Netlife Photosuite

Customer service

www.YOURDOMAIN.xx/admin

A short introduction

You will find your customer service tools in the admin panel. This involves subject, user and order search features with communication possibilities.

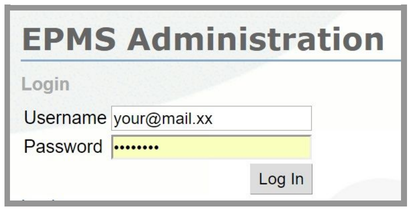
Definitions:

- *Subject*: A subject is the photographed individual. Subject data is typically added to the system via name lists from schools/nurseries or registered by the parents using a web registration form or a shoot card.
- *User*: Users are typically parents of the subject, they add subject picture/orders to their user account. Information on the user is based on contact info registered when creating the user account.

Contents

Get started

Visit *www.YOURDOMAIN.xx/admin* and login with username and password. Please contact your team leader if you don't have a username and password to access the site.



As the start page says, use the left hand side menu to find the features you are looking for.

Start here
A startpage tells you to use the sidebar to locate what you are looking for.

Support
Find support information, like email address, phone number and homepage for Netlife AS.

Logout
By clicking here you log out directly and get back to the login site.

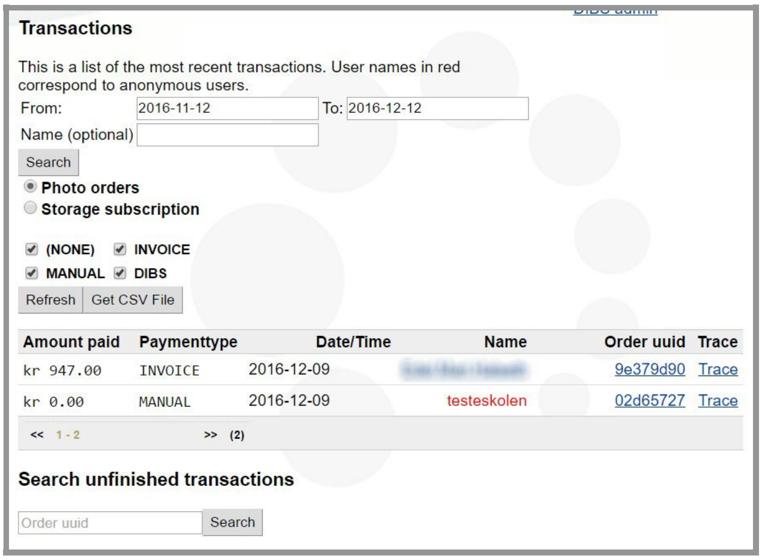
Subject search
Search, find and edit information about the different subjects. Learn more about subject search below or by clicking here.

Users
Search, find and edit information about the different users on your portals. Learn more about users below or by clicking here.

Orders
Search, find and edit order information. Learn more about orders by clicking here.

Transactions

By clicking transactions in the left hand side menu, you get a list of the most recent transactions. You may also search for older transactions by using the search feature on top. Set a time period for the search and narrow it down by checking or unchecking the boxes below. At the bottom of the page you may search for *unfinished transactions*.



My partners

Choose partners in the list to the left and indicate a sales period (both dates inclusive). A sales summary will then be created for each partner. The selected price list will be used for calculating sales summaries.

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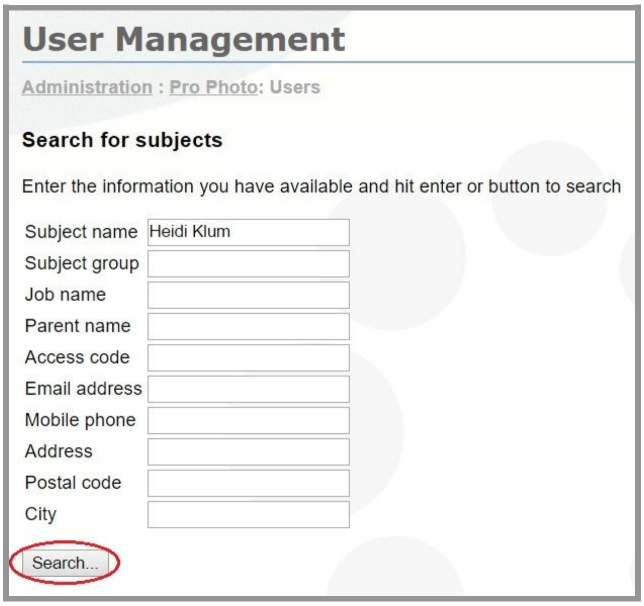
Subject search

Click *subject search* in the left hand side menu.

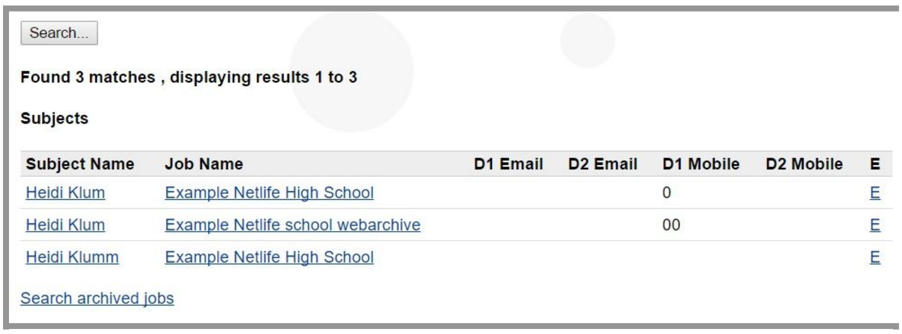
You may enter as much or as little information you have about the subject in the following search window. This feature is useful if a customer calls with questions about a specific subject.



Click *search* to see the results.

The search mainly scans through status 1-9 jobs.

This example search located 3 matches to the information typed in.



