

# WinMan® Bridge – Magento Extension

## User Guide

**Version: 2.0.0**

**Prepared by: Lynn Eagleton**

The contents of this document are confidential and should not be disclosed to any third party without the prior written consent of Systemware Services Limited

# Contents

Overview .....	3
Prerequisites .....	4
System Prerequisites.....	4
Data Prerequisites.....	4
Tax Rules, Rates and Classes .....	4
Freight Methods.....	5
Payment Methods.....	6
Installation .....	7
Configuration .....	8
General.....	8
Enable Bridge? .....	8
API Base URL .....	8
Website URL.....	8
API Access Token.....	8
Enable Bridge Logging? .....	8
Products .....	9
Fetch Products from WinMan?.....	9
Fetch Product Stock Levels from WinMan? .....	9
Fetch Product Images from WinMan? .....	9
Fetch Product Categories from WinMan? .....	9
Perform Full Product Update? .....	9
Perform Full Product Category Update?.....	9
Customers .....	10
Fetch Customers from WinMan? .....	10
Send New Customers a Welcome Email? .....	10
Perform Full Customer Update? .....	10
Sales Orders .....	10
Push Sales Orders back to WinMan? .....	10
Cron Schedule .....	10
Data Population and Export.....	11

Custom Attributes .....	11
Product Attributes .....	11
Category Attributes.....	11
Customer Attributes .....	11
Products .....	11
Product Images .....	12
Product Stock Levels .....	12
Product Categories.....	13
Customers .....	13
Sales Orders .....	15
Request Account Page .....	16
Customer Portal .....	17
Account Overview .....	18
Sales Orders .....	18
Quotes.....	20
Invoices .....	21

## Overview

The WinMan Bridge makes it possible for products, product categories and customers to be automatically populated in Magento 2.x from a WinMan application, and for orders created in Magento 2.x to be automatically sent back to a WinMan application via the WinMan REST API.

Once installed and configured, the majority of the functionality of the WinMan Bridge runs via your Magento cron schedule.

This document covers version 2.0.0 of the WinMan Bridge.

# Prerequisites

## System Prerequisites

- WinMan v7.0098.31.
- WinMan REST API v2.0.0.
- Magento v2.2.1 or higher. The extension might work with versions of Magento 2.x which are older than v2.2.1, but this has not currently been tested and is not supported.
- Your Magento cron must be set up and working.

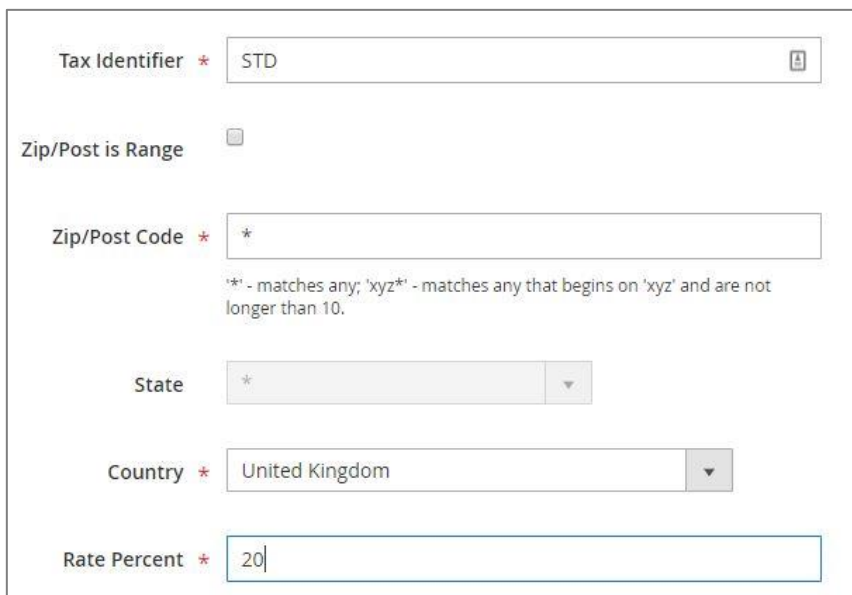
## Data Prerequisites

### Tax Rules, Rates and Classes

*Tax Rules, Rates and Classes* are not created automatically by the WinMan Bridge, and must be created manually in Magento. Your Magento *Tax Rules, Rates and Classes* should be named in a way which matches up to the *Tax Codes and Rates* in your WinMan application. The WinMan Bridge will then automatically assign the correct Magento Tax Class to the products that are populated.

