

iSAMS Dashboard and Search

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Overview

The new iSAMS administration Dashboard interface is responsive, so allows for a more user friendly experience when using different devices. The Dashboard is also customisable for a logged in user/s. ie: A logged in user name may be used by multiple people, all users with the same username and password will have the same personalisation's.

The Admin User Interface is broken down into different sections;

Header – The expanded navigation, search, notification, previous visited pages, feedback and logout.

Tiles – Most commonly used areas of the administration for that logged in user.

Widgets – Reporting features.

Header

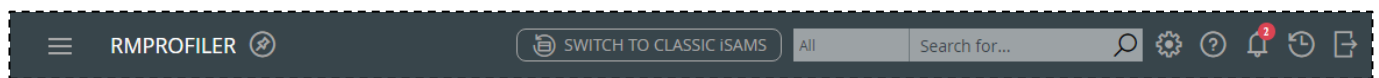


IMAGE	TITLE	DESCRIPTION
	Menu	A menu of all items that a user has permission to. Select the Mega Menu and select page you wish to navigate to.
	Collasp / Expand Menu	If the navigation is in the position of the left of the page (see settings below) you can choose to expand or collopse the left navigation.
	Page Name	The name of the page you are currently on.
	Pin to Dashboard	Allows an individual user to 'Pin' the page they are on to their own personal dashboard.
	Search	Allows for searching for; Content (category or Information) Customers Orders Products Vouchers (if you have Vouchers module) or All of the above items.

	Settings	Allows a user to set their navigation setting between Header and Left side
	Leave Feedback	A form available to allow you to make a suggestion, request a feature or ask a question.
	Messages	Notifications. Or 'Post it' notes.
	History	A quick link to the last 9 admin pages you have visited.
	Log Out	Log out of your current session

Navigation Location

You can set the Menu/Navigation to 2 different positions – top and left of the screen. This is achieved by selecting on the 'Settings' cog in the header and selecting your location choice, then select 'Apply'.

Top Navigation

The mega menu will display all options available based on the users permissions. On a desktop, the menu will display a section title with all the options below. Once you get to smaller devices, you will have the section title which will be expanded once selected to provide the available options.