To include search through status 10 jobs, click *search archived jobs* located below the search result list.

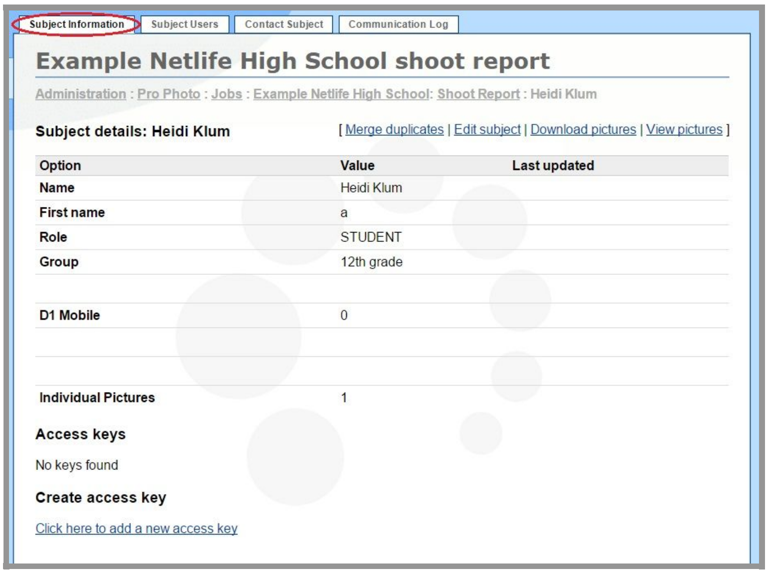
If the search gave you what you were looking for, click the subject name to open the subject details.

Related functions

- *List jobs*: Not relevant.
- *Retouch lik image search*: Not relevant.

Subject information

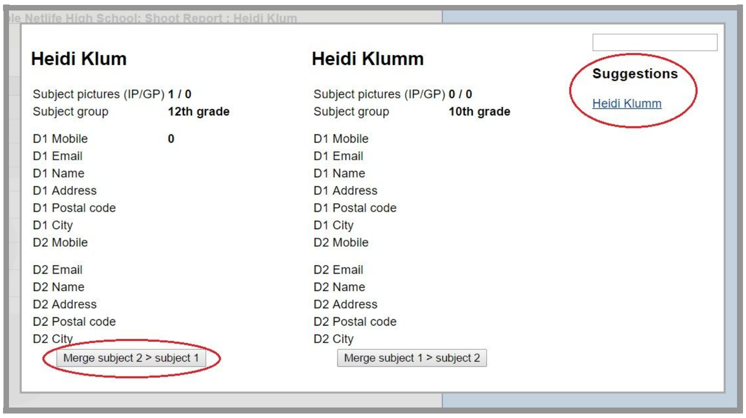
This page contains of subject details, such as name, role and group in addition to contact information. You may also find or create the access keys the customers needs to access their webshop accounts. Press *click here to add a new access key* if a key does not already exist.



You have four choices listed on the top right hand side; *merge duplicates*, *edit subject*, *download pictures* and *view pictures*.

Merge duplicates

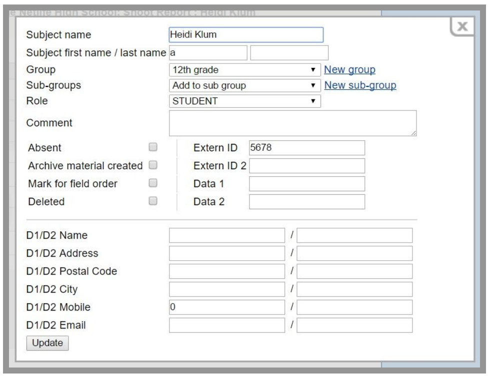
Use this feature if there exists two or more subjects that actually are the same person. You may use the search column to the right to find the second subject. Suggestions will be listed below. Click on the correct subject name and the information will be shown next to subject one. Choose how to merge by clicking one of the buttons at the bottom. By clicking *merge subject 2 > subject 1* you will be left with the first subject. By clicking *merge subject 1 < subject 2* you will be left with the subject you search for and added in the merge window.



As the option to merge now also is available in checkpoint, this feature rarely is needed, but it's ok to have the option if the question comes up.

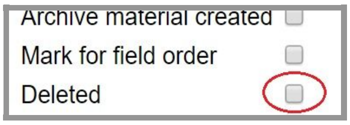
Edit subject

You may edit the subject information. Change name, contact information, group, role or leave a comment.



- *Mark for field order*: Mark this box if the subject user is going to receive automatically generated orders.

- *Deleted*: If you delete a subject it will not be fully deleted from the system, but it will be marked as deleted and presented with a line through its name and job name when presenting search matches. When you open the subject detail page a line with red text color, saying that the subject is marked as deleted, will show on top. To undelete click *edit subject* again and remove the mark in the deleted box. Remember to click *update* before leaving the edit page.



- *Data 1/ 2*: A feature often used if a subject is receiving automatically generated orders.

- *Extern ID 1/ 2*: Most often the subject's ID number, taken from the school's own administrative system.

Remember to click *update* if you made changes, if not, just click anywhere outside the edit window to go back.

Download pictures

Download all the subject pictures by clicking the button marked with red circle in the example screenshot to the right.

View pictures

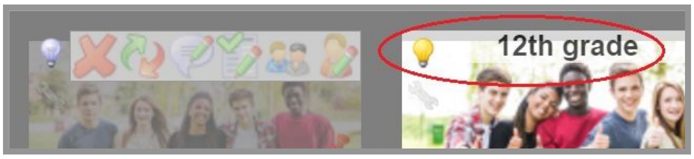
This feature show the whole job and its pictures divided in groups. You may click another group or subject name to see other pictures.

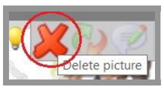
Click the *upload picture* button below the picture view to add more to the subject.