For example, in WinMan, if you have a *Tax Code* of *STD* which has a *Tax Rate* of *20%* and is applicable in the UK, you should follow the steps below to create the necessary information in Magento:

- Create a matching *Tax Rate*. In your Admin Panel, go to *Stores -> Tax Zones and Rates -> Add New Tax Rate*, and enter the information as shown below. Remember to click *Save Rate* when done.



Tax Identifier \* STD

Zip/Post is Range ☐

Zip/Post Code \* \*

\* - matches any; 'xyz\*' - matches any that begins on 'xyz' and are not longer than 10.

State \* \*

Country \* United Kingdom

Rate Percent \* 20

- Create a matching *Tax Rule* and product *Tax Class*. In your Admin Panel, go to *Stores -> Tax Rules -> Add New Tax Rule*. The *Name* of your new *Tax Rule* should be *STD*, and you should select *STD* from the *Tax Rate* box by clicking on it in the list box. Under *Additional Settings*, you should create a new *Tax Class* for products by clicking on the appropriate *Add New Tax Class* button. Please then ensure that your new product *Tax Class* is selected by clicking on it in the list box. Please also select all the customer *Tax Classes* by clicking on them. Once you have entered the necessary information, the first part of the page should look something like the below. Remember to click *Save Rule* when done.

### Tax Rule Information

Name \*

Tax Rate \*

✓ STD

Default

Add New Tax Rate

#### ▼ Additional Settings

Customer Tax Class \*

✓ Retail Customer

✓ Default

✓ STD

Add New Tax Class

Product Tax Class \*

Taxable Goods

✓ STD

Add New Tax Class

Priority \*

Tax rates at the same priority are added, others are compounded.

You may wish to experiment with different *Tax Rules* depending on your needs. The most important part for the WinMan Bridge is that a product *Tax Class* exists in Magento for each *Tax Code* in WinMan. The names must match exactly, as these are what the WinMan Bridge looks for when syncing data. If the WinMan Bridge is unable to find a matching product *Tax Class* in Magento, the product will have no tax class assigned to it, essentially making it tax exempt.

## Freight Methods

In order for Magento orders to be successfully sent back to WinMan, your Magento shipping methods must have a *Method Name* which matches up exactly to an appropriate *FreightMethodId* in WinMan.

## Payment Methods

In order for Magento orders to be successfully sent back to WinMan, your Magento payment methods must have a *Title* which matches up exactly to an appropriate *CreditCardTypeId* in WinMan.

# Installation

The WinMan Bridge **cannot** currently be installed via Composer and must be installed manually. Please note that **this process will take your Magento site offline until the installation is complete**. To install, follow these steps:

1. The extension will be provided in the form of a ZIP file. Extract the *app* directory from the ZIP file into your Magento root directory.
2. On your server, `cd` to your Magento root directory and run the following commands:

```
php bin/magento setup:upgrade  
php bin/magento setup:di:compile  
php bin/magento setup:static-content:deploy
```

3. If you have cache enabled, you should flush your cache either via the Admin Panel (*System -> Cache Management -> Flush Magento Cache*) or by issuing the following command:

```
php bin/magento cache:flush
```

4. Once the above steps are completed, you should check that the extension is listed and enabled in your Admin Panel under *Stores -> Configuration -> Advanced -> Advanced*.



# Configuration

Once you have successfully installed the WinMan Bridge, you can configure it in your Admin Panel under *Stores -> Configuration -> WinMan -> WinMan Bridge*. If your Magento site has multiple websites, you should configure the WinMan Bridge at website level by selecting the appropriate website from the *Store View* drop-down. If you have only one website, the WinMan Bridge can safely be configured at the *Default Config* level.

## General

### Enable Bridge?

You should set this option to *Yes* to enable the WinMan Bridge. If it is set to *No*, no information will be passed between WinMan and Magento.

### API Base URL

You should set this option to reflect the base URL of your WinMan REST API. When your WinMan REST API was set up by WinMan, both a *Training* and a *Live* base URL will have been created. For more information on this, please see the WinMan REST API documentation.

### Website URL

You should set this option to reflect the URL of your Magento website, exactly as it appears in the WinMan application under the *Ecommerce Websites* program. For more information on this, please see the WinMan REST API documentation.

