ERM User Manual

01 Main Menu Bar Items of the ERM

The **ERM** is an **Electronic Customer Relations Management and eCommerce Bookings Program** that has been designed by Iconic's Software and Web Development Department workers. The ERM contains almost all the data, details, history, bookings, orders, purchases emails and more information that is owned, managed and priority of the COMPANY. You can find the ERM at https://erm.iconicperformances.com.au

In the ERM you will find many different parts. Based on your user account permissions you many not have access to all menu options, buttons, fields or tabs. If you require permission to one of these and do not have permission you need to contact your team supervisor for approval.

In the ERM's Main Menu Bar it includes the following menu items, buttons, fields and tabs:
Most of the fields found in the pages of each page you open when selecting a menu are self-explanatory, however if you are unsure always ask an experienced Iconic Worker or your department supervisor.

1. The Main ERM Menu bar. This menu item has additional functions with specific menus.
    1. The **Customer** main menu contains specific functions relating to the customer. These are:

        1. The **Add New Customer** menu = allows you to add a new customer and new company to the ERM Database. Click here for more information
        2. The **Search/Lookup Customer** menu = allows you to search for a customer or company account. Click here for more information.
        3. The **View Customer List** menu = allows you to view the entire list of customers and company's. Click here for more information.
        4. The **Schedule Activity** menu = allows you to schedule an activity/task for a customer and Iconic Worker. Click here for more information.
        5. The **Merge Duplicate Acc** menu = allows you to merge customer accounts together especially where duplicate accounts have been made. Click here for more information.
        6. The **Customer Groups** menu = allows you to create new groups for customers. Groups are used to add customers to specific things. For example a group could be VIP Customers or a specific State or Country or Regular Customers. There are many possible groups that are created and if a customer is part of the group it would be displayed here. Click here for more information.
        7. The **Import Customers** menu = allows you to import multiple new customer accounts into the ERM database. Click here for more information.
        8. The **Export Customers** menu = allows you to export Iconic's current customer accounts from the ERM database. Click here for more information.

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2. The **Opportunties** main menu contains specific functions relating to opportunities the company has. Opportunities are possible bookings, product purchases or contracts. The additional menus here are:

    1. The **View Opportunity List** menu = allows you to view the opportunities the company has. Click here for more information.

    2. The **Manage Product List** menu = allows you to view/add/edit all the company products that can be purchased, booked or ordered by customers. Click here for more information.

    3. The **Manage Process List** menu = allows you to add/edit the processes relating to the opportunities the company has. Click here for more information.

    4. The **Export Opportunity List** menu = allows you to export all of Iconic's opportunities with customer accounts. Click here for more information.

3. The **Orders** main menu contains specific functions relating to all current and past purchases, booking and orders, notes, payments and statuses. The additional menus here are:

    1. The **View Orders** menu = allows you to view all current and past purchases, booking and orders including order notes, payments and statuses. Click here for more information.

    2. The **Search/Lookup an Order** menu = allows you to search for specific current and past purchases, booking and orders including order notes, payments and statuses. Click here for more information.

    3. The **Export Order** menu = allows you to export all or specific current and past purchases, booking and orders including order notes, payments and statuses. Click here for more information.

    4. The **View Shipments** menu = allows you to view all shipments created from current and past purchases, bookings and orders. To view a shipment and its details click the plus icon next to a shipment to see its complete details. Click here for more information.

    5. The **View Abandoned Orders** menu = allows you to view all abandoned orders, attempted purchases or bookings made on the company's Customer eCommerce booking website. When a customer uses the online eCommerce to make a purchase, booking or order, if they have not completed it, it is logged on the system in the event the customer calls later for assistance or wishes to complete an incompleted or abandoned purchased, order or

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booking. Click here for more information.

4. The **Products** main menu contains specific functions relating to all active and inactive products that the COMPANY manages, produces or owns and is available to customers. The additional menus here are:

    1. The **Product Availability** menu = allows you to view all available and current products; the available dates and times for each product; the prices; specific staff information about the product and other details. Click here for more information.