Click the picture to see it in full size. The pop up window will show picture and subject information like name and group, photographer, retouch status and date added. Choose to click *previous*, *next* or *close* window. You may find the same information by holding the mouse over the picture in the view window.

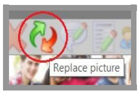
Picture symbols

- *Light bulb:* You may see all the group pictures but in this screenshot example only the favorite one will have a yellow light bulb. The spare pictures are also shown on this page, but with the light bulb turned of (grey color). This means that only the favorite picture is available for the customer. If a customer requests to see another group picture example (or portrait without light bulb on) you may click the light bulb to turn it on.

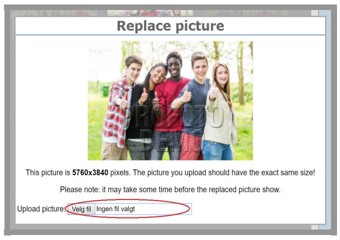


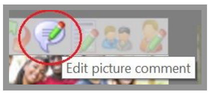


- *Delete picture*: Deletes selected picture. Notice that when deleting a group picture you will delete the same picture from all the subjects connected to it.

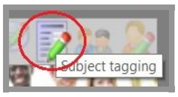


- *Replace picture*: Replace the selected picture with a picture you upload from the computer. The picture you upload has to have the exact same size as the previous one. It may take some time before the replaced picture show. Upload picture by clicking the button at the bottom of the window and choose the correct file.

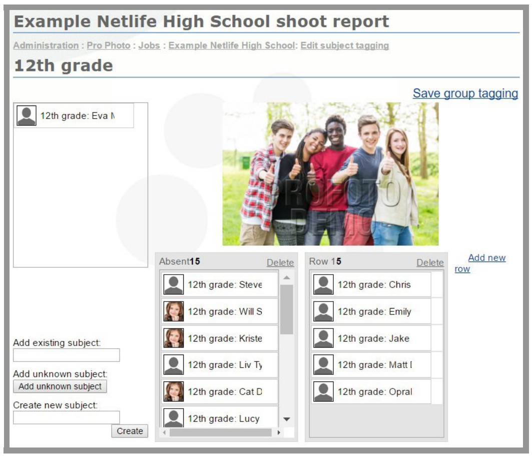


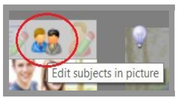


- *Edit picture comment*: Add or edit the picture comment. This comment follows the picture all the way from Photolink Pro, where the photographer is the one who comments, to Retouch Link where the products are retouched.

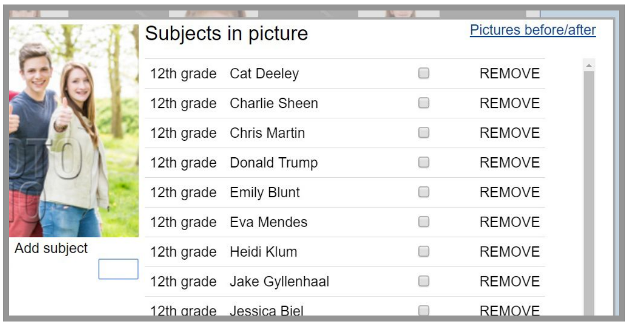


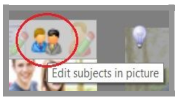
- *Subject tagging*: This feature opens a window where you may edit the subject tagging. This edit will only apply to the selected picture, and will not change the subject tagging on the group pictures belonging to other subjects in the group. You may add or delete rows and move, add or delete subjects. Remember to click *save group tagging* before closing the window.



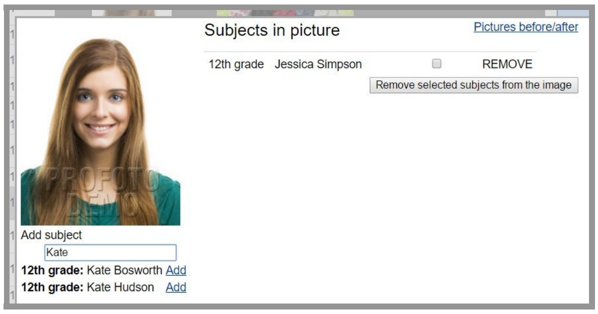


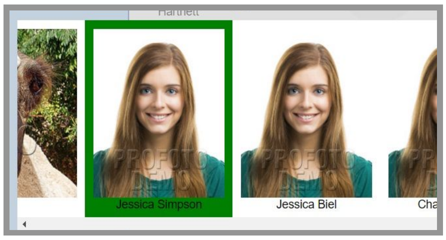
- *Edit subjects in picture* (group pictures): You may use this feature to make the selected group picture only available for one or several subjects. Remove all the other names except the ones you want to make the picture available for. This edit will only apply to the selected picture and not the group pictures belonging to the other subjects in the group. Remember to make sure the light bulb is turned on (yellow color) for this picture to make it available for the customers.

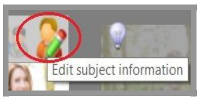




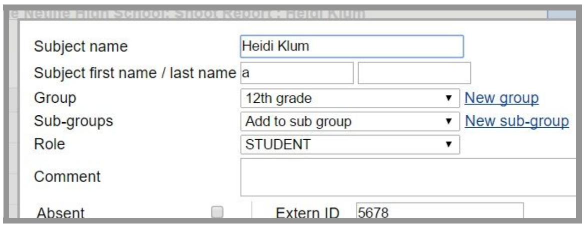
- *Edit subjects in picture (individual pictures)*: You may use this feature if the subject in the picture and the subject name is not the same person. Click the *edit subjects in picture* symbol. If you know who the person in the picture is, you use the *add subject* bar and search. Search matches will be listed below. Add the correct subject. Then you may click *remove* behind the wrong subject name (Jessica Simpson in this screenshot example). If you are not sure who the person in the picture is, click *pictures before/after*. This will show you a timeline with the pictures taken before and after the one you are dealing with, including subject names. This may help you locate correct subject name.