### API Access Token

You should enter a valid WinMan REST API Access Token in this box. For more information on this, please see the WinMan REST API documentation.

### Enable Bridge Logging?

The WinMan Bridge is capable of producing log output for information and debugging purposes. You should set this option to *No* if you would like to disable this output. If this option is set to *Yes*, the log output will be saved in the *winman\_bridge.log* file located in Magento's *var/log* directory. For production environments, it is recommended that this option is set to *No*.

## Products

### Fetch Products from WinMan?

If you would like to populate products in Magento from WinMan, you should set this option to *Yes*.

### Fetch Product Stock Levels from WinMan?

If you would like to keep the stock levels of your products in Magento in sync with the stock levels in WinMan, you should set this option to *Yes*. If *Fetch Products from WinMan?* is set to *No*, this option will be ignored.

### Fetch Product Images from WinMan?

If you would like to fetch your product images directly from WinMan, you should set this option to *Yes*. Please note that if you do set this option to *Yes*, any additional images you add to WinMan products manually through the Admin Panel will be removed from these products the next time the WinMan Bridge updates them. If *Fetch Products from WinMan?* is set to *No*, this option will be ignored.

### Fetch Product Categories from WinMan?

If you would like to populate product categories in Magento from WinMan, you should set this option to *Yes*. This option will not only create and update the product categories themselves, but it will also place any relevant WinMan products into these categories. If *Fetch Products from WinMan?* is set to *No* and this option is set to *Yes*, product categories will be created but may not have products added into them.

### Perform Full Product Update?

By default, the WinMan Bridge will only fetch product data from WinMan that has changed since the last time the data was fetched. If you would like to force the WinMan Bridge to fetch **all** relevant product data from WinMan, regardless of when it was last modified, you should set this option to *Yes*. If this option is set to *Yes*, the full update will occur the next time the cron job runs. Once the full update is completed, this setting will automatically revert to *No*.

If *Fetch Product Images from WinMan?* is set to *Yes*, product images will also be included in this full update. If *Fetch Products from WinMan?* is set to *No*, a full product update will not occur.

### Perform Full Product Category Update?

By default, the WinMan Bridge will only fetch product category data from WinMan that has changed since the last time the data was fetched. If you would like to force the WinMan Bridge to fetch **all** relevant product category data from WinMan, regardless of when it was last modified, you should set this option to *Yes*. If this option is set to *Yes*, the full update will occur the next time the cron job runs. Once the full update is completed, this setting will automatically revert to *No*.

## Customers

### Fetch Customers from WinMan?

If you would like to populate Magento customers from WinMan, you should set this option to *Yes*. The data that is populated in Magento comes from a combination of data from WinMan CRM Contacts and WinMan Customers. For more information on this, please see the WinMan REST API documentation.

### Send New Customers a Welcome Email?

If you would like Magento to send a welcome email to customers who are newly created by the WinMan Bridge, you should set this option to *Yes*. If this option is set to *No*, the WinMan Bridge can still create new customers but these customers will not be notified.

### Perform Full Customer Update?

By default, the WinMan Bridge will only fetch customer data from WinMan that has changed since the last time the data was fetched. If you would like to force the WinMan Bridge to fetch **all** relevant customer data from WinMan, regardless of when it was last modified, you should set this option to *Yes*. If this option is set to *Yes*, the full update will occur the next time the cron job runs. Once the full update is completed, this setting will automatically revert to *No*.

## Sales Orders

### Push Sales Orders back to WinMan?

If you would like orders placed within Magento to be automatically sent back to the WinMan application, you should set this option to *Yes*. If this option is set to *Yes*, orders are sent back to WinMan as soon as they are placed in Magento – you do not have to wait for the cron job to run.

## Cron Schedule

The WinMan Bridge has its own cron group. To manage the settings for this cron group, go to **Stores** -> *Configuration* -> *Advanced* -> *System* -> *Cron (Scheduled Tasks)* -> *Cron configuration options for group: winman* in your Admin Panel.

By default, the WinMan Bridge cron job is set to run every 15 minutes.