    2. The **View/Manage Product List** menu = allows you to view/add/edit all the company products that are produced, managed or are owned by the COMPANY, that can be purchased, booked or ordered by customers. Click here for more information.

    3. The **Add Product** menu = allows you to add a new company product that will be produced, managed or owned by the COMPANY, which can be purchased, booked or ordered by customers. Click here for more information.

    4. The **Product Categories** menu = allows you to view/add/edit Categories that products are placed in. Categories are used to allow products to be displayed in specific areas that have similar attributes. For Example, Film or Stage 1 Shows or Theatre In Education Shows etc. Click here for more information.

    5. The **Product Options** menu = allows you to view/add/edit Product options (such as quantity, time-slots, packages or different skus such as color, size, style) and assign them to products as part of an option set. Click here for more information.

    6. The **Search/Lookup Products** menu = allows you to search for specific products using the advanced search options. Click here for more information.

    7. The **Import Products** menu = allows you to import products to the ERM database from a CSV file on your computer or server. Click here for more information.

    8. The **Export Products** menu = allows you to export products from the ERM database to a CSV file to your computer or server. Click here for more information.

    9. The **View Product Reviews** menu = allows you to view/reply to all product reviews that have been received by customers who have been to or purchased a product and who have completed the COMPANY's feedback/review form. Click here for more information.

    10. The **View Brands** menu = allows you to view/add/edit all Brands which can

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be associated with products, allowing the customers to shop by browsing their favourite brands. Click here for more information.

5. The **View** main menu contains specific functions relating to viewing specific lists that as an Iconic worker would help you with checking emails, activities/tasks, orders, customer accounts or opportunities. The additional menus here are:

    1. The **Dashboard** menu = allows you to view your work and group email inbox, your daily activities, company news and articles and other information of the company. Click here for more information.

    2. The **View Activity / Task List** menu = allows you to view all your work tasks and/or activities specific to a customer account. Click here for more information.

    3. The **Search / Lookup Customer - View Customer List** menu = allows you to search for specific customers or companies based their name, phone, email address, country or locations and other search fields. Click here for more information.

    4. The **Opportunity List** menu = allows you View, Print, Export, Create a New Opportunity, Manage Product List or Manage Process List. Click here for more information.

    5. The **View Orders** menu = allows you to view all current and past purchases, booking and orders including order notes, payments and statuses. Click here for more information.

6. The **Write** main menu contains specific functions relating to creating email templates, creating documents and send emails. The additional menus here are:

    1. The **Create Template / E-mail Template** menu = allows you to create an email template using the template designer with variables. These templates are then allowed to used by specific users. Click here for more information.

    2. The **Edit Templates** menu = allows you to edit an email template with the additional feature of the template designer with variables. Click here for more information.

    3. The **Write Email** menu = allows you to write an email and send it to a customer. It allows you to select a template as well. This menu item is the same as Sending Emails Button on the Customer Account Detail Page. Click here for more information.

7. The **Quick Toolbar** main menu contains specific functions that are only available when you are on the Customer Details Account Page. The additional menus and

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functions here are:

1. The **Schedule an Activity for a Customer** menu = allows you to schedule an activity for a customer. An Activity/Task is something you have to do for a customer regardless of what that is. It could to call them; followup on an order, send a program, send an email, send an SMS, visit them, make a document. It is basically any work/task you have to do for a customer at any given date or time. Everything you do for a customer needs to have an activity if it is not going to be done immediately or a a New History of what you have done. Click here for more information.

2. The **Activity Series** menu = allows you to set and schedule a series of automated activities specific to a work/task. For example if the customer cancels or complains. The series and sequence of activities is pre-set and created by a Supervisor. Click here for more information.

3. The **New Opportunity** menu = allows you to create a new opportunity for the specific customer. Click here for more information.

4. The **Attach Email** menu = allows you to attach an email received by a customer and apply it to the customer's account history. This is used if the email cannot be attached normally from your Dashboard inboxes. Click here for more information.

5. The **Print Info** menu = allows you to print the customer account details pages with the option to include, orders and history. Click here for more information.

6. The **Delete Customer** menu = allows you to make the customer account inactive. No customer account is deleted ever. Accounts are only inactive and hidden. Click here for more information.

