



Web Trade User Guide

Dave Pert

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Version History

Version	Date	Who	Comments
0.1	5/01/15	Dave Pert	Initial Draft Document
0.2	12/03/15	Dave Pert	Update with Version 2 features.
0.3	10/03/17	Dan Church	Update with Version 3 features.

Introduction

The purpose of this document is to describe the features within the Web Trade product.

Site Homepage

My Invoices My Payments VOC Report My Orders My Account
Documents Feedback Admin Log Out

Quick Add Products Product code: 1 Add

MAM Checkout - £0.00

Lookup Group Selection Product Selection Xref Previous Parts Quick Add Basket Import Order

This is an example message.
Test

Welcome to the Web Trade Demo site!

<p>Dry Coils £54.55 In Stock 1 Add to Basket</p>	<p>Oxygen Sensor £107.57 In Stock 1 Add to Basket</p>	<p>Clutch Master Cyl. 32967311 £254.59 In Stock 1 Add to Basket</p>
---	--	--

10% Off
Save money on brake discs and pads

Free fitting
All light units come with free fitting

TRADE PORTAL THEME EDITOR

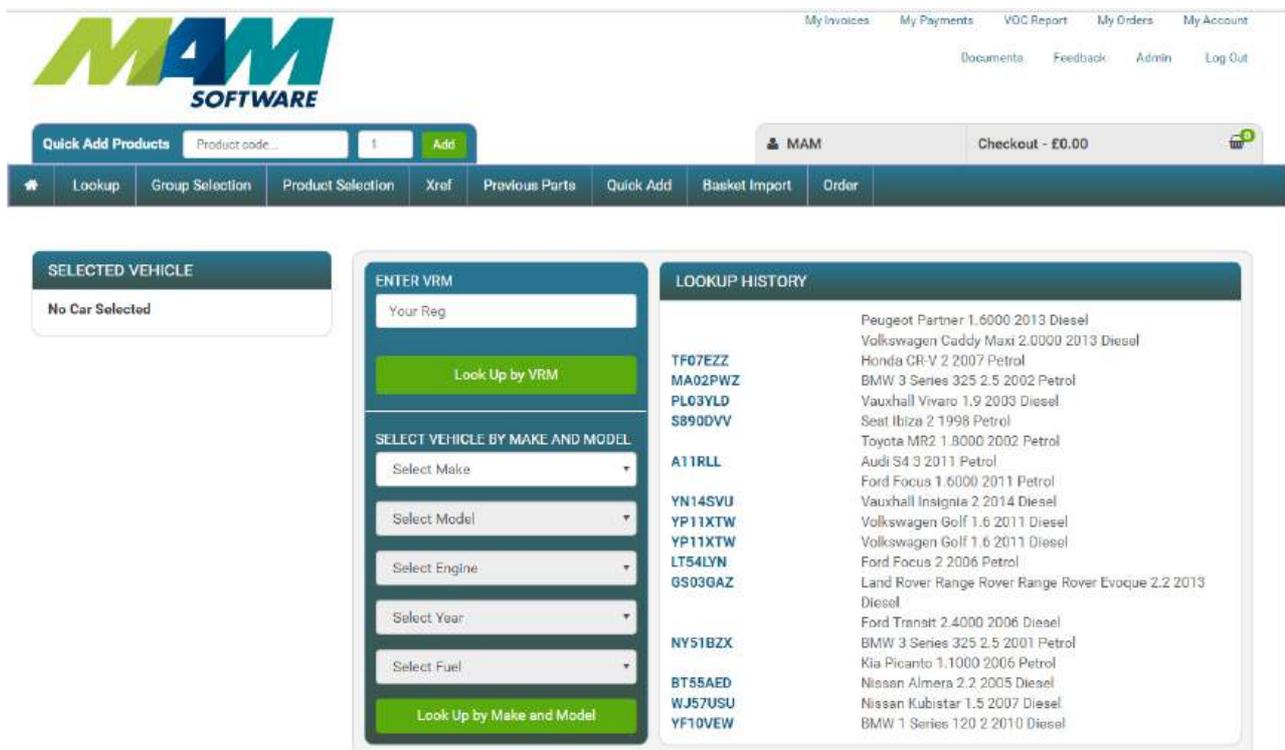
This page can be modified by the site administrator by following the instructions later in the document.

Using the site to view a product

Group Selection

To view a product the user must first choose 'Group Selection'. This will open the page below and allow the user to;

1. Pick the vehicle they are searching parts for.
2. Pick the category groups they want to search in for products.



The user can enter a VRM, find a vehicle by make and model or pick a vehicle from a recently used list.

When a vehicle is selected the category groups will be shown as below.

The user should pick from the parent group to view the sub groups. Select the sub groups required and click the 'Add Selected Groups' button to add them to a short list of selected category groups to search. When the user has selected the required groups the 'Find Products' button should be clicked to start the product search.