# Data Population and Export

## Custom Attributes

Upon installation, the WinMan Bridge creates several custom attributes which may be populated with data from WinMan. These are as follows:

### Product Attributes

<b>Unit of Measure</b>	This is set to the <i>UnitOfMeasurePrintText</i> from WinMan.
<b>Barcode</b>	This is set to the <i>Barcode</i> from WinMan.
<b>Pack Size</b>	This is set to the <i>PackSize</i> from WinMan.
<b>Length</b>	This is set to the <i>Length</i> from WinMan.
<b>Width</b>	This is set to the <i>Width</i> from WinMan.
<b>Height</b>	This is set to the <i>Height</i> from WinMan.

### Category Attributes

<b>Category GUID</b>	This is set to the <i>ProductCategoryGUID</i> from WinMan.
----------------------	--

### Customer Attributes

<b>GUID</b>	This is set to the <i>CustomerGUID</i> of the <i>Customer</i> in WinMan.
<b>Communication Allowed</b>	This is set to the <i>AllowCommunication</i> field of the <i>CRM Contact</i> in WinMan.

All the above product attributes are added to the *Default Attribute Set*, grouped together in a group called *WinMan Attributes*.

## Products

When products are created by the WinMan Bridge, they are added to the website for which the extension is configured and use the *Default Attribute Set*. At present, only *Simple* products are created, but products which have Options and Options Items in WinMan will have the corresponding customisable options created in Magento automatically.

In addition to the custom attributes mentioned previously, the following standard Magento product attributes are populated by the WinMan Bridge:

<b>Enable Product</b>	This is set to <i>Yes</i> .
<b>Product Name</b>	This is set to the <i>ProductDescription</i> from WinMan.
<b>SKU</b>	This is set to the <i>ProductId</i> from WinMan.
<b>Price</b>	This is set to the <i>WebPrice</i> from WinMan, unless this is 0. If it is 0, this attribute is set to the <i>StandardPrice</i> from WinMan.
<b>Tax Class</b>	This is set to the tax class which has the same name as the <i>TaxCodeId</i> from WinMan. If no tax class exists in Magento with this name, this attribute is set to <i>None</i> . If <i>Taxable</i> is set to <i>False</i> in WinMan, the tax class is set to <i>None</i> .
<b>Weight</b>	This is set to the <i>Weight</i> from WinMan.
<b>Visibility</b>	This is set to <i>Catalog, Search</i> .
<b>Description</b>	This is set to the <i>LongDescription</i> from WinMan.
<b>Short Description</b>	This is set to the <i>ShortDescription</i> from WinMan.
<b>Meta Title</b>	This is set to the <i>TitleTag</i> from WinMan.
<b>Meta Keywords</b>	This is set to the <i>KeywordsTag</i> from WinMan.
<b>Meta Description</b>	This is set to the <i>DescriptionTag</i> from WinMan.
<b>Customisable Options</b>	If the product in WinMan has Options and Options Items, the corresponding customisable options will be created automatically, including prices.

---

*Please note that when products are removed from the Ecommerce Website in WinMan, they are **not** automatically removed from Magento.*

---

## Product Images

When product images are populated by the WinMan Bridge, any images that are currently added to the product in Magento are removed and replaced by the images fetched from WinMan. The first image fetched from WinMan is set as the *base*, *small* and *thumbnail* for the product.

## Product Stock Levels

When product stock levels are populated by the WinMan Bridge, the following standard Magento product attributes are populated:

<b>Manage Stock</b>	This is set to <i>Yes</i> .
<b>Qty</b>	This is set to the sum of the quantity in stock across all inventory sites attached to the relevant website in WinMan.
<b>Qty Uses Decimals</b>	This is set to <i>Yes</i> .

<b>Stock Status</b>	If <i>Qty</i> is 0, this is set to <i>Out of Stock</i> . If <i>Qty</i> is greater than 0, this is set to <i>In Stock</i> .
---------------------	--

## Product Categories

When product categories are populated by the WinMan Bridge, they are created under the root category of the website for which the extension is configured, and their hierarchy matches that in WinMan.

In addition to the custom attributes mentioned previously, the following standard Magento category attributes are populated by the WinMan Bridge:

<b>Enable Category</b>	This is set to <i>Yes</i> .
<b>Category Name</b>	This is set to the <i>ProductCategoryDescription</i> from WinMan.
<b>Category Image</b>	This is set to the <i>CategoryImage</i> from WinMan, with base, small and thumbnail also set.
<b>Description</b>	This is set to the <i>DescriptionTag</i> from WinMan.
<b>URL Key</b>	This is set to a URL encoded version of the <i>ProductCategoryDescription</i> from WinMan.
<b>Meta Title</b>	This is set to the <i>TitleTag</i> from WinMan.
<b>Meta Keywords</b>	This is set to the <i>KeywordsTag</i> from WinMan.
<b>Meta Description</b>	This is set to the <i>DescriptionTag</i> from WinMan.