Full View

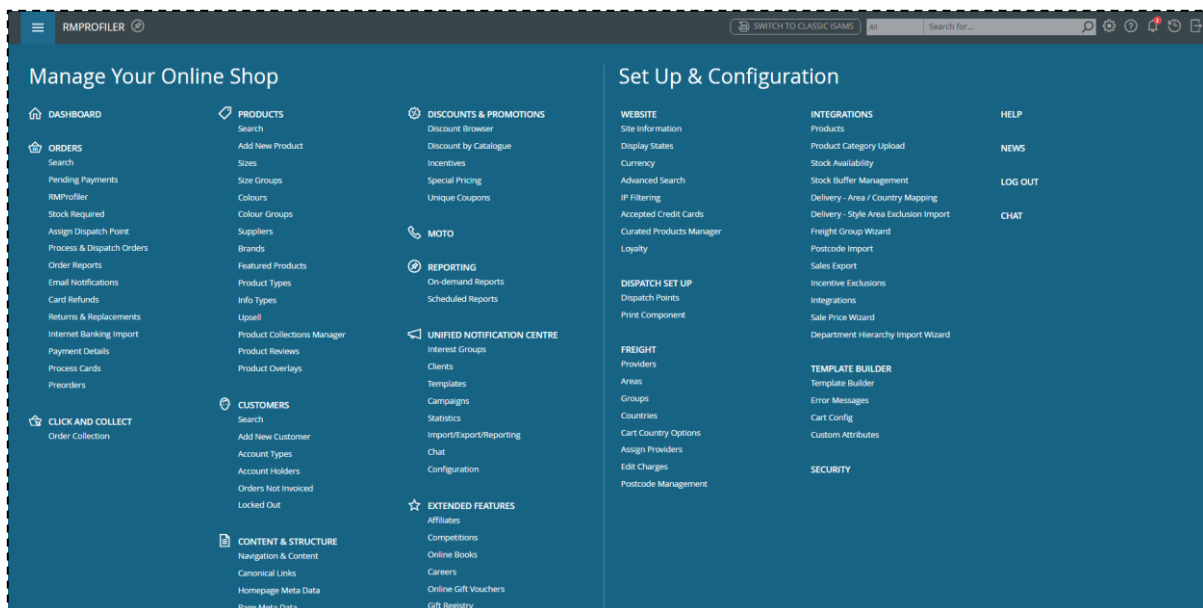


Figure 1

Tablet View

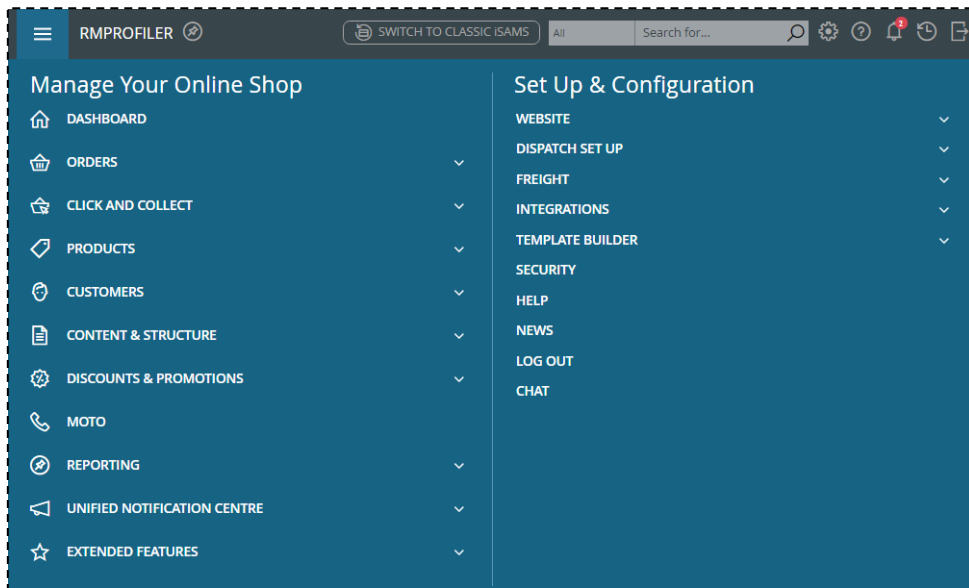


Figure 2

Phone View

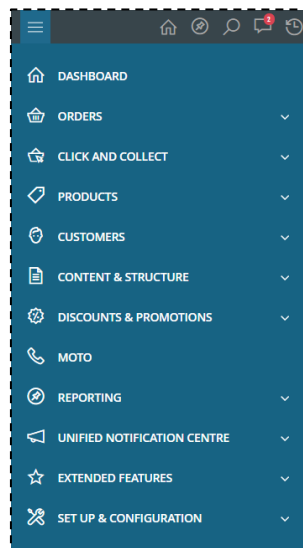


Figure 3

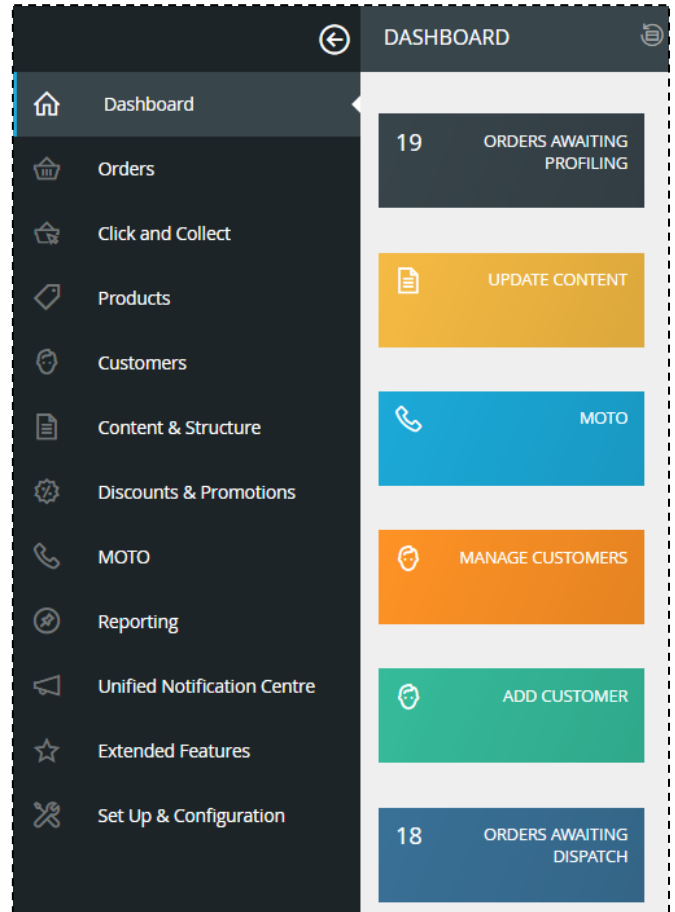
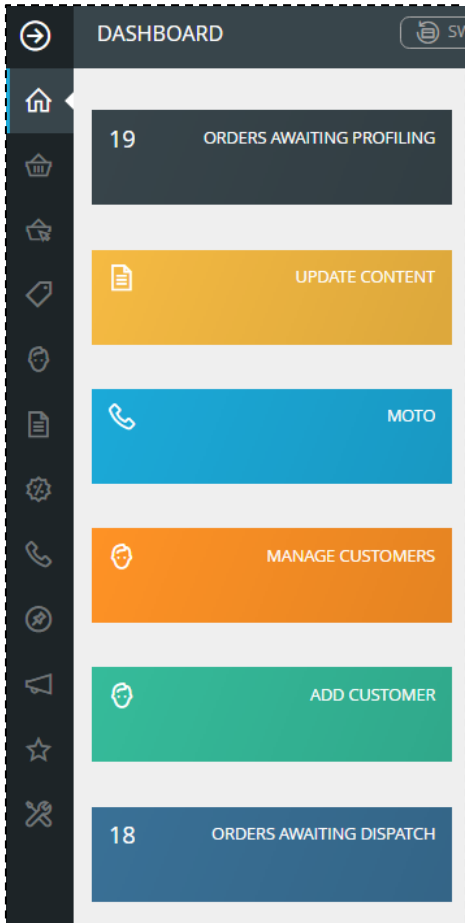
Left Navigation

When moving the navigation to the left, there are two views within this that you can choose, a **Collapsed** view, where icons for each section will display with additional options when you hover over the icon. And **Expanded** view, which displays the icon and name and is permanently positioned on the left navigation with options. This is achieved by selecting on the arrow at the very top of the navigation.

When accessing the iSAMS Admin on either a tablet or phone, the menu will revert to the top menu view as seen above in Figure 2 and Figure 3.

COLLAPSED

EXPANDED



Search

The search feature allows you to search specifically for Content (Information Pages, Links and Catalogues), Customers, Orders, Products and Online Gift Vouchers (if you have Vouchers module) or search on all the above fields.

Predictive search is also used when you start typing your search term. This will match your typed term with the below listed fields based on text typed from left to right.

For customers, the fastest way to find a given customer is to start typing either their name or email address, this should return and narrow down to the correct customer very quickly.

For products, the same approach is taken on the SKU and Title.

For orders, it is the Order ID and Email that is used.

Search Results

Once the results are returned only a small selection of the resulting data will be displayed and if the appropriate item is not displayed, more results can be displayed by click on the 'LOAD MORE' button at the bottom of the returned results.

There are also filters for narrowing down the results and sort arrows which will sort the entire results returned by column (not just the displayed results).

You also have the option to view the Customers, Orders and Products results in a listed view or a gallery view. This can be achieved by selecting the appropriate icon on the top right corner of the results page.

Listed View / Gallery View



Figure 4

Icons

There are a number of icons displayed within the results and the icons will vary depending on the tab and the view.

