

# **Intrex Professional**

# **Intrex Compact**

RELEASE 5



Shop Studio

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## Writing Conventions

In this handbook, text passages will be displayed in *italics* when they refer to settings in the displayed dialogs. Menu items that are available in context menus can, in addition, always be selected from the main menu. Main menu items will not be described if they are not available in the context menu. A description of the general main menu items can be found in the  *Portals* handbook. Programming code in the text will be displayed in the `Courier` font. Context menus can be opened by clicking with the right mouse button on the described element.

In the following, `<intrexx>` refers to your Intrexx installation path; under Windows, for example, this is usually  `c:\intrexx\`. On Linux, the normal install path is  `/opt/intrexx/`. The following symbols will be used for designation of special kinds of information:

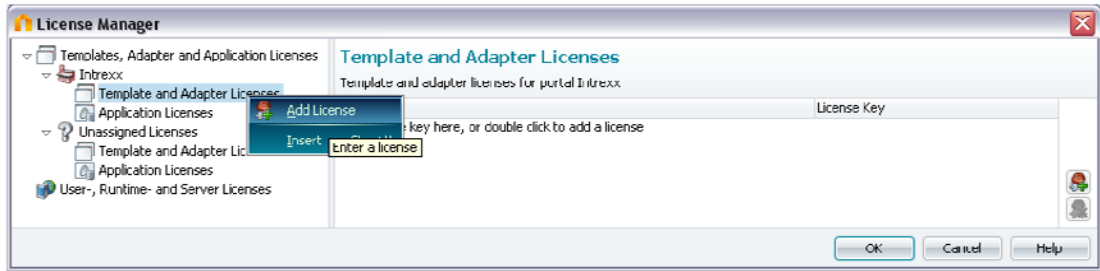
-  Information
-  References to an Intrexx handbook
-  Directories
-  URLs
-  Click on buttons

## Background Knowledge

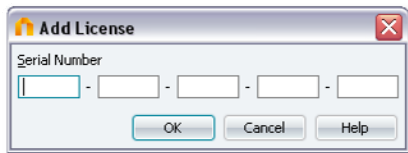
In order to understand this documentation, no special background knowledge is required. You can find helpful information in the  *Portals* and  *Applications* handbook.

## 1. Licensing

The *Shop Studio*, like every Intrexx application, will be created based on a template. You will find the *Shop Studio* template in the templates collection, which you can reach from the *Applications* module. In order to use the application you will need to purchase a license for it. Request the license from your software partner or from United Planet at the eMail address [info@unitedplanet.de](mailto:info@unitedplanet.de). The license key will be sent to you via eMail. In order to unlock the template, first open the Intrexx Portal Manager. Open the License Manager by clicking *Extras / License Manager*.



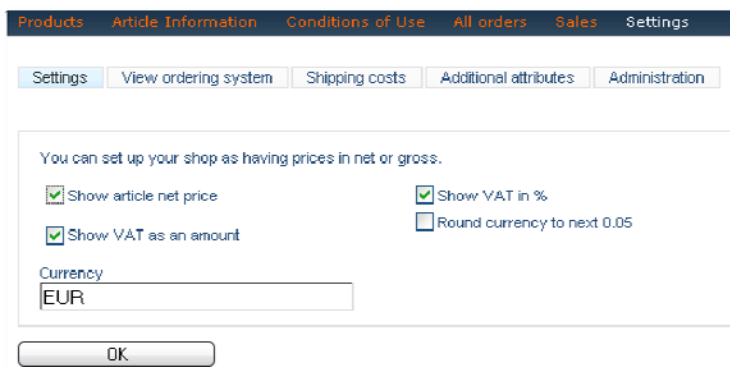
For the *Templates and Addons* entry, select *Add License* from the context menu.




Enter your serial number here and then click  *OK*. You can now create the shop in the *Applications* module as a normal application using the *Shop Studio* template. You can find more information on this topic in the  *Applications* handbook.

## 2. Settings

Open the *Shop* application in the browser and select the menu item *Settings*.