Quick Add Products

MAM Checkout - £0.00

- Lookup
- Group Selection
- Product Selection
- Xref
- Previous Parts
- Quick Add
- Basket Import
- Order

SELECTED VEHICLE	
Audi R8 5.2 2013 <input type="button" value="Clear"/>	
Make:	Audi
Model:	R8
Engine:	5.2000
Year:	2013
Fuel:	Diesel

PARENT GROUP

Select a group

- Brake Friction
- Cables
- Clutch Friction
- Cooling & Heating
- Electrical
- Engine Parts
- Exhausts
- Filters & Ignition
- Fitting Tools
- Flexible Mountings
- Fuel & Engine Management
- Hydraulics
- Lighting
- Lubricants & Fluids
- Publications
- Service Parts
- Steering & Suspension
- Transmission
- Wipers
- Body & Trim

SUB GROUP

- Accessories-Fit Kits
- Discs
- Drums
- Pads
- Shoes

SELECTED GROUPS

- Drums
- Water Hoses, Pumps
- Bushes, Mountings
- Engine Parts

The product results will appear in the results page as below.

MAM SOFTWARE

My Invoices My Payments VQC Report My Orders My Account Documents
Feedback Admin Log Out

Quick Add Products Product code: 1 Add MAM Checkout - £0.00

Lookup Group Selection Product Selection Xref Previous Parts Quick Add Basket Import Order

FILTER PRODUCTS

Description
Brake Disc
Brake Pad Set
Brake Shoe Set

Position
Front
Rear

SELECTED VEHICLE

L990VHP - RANGE ROVER VOGUE SE (MK1) **Clear**

Make: Land Rover
Model: Range Rover
Engine: 3.9
Year: 1994
Fuel: Petrol
CC: 3947
Engine Model:
Power: 182+136
Valves: 0
VIN: SALLHMM3KA646898
Engine No: 36D24751A
Colour: GREEN
Transmission: AUTOMATIC
Body Plan: ATV (5 DOORS)
Gears: 4

NO RESULTS
Sorry, we have no Drums for the currently selected vehicle.

DISCS

APEC BRAKE DISC (REAR) **Cross Reference** **COMPARE**

Range Rover 3.9 Catalyst MK 1 (1970-1995) 10/92-12/95
Product code: DSK945 **Please call £28.08**
1 Add

Fits the Following Vehicles:

Range Rover 3.9 Catalyst MK 1 (1970-1995) 10/92-12/95 Click for more info	Details			
	CC	Cylinders	Cam	Trans
	3947	8	OHV	4

APEC BRAKE DISC (FRONT) **Cross Reference** **COMPARE**

Range Rover 3.9 Catalyst MK 1 (1970-1995) 10/92-12/95
Product code: DSK931 **Please call £37.44**
1 Add

Fits the Following Vehicles:

Range Rover 3.9 Catalyst MK 1 (1970-1995) 10/92-12/95 Click for more info	Details			
	CC	Cylinders	Cam	Trans
	3947	8	OHV	4

MMI matches are displayed with a green highlight.

Use the Add button to add the product to the basket and start the order creation process.

Compare

Use the Compare check box at the top right of each product title to mark the products for comparison. When two or more products have been selected a Compare Items button will appear at the top of the page. Click this to open the comparison window.

Product Comparison

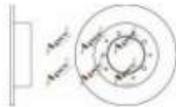


Apec Brake Disc (Rear) [Remove](#)

[Remove](#)

Apec Brake Disc (Front) [Remove](#)

[Remove](#)



£28.08

£37.44

Type	Solid
------	-------

Type	Vented
------	--------

Description	Brake Disc
-------------	------------

Description	Brake Disc
-------------	------------

Size/Length	5 Mounting Bores
-------------	------------------

Size/Length	5 Mounting Bores
-------------	------------------

Wear Indicators	Dia.: 290, Thickness: 12.6, Min. Thickness: 11.7, Centre Dia.: 10...
-----------------	--

Wear Indicators	Dia.: 298, Thickness: 24, Min. Thickness: 22, Centre Dia.: 101,...
-----------------	--

Mountings	35D, 36D
-----------	----------

Mountings	35D, 36D
-----------	----------

cc	3947
----	------

cc	3947
----	------

cam	OHV
-----	-----

cam	OHV
-----	-----

cylinders	8
-----------	---

cylinders	8
-----------	---

valves	16
--------	----

valves	16
--------	----

trans	4
-------	---

trans	4
-------	---

name	Brake Disc
------	------------

name	Brake Disc
------	------------

Filtering

The product list page can be filtered by available attributes. The filters will appear automatically at the top left of the page. Click a box to only show those items. Clicking a box in the same category will include the items that comply with either filters. Clicking a box in another category will show the items that comply with both filters.

Product Selection

This link will return you to the results of your last vehicle and category group search.