After the above attributes are populated, the appropriate products are added into the categories.

---

*Please note that when categories are removed from WinMan, they are **not automatically** removed from Magento. Please also note that when products are removed from categories in WinMan, they are **not automatically** removed from those categories in Magento.*

---

## Customers

When customers are created by the WinMan Bridge, they are associated to the website for which the extension is configured.

In addition to the custom attributes mentioned previously, the following standard Magento customer attributes are populated by the WinMan Bridge:

<b>Group</b>	This is set to the customer group which has the same name as the customer's <i>PriceListId</i> from WinMan. If no customer group exists in Magento with this name, the WinMan Bridge will create the group first and then set this attribute.
--------------	---

<b>Disable Automatic Group Change Based on VAT ID</b>	This is set to <i>Yes</i> (ticked).
<b>Prefix</b>	This is set to the <i>Title</i> of the <i>CRM Contact</i> in WinMan.
<b>First Name</b>	This is set to the <i>FirstName</i> of the <i>CRM Contact</i> in WinMan.
<b>Last Name</b>	This is set to the <i>LastName</i> of the <i>CRM Contact</i> in WinMan.
<b>Email</b>	This is set to the <i>PortalUserName</i> of the <i>CRM Contact</i> in WinMan.
<b>Tax/VAT Number</b>	This is set to the <i>TaxNumber</i> of the <i>Customer</i> in WinMan.

At present, a single address is created for the customer with the following attributes populated:

<b>Prefix</b>	This is set to the <i>Title</i> of the <i>CRM Contact</i> in WinMan.
<b>First Name</b>	This is set to the <i>FirstName</i> of the <i>CRM Contact</i> in WinMan.
<b>Last Name</b>	This is set to the <i>LastName</i> of the <i>CRM Contact</i> in WinMan.
<b>Street Address</b>	This is set to the <i>Address</i> of the <i>Customer</i> in WinMan.
<b>City</b>	This is set to the <i>City</i> of the <i>Customer</i> in WinMan.
<b>Country</b>	This is set to the <i>ISO3Chars</i> country code of the <i>Customer</i> in WinMan.
<b>State/Province</b>	This is set to the <i>Region</i> of the <i>Customer</i> in WinMan.
<b>Zip/Postal Code</b>	This is set to the <i>PostalCode</i> of the <i>Customer</i> in WinMan.
<b>Phone Number</b>	This is set to the <i>PhoneNumberWork</i> of the <i>CRM Contact</i> in WinMan.
<b>Default Billing Address</b>	This is set to <i>Yes</i> (ticked).
<b>Default Shipping Address</b>	This is set to <i>Yes</i> (ticked).

Newly created customers have their password randomly generated by Magento, and if the configuration option *Send New Customers a Welcome Email?* is set to *Yes*, they are sent a welcome email with a link to access their account. Customers which are being updated **do not** have their passwords changed.

---

*Please note that CRM contacts which are removed from WinMan are **not** automatically removed from Magento.*

---

## Sales Orders

For orders which are sent back to WinMan by the WinMan Bridge, the following fields from the Magento order are sent to the appropriate *EcommerceWebsite* in WinMan:

<b>Customer GUID</b>	
<b>Grand Total</b>	This is the total amount charged to the customer for the order in the customer's currency.
<b>Tax Amount</b>	
<b>Order ID</b>	This is used as the <i>CustomerOrderNumber</i> in WinMan.
<b>Coupon/Promotional Code</b>	
<b>Order Currency Code</b>	
<b>Customer Email</b>	
<b>SKU (of each product purchased)</b>	If the product has customisable options, these options and their prices will also be included.
<b>Quantity (of each product purchased)</b>	
<b>Row Total</b>	This the total price for the order row in the customer's currency.
<b>Tax Amount (for each order row)</b>	This is the total amount of tax for the order row in the customer's currency.
<b>Shipping Method Name</b>	This is used as the <i>FreightMethodId</i> in WinMan.
<b>Shipping Amount</b>	This is the total for shipping in the customer's currency.
<b>Shipping Tax Amount</b>	This is the total amount of tax for shipping in the customer's currency.
<b>Shipping Address First Name + Shipping Address Last Name</b>	This is used as the <i>DeliveryName</i> in WinMan.
<b>Shipping Address Street Address</b>	This is used as the <i>DeliveryAddress</i> in WinMan.
<b>Shipping Address Zip/Postal Code</b>	This is used as the delivery address <i>PostalCode</i> in WinMan.
<b>Shipping Address Country Code</b>	This is used as the <i>ISO3Chars</i> country code of the delivery address in WinMan.
<b>Billing Address First Name + Billing Address Last Name</b>	This is used as the <i>CompanyName</i> in WinMan when creating a new <i>Customer</i> .
<b>Billing Address Street Address</b>	This is used as the <i>Customer's Address</i> in WinMan when creating a new <i>Customer</i> .
<b>Billing Address Zip/Postal Code</b>	This is used as the <i>Customer's PostalCode</i> in WinMan when creating a new <i>Customer</i> .