7. The **Merge Duplicate Acc** menu = allows you to merge duplicate customer accounts together as one account. Click here for more information.

8. The **Web Content** main menu contains specific functions relating to additional web pages of the company and new articles for customers on the company's websites. The additional menus here are:

1. The **View Web Pages** menu = allows you to view/edit supplementary Web pages which are used to display content that doesn't change often. For example an 'About Us' or a 'Contact Us' page. Click here for more information.

2. The **Create a Web Page** menu = allows you to add supplementary Web pages which are used to display content that doesn't change often. For example, an 'About Us' or a 'Contact Us' page. This function adds

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supplementary web pages and are not the main webpages of the company's website. Click here for more information.

3. The **View News Items** menu = allows you to view/edit News items which are displayed on the company website and are a great way to tell your customers about new products or special promotions. Click here for more information.

4. The **Create a News Item** menu = allows you to create and add News items which are displayed on the company website and are a great way to tell your customers about new products or special promotions. Click here for more information.

9. The **Marketing** main menu contains specific functions relating to all aspects of marketing the company, the company products and potential SEO as well as coupons and gift certificates available to customers. The additional menus here are:

    1. The **Sell on Google** menu = allows you to add your Google Client ID for adwords to apply all the statistics. Click here for more information.

    2. The **Google AdWords Generator** menu = allows you to add create Adwords for you Google Client ID. While this is now able to be done direct on the company's Google Adwords Account, the function is obsolete.

    3. The **Google Shopping Feed** menu = is not functional and obsolete.

    4. The **Google XML Sitemap** menu = is not functional and obsolete.

    5. The **View Banners** menu = allows you to view/add/edit/delete Banners to add promotional links and images throughout the company eCommerce store to advertise special deals and discounts for customers. Click here for more information.

    6. The **Gift Certificates** menu = allows you to view/edit/delete Gift Certificates for customers. Click here for more information.

    7. The **View Abandoned Orders** menu = allows you to view all abandoned orders, attempted purchases or bookings made on the company's Customer eCommerce booking website. When a customer uses the online eCommerce to make a purchase, booking or order, if they have not completed it, it is logged on the system in the event the customer calls later for assistance or wishes to complete an incompleted or abandoned purchased, order or booking. Click here for more information.

10. The **Email Marketer** main menu contains specific functions relating to all aspects of email marketing the company creates and uses to email customers of the company newsletters, promotions, new products and other email marketing features. The additional menus here are:

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1. The **Contact Lists** menu = contains specific functions relating to creating email-marketing contact lists. Contact Lists are lists of customers with specific filters for specific email marketing campaigns. There are additional menus in this menu:

    1. The **View Contact Lists** menu = allows you to view/edit the contact lists for specific email campaigns. Click here for more information.

    2. The **Create Contact List** menu = allows you to create and add contact lists for specific email campaigns. Click here for more information.

2. The **Contact Lists** menu = contains specific functions relating to all customer contact email details that can be used when creating email-marketing contact lists. There are additional menus in this menu:

    1. The **View All Contacts** menu = allows you view all the customer contact email details. Click here for more information.

    2. The **Search Contacts** menu = allows you search for customers contact details for email campaigns using filters. This is not used to search for customer account details when a customer calls. Click here for more information.

    3. The **Email Suppression List** menu = allows you view emails or domains that have been suppressed from the company's email marketing campaigns. Click here for more information.

    4. The **Suppress an Email or Domain** menu = allows you add emails or domains that are to be suppressed from the company's email marketing campaigns. Click here for more information.

3. The **Email Campaigns** menu = contains specific functions relating to the creation of all the company's email marketing campaigns. There are additional menus in this menu:

    1. The **View Email Campaigns** menu = allows you view/send/edit/delete all email marketing campaigns, the dates they were created, sent and who created the campaign. Click here for more information.

    2. The **Create an Email Campaign** menu = allows you create an email marketing campaign using the company's template designer with variables (if required). Click here for more information.

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3. The **Send an Email Campaign** menu = allows you send a created and saved email marketing campaign to the specific contact list. Click here for more information.

