



# Detailed Function Overview

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## 1 Merchant Back Office

The merchant uses the Merchant Back Office, to define settings for the store. Seven Categories of data are managed in the following modules:

1. Orders
2. Customers
3. Products
4. Categories
5. Design
6. Marketing
7. Settings

### 1.1 General Functions

- Merchant logo in the Back Office
- Favorites for quick access to certain functions or objects
- History: the last ten visited areas can be quickly accesses
- Object tray is used to storing business objects, such as products or catalog categories. From the object tray, objects can be added to another module. For example, customers can be stored in the object tray and then be put into the addressee-list of a newsletter.

### 1.2 Orders

#### 1.2.1 Overview / Search for Orders

- Table with various sorting possibilities (ascending and descending) for each column (for example, using number, value, date, etc.)
- Batch operations for all or selected orders (for example, to change order status)
- Search for specific attributes (for example, new orders)

#### 1.2.2 Order Details

- All parameters of each order are shown (order and delivery address, delivery and payment methods, line items, etc.)
- Subsequent changes of the order by the merchant are possible (change quantity, delete or add line items), updated e-mail confirmations sent to the customer
- Print packing slips / invoices / credit notes
- Invoices and packing slips for partial delivery
- Data transfer to UPS (Worldship) possible. If the merchant enters the UPS tracking number, registered end customers can track where the parcel is at any time
- Various order statuses (seen, denied, in progress, waiting, awaiting delivery, delivered, delivery made, paid, closed, archived). When the merchant changes the order status, an e-mail can be sent to the customer automatically.



## 1.3 Customers

### 1.3.1 Overview / Search for Customers

- Table with various sorting possibilities (ascending and descending) for each column (for example, using name, country, customer groups, etc.)
- Customers can be created manually by the merchant
- Batch operations for all / selected orders (for example, assigning several customers to a new customer group)
- Search for specific attributes (for example, customers within a specific customer group, customers who generated a certain level of sales, or customers who have purchased a certain product)

### 1.3.2 Customer Details – General

- Creation and editing of customer data
- Send new password to customers via e-mail
- Various parameters
  - Customer number
  - Login, password, activated yes/no
  - Confirmation question, confirmation answer (for forgotten passwords)
  - Merchants can send changed login/password to the customers immediately via e-mail.
  - Salutation, company, first, middle, and last names, displayed name
  - Address (street, postal code, city, address extension)
  - Contact possibilities (e-mail, telephone, fax, mobile phone)
  - Ordering allowed yes/no
  - HTML in e-mails desired yes/no
  - Customer groups
  - Birthday, gender
  - Bank information (name of bank, account number, bank code)
  - Others (Sales tax number, department, position, etc.)

### 1.3.3 Customer Details – Attributes

- Unlimited number of customer attributes, (for example, marital status, hobby, etc.) can be presented in various formats
- Individual attributes can be used for new registrations (see page 15). The merchant can choose which data are mandatory.
- The merchant can list all orders of a certain customer, and he can access them by simply clicking on the list.

## 1.4 Categories

- Unlimited number of product catalogs or categories and Web sites of freely-definable content
- Unlimited number of sub-pages with flexible sorting for each level
- The merchant can choose between 6 different layout options for catalog and product lists.

- Categories viewable yes/no
- Category name, title, text, and image for each language
- File attachments, such as PDF-files
- Special categories such as Terms and Conditions, imprint, text on the home page and customer information (for each language)
- Products, catalogs, and available content on the same level
- Special offers (in a separate category)

## 1.5 Products

### 1.5.1 Overview / Product Search

- Table view with sorting possibilities (ascending and descending) for each column (for example, by price, name, etc.)
- Color-coding for each status (in stock, on-/offline)
- Batch processing for all / several products (for example, delete)
- Search in certain catalogs, for certain attributes (for example, only products where “0” are in stock).

### 1.5.2 Product Types

- Definition of an unlimited number of product types (e.g. jackets, shoes)
- Creation of an unlimited number of attributes for each product type (e.g. color, size)
- Various file types are available (for example, string, currency, date)
- The merchant can create attributes with a pre-defined list of values. These values are shown in the drop-down menu. For example, the attribute “color” can have the values “yellow”, “red”, “blue” and “green”.
- Localizable attributes (for display in various languages)
- Special attribute for file attachments (for example, PDF-files)
- Attributes can be visible or invisible (data remains unchanged)
- Unlimited sorting orders for editing in the Back Office or in the Storefront
- For every product type, the merchant can choose between 3 layouts for product details and 3 layouts for product variations.