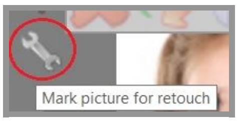




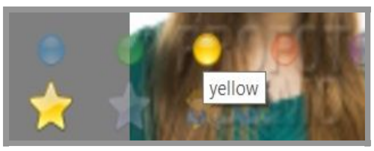


- *Edit subject information*: A direct link to the edit subject information window.

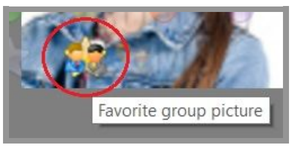




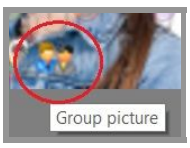
- *Mark picture for retouch*: If the picture needs to go through retouch you click the wrench symbol (marked with red circle in the example screenshot).



- *Picture color tags*: Choose to tag the picture with, or change the tag to, either a yellow star (photographers favorite), grey star, blue, green, yellow, red, purple or grey circle. The yellow star tagged picture will be the default image on the webshop products. The other color tags may also be linked to certain places, so make sure you tag the pictures correctly.



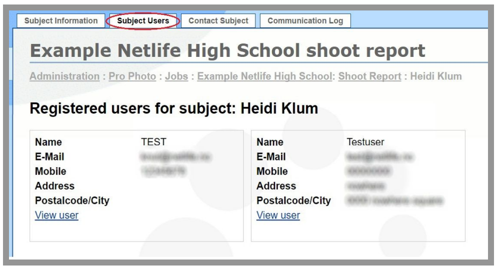
- *Favorite group picture:* Set or change favorite group picture by using this picture symbol. Remember that you then change or set the favorite group picture for all the subjects connected to the picture.



- *Group picture*: Set the picture as a group picture.

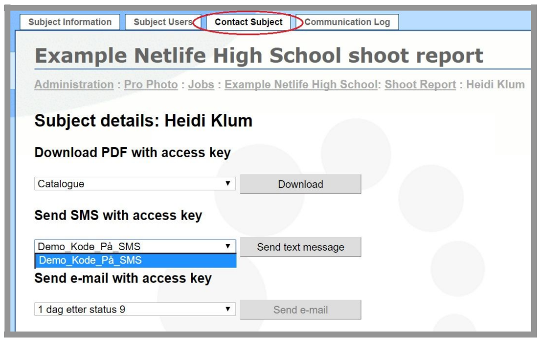
Subject users

Click *subject users* to see a list of registered users for the selected subject. The list contains of contact information about the users. Click *view user* to see more information (click here to read more about users).



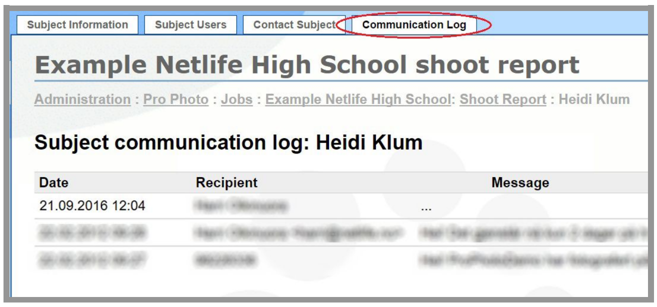
Contact Subject

Use this feature to send either a text message or email for the subject. This can be done if contact information was missing or incorrect when the messages was sent out for all the subjects the first time. Choose correct template from the drop down list before clicking *send*.



Communication Log

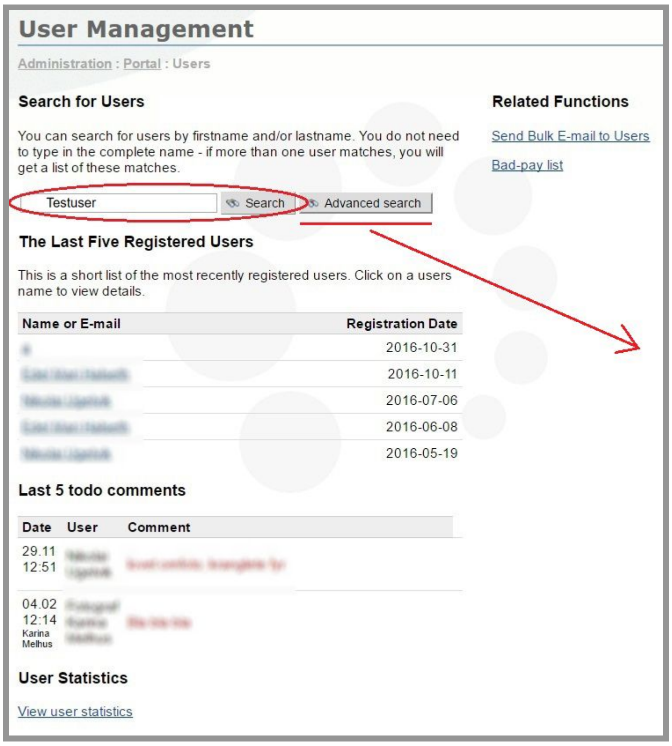
A log over communication out to the users for the selected subject with information about what was sent out, when and to who.



