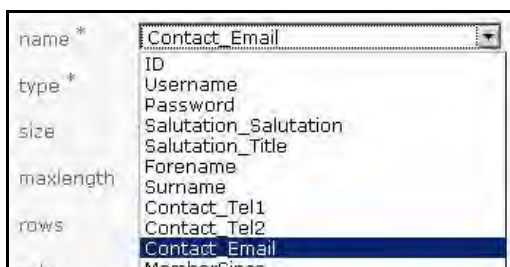
A "we:sessionField" dialogue box opens (see Figure 27).

**Figure 27 we:sessionField dialogue box**



- 9 Choose a value from the *name* attribute select box. You will see all the default field names (and any that you have added in the Customer Management Module) that are available for your form (see Figure 28).

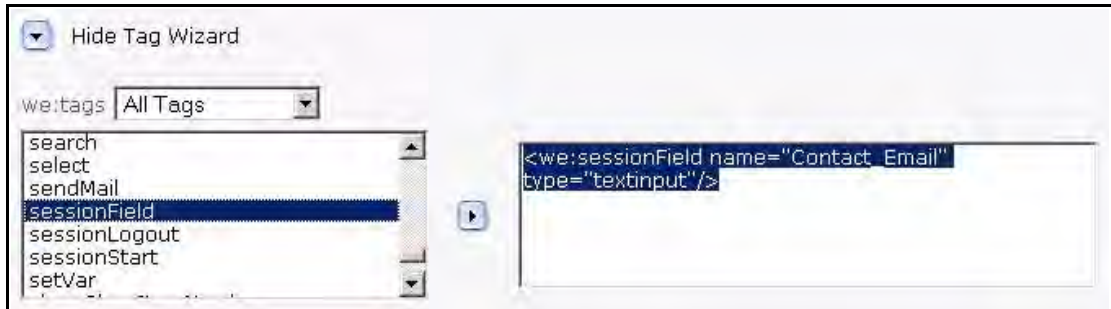
**Figure 28 Available field names for your form**



- 10 Choose the type of input field from the *type* select box.
- 11 Click **Save**.

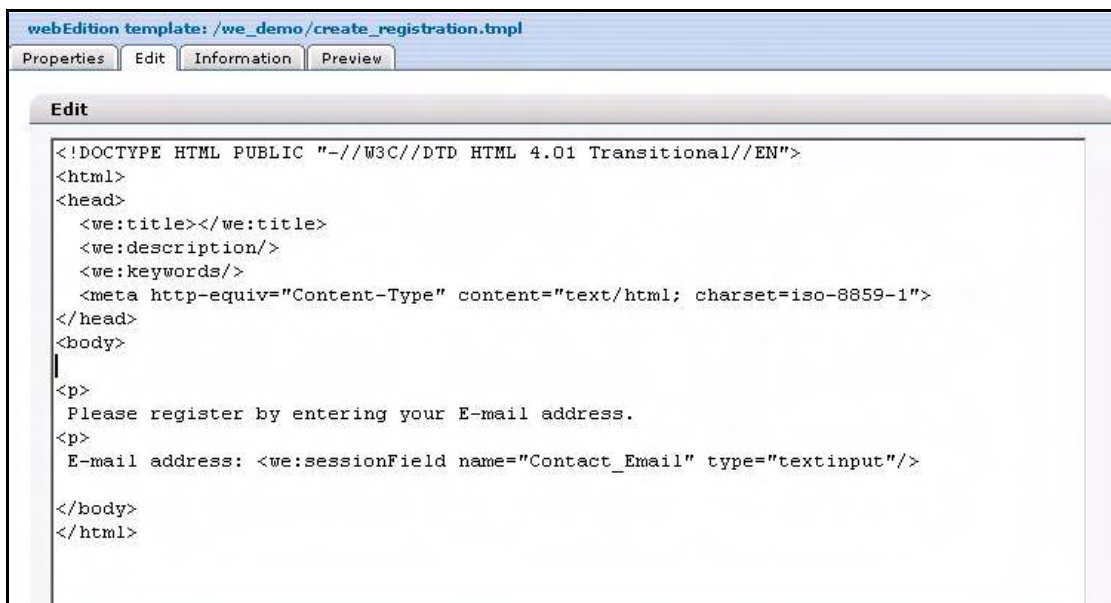
The dialogue box closes and you are returned to the *Edit* view. The `<we:session>` tag with your newly defined attribute appears in the right-hand portion of the *Tag Wizard* (see Figure 29).