### 1.5.3 Product Details – General

#### 1.5.3.1 Prices / Stock

- Parameters
  - Alphanumeric product number
  - Manufacturer name
  - Manufacturer product number (for example, for purchasing from manufacturer)
  - Sales price for each currency
  - Weight per unit
  - Daily price dependent yes/no (for example, for special display in the Storefront)

- Tax class
- Dimensions (length, width, height)
- Ordering unit
- Price dependent upon xx <units> (for example, the price can be valid for 12 pieces)
- Minimum order quantity
- Product scaling (for example, a liquid can only be shown in quantities of .1 liters, because smaller quantities cannot be measured exactly)
- Reference unit and amount in the product (this enables, for example, a .33 liter can of soda to be shown as price per liter, requirement of PAngV)

#### 1.5.3.2 Description

- Product name, product description, and expanded product description for multiple languages
- HTML is possible for product descriptions
- Product description and expanded product description up to 30,000 characters
- WYSIWYG edition for product description and expanded product description (WYSIWYG = What-You-See-Is-What-You-Get editor)
- Products viewable yes/no (applies to the Storefront)
- A product can be marked as “new”
- The merchant can define key words and alternative search terms for the search functionality within his store, or in search engines (e.g. for a pullover: sweater, jumper, slipover)
- A product can be marked „not yet purchasable“, e.g. a DVD that will be launched shortly. The price is displayed, but the product cannot yet be added to the basket. An availability date is displayed – as soon as this date is reached, the product automatically becomes purchasable.

#### 1.5.3.3 Categories

- Assign a product to one or more categories (catalogs)
- If a product is assigned to a main category, the product is displayed on the homepage of the shop

#### 1.5.3.4 Attributes

- Selection of product type
- Assignment of attributes

(The merchant can create an unlimited number of product types and product attributes. Several attributes can be combined into one product type. This helps keep the product pages in the Back Office concise. For example, the merchant can create the product type “Jacket” with the attributes “Size”, “Color”, “Material”, and so on. The next time he assigns the product type “Jacket” to a product, the system will ask him to fill out the attributes “Size”, “Color”, “Material”, etc.)

### 1.5.4 Product Details – Images

- Standard images for product lists (thumbnails), normal and expanded view
- Images can be automatically reduced for the smaller version
- Separate image for promotion of products (special offers)
- Preview of each image in Back Office
- Slide show
- Defining external URL instead of uploading to the Shop server



### 1.5.5 Product Variations

- Unlimited number of variation types (for example, size / color), with unlimited number of variation values (for example, M, L, XL / red, blue, yellow), values and types localizable
- Attributes (for example, price, image, description) are inherited from main product, but each can also be individually configured
- A certain sub-product is marked as a standard suggested product
- Variation products can be sorted

### 1.5.6 Prices

- For discounts and bulk discounts, price lists can be created with time limits
- All prices list can be assigned to customer groups and single customers

#### 1.5.6.1 Discounts (For each Product)

- Bulk discounts per product (e.g. 5% discount for 10 pieces, 7.5% discount for 25 pieces, etc.)
- Price discounts per product (e.g. 5% discount for an order volume above 100€, 7,5% discount for order volume above 500€)
- Can be combined with bulk discounts
- A discount on the complete basket can be granted.

#### 1.5.6.2 Bulk Discounts

- Bulk discounts (with fixed prices) for each currency (for example, you pay 10€/unit if you buy 5 units of a product or 9€/unit if you buy 10 units of a product)
- Can be combined with standard discounts



## 1.5.7 Cross-Selling

### 1.5.7.1 Manual Cross-Selling

- Unlimited assignment of products inside the shop
- Additional commentary as “reason” for cross-selling

### 1.5.7.2 Accessories

- The merchant can assign an accessory product to an other product. This will be displayed in the storefront as “accessory” every time a customer looks at the product (e.g. a head set for a mobile phone).
- Additional commentary as “reason” for accessory

### 1.5.7.3 Product comparisons

- The merchant can assign products to an other product. Every time the customer looks at it, the assigned products will be displayed for comparison (e.g. several screens with all technical parameters).

## 1.5.8 Product bundles

- The merchant can bundle products. He can determine the number of articles for each product.
- The bundle has its own (reduced) price – the saving is displayed in the storefront.