4. The **Scheduled Email Campaigns** menu = allows you view the Email Campaigns that have been scheduled. This page displays email-marketing campaign statistics of each email campaign, including the status of the email campaign. Click here for more information.

4. The **Auto Responders** menu = contains specific functions relating to emails that are automatically sent to customer emails when an email is received by the customer replying to an email marketing campaign. There are additional menus in this menu:

    1. The **View Auto Responders** menu = allows you view the auto responders that have been created to for specific contact lists for email marketing campaigns. Click here for more information.

    2. The **Create an Auto Responder** menu = allows you create and add an auto responder for specific contact lists for email marketing campaigns. Click here for more information.

    3. The **View Triggers** menu = allows you view specific triggers that would activate and send an auto responder emails for specific contact lists for email marketing campaigns. Click here for more information.

    4. The **Create Triggers** menu = allows you add specific triggers (for example date or when an email campaign is opened that would activate and send an auto responder emails for specific contact lists for email marketing campaigns. Click here for more information.

5. The **Templates** menu = contains specific functions relating to template emails that can be used for specific email marketing campaign. There are additional menus in this menu:

    1. The **Create Template / E-mail Template** menu = allows you create an email template that can be used over and over again for email marketing campaign using the company's template designer with variables (if required). Click here for more information.

    2. The **Edit Template** menu = allows you edit email templates that have been created and can be used over and over again for email marketing campaign using the company's template designer with variables (if required). Click here for more information.

11. The **Live Chat** main menu contains specific functions relating to all aspects of the

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online Live Chat Customer Support and instant-live (real-time) conversations customers can use to speak with a real-live Iconic Worker. The additional menus here are:

1. The **New Live Chat** menu = opens the internal Iconic Worker Live Chat messaging system when a customer activates or requests to speak with an Iconic Worker using the online Live Chat feature. Click here for more information.

2. The **Chat History** menu = opens the all past Chat Histories that was done with the online Live Chat messaging system. Click here for more information.

12. The **Reports/Analytics** main menu contains specific functions relating to all reports that can be used for meetings, statistics and other generated reports. The additional menus here are:

    1. The **Store Overview** menu = is a report of the general overview of the eCommerce site. A 'Date Range' option to view an overview for a different period is available. Click here for more information.

    2. The **Order Statistics** menu = is a report of the company's orders, purchases and bookings. A 'Date Range' option to view an overview for a different period is available. Click here for more information.

    3. The **Abandoned Cart** menu = allows you to view all abandoned orders, attempted purchases or bookings made on the company's Customer eCommerce booking website. When a customer uses the online eCommerce to make a purchase, booking or order, if they have not completed it, it is logged on the system in the event the customer calls later for assistance or wishes to complete an incompleted or abandoned purchased, order or booking. Click here for more information.

    4. The **Product** menu = is a report of the company's Product Overview; Popular Product; and Inventory Reports. The report is a summary of all products focusing on the total number of units sold for the selected date range; a summary of all products focusing on how many times each product has been viewed and a summary of inventory levels for all products. A 'Date Range' option to view an overview for a different period is available. Click here for more information.

    5. The **Customer** menu = is a report of the company's customers, their purchases, length of time as a customer and other details. A 'Date Range' option to view an overview for a different period is available. Click here for more information.

    6. The **Email Marketer** menu = contains specific reports relating to email-marketing campaigns, contact lists and contacts. There are additional menus in this menu:

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1. The **Email Campaign Statistics** menu = allows you view the Email Campaigns that have been scheduled. This page displays email-marketing campaign statistics of each email campaign, including the status of the email campaign. Click here for more information.

2. The **Contact List Statistics** menu = is a report on the statistics of the contact lists from an email-marketing campaign. Click here for more information.

3. The **Unsubscribe Customers** menu = is a report of customers who have unsubcribed from email newsletters or email marketing campaigns. Click here for more information.

4. The **Bulk Edit Email Status** menu = is a report (this report is not yet functional and more information will be provided soon). Click here for more information.