With the setting *Show item net price*, the net prices of products (without tax) will be displayed in the shop. The setting *Show VAT as amount* will display the rate of value added tax in percent. The setting *Round currency to next 0.05* will round all prices to the next 0.05 of the respective currency. Enter the abbreviation for the currency in the *Currency* field. Save your settings with  *OK*, then go to the *Ordering System* tab.

Products Article Information Conditions of Use All orders Sales Settings

Settings View ordering system Shipping costs Additional attributes Administration

You can enter data on products, special offers and article recommendations

Number of special offers  
10

View article recommendations

Number  
10

OK

You will define the *Number of sale items*, *Number of products per page*, and the *Number of product recommendations* here. The setting *Show product recommendations* will provide customers, after they have entered a product to their shopping cart, products that other customers have purchased in addition to the first. When you are done, switch to the *Shipping Costs* tab.

Products Article Information Conditions of Use All orders Sales Settings

Settings View ordering system Shipping costs Additional attributes Administration

You can enter two different kinds of postage costs.  
Enter the corresponding description (e.g. standard mailing with the post office, express mailing with UPS) and the amount.  
Depending on your setting for "Show article net price" ("Settings" tab), the amount entered will be handled as a net or gross amount.

Show shipping costs 1

Description 1 Amount 1  
0,00

Show shipping costs 2

Description 2 Amount 2  
0,00

You can encourage users to increase their order quantity by showing a note about free shipping.

Show note

Minimum order Note on amount  
0,00 0,00

Two types of shipping expenses can be defined here. Enter a description for the shipping charges in field *Description 1* and/or *Description 2*. In *Amount 1* and/or *Amount 2*, you will enter the amount of shipping charges. The settings to *Show shipping costs* will activate the corresponding type of shipping charge. Enter a *Minimum order* if you wish to send shipments for free above a certain amount. When activated, the setting *Show note* will alert the customer of this free shipping offer when the minimum order amount is reached. Next, go to the *Additional Attributes* tab.

You can add up to 7 definitions to your article data (e.g. color, size, etc.).  
 Afterwards, you can define in the master data of each article which of these additional attributes will be used.  
 If you have added an entry in the format "red;blue;yellow", a selection list will be shown on the article ordering page with the 3 values available.

Title 1	Addition 1
Title 2	Addition 2
Title 3	Addition 3
Title 4	Addition 4
Title 5	Addition 5
Title 6	Addition 6
Title 7	Addition 7

OK

Up to seven additional attributes of a product can be entered here. For each one, enter a *Title* (such as *Color*). In the *Addition* field, multiple additional attributes can be entered. Separate multiple entries with a semicolon (such as Red;Yellow;Blue). Multiple additions will be selected later on the order page from selection lists. Save your settings with *OK*, then click on the *Administration* tab.

Country ▲  
 No data set exists

New

Method of payment ▲  
 Vorkasse

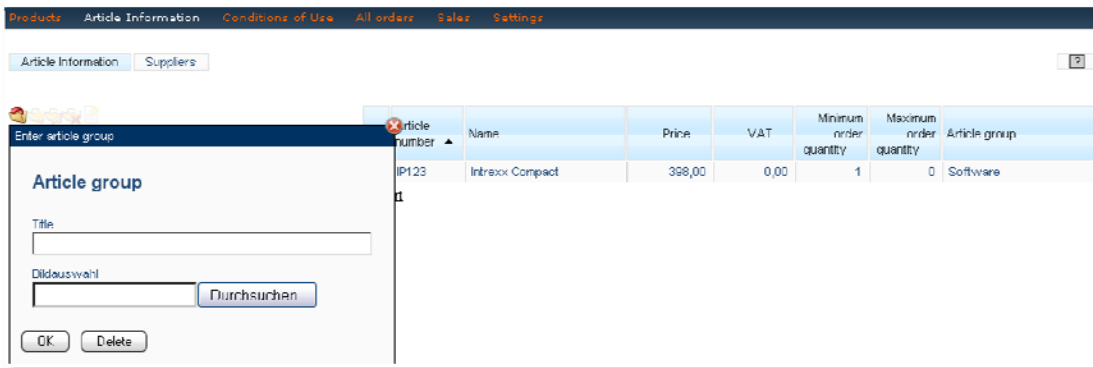
New

On this tab, a list of countries can be entered, which will be available in a selection list when ordering. The forms of payment entered here will be also shown on the page where customer data is entered.