Previous Parts

This link will display a list of the parts that have been ordered in the past and allow a quick add to place them into the basket again. This feature will be useful where product codes are known and can be identified without requiring a vehicle search. You can also specify when you bought the part to find products faster

Basket Import

The user is able to bulk upload a list of products. The user must use a .csv file and list the required products and their quantity. The web page will allow the user to select the file for upload, click Choose File. With the file selected the user should click Submit to start the import. The results will be displayed as below.



The user may now go to the basket, by clicking Checkout, to view the products that were just uploaded.

Order

This link will take you to the basket page. The basket page can also be accessed at any time by pressing the 'Checkout' button at the top of the page.

When a user adds a product to their basket they will be taken to the basket screen as below.

My Invoices My Payments VDC Report My Orders My Account
Documents Feedback Admin Log Out

Quick Add Products Product code: 1 Add

MAM Checkout - £45.46

Home Lookup Group Selection Product Selection Xref Previous Parts Quick Add Basket Import Order

MY BASKET Clear Basket

Image	Description	Price	Quantity	Total
	Dry Coils Seller Service Product Product Code: 12300	£45.46	1 Update Remove	£45.46 In Stock
			Total	£45.46

Save Basket Checkout

Origin Car Parts Powered by MAM SOFTWARE origin software solutions

TRADE PORTAL THEME EDITOR

The Checkout button will disappear and a message will be highlighted if there is a problem with the basket.

If the user wants to go back and search for more products they can click the 'Continue Shopping' basket to return to the previous page or click 'Group Selection' to start a new car or category group search or if they wish to save the current item in the basket to purchase again, you can click the Save Basket button to do so.

The user can use the Quick Add feature of the site by entering a product code into the quick add text box. This is useful if the product code is known.

Clicking 'Checkout will create an order from the items in the basket.

Menu Options

My Invoices

This link will display a summary of available invoices.

My Invoices My Payments VOC Report My Orders My Account
Documents Feedback Admin Log Out

Quick Add Products Product code Add MAM Checkout - £45.46

Lookup Group Selection Product Selection Xref Previous Parts Quick Add Basket Import Order

INVOICES

Start date: 18/01/2016 End date: 18/01/2017 Invoice Credit Backorder Suspend Picknotes Quotes Filter

Invoice Date	Order No	Type	Grand Total	View Document
27/07/2016	009896	I	180.00	View Invoice
27/07/2016	009895	I	180.00	View Invoice
27/07/2016	009894	I	180.00	View Invoice
27/07/2016	009893	I	180.00	View Invoice

Origin Car Parts Powered by MAM SOFTWARE origin software solutions

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Clicking on the 'View Invoice' button will display the full detail of the invoice.

Print 

MERCHANT

Origin Car Parts
Address Line 1
Address Line 2
City
County
Postcode
Country

Tel: 01234 5678901
VAT No: 12345678
Registered No: 12345678
Email: support@originsoftware.co.uk

CUSTOMER

A001 Vehicle Spares Ltd
4 ST. JOHNS HOUSE
ST. JOHNS ROAD
CUDWORTH
BARNSELY

S72 8BY

INVOICE 009896

Notes:
• 123
• Order Date: 2016-07-27T08:50:25.07+01:00
• User Account: A001

MY INVOICE

Product Code	Description	Price	VAT Rate	Quantity	VAT	Total (ex VAT)
PART1	Battery Leisure 110amp	£20.00	20.00%	5	£20.00	£100.00
					Subtotal	£150.00
					VAT	£30.00
					Total	£180.00

VAT Code	Rate	Goods	VAT
1	20.00%	£100.00	£20.00

[Return to View Invoices](#)

[Download PDF](#)

Origin Car Parts

[TRADE PORTAL THEME EDITOR](#)

My Payments

This link will display a summary of the payments made on the account.

MAM Checkout - £45.46

- [Home](#)
- [Lookup](#)
- [Group Selection](#)
- [Product Selection](#)
- [Xref](#)
- [Previous Parts](#)
- [Quick Add](#)
- [Basket Import](#)
- [Order](#)

VIEW ACCOUNTS

Your account history is shown below:

Credit Limit	Available Credit	Balance		Amount
£0.00	£-1,372,083.41	Total Balance		£671.60
		Current		£0.00
		30 Days		£0.00
		60 Days		£0.00
		90 Days +		£0.00

PRef	Account Data	Ref	Total	Balance	Post Date
Paid 30 Dec 99	26/01/2009	002364	£26.44	£0.00	30 Dec 99
Paid 30 Dec 99	26/11/2008	002222	£264.38	£0.00	30 Dec 99
Paid 30 Dec 99	26/11/2008	002221	£264.38	£0.00	30 Dec 99
Paid 30 Dec 99	20/11/2008	002212	£35.25	£0.00	30 Dec 99
Paid 30 Dec 99	08/09/2008	001999	£264.38	£0.00	30 Dec 99
Paid 30 Dec 99	04/09/2008	001997	£264.38	£0.00	30 Dec 99
Paid 30 Dec 99	05/08/2008	001903	£264.38	£0.00	30 Dec 99
Paid 30 Dec 99	04/08/2008	001882	£264.38	£0.00	30 Dec 99

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My VRM History

The recent VRM lookup history is available for quick re-use by going to Lookup and the History will be on the right of the screen. The summary will be displayed as below.