**Figure 29** The `sessionField` tag with defined attributes



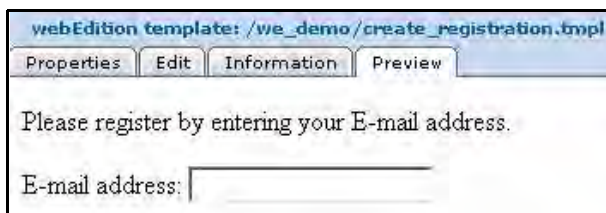
- 12 Using your mouse, cut the newly defined tag from the right side of the *Tag Wizard* and paste it into your template. (You can also edit and add any accompanying text to the template at this time.)

**Figure 30** The `sessionField` tag used in a template



- 13 Click **Save**.
- 14 Click on the *Preview* tab to view the changes to your template.

**Figure 31** Preview of



- 15 You have completed this procedure.



## 3.2 Creating a form to register a new customer

To allow visitors to your site to register as a new customer, you need to create a link on your Web site that points to a form where all required fields (or all fields listed in the customer management database) are called up with the `<we:sessionField/>` tag. Once the visitor has entered all the required information, the form can be saved so that all data will be written to the database. Thereafter the visitor becomes a “customer” and can log in with a user name and password. From this point on, you can view and change the data associated with this customer using the Customer Management Module.

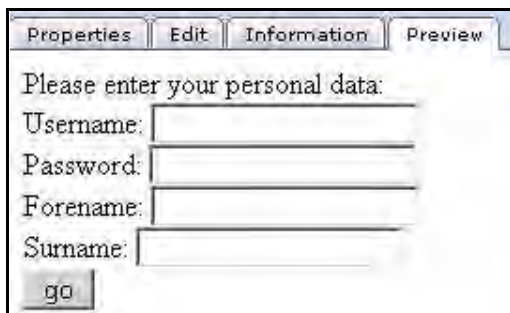
### 3.2.1 Designing registration forms: code example

You can design registration forms with the following we:tags:

```
<we:sessionStart/>
<we:saveRegisteredUser/>
<html>
<head>
  <we:title>webEdition Default-template</we:title>
  <we:description>Form</we:description>
  <we:keywords>webEdition, cms, </we:keywords>
</head>
<body>
Please enter your personal data:<br>
<we:form id="self">
  Username: <we:sessionField name="Username" type="textinput"/><br>
  Password: <we:sessionField name="Password" type="password"/><br>
  Forename: <we:sessionField name="Forename" type="textinput"/><br>
  Surname: <we:sessionField name="Surname" type="textinput"/><br>
  <we:sessionField name="ID" type="hidden"/>
  <input type="submit" value="go">
</we:form>
</body>
</html>
```

Figure 32 shows the output from the code noted above.

**Figure 32 Example of form output**



### 3.2.2 Explanation of code

It is essential that forms in which changes are to be made to the data always contain the following type of hidden field: `<we:sessionField Last name="ID" type="hidden">` This field ensures that the session created by the `<we:sessionStart/>` tag is also transmitted and the customer is uniquely identified. The data cannot be assigned without this session. The following page must begin with:

`<we:sessionStart/><we:saveRegisteredUser/>`. Aside from these tag conventions, you have complete freedom with the layout of your form.

### 3.3 Creating a login area for your customers

The webEdition Customer Management Module gives you the capability to create a section on your Web site where your customers can log in to your site. By doing so, you can make whole pages or entire sections of your site accessible only to registered users.

The following sub-sections describe how to

- generate a login section where a user can log in
- make information accessible only to logged-in users

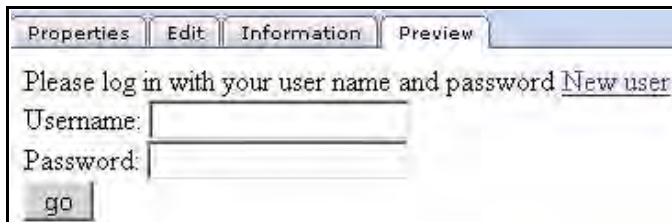
#### 3.3.1 Generating a login section: code example

The following code is an example of how to design a template to allow customers to log in to your Web site:

```
<we:sessionStart/>
Please log in with your user name and password
<we:a id="self">New user</we:a>
<br>
<we:form id="self">
Username: <we:sessionField name="Username" type="textinput" /><br>
Password: <we:sessionField name="Password" type="password" /><br>
<input type="submit" value="go">
</we:form>
```

Figure 33 shows the output from the code noted above.