Key to the icons;

TAB	VIEW	ICON	DESCRIPTION
Content	Default		Active
			Not Active
			Direct Access Only
Customers	Gallery		Normal Customer
			Customer has been black listed or has had an order set to Fraudulent.
			Marketing emails opened
			Orders Dispatched
			Orders in Progress
			Order Value
Orders	Gallery		Order Value
			Days Since Order was Placed
			Above the Detail Box Order has been shipped
			Above the Detail Box

			Order at Invalid Card
			Above the Detail Box Order at Invalid Transaction Attempted
			Above the Detail Box Purchase in Progress or Pending Payment Processing
			Above the Detail Box All other status
Products	List & Gallery		Available on Sit and for Sale
			All other status
			Reviews Rating

Note: With the tiles for the order status, Red is picked up by us as part of our daily manual order resolution checks. We will let you know if we need you to do anything regarding these orders.

Blue does not get picked up automatically, but please let us know if orders remain at this status for more than half an hour.

Tiles

The tiles part of the dashboard is a quick navigation to the most commonly used pages for that logged in user. Individual tiles can be added, removed, coloured, renamed, moved or add a title not currently on your dashboard to completely personalise the items a logged in user uses most frequently.

Note: A logged in user may be multiple people therefore all users with the same credentials will share the tiles and widgets.



Figure 5

Note: There is no limit to the number of tiles you can have on your dashboard at any one time.

Note: If you remove all tiles from your dashboard, some basic tiles will always display when you navigate back to the dashboard. These are;

Stock Required

Orders Awaiting Profiling

Orders Awaiting Dispatch

Notification - Emails Pending

Pending Payments

MOTO

Add Customer

Manage Customers

Update Content

Email Campaigns

These are the most commonly used modules. If you do not have one of these tiles on your dashboard, you can select the appropriate one from the 'ADD NEW' button below the tiles or alternatively this can also be achieved after you have navigated to the page you are wishing to add.

Adding a New Tile to Your Dashboard

If a page you use frequently is not part of the default tiles on your dashboard, you are able to add your commonly used pages to your own dashboard. When you navigate to a frequently used page via the 'Menu' select the Pin from the Header. A pop-up will be presented where you can change the title from the default title, the Main Dashboard 'Location' will already be selected. Select Save.

When you navigate back to the Dashboard, this new page will be a new tile which can then be moved or coloured as appropriate.

You are able to select the Navigation & Content page to be on your Dashboard, but if there is a particular page from your page/catalogue structure (such as the Homepage) that you edit on a regular basis, this can also be added to your dashboard.

Firstly, search for the page you are wanting to add. The searched term will return in the Content Tab of the search results. Click into the page (ensuring you have the correct page type) then select the Pin from the header. As above, you then have the option to change the default name of the page then save.

When you next return to the dashboard, this page will be a new tile. The tile can then be moved, change colour, rename or removed if it is no longer required.

Moving a Tile on Your Dashboard

If you wish to move a tile to a new display order within your available tiles, click on the Edit icon in the bottom right corner. (The edit icon will display when you hover over any part of the tile)

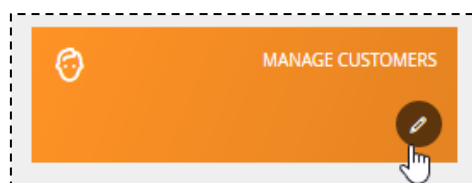


Figure 6

Once edit has been selected, the view of the tile will change to display command options.



Figure 7

Move your mouse to hover over the location arrows in the top left corner of that tile, click your mouse and drag the tile to the new location and release. If you have completed the changes you wish to make to that tile (see below for colouring, removing and renaming tiles) click into the grey area away from the tiles.

Colour a Tile

If you wish to change the colour of a tile, click on the Edit icon in the bottom right corner. The view of the tile will change to display command options. Select the colour from the choices below the tile. Click into the grey area away from the tile.