## 1.5.9 Automatic Cross-Selling

- “Customers that purchased this product also purchased ...”
- Data is generated automatically from previous orders
- See chapter 1.7.7 “Product Settings”

## 1.5.10 Import and Export

- Import and Export via CSV-file
- Export to Kelkoo
- Export to Pangora
- Export to Froogle
- Registration at Google™ search engine

## 1.6 Design

- Access to the templates (Storefront / Back Office) for the following products:
  - ePages 5 Merchant
  - ePages 5 Merchant Pro
  - ePages 5 Merchant Enterprise
  - ePages 5 Merchant Corporate
  - ePages 5 E-Com Flex



### 1.6.1 Shop Styles

- Selection of various styles
- Selection of various symbol sets

### 1.6.2 Navigation

- Various navigation elements
  - Link to Start page
  - Login
  - My Account, Login / Registration
  - Search
  - Language selection
  - Currency selection
  - Shop name
  - Logo
  - Informational text
  - Copyright notice
  - Link to the shopping basket
  - Basket status
  - Compressed basket view
  - Link to categories (catalogs)
  - Link to top-level categories (catalogs)
  - List of main categories
  - Link to the imprint
  - Link to terms and conditions
  - Link to promotional products
  - Available elements with links to selectable categories and products (for example, to place a “Product of the Week”)
- Flexible distribution of these elements on various areas of the page
  - Header
  - Upper area
  - Footer
  - Lower area
  - Left navigation area
  - Right navigation area
- Flexible sequence of elements for each area
- Selectable sub-variations of elements (for example, language selection viewable as a list [English, German] or through flags)
- View of areas and sizes can be altered (for example, size of left navigation bar or deactivation of right navigation area)
- No HTML knowledge necessary



### 1.6.3 Customization of storefront layout

- Width and height of each area of the site can be customized.
- An image can be uploaded into each area of the site, or a background can be set.
- Text colors can be entered as RGB value, or be chosen from a color box.

### 1.6.4 Design Settings

- Shop logo (shown in Back Office)
- URL for the logo (for linking to other Web sites)
- Slogan, informational text, and copyright notice localizable

## 1.7 Settings

- Formats for numbers, currencies, and date/time are shown according to country standards

### 1.7.1 Shop Status

- Store is “open” or “closed”
- The merchant can enter the text which is shown in the storefront when the store in “closed”
- Utilization information (for example: 23 out of 100 possible products are being used in the store; 1 out of 2 languages are being used)

### 1.7.2 Shop Address

- The merchant enters contact details during the store creation process. The contact details can then be used for the registration at external services, e.g. at Pangora, etracker, etc.)

### 1.7.3 Management of Shop Administrators

- An unlimited number of users can be created for the back office.
- Every user can have his own settings (e.g. language, favorites)

### 1.7.4 Tax Calculation

- Flexible tax matrix (tax classes, tax areas)
- The “default” tax class and tax area is pre-set
- Names for tax areas are in every language
- Switching between gross and net prices possible (and vice-versa)

### 1.7.5 Shipping and Payment

#### 1.7.5.1 Shipping Methods

- Named in every language



- Available yes/no
- Pre-set (“Default”) yes / no
- List of shipping methods can be sorted flexibly. The sort sequence will be displayed in the storefront.
- Available tax classes for each shipping method
- Price for each currency (for example, the price for express delivery)
- Fixed price, free of charge above a certain price, free delivery
- Additional field for comments for each language

#### 1.7.5.2 *Payment Methods*

- Named in every language
- Available yes/no
- Pre-set (“default”) yes / no
- List of payment methods can be sorted flexibly. The sort sequence will be displayed in the storefront.
- External payment methods (for example, WorldPay) can be added through cartridges
- Price for each currency for each payment method (for example, price for payment via cash-on-delivery)
- Fixed price, free of charge above a certain price, or free delivery
- Payment by instalments is possible. The interest rate can be defined by the merchant, depending on term and invoice amount. Each currency can have its own interest rates. The instalments are calculated and displayed to the customer automatically.
- A discount can be defined for a payment method (e.g. cash discount)
- Electronic payment methods (e.g. WorldPay)

#### 1.7.5.3 *Dependencies (between Delivery and Payment methods)*

- Not all payment methods are allowed for all delivery methods

#### 1.7.5.4 *Shipping Options*

- The merchant can offer various options (e.g. for gift wrap paper or greeting cards)
- For each option, the merchant can upload several pictures, or he can allow the customer to enter a text for the greeting card.
- A price can be assigned to each option.

### 1.7.6 **Regional Settings**

- Formats for numbers, currencies, and date/time are shown according to country standards, including thousand and decimal separators

#### 1.7.6.1 *Languages*

- Multiple languages are possible (for the Storefront and Back Office)
- One language is pre-set (“Default”)
- The merchant can localize all entries maintained in the Back Office (for example, product names, delivery methods, etc.)
- Languages can be set to “invisible” in the Storefront (in order to have time to enter all data first)
- Each language is in the local language, as an ISO code, and in English and French (for example “Deutsch“, „de (ger)“, „German“, „allemand“)



- If a language is deleted, the localized data is not deleted. It is available again once the language is re-added.