13. The **View Store** main menu opens a new internet page and takes you to the company's live eCommerce booking site that customers use.

14. The **Tools** main menu contains specific functions relating to managing the eCommerce Bookings Site and store logs. The additional menus here are:

    1. The **Export Templates** menu = allows you to create/view/delete Export templates which are a quick and easy way to specify which fields (and in what order) you want to export for orders, customers and/or products in the company eCommerce booking site. Click here for more information.

    2. The **Store Logs** menu = allows you view all store logs from Iconic Workers to customer's using the company websites. Click here for more information.

    3. The **Recent Visits** menu = allows you view the IP address, location and date & time a browser has visited the company websites. Click here for more information.

    4. The **IP Address Blocking** menu = allows you to block an IP address from visiting or accessing the company websites. This can be useful if there is an annoying browser user. Click here for more information.

    5. The **Notification** menu = allows you to view all notification messages the system has generated. This can be from adding a New Customer, product reviews or new orders. Click here for more information.

    6. The **Analytics** menu = allows you to enable Google Analytics integration in the company eCommerce site. Click here for more information.

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15. The **Manage** main menu contains specific functions relating to managing the eCommerce drop-menu fields, and templates. The additional menus here are:
    1. The **Activities** menu contains specific functions relating to managing the ERM's Activities drop-menu fields, and templates. The additional menus here are:

        1. The **Activity Type** menu = allows you to View/Add/Edit/Delete the values for the Activities types that an Iconic worker would use when scheduling an activity on a customer. Click here for more information.

        2. The **Activity Result** menu = allows you to View/Add/Edit/Delete the values for the Activities results that an Iconic worker would use when clearing an activity of a customer. Click here for more information.

        3. The **Prop Activity Type** menu = allows you to View/Add/Edit/Delete the values for the Prop Item Activity types that an Iconic worker would use when scheduling an activity for a prop item. Click here for more information.

        4. The **Prop Activity Result** menu = allows you to View/Add/Edit/Delete the values for the Prop Item Activity results that an Iconic worker would use when clearning an activity related to a Prop Item. Click here for more information.

        5. The **Activity Regarding** menu = allows you to View/Add/Edit/Delete the values for the pre-selected Subject or Regarding Text Entries that an Iconic worker would use when scheduling an activity on a customer account. Click here for more information.

        6. The **Activity Priorities** menu = allows you to View/Add/Edit/Delete the values for the Activities priorities that an Iconic worker would use when scheduling an activity for a customer. The priorities are values that indicate how important an activity/task is. Click here for more information.

        7. The **Activity Series Templates** menu = allows you to View/Add/Edit/Delete the values for the Activities Series that an Iconic worker would use when scheduling an activity series on a customer account. The activity series a pre-set selection of specific things (activities or tasks) that are required to be done by specific workers or departments. This can be a payment request, event date change or cancellation of a purchase. Click here for more information.

    2. The **Customers** menu contains specific functions relating to managing the ERM's Customer drop-menu fields, and templates. The additional menus here are:

        1. The **Customer Role/Position** menu = allows you to View/Add/Edit/Delete the values for the Customer Role/Position. These

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values indicate the position or role the customer has with the company. For example, Coordinator or Manager) and are used in the Customer Account Details Page. Click here for more information.

2. The **Customer Referred By** menu = allows you to View/Add/Edit/Delete the values that can be selected to indicate how a customer found out about the company. For example (by Google, or a friend or an Email Campaign. These are used in the Customer Account Details page. Click here for more information.

3. The **Company** menu contains specific functions relating to managing the ERM's Customer Company's drop-menu fields, and templates. The additional menus here are:

    1. The **Company Status/ID** menu = allows you to View/Add/Edit/Delete the values that can be selected to indicate the status of a company. For example (Active or Inactive or Company Closed). These are used in the Customer Account Details page. Click here for more information.

    2. he **Company Type** menu = allows you to View/Add/Edit/Delete the values that can be selected to indicate the industry the company is part of or in. For example (Education or Shopping Mall or Licensed club). These are used in the Customer Account Details page. Click here for more information.