Removing a Tile

If you no longer wish to have a tile on your dashboard, click on the Edit icon in the bottom right corner. The view of the tile will change to display command options. Select the trash can from the top right corner of the widget.

Renaming a Tile

If you wish to change the name on a tile, click on the Edit icon in the bottom right corner. The view of the tile will change to display command options. Overtyping the previously displayed title. Click into the grey area away from the tile.

Note: This can also be done during the pining process. Please see Adding a New Tile to Your Dashboard above.

Widgets

There are a number of Widgets that can be displayed on your dashboard for reporting purposes and like the tiles, these can be personalised by a logged in user. Each widget has options for moving, changing the view of the reported data or removing an individual widget

Note: If you remove all widgets from your dashboard, all six widgets will display when you return to the dashboard.

Widgets can come in different views and different periods of time. The options available are as follows;

WIDGET TITLE	VIEW OPTIONS	TIME PERIODS
Orders In Progress	Numbered view	No options
Products by Status	Pie chart	No options
Orders Dispatched	Line graph	Day
	Bar graph	Week

	Numbered view	Month
		Year
Orders in Dispatch	Numbered view	No options
Notifications Pending	Numbered view	No options
	Pie chart	
Best Sellers	Numbered view	Week
	Line graph	Month
	Pie chart	Year

Add a Widget

If you do not have one of the widgets on your dashboard, you can select the appropriate one from the 'ADD WIDGET' button below the displayed widgets.

If you have completed the changes you wish to make to that widget (see below for changing the view or moving widgets) click into the grey area away from the tiles.

Note: You can have the same widget on your dashboard multiple times and select the different time periods on each tile.

Change the Time Period of a Widget

For the Orders Dispatched or Best Sellers widget, simply select the dropdown box at the top of the appropriate widget and select the period you are wishing to change the view to.

Move a Widget

Like moving a tile, click on the Edit icon in the top right corner when you hover over the widget. The view of the tile will change to display command options.

Move your mouse to hover over the location arrows in the top left corner of that widget, click your mouse and drag the tile to the location and release. Click into the grey area away from the widget.

Changing the View

To change the view of the Orders Dispatched, Notifications Pending or Best Sellers, click on the Edit icon in the top right corner. The view of the widget will change to display command options. Select the icon for the view you are wishing to change to. Click into the grey area away from the tile.

On the following page is examples of the views:

Bar graph

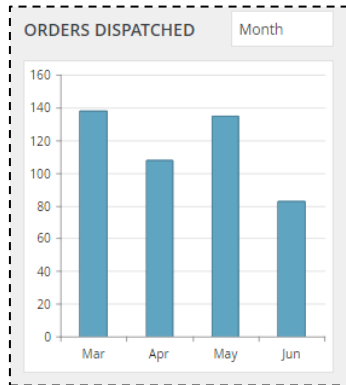


Figure 8

Line graph

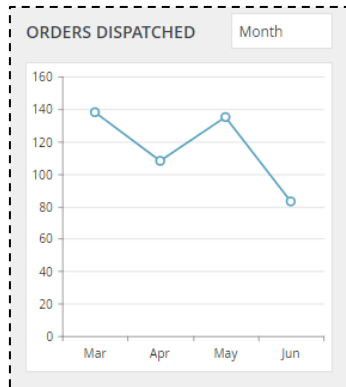


Figure 9

Numbered



Figure 10

Pie graph

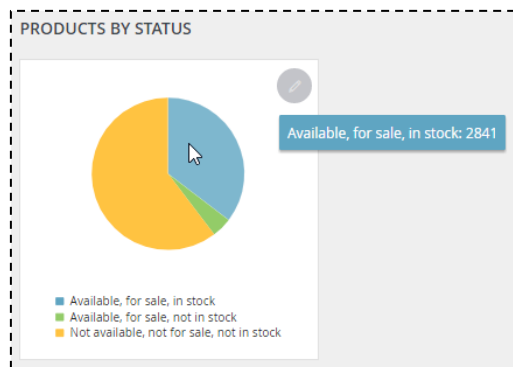


Figure 11