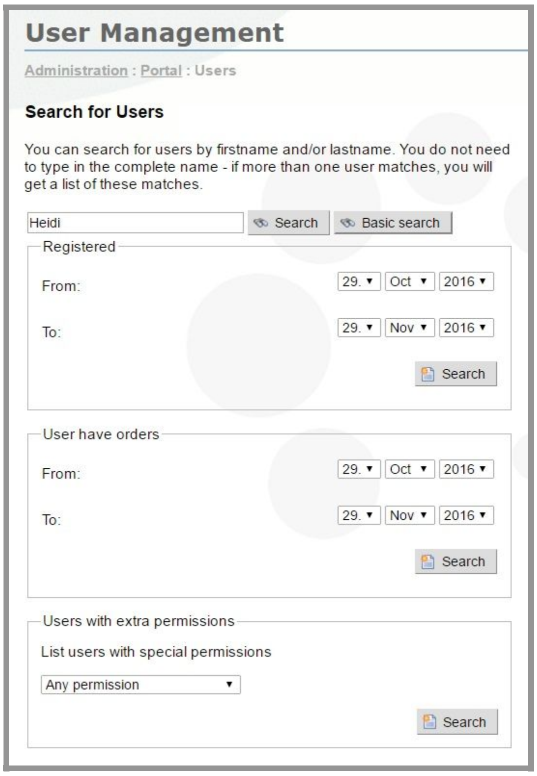
Users

Search for users

To find the user you are looking for type in the information you have and click *search*.



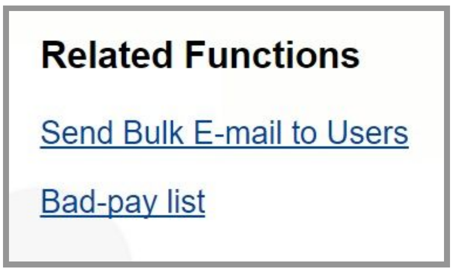
Advanced search: To narrow down the search you may use the *advanced search* feature. To go back click *basic search*.



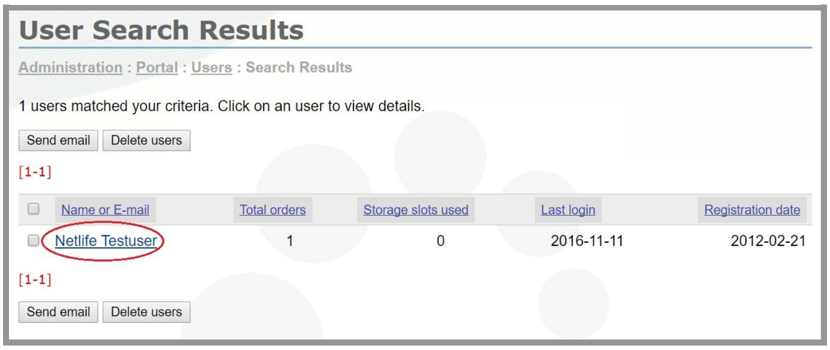
Below the search feature you may find a list of the last five registered users and last five todo comments. At the bottom you may click *view user statistics*. This will show statistics over new users and total number of users.

Related functions:

- *Send bulk e-mail to users*: Use this feature to send newsletters to the users.
- *Bad-pay list*: Upload a list with users called bad payers. These users will not get the invoice option, but will have to use the online payment when ordering from the webshop.



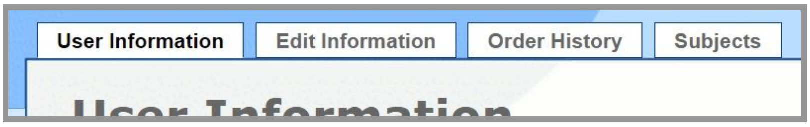
User search results
After typing in the information and clicking *search* the search results will be shown. All the users found in the search with order, login and registration information will be listed.



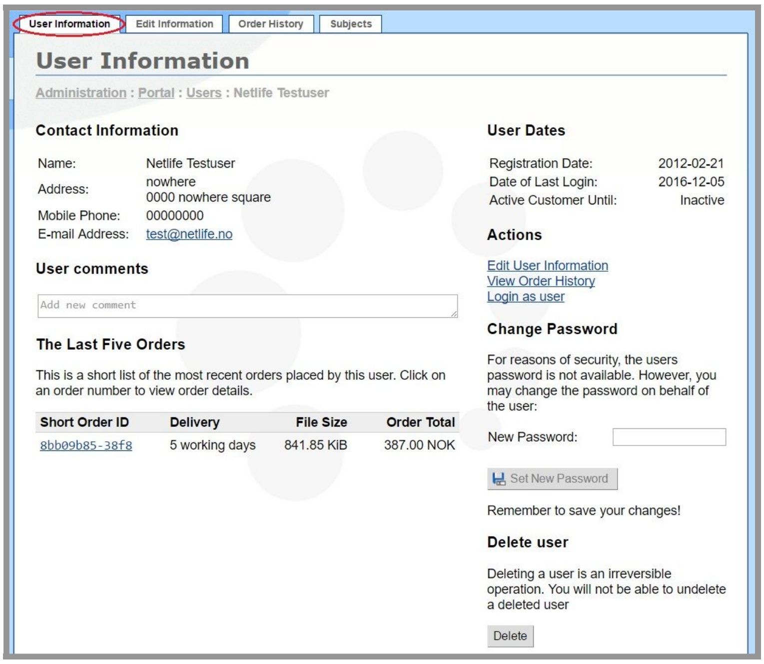
From this window you may *send email* or *delete users*.

When locating the correct user, click the name to open the user information window.

User information



This tab will show you information about the user. You will find name, address, contact information and dates showing registration and last login. At the bottom the last five orders are listed.



Active customer until
Users who order in webshop will have this feature set to active.

User comments
Write down your note and use the drop down list to choose to save it as a comment or todo note. Click add comment when finished.

Edit user information
Direct link to the edit information tab (see below).

View order history
Direct link to the order history tab (see below).

Login as user
Use this function to simulate the user in webshop. Learn more by clicking here.

Change password
On the right hand side you may change password. An email will be sent to the user with information about the changes.

Delete user
Deleting a user is an irreversible action. You will not be able to undelete a user.

Edit information

You may edit the information saved for the user. Remember to save the changes you make.

Access
Only applicable for /admin users.