<b>Billing Address Country Code</b>	This is used as the <i>ISO3Chars</i> country code of the Customer in WinMan when creating a new <i>Customer</i> .
<b>Payment Method Title</b>	This is used as the <i>CreditCardTypeId</i> in WinMan.
<b>Total Paid</b>	This is the total amount that the customer has paid online in the customer's currency.

If the order is successfully sent to WinMan, its status in Magento is set to *Complete* and a note is added containing the WinMan Order ID. If the order is **not** successfully sent to WinMan, its status in Magento is set to *On Hold* and a note is added advising an Administrator to check the logs for more information. Please note that the customer is **not** notified of any change of order status which is made by the WinMan Bridge.

If the Magento customer does not have a *Customer GUID* (either because the account has been created in Magento, **not** via the WinMan Bridge, or because they are a guest), the WinMan Bridge will attempt to match up the customer's email address to a *CRM Contact's PortalUserName* in WinMan (provided the appropriate *Program Profile* has been enabled in WinMan. Please see the WinMan REST API documentation for more information on this). If a match is found, the order will be placed in WinMan using this existing *CRM Contact* and associated *Customer*. If no match is found, a brand-new *CRM Contact*, *CRM Company* and *Customer* will be created in WinMan (if possible). In all cases, the WinMan Bridge sends the *Customer GUID* from WinMan back to Magento after the order has been successfully placed in WinMan.

