



## Order processing system

**Order processing allows you to set up templates which can either be emailed directly to your customer or you can print. The template can be anything you wish, for example a shipping notice, invoice or packing slip.**

Templates are constructed using a very similar syntax to that of the HTML customer receipt template, see the help file in the Support section.

In addition to the template system, order processing also automatically creates a **Customer account** for each of your customers. Your customer can login to their account and view the status of both their current order and their past orders.

Turning on Order processing does not effect the functioning of the cart in any way, rather it enables features in Admin which you can then use if you wish. However it does effect some of the way information in Admin is displayed, particularly in **List current orders** view which is the main entry point for using the order processing system.

## Templates

Templates are constructed using ordinary HTML, they can include CSS styles although a printed template may not work with an externally linked style sheet.

Templates use special tags which are replaced with data extracted from the database record for that order, for example the customers' name, address and the details of the items the customer ordered. Generally any information you can see when you view an order in Admin can be included in a template if you use the correct tag.

### The basic tags are:

#Merchant_name#	Your company name
#shopperid#	Shopper ID
#ip#	Customer's IP address
#date#	Date (D M Y) - 20 May 2009
#pay_method#	Payment method
#pay_data#	Additional payment data (For example: PayPal ref.)

#cart_contents#	Tabulated list of products bought
#discount_value#	The value of a discount
#subtotal#	Value of the products bought
#shipping_value#	Cost of shipping
#tax_value#	Tax charged
#total_value#	Total cost of order
#currency#	The currency of the order
#shipping_zone#	Shipping zone selected (options 4 to 7)
#shipping_calc#	Data from a shipping calculator (for example Advanced shipping calc)
#inv_name#	Customer name
#inv_company#	Billing company
#inv_addr1#	Billing address
#inv_addr2#	
#inv_state#	
#inv_zip#	
#inv_country#	
#ship_name#	Ship to name
#ship_company#	Ship to company
#ship_addr1#	Shipping address
#ship_addr2#	
#ship_state#	
#ship_zip#	
#ship_country#	
#ship_tel#	Shipping telephone number
#inv_tel#	Customer telephone number
#inv_fax#	Fax
#email#	Email address
#edata#	Additional customer information data
#giftvoucher_value#	Gift certificate/voucher value
#giftvoucher_code#	Gift cert/voucher code
#voucher_value#	Discount voucher value
#voucher_code#	Discount code value
#customer_message#	Customer's message
#inv_id#	Tax/Social security ID
#Download_links#	Output from download system
#currency#	Your currency
#password#	The customer's password
#login_link#	A link for the customer to login to their account with

Tags are case insensitive #login\_link# or #LOGIN\_link# will work just as well.

Please note that this list includes some additional tags which are not available in the normal HTML email template, particularly the login link and customer's password.

## Individualizing messages for each customer

Sometimes you may wish to include other information in a message to customer, for example in a shipping note you may wish to include the tracking details for their package. The cart doesn't have this information but you can program your template to pop-up a form asking for it before you send them the email.

For example, when you click to send your shipping note you might first see this form:

The form is titled "Send email - Shipping note". It contains the following elements:

- Carrier:** A label followed by three radio button options:  UPS,  FEDEX, and  USPS.
- Tracking:** A label followed by a text input field.
- Tracking URL:** A label followed by a text input field.
- Message:** A label followed by a large text area.
- Buttons:** An orange button labeled "SEND EMAIL" and a grey button labeled "Cancel".

How is this done? The answer is that this particular template included four special tags:

#Edit\_List:Carrier:UPS,FEDEX,USPS#

#Edit\_Text:Tracking:20#

#Edit\_Text:Tracking URL#

#Edit\_Textbox:Message#

The email which will be sent to the customer will include whatever you select or enter on the form. It is inserted in the place of those tags in the template.

## The Edit tag format

The first part of the tag is always: **#Edit\_** and it must always end in **#**.

The next part of the tag can be either:

- **List** – always presented as a radio list, not a drop down list
- **Text** – a normal text box
- **Textbox** – an HTML textarea box

The type of form field we are going to use in the pop-up is then followed by a colon and the label that will appear beside it. So for example with:

```
#Edit_Text:Tracking number:20#
```

This is going to be a text box asking for a “Tracking number”.

Finally, after the label, there may be a third item delimited by a colon: with a text box this is size of the box (this is optional) and with a List edit is a list of items to make up the radio list, each one separated by a colon.

## A word about the PDF print format

The template is still HTML but is rendered as a .pdf file which can either be printed or saved.

It is fair to say that there are some limitations with .pdf parser. Basically it can handle good, well formed, HTML using standard tags plus some embedded style sheets. It will also render external images which you’ve linked to as long as they aren’t too big. But it will struggle with bad HTML or exotic style sheets.

Think basic HTML and it will work! But if you want something non-standard then use HTML and let your browser do the work instead of the .pdf parser. You can print from your browser.

## Customer accounts

**Although the system automatically creates an account for a customer you are not obliged to tell them about it!** In other words you don’t need to actually use the Customer accounts system if you don’t want to.

The cart will try to match up repeat customers with orders they have placed before. It does this using by searching for orders placed using the same email address or PayPal account ID if they have paid by PayPal. Obviously it won't always work, they may use a different email address for a subsequent order, they may not pay by PayPal. You can manually merge accounts/orders which you know belong to the same person.