    3. The **Delete Duplicate Company** menu = allows you to View/Delete duplicate company names. This does not delete the customer account or the company history notes. It is used to delete duplicate company names, often occurring when you import company details. Click here for more information.

4. The **Products** menu contains specific functions relating to managing the ERM's Products drop-menu fields, and templates. The additional menus here are:

    1. The **Product FAQs** menu = allows you to View/Add/Edit/Delete the FAQS that are specific to a product the company produces, manages and owns. These are used in the Product Availability Page and the Product Create/Edit Page. Click here for more information.

    2. The **Production Team/Bin** menu = allows you to View/Add/Edit/Delete the values that can be selected to indicate the Production Team/BIN. A Production team or BIN (bump-in-troupe) is a group of Iconic workers allocated together as a troupe when touring or managing specific events. This ensures that all products are allocated to a BIN and avoids double booking a group of workers or their availability. These are used in all areas of Products, Product

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Availabilities, Purchases, Orders and Bookings. Click here for more information.

3. The **Production Team/Bin Calendar** menu = allows you to View/Add/Edit/Delete the dates/months/year values that can be selected to mark on or off the availability of a Production Team/BIN.he status of a company. These are used in all areas of Products, Product Availabilities, Purchases, Orders and Bookings. Click here for more information.

4. The **Production Location** menu = allows you to View/Add/Edit/Delete the values that can be selected to indicate the locations (regions/zones) a product can be held or produced or managed. For example (a State, Country Region, Suburb, Town). These are used in the all areas of Products, Product Availabilities, Purchases, Orders and Bookings. Click here for more information.

5. The **Bulk Edit Product Calendar** menu = allows you to View/Add/Open/Close the values that can be selected to indicate the availability of a product specific to a date, the quantity available and the minimum or maximum allowable to that product. It also allows you to select the region/zone locations a product is available or not available. These are used in all areas of Products, Product Availabilities, Purchases, Orders and Bookings. Click here for more information.

6. The **Bulk Edit Progress Queue** menu = allows you to View the processing of the Bulk Edit Product Calendar availability. These are used in all areas of Products, Product Availabilities, Purchases, Orders and Bookings. Click here for more information.

7. The **View Product Location Calendar** menu = allows you to View the values of Products and their Locations that are Available on Specific Days, Months or Year to view what is availabile in specific regions/locations. It also allows you to view/change the qty / min / max available for a product location. Click here for more information.

5. The **Orders** menu contains specific functions relating to managing the ERM's Orders drop-menu fields, and templates. The additional menus here are:

1. The **Order Notes** menu = allows you to View/Add/Edit/Delete the notes that can be used to apply to a purchase/booking/order invoice. that are specific to a product the company produces, manages and owns. These are used mostly for invoices. Click here for more information.

6. The **Email Templates** menu contains specific functions relating to managing the ERM's Email drop-menu fields, and templates. The additional menus here are:

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1. The **Email Accounts** menu = allows you to View/Add/Edit/Delete/Setup email addresses so you can send and receive emails from the company domain. (bookings.iconicperformances.com.au). Click here for more information.

7. The **SMS Templates** menu contains specific functions relating to managing the ERM's SMS API drop-menu fields, and templates. The additional menus here are:

    1. The **SMS Templates** menu = allows you to View/Add/Edit/Delete the templates that can be sent using the SMS Broadcast function from the Customer Details Page, Clear Activity, New History and Email Page. Click here for more information.

8. The **Slack Templates** menu contains specific functions relating to managing the ERM's Slack drop-menu fields, and templates. The additional menus here are:

    1. The **Slack Templates** menu = allows you to View/Add/Edit/Delete the templates that can be sent using the SLACK Broadcast function from the Customer Details Page, Clear Activity, New History and Email Page. Click here for more information.

9. The **Locations** menu contains specific functions relating to managing the ERM's Location Addresses drop-menu fields, and templates. The additional menus here are:

    1. The **Location Country** menu = allows you to View/Add/Edit/Delete the countries that can be selected by an Iconic Worker or Customer when adding or editing a Customer Account or making a purchase, booking or order. Click here for more information.