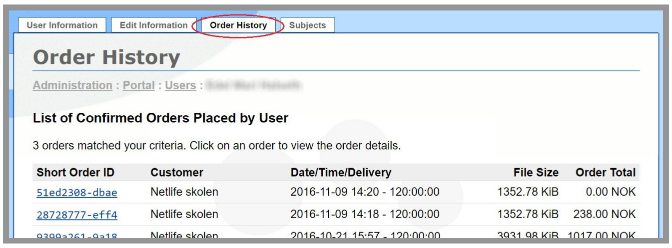
Accept email
The users who've accepted email will receive f.ex. newsletter emails.

Mark as bad payer
If a user is marked as bad payer, the invoice option will be removed and the user have to pay online when ordering from the webshop. This to secure the user paying for its orders.

Account balance
If the user through f.ex. a discount campaign have a certain amount to shop for for free, the amount may be typed in here.

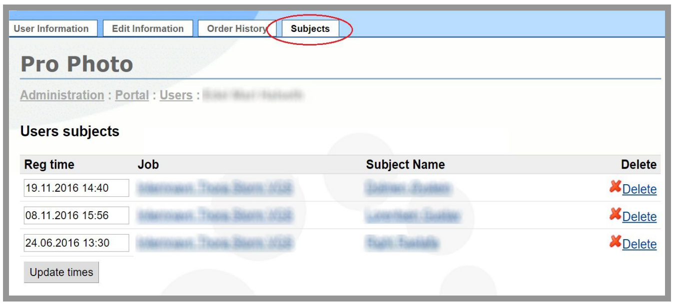
Order history

Gives you a list of confirmed orders placed by user. You may click on the order to view the order details.



Subjects

A list of the user´s subjects. You may click on the subject to view and edit the information. *Update times* if f.ex. a timed discount period has expired and you want to extend it.



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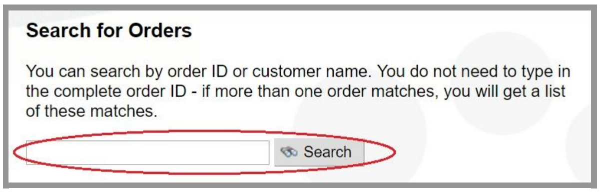
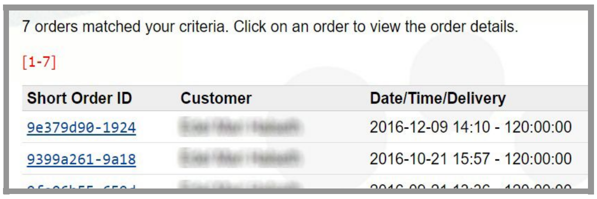
Orders

...omers may have questions or complaints about their orders. ... *orders* in the left hand side menu to open the order page in ...h you may search for, edit or change orders, among other ...ns.

Search for orders

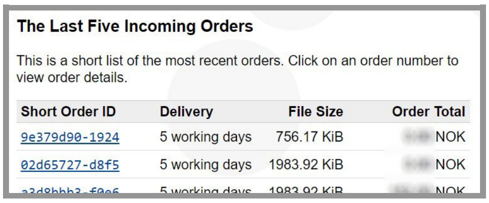
To find the order you are looking for, type parts of or the whole order ID number or customer name in the search bar on top. If there are more than one order match, you will get a list of these matches. If there are only one match, you go directly to the information page for the order. Learn more about the order information page below or by clicking here.





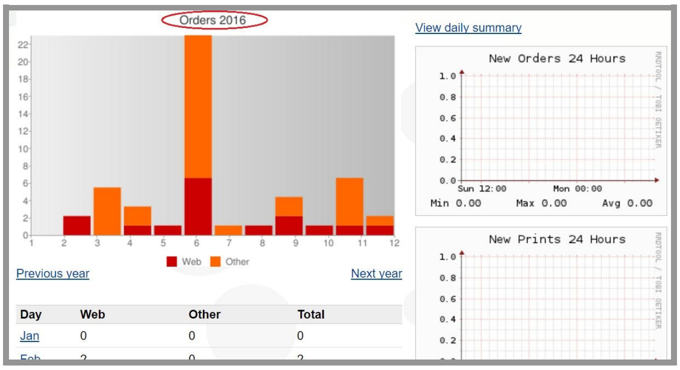
The last five incoming orders

A list of the five most recent orders show on the order start page. In the list you may find information about ID number, delivery date, file size and order cost.

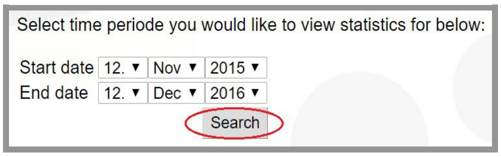


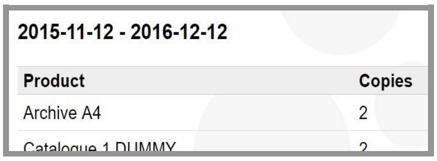
Statistics

- *View order statistics*: Show statistics regarding number of orders, turnover and produced copies. The default view show information from each day in the last month. You may change to other months, or see all orders this year, divided into months. The *web* column show number of regular orders booked through the webshop. *Other* show number of admin generated orders (f.ex. archive material).



- *View statistics based on products*: See how many numbers of each product has been sold in the selected period of time of your choice. An alphabetical list of products will show when you click *search*. The default setting is a statistic over the last month.





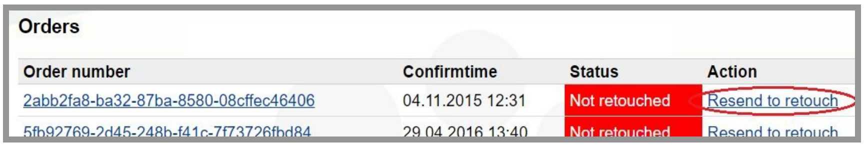
Orders

- *View stalled orders*: Stalled orders are orders booked but not ready for production. An example may be school catalogues. You have two choices in what to do with the orders; either send them to retouch or send them to Lablink. You *send to Lablink* if the order is ready for printing. *Send to retouch* if the order needs to go through retouch first. You may also click the order name and see or edit the information about it.