SELECTED VEHICLE

L990VHP - RANGE ROVER VOGUE SE (MK1) Clear

Make:	Land Rover
Model:	Range Rover
Engine:	3.9
Year:	1994
Fuel:	Petrol
CC:	3947
Engine Model:	
Power:	182~136
Valves:	0
VIN:	SALLHAMM3KA...
Engine No:	36D24751A
Colour:	GREEN
Transmission:	AUTOMATIC
Body Plan:	ATV (5 DOORS)
Gears:	4
Date Registered:	19940214
Has been Scrapped:	0

ENTER VRM

Your Reg

Look Up by VRM

SELECT VEHICLE BY MAKE AND MODEL

Land Rover

Select Model

Select Engine

Select Year

Select Fuel

Look Up by Make and Model

LOOKUP HISTORY

L990VHP Land Rover Range Rover 3.9 1994 Petrol
Ford Fiesta 1.4000 2011 Diesel
Fiat 500 1.2000 2011 Diesel
Audi R8 5.2000 2013 Diesel
Peugeot Partner 1.6000 2013 Diesel
Volkswagen Caddy Maxi 2.0000 2013 Diesel
Honda CR-V 2 2007 Petrol
BMW 3 Series 325 2.5 2002 Petrol
Vauxhall Vivaro 1.9 2003 Diesel
Seat Ibiza 2 1998 Petrol
Toyota MR2 1.8000 2002 Petrol
Audi S4 3 2011 Petrol
Ford Focus 1.6000 2011 Petrol
Vauxhall Insignia 2 2014 Diesel
Volkswagen Golf 1.6 2011 Diesel
Volkswagen Golf 1.6 2011 Diesel
Ford Focus 2 2006 Petrol
Land Rover Range Rover Range Rover Evoque 2.2 2013 Diesel
Ford Transit 2.4000 2006 Diesel
BMW 3 Series 325 2.5 2001 Petrol

TF07EZZ
MA02PWZ
PL03VLD
S890DVV
A11RLL
YN14SVU
YP11XTW
YP11XTW
LT54LYN
GS03GAZ
NY51BZX

TRADE PORTAL THEME EDITOR

My Orders

This link will display a summary of the orders made on the account.

My Account

This link will display the user's details and, if the setting has been enabled in the admin area, the users address details. Addresses are maintained by the administrator (only) if they are not displayed to the user here. The user password can be changed from here.

ACCOUNT USERS

These are your users that have been set up on the system:

Email	Name	Enabled	Actions
mam@originsoftware.co.uk	MAM Software	Yes	Edit Disable
support@originsoftware.co.uk	Steve Scofield	Yes	Edit Disable

[Add a New User](#)

MY ACCOUNT

Title *	First Name *	Surname *
<input type="text" value="Mr"/>	<input type="text" value="MAM"/>	<input type="text" value="Software"/>
Email Address *	Telephone	
<input type="text" value="demo@originsoftware.co.uk"/>	<input type="text"/>	
Password (must be at least 6 characters long)		
<input type="text"/>		
Re-enter Password		
<input type="text"/>		
Company Name		
<input type="text"/>		
Company Registration Number		
<input type="text"/>		
Company VAT Number		
<input type="text"/>		
<input checked="" type="checkbox"/> I want to receive email newsletters containing the latest offers, products and ...		

[TRADE PORTAL THEME EDITOR](#)

Administration Area / Site Setup

Administration Area

The site administrators have access to an additional area within the website where they can setup and maintain the site and its users. This area can be accessed by clicking on the Admin link seen on the top menu. Standard users cannot access this area.



The admin area has four main areas. The Dashboard, general site settings, advanced site setting and Reports. The Dashboard provides a view of site performance. The two settings area will allow changes to be made to the site configuration. The reports area will provide usage figures for the site.

Site Settings

Site Homepage

The homepage can be edited by the administrator by following these next steps;

1. Click Admin from the Main Menu, to be taken to the admin area
2. Expand the Site Settings title
3. Click Page Text Elements to be shown the page below.
4. Click Edit to open the editor window.

origin

Quick Search Orders : You are logged in as MAM

NAVIGATION

Dashboard

Site Settings

- Documents
- Home Pages
- Link Editor
- Messages
- Order History
- Page Text Elements
- Pages
- Site Setup
- Users
- VRM History

Advanced Settings

Back To Site

Logout

Home

Dashboard

Daily Sales

Day	Sales
1	0
2	0
3	0
4	0
5	0
6	0
7	0
8	0
9	0
10	0
11	0
12	2.0
13	1.0
14	1.0
15	0
16	1.0
17	0
18	0
19	0
20	0
21	0
22	0
23	0
24	0
25	0
26	0
27	0
28	0
29	0
30	0
31	0