**Figure 33 Example of login form**



#### 3.3.2 Making information accessible only to logged-in users: code example

You can make whole pages or entire sections accessible only to registered users. You can implement this function by using the `<we:ifRegisteredUser/>` tag:

```
<we:sessionStart/>
<we:ifRegisteredUser>
Hello: <we:sessionField Last name="user name" type="print" /><br>
Logged in
</we:ifRegisteredUser>
```

##### 3.3.2.1 Explanation of code

For all functions that you wish to control from the Customer Management Module, you must always include the `<we:sessionStart/>` tag. This tag must appear at the very beginning of every page that has anything to do with the Customer Management Module, before any other (html) tag (e.g. `<html>` or `<body>`).

The code queries whether a user is registered. If so, the user will be greeted with "Hello, user name". User name is a placeholder for the visitor's actual user name as entered in the system.

You can decide what is written between the `<we:ifRegisteredUser>` and `</we:ifRegisteredUser>` tags. It can be individual information, features, links to other pages, navigation or any other functions.

### **3.4 Creating a form to allow a customer to modify their existing registration data**

In order to allow a customer to modify their existing registration data, you need to create a form that is identical to the one described in Section 3.2, "Creating a form to register a new customer" on page 33, but which is located in an area of your site that can only be accessed by registered customers. Because this user is already registered, the registration information will always be called up via the `<we:sessionStart/>` tag. When the customer accesses the form, the existing data in the database will automatically be written to the form fields. Thereafter the customer can modify and save his/her registration information.



---

## 4 The Customer Management PRO Module

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The webEdition Customer Management PRO Module builds upon the standard Customer Management Module. The information in this book pertains to both of these webEdition applications (thus users of the PRO module must read the previous chapters of this manual for basic information about the features in the standard Customer Management Module). This chapter provides supplementary material describing the particular features of the Customer Management PRO Module.

### 4.1 What is the webEdition Customer Management PRO Module?

The Customer Management PRO Module allows you to perform all of the same functions as the Customer Management Module. In addition to the basic functions, the PRO module gives you enhanced abilities to manage your database by allowing you to:

- Sort your customers
- Search for customers

### 4.2 General information and navigation

After installation, you will find a new menu item in the webEdition main screen called *Modules*, which contains all the modules in your installation of webEdition (see Figure 34).

**Figure 34 Modules drop-down menu**

Modules	Help
Banner/Statistics Module...	
Customer Management...	
Database/Object Module...	
Newsletter Module...	
Scheduler...	
Shop...	
Task/Messaging Module...	
User Management...	
Workflow Module...	
Editor Plug-in...	
Module Installation...	

#### 4.2.1 Customer Management PRO explorer menu

Like the standard Customer Management Module, the explorer menu in the PRO Module displays a list of icons representing the customer data you have in your customer database. There are two additional features visible in the PRO Module explorer menu (see Figure 35):