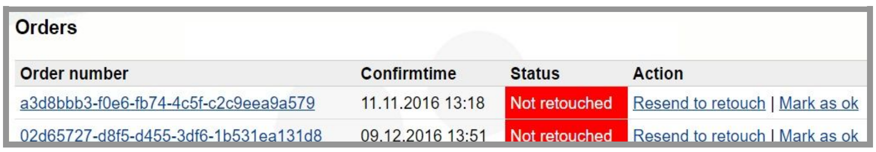
- *Orders by status*: Lists how many orders there are in each status. The list only contains orders from the last 6 months. You may download the list in *CSV* or *HTML*. Click *products* to see which products the orders in a specific status contains.

Retouch

- *View orders in retouch*: Gives you a list of the orders with status 95 (in retouch). You may choose to *resend* a order to retouch. This may be applicable if the order is claimed in retouch (if an order is claimed no one else can take over the retouching) by a person incapable of finishing the retouch. By resending you open the order for retouch again. The oldest orders are listed on top.



- *Review retouched orders*: Show you the orders in status 96 (review retouch). You may *send back to retouch* (set the order back to status 95) if needed or *mark as ok* (set the order to status 1 - ready for download).



Upload order list

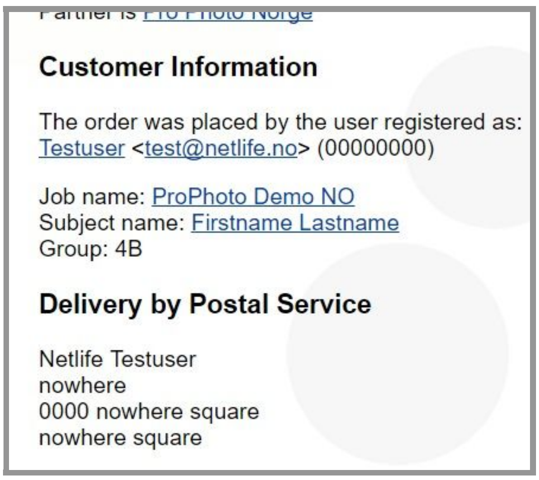
- *Upload list of sent orders*: You may upload a document which automatically sets the mentioned orders to status 9. The document has to contain the order IDs and only one order per line. This feature is helpful f.ex. if invoices only is being made for orders in status 9. Click the button down to the left to locate correct file and *upload order list* to upload and finish.

Order information

After searching for and locating the correct job you click on the order name. Once opened the order information page, you may read and edit information about the order.

Customer information

Gives information about the user who placed the order. You may find user name and contact information. Information about the subjects included in the order is also listed here, such as subject name, group and job name. Click the user, subject or job name to see extended information.

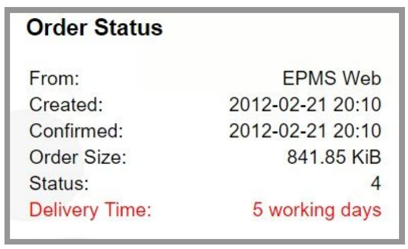


Delivery by postal service

Displays the selected delivery method. Another option may be Pick up instore or School/club delivery.

Order status

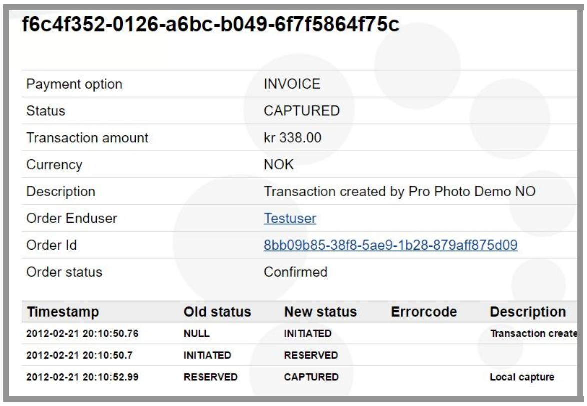
Gives information about when the order was created and confirmed, size, status and delivery time.



Payment details

Gives information about total order amount and payment type.

You may also *track the transaction*. This is more helpful when an online payment has been made. Through the tracking you may find information about payment option, amount, order status and timestamp for the different status´ of the transaction.



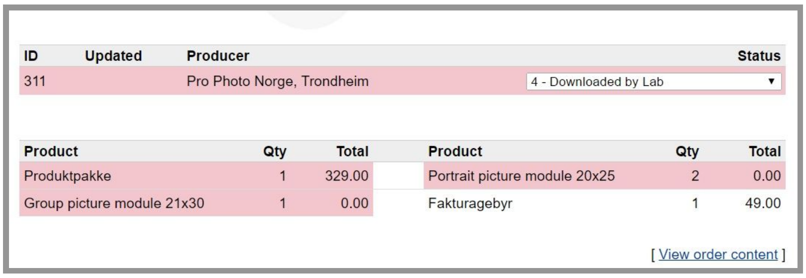
f6c4f352-0126-a6bc-b049-6f7f5864f75c

Payment option	INVOICE
Status	CAPTURED
Transaction amount	kr 338.00
Currency	NOK
Description	Transaction created by Pro Photo Demo NO
Order Enduser	Testuser
Order Id	8bb09b85-38f8-5ae9-1b28-879aff875d09
Order status	Confirmed

Timestamp	Old status	New status	Errorcode	Description
2012-02-21 20:10:50.76	NULL	INITIATED		Transaction create
2012-02-21 20:10:50.7	INITIATED	RESERVED		
2012-02-21 20:10:52.99	RESERVED	CAPTURED		Local capture

Producer list

You may have several producers for the products you offer, and the different parts of the order therefore may have different order status´. The total status of the order is always the same as the lowest status from the producers. By using the drop down list you may change order status. The total status of the order is shown in *order status* at the top right hand corner of the order information page.