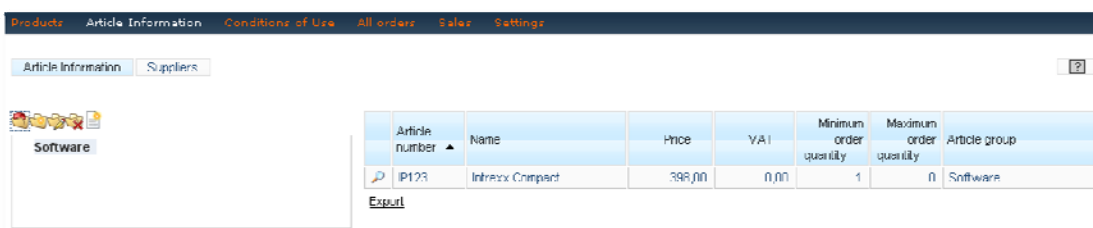
### 3. Product Information

#### 3.1. Creating Product Categories and Product Subcategories

If you have just created the *Shop* application recently, you must first create product categories from the *Article Information* menu.



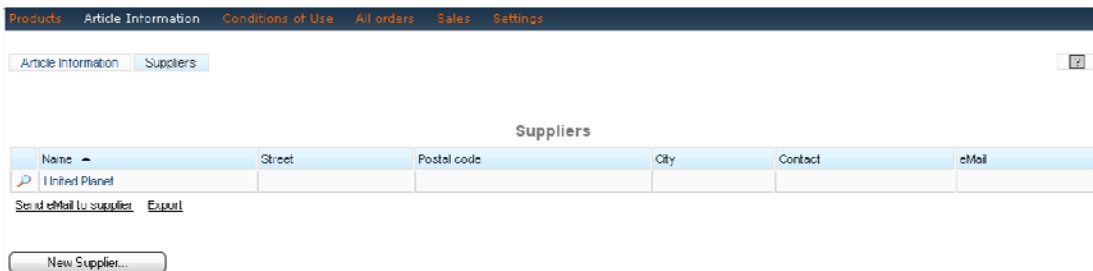
Click *Create Product Category*. Enter the *Product category* here. Select an image as icon for the product group. By clicking *OK*, the product category will be saved.



Below this product category any amount of sub-ordinate groups can be created. All information on this topic you will find in the handbook *Application Templates*, chapter *Empty Application - Tree Structure*.

### 3.2. Entering Suppliers

Switch to the *Suppliers* tab and enter suppliers for the products there.



Click *New supplier*.

Enter suppliers

**Vendor**

Name

Street

Postal code    City  
   

Contact

eMail

OK    Cancel

Enter the address and contact data of a supplier and save it by clicking OK.

Whenever you see the link to *Export* below a table, you have the ability to export the displayed data in the form of a text or Excel file. The link to *Send eMail to suppliers* allows you to send an eMail to all suppliers. Additional information on these topics can be found in the *Applications* handbook.

### 3.3. Entering Article Data

Switch to the *Article Data* tab.

Products    Article Information    Conditions of Use    All orders    Sales    Settings

Article Information    Suppliers

Software

Article number	Name	Price	VAT	Minimum order quantity	Maximum order quantity	Article group
IP120	Intrex: Compact	390,00	0,00	1	0	Software

[Export](#)

All products will be listed in a table with *Product number*, *Name*, *Price*, *VAT*, *Supplier*, and *Minimum and maximum order quantity*. Click *New Article*.

Enter the *Article name* and the *Article number* here. Assign it to a *Supplier*, the *Product category*, and the *Product category*. Enter the *Price* and the *Value Added Tax*. Next, define the minimum and maximum order quantity for this product.