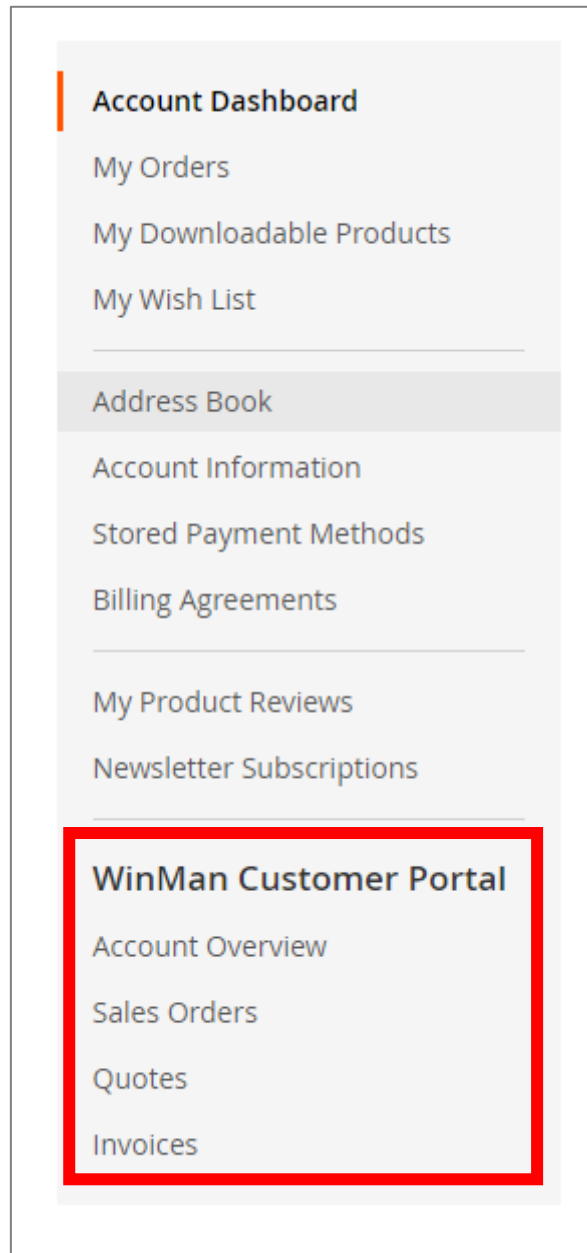
## Request Account Page

The WinMan Bridge makes it possible for *CRM Contacts* to be created automatically in WinMan. A frontend page is created when the WinMan Bridge is installed which can be reached at [http\(s\)://<your\\_website\\_URL>/requestaccount](http(s)://<your_website_URL>/requestaccount). It contains a simple form for the potential customer to complete. Once all the mandatory fields are completed and the potential customer clicks the submit button, the data is automatically sent back to WinMan and *CRM Contact* and *CRM Company* is created. Within the WinMan application, this *CRM Company* can then be promoted to a full *Customer*, at which point, the WinMan Bridge will be able to automatically pick up the data again and create a Magento customer.

A success or failure message is displayed above the form to inform the potential customer whether their request was successfully sent to WinMan.

## Customer Portal

The WinMan Bridge includes several Customer Portal pages which enable customers to view sales order, invoice, quote, statement and account overview information from WinMan within Magento. To access these pages, customers need to log in to their Magento account as normal and they will see additional links in the navigation menu, as highlighted below:



If the customer does not have a Customer GUID saved against their Magento customer account, they will not see these additional links.

## Account Overview

From the account overview page, customers can view basic information about their WinMan account, download a PDF copy of their current WinMan statement, and view brief lists of the 5 most recent sales orders and sales invoices linked to their WinMan account. Customers can also click through to each of these recent sales orders and/or sales invoices to see further detail, click through to see a full list of all sales orders and/or sales invoices, and download PDF copies of these recent sales orders and/or sales invoices. A typical account overview page looks like the below:

### WinMan Customer Portal

#### Account Overview






**Company Information**  
Company name: John Smith  
Company reference: C00004-0000

**Finances**  
Account balance: **£-845.75**  
Overdue balance: **£0.00**



#### Current Statement

Download Statement

**Recent Sales Orders** [View All](#)

Sales Order ID	Effective Date	Order Value	
<a href="#">QU-0000001</a>	Mar 26 2018	£204.96	
<a href="#">SO-0000114</a>	Mar 16 2018	£123.00	
<a href="#">SO-0000113</a>	Mar 16 2018	£123.00	
<a href="#">SO-0000112</a>	Mar 16 2018	£123.00	
<a href="#">SO-0000111</a>	Mar 14 2018	£19.00	

**Recent Sales Invoices** [View All](#)











Sales Invoice ID	Effective Date	Invoice Value	
<a href="#">INV0000004</a>	Mar 23 2018	£12.00	
<a href="#">INV0000005</a>	Mar 23 2018	£118.00	

## Sales Orders

From the sales orders page, customers can view a complete list of sales orders linked to their WinMan account. The list is paged, showing 10 items per page by default with the option to change this to 20 or 50. Customers can click through to individual sales orders to view further details, and download PDF copies of each sales order. A typical sales orders page will look like the below:

## WinMan Customer Portal

### Sales Orders

Order ID	Order Date	Total Price	Status	Order Number	Tracking Number	
QU-0000001	Mar 26 2018	£204.96	New	ABC123		
SO-0000114	Mar 16 2018	£123.00	Shipped	000000066	123456	
SO-0000113	Mar 16 2018	£123.00	New	000000065		
SO-0000112	Mar 16 2018	£123.00	In Progress	000000064		
SO-0000111	Mar 14 2018	£19.00	In Progress	000000062		
SO-0000110	Mar 14 2018	£361.00	In Progress	000000061		
SO-0000109	Mar 14 2018	£304.00	In Progress	000000060		
SO-0000108	Mar 14 2018	£19.00	In Progress	000000059		
SO-0000107	Mar 14 2018	£292.04	In Progress	000000058		
SO-0000106	Mar 14 2018	£224.94	New	000000055		

Showing items 1 to 10 of 50 total

1 2 3 4 5 >

Show 10 per page

When a customer clicks through to an individual sales order, they will see additional details, including a complete list of all items on the order. A typical individual sales order page will look like the below:

## WinMan Customer Portal

### Sales Order - SO-0000114

[View All Orders](#)

