

Easy Account User Guide

Version 5.25

Turn First Time Customers into Repeat Customers

Overview

Easy Account helps make first time customers repeat customers by making account creation simple and easy.

AFTER your customer places an order, Easy Account asks them to simply enter a password and Easy Account does the rest. This lowers the barrier for customers to create an account and simplifies the checkout process as well. Now your customer can use order tracking and history features to speed through return visits.

Easy Account will even include the current order as part of the Customer's Order History.

Easy Account also provides a convenient Preview button for the Create Account and Remember Me Login dialog boxes so you can quickly see the results settings made in the Admin.

Note: Easy Account can be used on any screen AFTER the customer has entered their personal information (OSCT Screen). However, carefully test this type of application as other functionality that could exist on these pages may effect Easy Account.

Responsive Design

The latest version of Easy Account uses a jQuery Dialog box for its customer prompts. Simply put, these dialog boxes automatically adjust to fit most mobile devices.

Remember Me

The Remember Me option lets your customers remind themselves that they have an account with your store.

If they select this option, and then return to your store, Easy Account pops up a Sign In dialog box with their username already selected.

The Remember Me feature also lets customers 'suspend' logging in, or to turn it off entirely (on their Edit Account screen).

Installation and Licensing Instructions

Installation and licensing procedures are covered in the [Module Installation and Licensing Guide](#).

The Easy Account Process

When your customer completes their order without an account, Easy Account "pops" up a dialog box asking them if they want to create an account. All they need to do is enter a password. (And, BTW, it's not a real popup, so popup blockers have no effect.) Easy Account uses customers billing email address as their login (and tells them) to make remember their username easier.

After they complete this simple task, they return back to the Invoice screen. (So, it might be a good idea to provide an obvious link to their Order History or Edit Account screen.) Easy Account then updates that Merchant's databases with the customer's new "customer id" so that their order can be tracked. In addition, the module also tracks the number of people who have used Easy Account to create accounts.

Easy Account has provisions for you to add your own compelling pitch or additional instructions and to change the confirmation message customers see when they complete the process.

Configuring Easy Account

Easy Account is easy for you and your customers. Typically, all you need to do is follow the installation instructions and we do all the hard work. IF DESIRED, you can use the settings in the Settings tab to further customize the appearance and content of the Easy Account customer displays.

For troubleshooting and unique situations, here are the changes Easy Account makes to your Merchant store:

Adds the following SMT Item to the INVC page and assigns that Item to the page:

```
<mvt:item name="pm_easy_accnt" param="showform" />
```

This creates the Create Account dialog box.

Adds the following SMT Item to the Global Footer page and assigns that Item to ALL pages:

```
<mvt:item name="pm_easy_accnt" param="showlogin" />
```

Important Note: In order for Easy Account (and your customers) to use an email address as the login name (so they can easily remember their login), you must TURN OFF strict validation. Strict Validation checks to see if important fields do not use special characters. If you have worked with Miva Merchant for more than a few months, you already know that you can't use things like spaces, \$, !, # etc, characters in your page, product and category codes.

Easy Account Settings

The appearance of the Easy Account Sign up form is controlled from the settings in the modules interface.

You DO NOT have to make any changes to these settings. They are provided to allow you to adjust the appearance of the Easy Account Sign Up form either to better match your site's design, or to make it stand out more.

We also provide a way to add CSS styles to further control the final appearance of your Easy Account customer interfaces.

To access the module's interface settings:

1. Open either the Invoice or Customer Edit pages.
2. Click the Easy Account tab.

OR

1. Open the Utilities folder.
2. Click Easy Account.

3. Click Open Easy Account.

Setting Details

Here are the details on the Easy Account Settings:

Note: Be sure to click the Save Settings button at the bottom of the screen after making any changes. Easy Account DOES NOT use the Update button.

Show Remember Me: Select to let your customers choose to have Easy Account remember them when they return to your site. If a custom choose this option, when they return to the site, they are prompted with a dialog box (patterned and styled the same as the Easy Account Create dialog) letting them sign in with just their password.

Show Password Detials: Select to have Easy Account tell your customers what the password requirements are (number of characters, uppercase, lowercase, numbers, etc).

Show Account Preview: Click to view the results of your current settings in this tab that effect the Create Account dialog box.

Show Login Preview: Click to view the results of your current settings in this tab that effect the remember me Login dialog box.

Note: If you are using any method to block access to your site pages (for example, often times a directory access block is placed on development sites), the above Previews WILL NOT BE ACCURATE.

Dialog Content

Message: Type your message to invoice customers to create an account. Tokens are available for Bill to name and email address which can be used to personalize and instill confidence. Tokens are %BillTo_FirstName%, %BillTo_LastName% and %BillTo_Email%

Confirmation: Type the message you want your new customers to see after they have created their account. This message appears to users after they create their account.