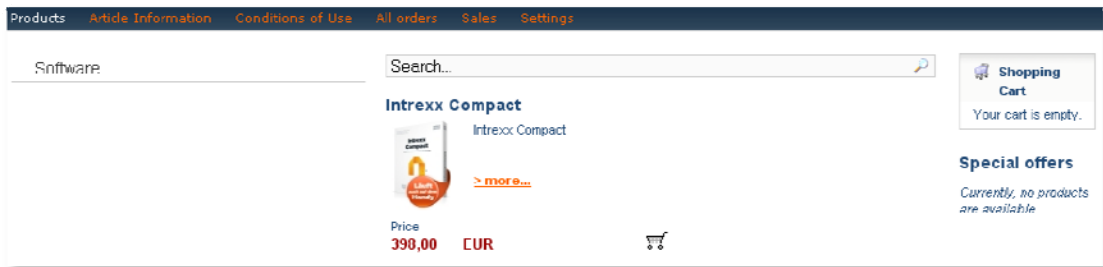
Clicking *Change* will open a pop-up window in which you can select additional attributes for the product. The title of the product will be entered in the *Title* field, which will be shown on the product pages as the article name. A short description and a description for the detail view of the product can also be entered. The *Browse* button allows image files to be loaded. The *Special offer* setting designates a product as a sales item.

The *Product blocked* setting will cause a product to not be shown on the *All products* page. It will also be unreachable from the product search. The setting *Show link to large image* will show the product image in link format. Clicking this link will load the large image in a pop-up window. The setting *Show link to detail view* will show the link to the detailed description of the product.

Clicking *Accept* will save the product. Clicking *Copy* will create a copy of the product, which can be further edited.

## 4. Products

If you click the *Products* menu, you will find yourself on the main page of the shop. In the left area you will see the product categories. In the middle the contained products will be displayed. The view of the shopping cart and the list of the special offer products you will find in the right area.



By clicking on the shopping cart symbol, a product can be ordered.



Click on the shopping cart in the right area.



You can reach the shopping cart via the *Shopping cart* tab. On this tab, the number of products currently placed in the shopping cart will be displayed. *Update* will refresh the shopping cart, such as when you have changed the amount to order. *Delete* allows an individual product to be removed from the order. By clicking *Go to checkout*, you will proceed to the next step in the order process.

Enter order

Article No.	Article	Amount	VAT	Price	Total Price	Properties
IP123	Intrexx Compact	1	0,00 %	398,00 EUR	398,00 EUR	
Total Net Sum					398,00 EUR	
Plus VAT					0,00 EUR	
<b>Invoice Total</b>					<b>398,00 EUR</b>	

09.03.2010

Company  Customer number


First name  Last name

Street

Postal code  City

Country

Telephone  eMail

Edit fields for entering customer information and methods of payment will now be shown below the shopping cart. Clicking  *Send order* will complete the order process. All order data will be shown below the shopping cart and can be printed out if needed.

## 5. Order Processing


The order can now be processed under the *All orders* menu.

Products Article Information Conditions of Use All orders Sales Settings


New orders



Customer name	Order date	eMail
No data set exists		
<a href="#">Send eMail to customer</a>		

Processed orders

Customer name	Order date	eMail	Employee	Processed on
 Muller	09.03.2010	Heinrich.Mueller@unitedplanet.com	Administrator	09.03.2010
<a href="#">Send eMail to customer</a>				

Analyze by date... Analyze by supplier...

All new and processed orders will be listed here. An order can be opened and processed by clicking the magnifying glass icon. Clicking the link *More information on customer* will show all data relating to the customer.  *Edit* will open an additional window, where the order can be designated as having been processed.

A processed order will now be shown in the lower table.  *Analyze by date* and  *Analyze by supplier* allows all orders in a specific time frame to be shown.

Products Article Information Conditions of Use All orders Sales Settings

### Filter orders by supplier

Suppliers: [none] ▼ Order date: [ ] - [ ]  Include processed orders

[Adjust Table...](#)

	Supplier ▲	Order date	Article number	Article description	Addition 1	Addition 2	Addition 3	Additi
<input checked="" type="checkbox"/>	United Planet	09.03.2010	IP123	Intrexx Compact				

[Export orders by supplier...](#)

Enter the time frame in the edit fields at the head of the page. The setting to *Include processed orders* will take processed orders into account as well. The results will be shown in the table. When analyzing by suppliers, a supplier may additionally be selected. This analysis will only show the orders relating to this supplier.