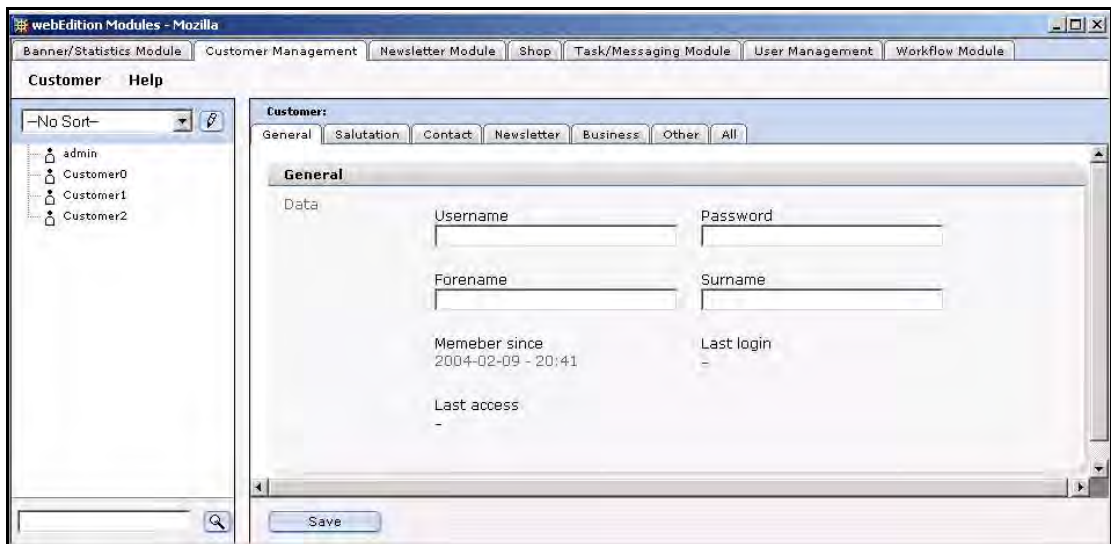
**Figure 35 Customer Management PRO explorer menu**

- **Sort feature.** At the top of the explorer menu is the sort feature. The sort feature has a select box where you can choose from your defined sort profiles, and a pencil icon where you can create and/or edit the your parameters for your existing sort profiles.
- **Search feature.** At the bottom of the explorer menu is the search feature which consists of a search field, and a search icon.

#### 4.2.2 The *Customer* drop-down menu

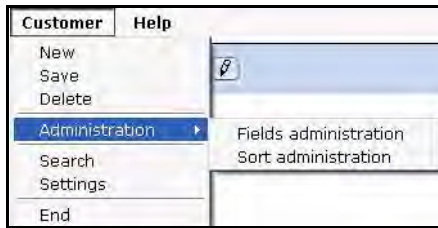
Click on *Modules > Customer management* to open the Customer Management Module main screen (see Figure 36).

**Figure 36 Customer Management main screen**



In addition to those items described in Section 1.3.2.1, "The Customer drop-down menu" on page 17, The *Customer* menu in the PRO Module has the following items (see Figure 37):

- *Administration.* The PRO Module offers two administrative features.
  - *Fields administration.*
  - *Sort administration.*
- *Search.* Use this item to access the module's search engine
- *Settings.* This item allows you to set your default sort view and your Start year for date sorting.

**Figure 37 Customer drop-down menu in the PRO Module**

### 4.2.3 Using the Search function

The Customer Management PRO Module offers advanced search capabilities, allowing you to find and manage the data for your customers.

You can access the search feature in the following ways:

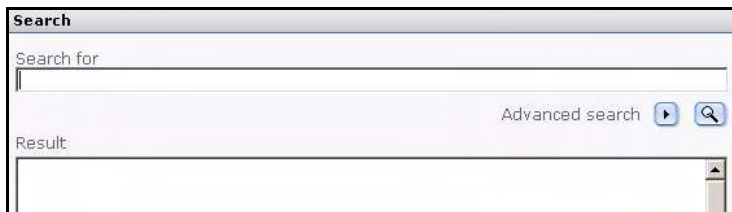
- Click on *Customer > Search*
- Use the simple search option at the bottom of the explorer menu.

#### Procedure 9 Using the search feature

##### *In the Customer Management Module main screen*

- 1 Click on *Customer > Search* or enter a name for a customer in the search field at the bottom of the explorer menu and click the search icon (represented by a magnifying glass).

*The Search window opens (see Figure 38).*

**Figure 38 Search window**

- 2 Two types of searches are possible. Do one of the following steps:

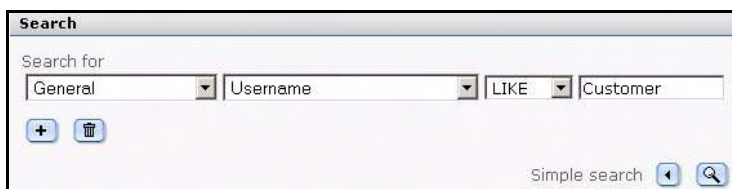
- a *Simple search.*

To perform a simple search, enter the text string in the *Search for* field.

- b *Advanced search.*

- i Click the right arrow icon beside *Advanced search*.