#### 1.7.6.2 Currencies

- Multiple currencies are possible
- One currency is pre-set (“Default”)
- Currencies can be set to “invisible” in the Storefront (in order to enter all data first)
- Each currency has a currency symbol (for example, “€”) and a ISO4217 code (for example, “EUR”). The ISO code is often necessary for communication with online payment systems.

#### 1.7.7 E-Mail Settings

- Sender name and e-mail address for each language
- Signature for each language
- The merchant can determine, events that trigger e-mail confirmation to customers, for example, after registration, after placing an order, subscribing to a newsletter, etc.)
- The merchant can assign addressees of e-mail copies and e-mail blind copies

#### 1.7.8 Basket and Orders

- Minimum order value per currency
- Adding an item to the basket which the basket already contains can result in either keeping the previous product quantity, increasing the quantity, or replacing the product quantity with the new quantity (set by the merchant)
- The merchant determines whether customers must accept the store’s General Terms and Conditions
- The merchant can enter a text which will be displayed in the storefront as order confirmation.
- The merchant determines whether the end customer can choose a tax class in the storefront. If not, only gross prices will be displayed.
- The order or Für den Bestellprozess können verschiedene, aus rechtlichen Gründen notwendige, Texte verfasst werden. Alle Textfelder sind bereits mit umfassenden Beispielen gefüllt.
- For the order process, several texts can be included (sometimes necessary from a legal point of view). All text fields are already pre-filled with examples.

#### 1.7.9 Product Settings

- Stock settings: The merchant defines what will happen if the stock falls below a certain level, for example: a notice about possible delivery delays can be displayed, etc.)
- Auto cross selling: collect statistics yes/no, auto cross selling recommendations viewable yes / no, number of product recommendations that are shown in the storefront

#### 1.7.10 Customer Settings

##### 1.7.10.1 Customer Groups

- Unlimited number of customer groups with freely-assignable names



- One customer group is pre-set (“Default”) – customers not assigned to any group are assigned to this group
- Customer groups are the foundation for other functions such as bulk and standard discounts, and the newsletter

#### *1.7.10.2 New Registration*

- Various customer data, such as address, bank account, preferred currency, etc., can be set to “visible” or “required”, and turned on and off. This means that they are shown during customer registration or designated as “Required” fields (this also applies to the information about purchasers that do not register, but instead purchase anonymously). The same applies to delivery addresses.
- Individually created customer attributes (see Customer Details – Attributes, page 16) can be used here

#### *1.7.10.3 Countries*

- The customer can determine in which countries he delivers his goods. When a customer enters his address, he can only choose between these countries.
- The merchant can define the order in which the countries appear in the drop down menu in the storefront, and he can define a default country.

#### *1.7.10.4 Login*

- Login necessary yes/no. If “yes“, only registered customers can use the shop.
- Automatic login via cookie yes/no. If “yes“, a cookie is saved and the customer is recognized upon next entering the shop without having to provide a login and password

#### *1.7.10.5 Attributes*

- Creation of an unlimited number of customer attributes
- Various file types are available (for example, string, currency, date, enumeration)
- Attributes can be visible or invisible (data remains unchanged)
- Unlimited sorting orders for editing in the Back Office or in the Storefront

#### *1.7.11 Web Services*

- Web Services allow the merchant to integrate his store into other applications
- ePages 5 Standard Web Services include
  - o Content (categories, products, price lists)
  - o Customers
  - o Orders



## 1.8 Marketing

### 1.8.1 In General

- Search Engine Support (for example Google™)

### 1.8.2 Newsletter

- Personalized newsletter
- Product information (texts, prices, images) in newsletter
- HTML templates for newsletter
- Send coupon with newsletter
- Preview function
- Sender name and e-mail sender variable
- Immediately send or at a specific dispatch date/time
- Recipient selection, search via:
  - Customer number or name
  - All customers of a specific customer group
  - All customers that purchased a specific product
  - All customers that had a particular purchase volume in a specific time period
  - Manually add recipients
- List of recipients will be saved after sending the newsletter
- Unregistered customers can subscribe to the newsletter at the merchant's discretion

### 1.8.3 Coupons / Vouchers

- Coupons with fixed value or in percent for each currency
- Coupons with expiration dates
- Number of valid coupon codes is limited (for example, only the first 25 of 100 codes are valid)
- Coupon codes can be used multiple times or only once
- Length of coupon codes is variable
- Coupon codes can be created manually (for example, for sending via mail or printing in newspapers)
- Coupons for waiving shipping costs

### 1.8.4 Product Recommendations (Tell-a-Friend)

- Activate / deactivate Tell-a-Friend
- The merchant defines whether all users, or only registered customers can recommend products
- The merchant sets a limit of a maximum number of product recommendations per user per day.