## 6. Sales

Under the *Turnover* menu item, you can run analyses for your shop.

### Sales Tab

Products Article Information Conditions of Use All orders Sales Settings

Sales Sales by article Sales by customer Sales per day

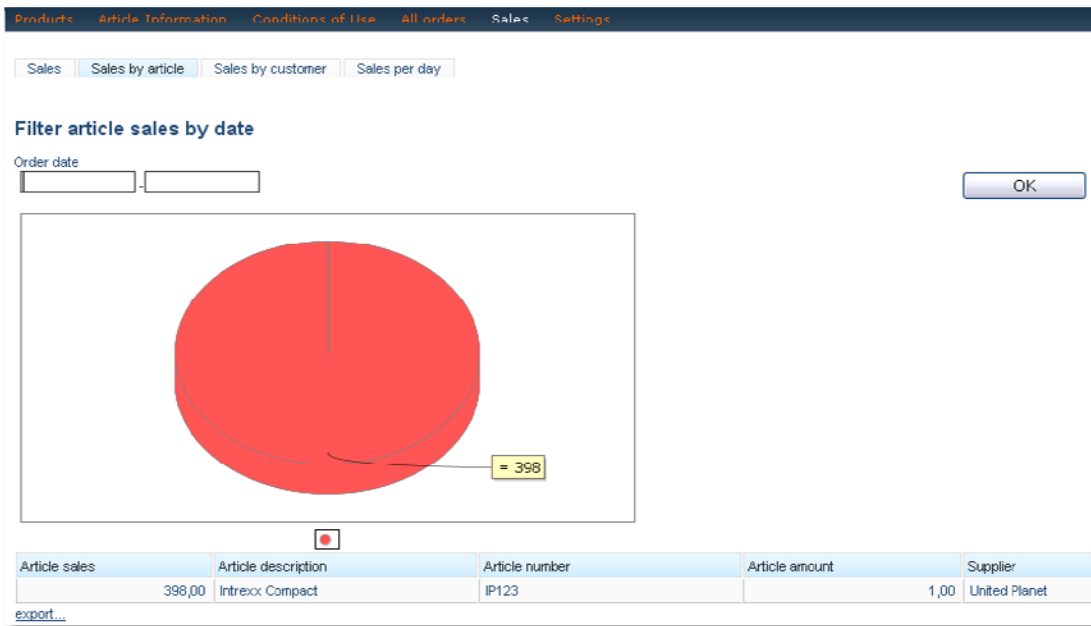
### Filter total sales by date

Order date: [ ] - [ ]

Total sales ▲
398,00

On this tab a time frame can be defined, for which the total sales volume of all orders will be automatically calculated and displayed in the results table.

## Sales by article



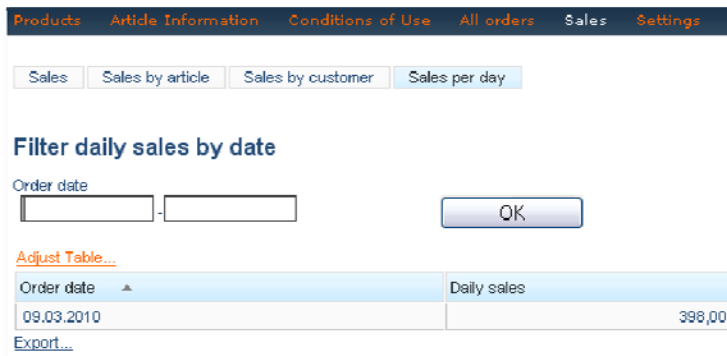
On this tab a time frame can be defined in which sales will be shown, grouped by product. A chart will show the portion of the sales corresponding to products.