Category	Value	Orders
TODAY'S ORDERS	£0.00	0 Orders
YESTERDAY'S ORDERS	£0.00	0 Orders
THIS WEEK	£0.00	0 Orders
LAST WEEK	£0.00	0 Orders
TOTAL ORDERS	£10,071.04	42 Orders
THIS MONTH'S ORDERS	£0.00	0 Orders
LAST MONTH	£1,832.89	5 Orders
2 MONTHS AGO	£1,109.81	3 Orders

- You will see the following window when you are editing the homepage.
- Use the WYSIWYG editor to make your changes to the home page. This editor can be switched to html by clicking the source button.
- Once complete click the Save button to upload your changes.



Q Order number...

- Dashboard
- Site Settings
- Advanced Settings**
 - Advanced Accounts
 - Advanced Users
 - Delivery Charges
- Reports**
 - Order History
 - VRM history
- Back To Site
- Logout

Edit Page Element (ID: 1)

Position trade_homepage

Content Text

Tables:

Opening Hours:

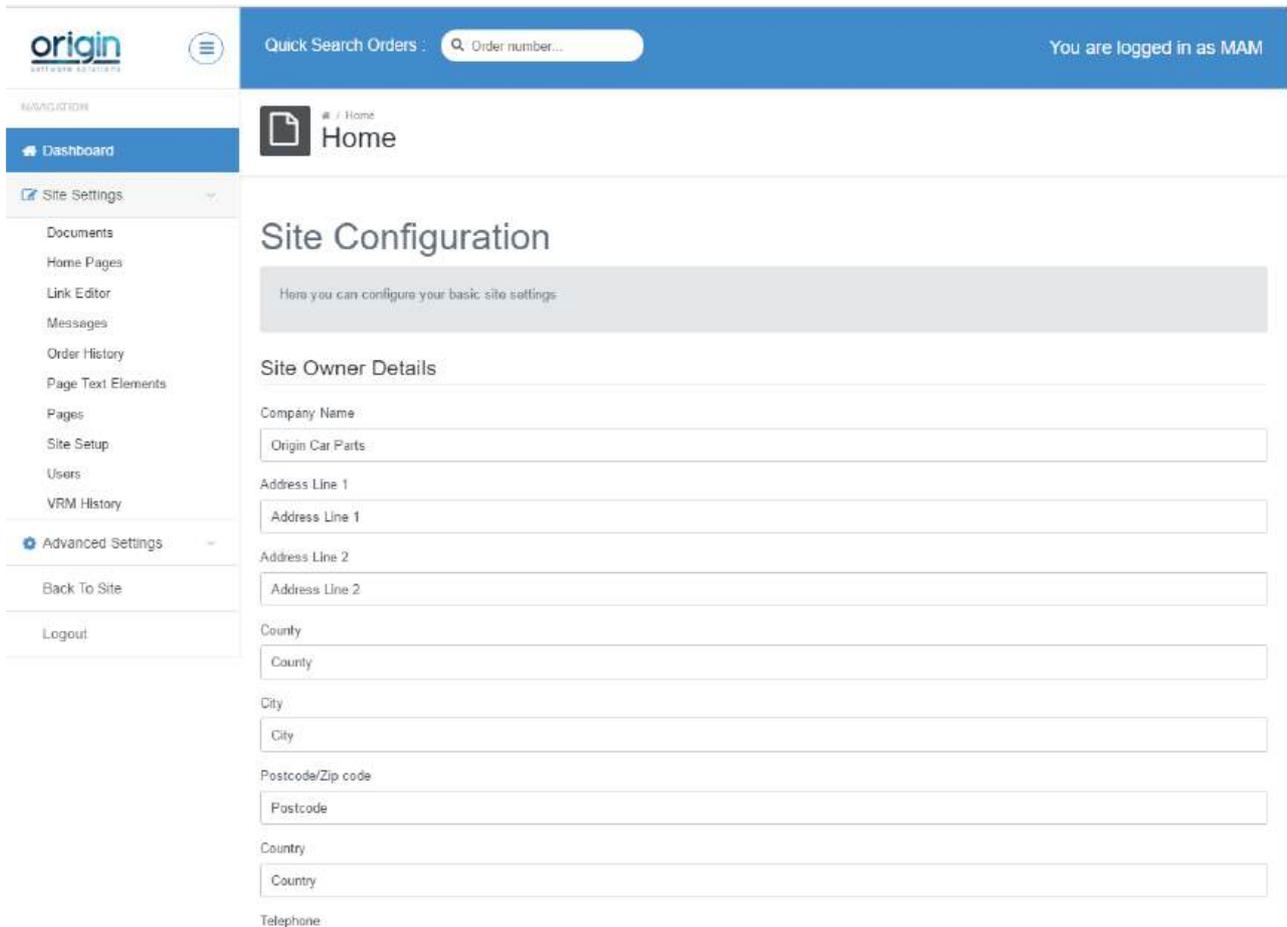
Day	Open	Close
Monday	9am	6pm (4pm on bank holidays)
Tuesday	9am	6pm
Wednesday	9am	6pm
Thursday	9am	6pm
Friday	9am	6pm
Saturday	9am	6pm
Sunday	9am	6pm

body

Back Save

Site Settings

The site settings page will allow the administrator to maintain the site configuration settings.