Title: Type the text you want to appear as the title of the Create Account dialog box.

Create Account button: Type the text you want to appear on the create account button.

Cancel Account button: Type the text you want to appear on the cancel account button.

Dialog Window

Height: Enter the height of the Sign up form window in pixels.

Width: Enter the width of the Sign up form window in pixels.

Padding: Enter the amount of space between the inside edge of the border and the content of the Sign up form in pixels.

Border Color: Enter the color of the border around the Sign up form. You can use the pop up color selector button, or simply enter the hexadecimal color value.

Border Width: Enter the width of the border around the Sign up form in pixels.

Background Color: Enter the background color of the Sign up form. The settings background shows the selected color. You can click anywhere in the box to use the pop up color selector, or simply enter the hexadecimal color value.

Drop Shadow: Select to apply a slight drop shadow to the Create Account dialogs.

Obscure Password: If selected, the text entered by the customer in the password boxes will be converted to **** etc. or ●●● etc. (Depends on browser used.)

Border Style: Select a border "style" to apply to the Easy Account dialog boxes.

Border Radius: Enter the amount of "roundness" you want for the corners of your Sign Up form. Entering 0 will give you a square box. Typical values are between 5 and 18 pixels.

Dialog Overlay

Background Color: Enter the color used to 'fade' out the rest of the page so that the customer focuses on the Sign up form. (Also indicates to the customer that they have to do something in that box before they can view/print the invoice page.) The settings background shows the selected color. You can click anywhere in the box to use the pop up color selector, or simply enter the hexadecimal color value. (This control works in conjunction with the Opacity setting.)

Opacity: Select how dark you want the overlay background color to be: 1 being the lightest and 9 being the darkest.

Advanced Settings

When selected, the Additional Inline Styles box appears.

Additional Inline Styles: These controls are intended for those who have a good understanding of how CSS works. These inline styles are added in AFTER the default inline styles and the style associated with the non-advanced settings are rendered. (If you need any more information than that, then this box is not for you.)

Account Signup Logging

Shows the number of times customers have viewed the Sign up form, and the number of times customers have used the sign up form to create an account.

Testing

We recommend that you temporarily hide the Easy Account SMT item by wrapping it in a conditional that hides it from everyone but you. To do that, use:

```
<mvt:if expr="s.remote_addr EQ '111.222.333.444'">  
<mvt:item name="pm_easy_accnt" param="showForm:all" />  
</mvt:if>
```

on the INVC screen where 111.222.333.444 is your IP address.

(To find your IP address, go to www.whatismyip.com.)

Testing Easy Account

After you are satisfied with the appearance of the Easy Account sign up form, we recommend you do at least one 'Final' live test and place an order in your store.

Note: Easy Account tests to see if the customer is already logged in as a customer and if the billing email was already used in a previous customer account. So when testing, make sure you are NOT logged in and use an email address that is NOT used as a customer login name.

Testing Remember Me

Make sure you choose "Remember Me" when creating the account so you can test it later. After you do your final test, log out of the newly created account.

Then, revisit any page in your site. You should see the remember me, Sign In form. Enter your password and verify that it logs you in.

Next, log out again, and revisit your site, and this time, click Not Today. The Sign In form should disappear and remain that way until 24 hours later.

Lastly (as in the following day), choose the Don't Remember Me. You should never see the Sign In form again. (You can still log into the account and reset it by selecting the Remember Me option on your account page.

Need Help? (AKA Getting Support)

We've made every effort we could think of to make Easy Account easy to use and simple to install. However, there is always room in the world for problems. Should you run into one, please help yourself get faster support by following these simple rules.

Send a support ticket through the module itself. This support ticket contains valuable information we can use to assist you.

In the support ticket, try to be as thorough as possible in explaining the problem you have found. Include what you were doing and what you saw.

Here at Phosphor Media, we are fanatical about providing support; and our customers agree. We have a reputation of providing some of the best support in the Miva Merchant community. However, support is a relationship and like all successful relationships, both sides need to put forth an effort and strive to communicate effectively.

To make communication effective, every product we sell has a built in "support" feature. (In Easy Account, it's in the Support tab.) Using this support feature is by far the fastest, most effective way for us to help you. The other key to getting fast solutions is to invest a bit of time when describing your issue. If you run into a problem please include the steps you took before the problem appeared. If it's a general question that is NOT answered by our documentation, tell us what you are trying to accomplish...not just what you are doing.

If You Can't Get to the Internal Support Feature

If for some reason you cannot use the internal support feature, the next best method is to use the support form on our web site: <http://www.phosphormedia.com/support/>

Note: if you want to start over, there is a Reset to Default setting on the modules "utility module" interface (Open the Utilities folder, click Easy Account, then check the Reset to Default Settings check box and click Update.)