## Sales by customer

Customer name	First name	Purchase volume
Müller	Heinrich	398,00

On this tab a time frame can be defined in which the sales will be shown, grouped by customer.

## Sales by date



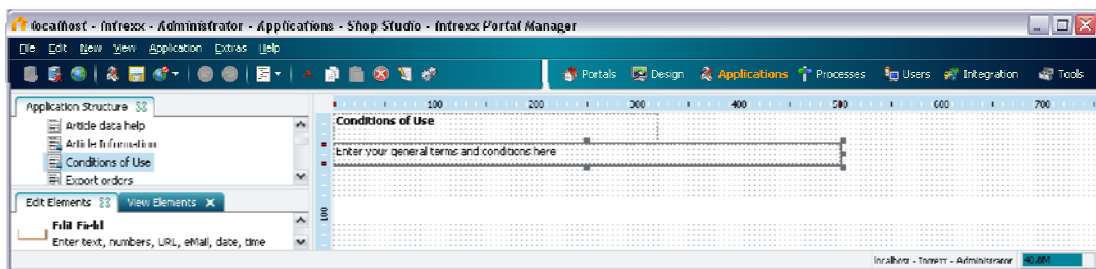
This tab will provide an overview of sales by date.

## 7. Adjustment in the *Applications* module

Open the *Shop* application in the *Applications* module.

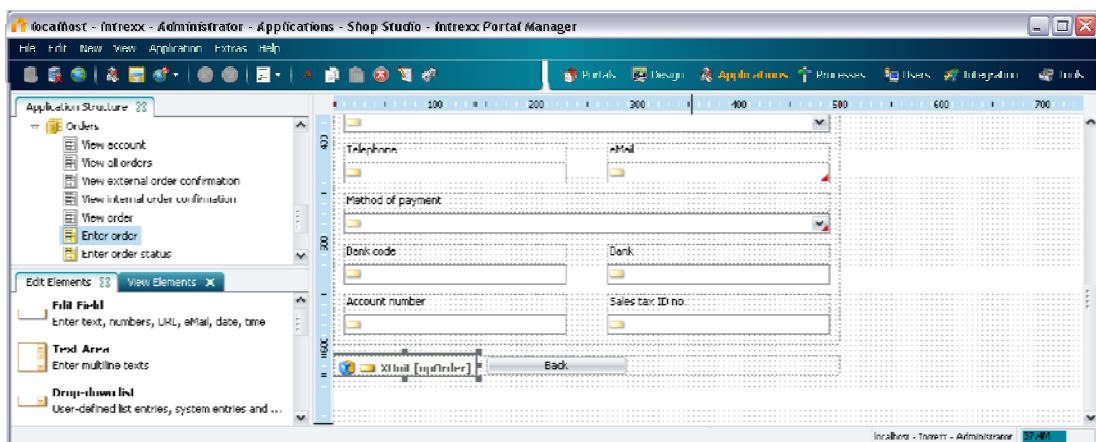
### Conditions of use

On the *Conditions of use* page, the terms and conditions of your business can be entered. Open the properties dialog by double clicking on the text field, enter your terms and conditions, and then save the application to apply the changes.

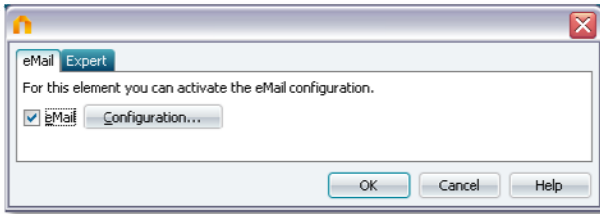



### eMail Configuration: Order Confirmation

If you wish to send your customers an order confirmation via eMail, you can insert the required entry on the *Enter Order* page in the *Orders* data group.



Open the properties dialog of the *XUnit upOrder* with a double click.



Sending eMails is activated by selecting the *eMail* checkbox. For this function to work, the *SMTP Service* tool must first be set up. Information on this topic can be found in the *Tools* handbook. Recipient and sender data, as well as the format of the eMail, will be set by clicking the *Configuration* button. Information on this can be found in the  *Applications* handbook.