The screenshot displays the 'Site Configuration' page. At the top, there is a blue header with the 'origin' logo, a search bar for 'Quick Search Orders', and the user 'MAM'. The left navigation menu includes 'Dashboard', 'Site Settings' (expanded), and 'Advanced Settings'. The 'Site Settings' menu items are: Documents, Home Pages, Link Editor, Messages, Order History, Page Text Elements, Pages, Site Setup, Users, and VRM History. The 'Site Configuration' section has a grey box stating 'Here you can configure your basic site settings'. Below this is the 'Site Owner Details' form with the following fields:

- Company Name: Origin Car Parts
- Address Line 1: Address Line 1
- Address Line 2: Address Line 2
- County: County
- City: City
- Postcode/Zip code: Postcode
- Country: Country
- Telephone: (empty)

User Settings

The user settings page will allow the administrator to maintain the user settings.

Once a user has been setup on the website the user's configuration can be administered from this screen.

1. Click Admin from the Main Menu, to be taken to the admin area
2. Expand the Site Settings title
3. Click Users.
4. You will see a summary of the users currently listed in the site.

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Quick Search Orders : You are logged in as MAM

NAVIGATION

- Dashboard
- Site Settings
 - Documents
 - Home Pages
 - Link Editor
 - Messages
 - Order History
 - Page Text Elements
 - Pages
 - Site Setup
 - Users
 - VRM History
- Advanced Settings
 - Back To Site
 - Logout

Home

Site Users

Here you can edit the site specific users. Advanced user options are available [here](#) (not recommended)

[Add New User](#)

Name	Username	MAM Account	Login Count	Last Login	Order Count	Last Order	Enquiry Count	Enquiry Order	Actions
Steve Scofield <i>support@originsoftware.co.uk</i>	support	A001	3	19-05-2016	0		23	03-02-2016	Edit
Stephen Scofield <i>stephen.scofield@originsoftware.co.uk</i>			0		0		0		Edit
Ronnie Tutton <i>ronnie.tutton@mamssoft.co.uk</i>			0		0		0		Edit
automation automation <i>automation@originsoftware.co.uk</i>			0		0		0		Edit
MAM Software <i>demo@originsoftware.co.uk</i>	demo	A001	733	18-01-2017	29	16-12-2016	4921	18-01-2017	Edit
MAM Software <i>mam@originsoftware.co.uk</i>	mam	A001	1	22-01-2016	0		7	22-01-2016	Edit
Nathan Fothergill <i>nathan.fothergill@mamaoft.co.uk</i>	TEST123		0		0		0		Edit
Aaron Gaw <i>aarongaw72@gmail.com</i>	agcarsbangor		0		0		0		Edit

Clicking Edit will open the following screen where the user may be administered. Click Submit to confirm the changes. This screen allows a user to be locked to an IP address as well as limit their VRM searches, among other settings.

NAVIGATION

[Dashboard](#)[Site Settings](#)[Advanced Settings](#)[Back To Site](#)[Logout](#) # / Home
Home

Editing user MAM Software

This page allows you to edit the settings for the user MAM Software (demo@originsoftware.co.uk)

User details

Username

The username the user will use to log in to the site.

Email

The email address of the user. Please note that each user must have a unique email address.

Password

Set the users password. Leave blank to keep the users existing password.

Password Confirmation

Confirm the users password. Leave blank to keep the users existing password.

IP Address

If set, this user will only be able to login from this ip address. Leave completely blank to allow login from any ip address. PLEASE NOTE: The option 'Limit user login by IP address' must be enabled [here](#) to allow ip address blocking.

Title

First name

Last name

Telephone

Company Name

Address Line 1

Advanced Settings

Set up web accounts

The first task in setting up a user is to create their company account on the website. The purpose of the web account is to link web users to their customer account held in MAM.