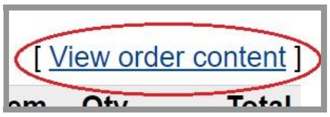
ID	Updated	Producer	Status
311		Pro Photo Norge, Trondheim	4 - Downloaded by Lab

Product	Qty	Total	Product	Qty	Total
Produktpakke	1	329.00	Portrait picture module 20x25	2	0.00
Group picture module 21x30	1	0.00	Fakturagebyr	1	49.00

[View order content]

View order content

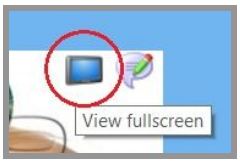
See which products the customers have ordered. See the exact paper sheets and which pictures on what templates.



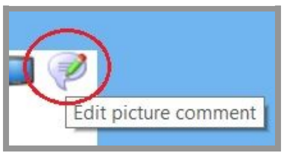
This example screenshot show us that the customer has ordered one sheet of portrait module 12x8".

You have the option to create a new order based on the existing one. This is the quickest way to create a new order where the content does not need to be changed much but only reordered. If a customer complains about delivery damage or bad retouch on the package they have received you may order a new one.

Mark the products the new order should contain (you don't have to mark all, you may make a selection). The products selected will get a blue mark around. Leave a *Lablink comment* and mark *require retouch* if needed. When satisfied click *create order* at the bottom, and a partial order with the selected order parts will be made. The new order will get its own order ID and is totally independent from the existing one. If marked *required retouch* the order will get status 95 (in retouch) and status 1 (ready for download) if not. An order made this way will automatically be free for the customer and this can not be overruled.



Hold the mouse over the picture and a tv screen will show. Click the symbol to view the selected picture in full screen.



Hold the mouse over the picture and a huddle will show next to the tv screen. Click the symbol to open the picture comment window and read or edit it for the retouchers to see.

Most common issues

Free orders

The need to create free orders is often necessary if the customer has received wrong or damaged products. There are mainly three ways to create new orders for the customer, either by ordering the same package or creating a new order from the scratch. See the different ways below.

- **Create an identical order - change order status**
  If the customer wants the exact same products as the original order contained of, the easiest way is to set the order status back to 1-Ready for download.

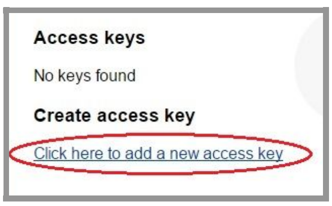
- **Create an identical order - view order content**
  If the customer either want all the exact same products retouched or a selection of the already ordered package you may use this method to create a new partial order. See previous page to learn how to.

- **Create new order: login as user**
  If the order has to be altered or the customers for any reason cannot create the order themselves, you may login to the webshop as the user and create the order in their place. Click here to learn how to login as the user.

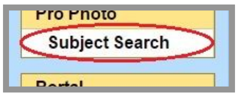
Access key - missing

If a customer is missing an access key to enter webshop you may manually create a new one. Click *subject search* in the main menu on the left hand side in */admin*. Use the search bar to locate the correct subject and click the name to open subject information page.

Press *click here to add a new access key* and a key (picture code) will be created for the subject. Please remember to forward information about the key to the customer.



Wrong subject information



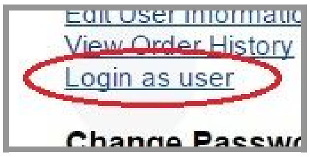
If the subject information is wrong, such as name spelled incorrectly or contact information is missing you may edit this. Click *subject search* in the main menu on the left hand side in */admin*. Use the search bar to locate the correct subject and click the name to open the subject information page. Select *edit subject* from the right hand side horizontal menu and edit the information in the pop up window.

Login as user

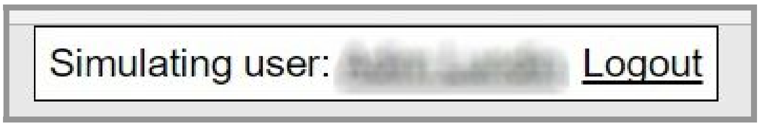
This option is useful if a customer says he/she can´t order pictures themselves or are having some problems and need help. By logging in as user you simulate the customer in webshop and create orders in his/hers place.

Click *user* in the left hand side menu in */admin*.

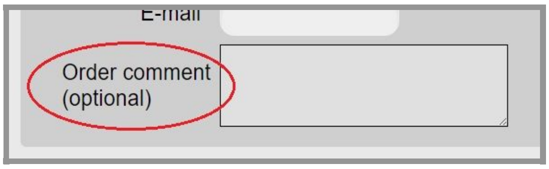
Search for the user by typing in the name in the search bar. When the correct user is found click the name to open the information page.



Select *login as user* in the right hand side menu of the user information page.



This will log you in to the webshop as the selected user. The only thing reminding you about this is the message in the top right hand corner saying you are *simulating user: X*. Except from this everything you see is the same as the customer sees and everything you do is as him/her.



When you get to checkout in the webshop choose invoice as payment option if the order is not going to be free.

You may also leave a order comment. This option may be closed for the customer, but is always available when using the 'Log in as user' feature.. If the order is going to be free (f.ex.because of an complaint) you write SET_NO_CHARGE in the comment box. This will set all costs to zero, including all fee. The customer will get a order confirmation containing order ID and reference number by email once you click *finish order*.

If the order is going to be an test order you note SET_TEST_STATUS in the comment box. This will set the order to status 99 and not send it to Lablink.

Please notice: It´s very important to remember to *logout* when finished with the

session! If not you may risk adding other subjects to the user account.