*The Advanced search fields appear as seen in Figure 39.*

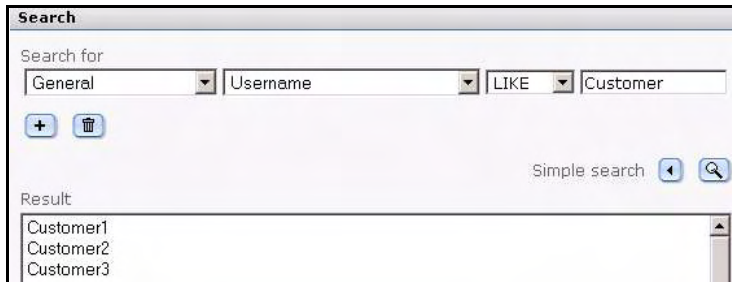
**Figure 39 Advanced search**

- ii Select your search parameters from the select boxes.

- In the first select box, choose one of the views that you have defined.
- In the second select box, choose from the fields that you have defined within the view.

- In the third select box, choose a search operator.
  - Enter a parameter in the text field.
- 3 Click the search icon (magnifying glass).
- If the system finds a match for your search, the item will appear in the Result box (see Figure 40).*

**Figure 40 The Search Result box**



- 4 To access or edit the data for an item found in the *Search Result* box, double click on the item.
- webEdition opens the editing area for the customer, where you can modify the data in the General, Other and All views, and also those additional views (such as Salutation or Contact) that you have created.*
- 5 You have completed this procedure.

#### 4.2.4 Using the Sort function

The Customer Management PRO Module offers advanced sorting capabilities, allowing you to create and save multiple sort profiles so that you can manage the data for your customers.

You access the sort feature by selecting an item from the sort select box at the top of the explorer menu. You can edit your sort parameters by clicking the edit (pencil) icon adjacent to the sort select box, or by clicking *Customer > Administration > Sort administration*.

**Note:** The first time you log in to the system, there are no sort parameters defined. The select box has *—No Sort—*.

#### Procedure 10 Using the sort feature

##### *In the Customer Management Module main screen*

- 1 Click *Customer > Administration > Sort administration*.
- The Sort administration screen opens. The first time that you use this feature, the system displays a plus icon.*

**Figure 41 Sort administration screen**



- 2 Click on the plus (+) icon to activate *Insert new group*.
- The Sort area opens (see Figure 42).*



**Figure 42 Sort area**

sort0

Name

View	Field	Function	Order

+ (plus icon)

🗑️ (trash icon)

+ (plus icon) Insert new group

Save Cancel

- 3 Type a name to identify your sort group in the *Name* field.
- 4 Click the plus (+) icon to add your sort parameters. Choose the sort parameters in accordance with the way you wish to arrange and access your customer data. There are four areas, each is represented by a select box. The views, fields and functions that are available are determined by the views and fields that you have defined for your Customer Management database (see Section 2.4.1, "Creating a new view" on page 25).
  - a *View*. Sort according to view.
  - b *Field*. The available fields are determined by the view you have chosen.
  - c *Function*. The available functions vary depending on the field type that characterises the field you have chosen. For example text, can be sorted by alphabetical order; dates by day, month, year (etc.).
  - d *Order*. Use this command to choose to display your sort results in ascending (*ASC*) and descending (*DESC*) order.

**Figure 43 Sort parameters selected**

sort1

Name

View	Field	Function	Order
General	Username	ALPH1	DESC

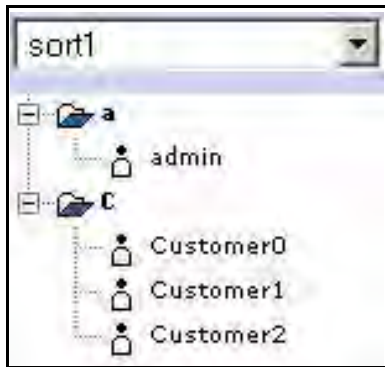
🗑️ (trash icon) + (plus icon)

🗑️ (trash icon)

+ (plus icon)

- 5 Click **Save**.  
*The system shows you a confirmation message.*
- 6 Click **OK**.  
*The sort group you have created appears in the sort select box in the explorer menu.*
- 7 Click on your newly created sort group.  
*Your customers appear in folders that conform to the parameters you have set.*

**Figure 44 New sort group**



8 You have completed this procedure.

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