1. Click Admin from the Main Menu, to be taken to the admin area
2. Expand the Advanced Settings title
3. Click Advanced Accounts.
4. You will see a summary of the accounts currently listed in the site.

origin software solutions

Quick Search Orders : You are logged in as apdemo

NAVIGATION

- Dashboard
- Site Settings
- Advanced Settings
 - Advanced Accounts
 - Advanced Users
 - Delivery Charges
- Reports
- Back To Site
- Logout

/ Home / Account Management

Account Management

Manage the trade accounts that can then be assigned to users

[Add a New Account](#)

[Copy to Clipboard](#) [Export to CSV](#) [Select All](#) [Select None](#)

Show entries Search:

Name	Account Code	On Stop	Actions
Steve's Account	A001		Edit Addresses Delete
Jason Bradshaw Test Account	JB001		Edit Addresses Delete

Showing 1 to 2 of 2 entries

[Previous](#) [1](#) [Next](#)

5. You may now add a new account or edit an existing one. Data will be shown if the edit option is clicked.
6. The administrator will need to complete all mandatory fields before saving the page. The critical field is the 'Account Code', this should mirror the account code held at MAM.

- Dashboard
- Site Settings
- Advanced Settings**
 - Advanced Accounts
 - Advanced Users
 - Delivery Charges
- Reports**
 - Order History
 - VRM history
- Back To Site
- Logout

Edit Account (ID: 1)

Parent Account	<input type="text" value="No Parent"/>
Account Code *	<input type="text" value="A001"/>
Account Name (Descriptive) *	<input type="text" value="Steve's Account"/>
Owner Email Address *	<input type="text" value="support@originsoftware.co.uk"/>
Owner's Title	<input type="text" value="Mr"/>
Owner's First Name *	<input type="text" value="Dave"/>
Owner's Surname *	<input type="text" value="Bob"/>
Telephone	<input type="text" value="123"/>
Account On Stop	<input type="text" value="No"/>
Cash Account	<input type="text" value="No"/>

7. Click Save when complete. Once saved the site will receive and send data in relation to the assigned MAM account code. If the MAM code is not valid the site will not work.

The web account has been created, the web users must now be added.

Set up web users

1. Click Admin from the Main Menu, to be taken to the admin area
2. Expand the Advanced Settings title
3. Click Advanced Users.
4. You will see a summary of the users currently listed in the site.

The screenshot shows the 'Advanced Users' management page in the Origin software. The interface includes a sidebar with navigation options like 'Dashboard', 'Site Settings', 'Advanced Settings', 'Advanced Accounts', 'Advanced Users', 'Delivery Charges', 'Back To Site', and 'Logout'. The top navigation bar features a search box for orders and indicates the user is logged in as 'MAM'. The main content area has a heading 'Manage the users that have access to the system.' with buttons for 'Add a New User' and 'Bulk Enable / Disable Users'. Below this are buttons for 'Copy to Clipboard', 'Export to CSV', 'Select All', and 'Select None'. A search box and a 'Show 50 entries' dropdown are also present. The main table lists users with columns for Username, Account, Name, Email, Enabled, and Actions. The table contains 8 entries, including users like Stephen Scofield, Ronnie Tutton, automation automation, aaron gaw, demo, mam, support, and TEST123. At the bottom, there is a 'Showing 1 to 8 of 8 entries' indicator and a pagination control with 'Previous', '1', and 'Next' buttons.

Username	Account	Name	Email	Enabled	Actions
		Stephen Scofield	stephen.scofield@originsoftware.co.uk	1	Edit Addresses Attributes Delete
		Ronnie Tutton	ronnie.tutton@mamsoft.co.uk	1	Edit Addresses Attributes Delete
		automation automation	automation@originsoftware.co.uk	1	Edit Addresses Attributes Delete
agcarsbangor		Aaron Gaw	aarongaw12@gmail.com	1	Edit Addresses Attributes Delete
demo	Steve's Account	MAM Software	demo@originsoftware.co.uk	1	Edit Addresses Attributes Delete
mam	Steve's Account	MAM Software	mam@originsoftware.co.uk	1	Edit Addresses Attributes Delete
support	Steve's Account	Steve Scofield	support@originsoftware.co.uk	1	Edit Addresses Attributes Delete
TEST123		Nathan Fothergill	nathan.fothergill@mamsoft.co.uk	1	Edit Addresses Attributes Delete

5. The search box can be used to quickly find a particular user.
6. You may now add a new user or edit an existing one. Data will be shown if the edit option is taken.
7. The administrator will need to complete all mandatory fields before saving the page. The critical field is the 'Trade Account', this should be the web company account which the user works for. General users should be set to a role of 'User'.

The screenshot shows the 'Edit User (ID: 6)' form in the Origin system. The form is divided into several sections with the following fields:

- Basic Information:** Email Address (ap.demp@origin-system.co.uk), Login Username (apdemp01), Role (Super Admin), Password (masked), Title (Mr), First Name (apdemp), Surname (I), Telephone.
- Marketing Preferences:** Has Signed Up to Marketing (No), User Activated (Yes), User receives SMS messages? (No).
- Account Information:** Default Search, Trade Account (A001 - Steve's Account), Trade Label (No), Company Name (apdemp01), Company Registration Number, Company VAT Number.
- Budget Settings:** Has Budget (No), Can See Budget (No), Budget, Can See Prices (Yes), Show Ex VAT Prices (inherit from site settings).
- Delivery Options:** Delivery Charge, Delivery Flat Fee, Free Delivery Threshold, Free Delivery Flat Fee, Minimum Order Value, Order Approval Email.
- Other Settings:** Collection Countries (No), Can Edit Addresses (No), User Complete (Yes).