    2. The **Location State** menu = allows you to View/Add/Edit/Delete the states of the specific country that can be selected by an Iconic Worker or Customer when adding or editing a Customer Account or making a purchase, booking or order. Click here for more information.

    3. The **Location City** menu = allows you to View/Add/Edit/Delete the city/suburb/town and zip/postcode that can be selected by an Iconic Worker or Customer when adding or editing a Customer Account or making a purchase, booking or order. Click here for more information.

10. The **Opportunities** menu contains specific functions relating to managing the ERM's Opportunities drop-menu fields, and templates. The additional menus here are:

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1. The **Opportunities Reasons** menu = allows you to View/Add/Edit/Delete the reasons why an opportunty was successful or not successful. These values are used in the Opportunities Page. Click here for more information.

2. The **Opportuntity Competitors** menu = allows you to View/Add/Edit/Delete the names of competitors the company has when an opportunity has been lost because of a competitor. These values are used in the Opportunities Page. Click here for more information.

3. The **OPP Process** menu = allows you to View/Add/Edit/Delete the opportunity processes that an opportunity can or will go through. This is known as the Probability Pipeline of Opportunities. These values are used in the Opportunities Page. Click here for more information.

11. The **Staff/Users** menu contains specific functions relating to managing the ERM's Staff User Accounts, their drop-menu fields, permissions and templates. The additional menus here are:

    1. The **Manage Staff/Users** menu = allows you to View/Add/Edit/Delete the Iconic Workers User Accounts. This menu allows you to create a user and provide them with a company email address, login details, system permissions and a user role. This feature/function is often used by the IT Support Team and some Channel Supervisors. Click here for more information.

12. The **Security** menu contains specific functions relating to managing the ERM's Security features for changes to customer accounts, orders, coupons or roster overtime extensions. The additional menus here are:

    1. The **Generate Security Code** menu = allows specific users to generate a one-off security code to provide to other Iconic Workers to make necessary changes to a customer account, a purchase/booking/order or call sheet roster overtime extensions. This feature/function is only used by some department or Channel Supervisors. Click here for more information.

16. The **Design** main menu contains specific functions relating to managing the eCommerce banners and images. The additional menus here are:

    1. The **Store Front Carousel** menu = allows you to View/Add/Edit/Delete banners that are displayed on the front page of the company's website. Click here for more information.

    2. The **Image Manager > View Image Manager** menu = is (not yet functional and more information will be provided soon). Click here for more information.

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3. The **Favicon** menu = allows you to View/Upload/Delete the company's own favicon image that will be shown in the address bar of a customer's browser. Supported image types are ICO. Click here for more information.

17. The **Settings** main menu contains specific functions relating to managing the eCommerce payment, invoice and user-role settings. The additional menus here are:
    1. The **Checkout** menu = allows you to View/Edit the type of eCommerce checkout/purchase settings. Click here for more information.

    2. The **Gift Certificates** menu = allows you to create the required settings to allow customers to purchase gift certificates via the eCommerce store that they can send to friends, family, colleagues etc. Click here for more information.

    3. The **Payment Methods** menu = allows you to View/Add/Edit/Delete the allowed payment methods accepted by a customer to make a payment for a product purchase/order/booking. Click here for more information.

    4. The **Invoice Payment Terms** menu = allows you to View/Edit the payment terms for products that to be pre-printed on all invoices created. Click here for more information.

    5. The **Store Settings** menu = allows you to View/Add/Edit specific settings relating to the physical dimensions used (eg: Weight/Length); decimal places, Search Engine Optimisation and WWW redirects. It also allows you to view and set the Language and Date Settings and the method the search functionality is to work. Click here for more information.

    6. The **Staff/User Role** menu = allows you to View/Add/Edit/Disable/Enable all user-roles that a staff/user can be associated with. All Users of an ERM are required to be assigned a user-role and based on the user role certain permissions to view/manage/add/edit/delete functionality is given to the Iconic worker in using the ERM. It also provides the permission for a user to be able to view and clear other users activities/tasks. Click here for more information.

Attached files:

Unique solution ID: #1554
Author: n/a
Last update: 03-Jun-2020 05:55

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