### 1.8.5 Kelkoo

- Selection and export of the products to Kelkoo
- Selection of countries in which the products are transferred to Kelkoo
- Confirm language and currency
- Selection of shipping method, picture, and product description that is published on the Kelkoo platform

### 1.8.6 etracker

- Link to etracker's Web site where the etracker security code can be requested
- Input field for the security code
- The merchant can define the importance of certain pages, such as newsletter registration or all pages related to the order process

### 1.8.7 Froogle

- The merchant chooses shipping method, image and product description that are published at Froogle
- He chooses the products that should be uploaded, and exports them.

### 1.8.8 Pangora

- Selection of the countries in which the products are transferred to Pangora
- Confirm language and currency
- Link to Pangora's Web site where the merchant can register
- Selection of shipping method, picture, and product description that is published via Pangora
- Selection and export of the products to Pangora
- Link to export file

### 1.8.9 Trusted Shops

- The store is prepared for "Trusted Shops" certification
- Link to "Trusted Shops" application form
- Input field for "Trusted Shops" ID
- "Trusted Shops" logo is displayed in the storefront

### 1.8.10 eBay

- Products can be directly uploaded to eBay Marketplace
- Preservation of all product details (for example, product name and image) as suggested by the shop
- Multi-step assistant for various options (for example, "Bold" or "Gallery Featured")
- Short list of last used categories
- Delay start of the auction without additional costs
- Automatic repeated upload of the same article (for example, every two days)



- Use of pre-made design templates
- Management of self-made design templates
- Use of shipping and payment methods of the shop
- Test creation of an auction, to test costs and accuracy of auction data
- View overview of all auctions for a single product or all auctions
- Filter for the overview (for example, only running auctions)
- Automatic creation of orders in the shop after the end of the auction
- Rating the seller
- New upload of previous auction (copy), with the same or similar parameters

## 1.9 Administrators of the Shop (User Settings)

- User name, login, password per user
- Each administrator can set a personal Back Office language
- Security question for deletions yes/no



## 2 Storefront

### 2.1 General Display Elements

- Link to the shopping basket
- Shopping basket status (quantity of products in the basket and total basket price)
- Shopping basket contents (quantity of products and product names in the basket and total basket price)
- Login, new registration of customers, My Account
- Select the language
- Select the currency
- Terms and conditions
- Imprint
- Copyright notice
- Slogan
- Informational text
- Logo is optional with a link to any URL
- List of main categories
- Special offers (in separate category)

### 2.2 Display of Categories and Products

- Special promotion of products on the homepage of the shop
- Special offers in a certain area
- Categories (catalogs and/or available pages) and products on one level
- Navigation through categories with display of all sub-categories as links
- Tell-A-Friend (product recommendation)

### 2.3 Shopping Basket / Order

- Amount in shopping basket can be changed
- Products can be removed from the basket
- A copy of an item already in the basket can be created as a new line item (for example, to order two pens with separate engravings)
- Shipping method selection
- Payment method selection, the order process will automatically include all necessary sites (e.g. for direct debit or instalments)
- Accept Terms and Conditions before placing order (as a “required” field, if necessary)
- Customer can enter an order note. The order note will appear on the delivery note, order-related e-mails, etc.



- After the customer has finished the order process, he or she can sign up for “Trusted Shops” money-back warranty (only if the store is “Trusted Shops” certified)

## 2.4 Search

- Quick search (of all products or in the current catalog)
- Advanced search (expanded search, for example, limited by price or manufacturer)

## 2.5 Functions for Registered Customers

- Access to orders with status view (seen, denied, in progress, waiting, awaiting delivery, delivered, delivery made, paid, closed, archived)
- Parcel tracking for shipment via UPS
- Change password or address
- Forgotten password → request new password
- Product lists (mark products for ordering later)
  - Multiple lists per user
  - Lists can be assigned any name
  - Save quantity and product name, delete, or add products
  - Date of the last change
  - Marking offline or deleted products
  - Save shopping basket as product list ↔ change product list into shopping basket
- Subscribe to newsletters