At the bottom right of the form, there are 'Back' and 'Save' buttons.

- Click Save when complete. Once saved the user will only be able to see price based on the account code they have been assigned to.

The user has now been created.

Reports

Order history

Under Site Settings in the admin section, click Order History. This will display the order history which can then be filtered further between dates and status.

The screenshot shows the 'Order Management' section of the Origin admin interface. The 'Order History Viewer' is active, displaying a table of order history entries. The table has the following columns: Order No., Web ID, Username, Ok?, Placed on, Invoice No., Paid, Pay Ref, Paid on, Paid with, Total, Sales Channel, Status, Actions, and Select. The table contains 20 rows of data, with the last row (Order No. 50) highlighted in red, indicating a failed order. The interface also includes filters for 'From Date' (17/01/2017) and 'To Date' (18/01/2017), an 'Export All' button, and a 'Bulk Status Update' dropdown menu.

Order No.	Web ID	Username	Ok?	Placed on	Invoice No.	Paid	Pay Ref	Paid on	Paid with	Total	Sales Channel	Status	Actions	Select
03	000003	demo	Yes	2010-12-10 13:49:15	000003	No				171.29			View	<input type="checkbox"/>
02	000002	demo	Yes	2010-12-14 17:26:03	000002	No				250.71			View	<input type="checkbox"/>
01	000001	demo	Yes	2010-12-10 22:23:55	000001	No				254.59			View	<input type="checkbox"/>
00	000000	demo	Yes	2010-12-13 10:25:21	000000	No				297.60			View	<input type="checkbox"/>
09	000009	demo	Yes	2010-12-12 11:20:29	000009	No				852.70			View	<input type="checkbox"/>
08	000008	demo	Yes	2010-11-29 17:20:56	000008	No				246.66			View	<input type="checkbox"/>
07	000007	demo	Yes	2010-11-23 14:10:34	000007	No				92.66			View	<input type="checkbox"/>
06	000006	demo	Yes	2010-11-17 10:30:05	000006	No				766.48			View	<input type="checkbox"/>
05	000005	demo	Yes	2010-10-13 00:44:40	000005	No				44.93			View	<input type="checkbox"/>
04	000004	demo	Yes	2010-10-10 14:29:38	000004	No				187.25			View	<input type="checkbox"/>
03	000003	demo	Yes	2010-09-11 10:48:10	000003	No				123.55			View	<input type="checkbox"/>
02	000002	demo	Yes	2010-08-05 10:00:38	000002	No				92.00			View	<input type="checkbox"/>
01	000001	demo	Yes	2010-08-03 13:33:05	000001	No				185.78			View	<input type="checkbox"/>
00	000000	demo	No			No				144.00			View	<input type="checkbox"/>

VRM History

This link will display the VRM history which can then be filtered further between dates and users.

The screenshot shows the 'VRM Log Viewer' interface. At the top, there is a navigation menu with 'Dashboard', 'Site Settings', 'Advanced Settings', 'Reports', 'Back To Site', and 'Logout'. The main content area is titled 'VRM Log Viewer' and contains a form for filtering VRM lookup usage. The form includes a 'User' dropdown menu set to 'apdemo 1', 'From Date' and 'To Date' input fields with a 'dd/mm/yyyy' placeholder, and 'Export' and 'Search' buttons. Below the form are buttons for 'Copy to Clipboard', 'Export to CSV', 'Select All', and 'Select None'. A table displays the search results, showing columns for User, Account, VRM, Result, and Date. The table contains three entries for user 'apdemo 1'. Below the table, it indicates 'Showing 1 to 3 of 3 entries' and includes 'Previous', '1', and 'Next' navigation buttons.

origin
NAVIGATION
Dashboard
Site Settings
Advanced Settings
Reports
Back To Site
Logout

Quick Search Orders : Order number... You are logged in as apdemo

Home

VRM Log Viewer

This form allows you to view and filter VRM lookup usage

User: apdemo 1
From Date: dd/mm/yyyy
To Date: dd/mm/yyyy

Export Search

Copy to Clipboard Export to CSV Select All Select None

Show 50 entries Search:

User	Account	VRM	Result	Date
apdemo 1	Steve's Account	CV08DHX	Ford Focus 1.6 2008 Petrol	13/03/2015
apdemo 1	Steve's Account	L990VHP	Land Rover Range Rover 3.9 1994 Petrol	16/03/2015
apdemo 1	Steve's Account	HN51YFC	Jaguar/Daimler XJ Series XJR 4 2001 Petrol	16/03/2015

Showing 1 to 3 of 3 entries

Previous 1 Next