#### Company Address

John Smith  
987 Example Road  
Birmingham  
ABC 321  
United Kingdom

#### Shipping Address

John Smith  
987 Example Road  
Birmingham  
ABC 321  
United Kingdom

#### Order Details

Order ID:	SO-0000114	<a href="#">Print Order</a>
Order Date:	Mar 16 2018	
Status:	Shipped	

#### Order Items

Quantity	Item	Cost	Line Cost
1	PC-TWENTYONE-SILVER COMPUTER MONITOR-21"-SILVER	£98.33	£98.33
1	Shipping NEXT DAY	£5.00	£5.00




Subtotal: £103.33

Tax: £19.67

Order Total: £123.00

## Quotes

From the quotes page, customers can view a complete list of quotes linked to their WinMan account. The list is paged, showing 10 items per page by default with the option to change this to 20 or 50. Customers can click through to individual quotes to view further details, and download PDF copies of each quote. A typical quotes page will look like the below:

WinMan Customer Portal				
Quotes				
Quote ID	Quote Date	Reference	Total Value	
SO-0000116	Mar 27 2018	QUOTE1	£360.60	
SO-0000117	Mar 27 2018	QUOTE2	£37.20	
SO-0000118	Mar 27 2018	QUOTE3	£18.60	
Showing items 1 to 3 of 3 total			Show	10 <input type="text"/> per page

When a customer clicks through to an individual quote, they will see additional details, including a complete list of all items on the quote. There is also a button which allows the customer to convert the quote to a sales order. A typical individual quote page will look like the below:

WinMan Customer Portal

Quote - SO-0000116

View All Quotes

Company Address

John Smith  
987 Example Road  
Birmingham  
ABC 321  
United Kingdom

Shipping Address

John Smith  
987 Example Road  
Birmingham  
ABC 321  
United Kingdom

Quote Details

Quote ID:  
Quote Date:  
Status:

SO-0000116  
Mar 27 2018  
Active

Print Quote

Convert to Order

Quote Items

Quantity	Item	Cost	Line Cost
10	DISPLAY STAND A lovely display stand with glass shelves	£30.00	£300.00
1	Shipping NEXT DAY	£0.50	£0.50

Subtotal:

Tax:

Quote Total:

£300.50  
£60.10  
£360.60

## Invoices

From the invoices page, customers can view a complete list of invoices, credits and payments linked to their WinMan account. The list is paged, showing 10 items per page by default with the option to change this to 20 or 50. Customers can click through to individual invoices to view further details, and download PDF copies of each invoice. A typical invoices page will look like the below:

WinMan Customer Portal							
Invoices							
Date	Type	Status	Invoice	Sales Order	Reference	Debit	Credit
Mar 23 2018	Invoice	Paid	<a href="#">INV0000004</a>	SO-0000114	000000066	£12.00	£0.00
Mar 23 2018	Invoice	Paid	<a href="#">INV0000005</a>	SO-0000114	000000066	£118.00	£0.00
Dec 11 2017	Payment					£0.00	£-13.20
Dec 11 2017	Payment					£0.00	£-13.20
Dec 11 2017	Payment					£0.00	£-13.20
Dec 11 2017	Payment					£0.00	£-13.20
Dec 11 2017	Payment					£0.00	£-13.20
Dec 11 2017	Payment					£0.00	£-13.20
Dec 08 2017	Payment					£0.00	£-13.20
Dec 08 2017	Payment					£0.00	£-13.20
Showing items 1 to 10 of 25 total						Show 10 per page	

When a customer clicks through to an individual invoice, they will see additional details, including a complete list of all items on the invoice. A typical individual invoice page will look like the below:

WinMan Customer Portal

Invoice - INV0000004

View All Invoices

Company Address

John Smith  
987 Example Road  
Birmingham  
ABC 321  
United Kingdom

Shipping Address

John Smith  
987 Example Road  
Birmingham  
ABC 321  
United Kingdom

Invoice Details

Invoice ID: INV0000004  
Sales Order ID: SO-0000114  
Invoice Date: Mar 23 2018  
Invoice Due Date: Apr 30 2018  
Status: Paid

Print Invoice

Invoice Items

Item	Description	Quantity	Unit Cost	Line Cost
Shipping	Shipping NEXT DAY	1	£5.00	£5.00
Shipping	Shipping NEXT DAY	1	£5.00	£5.00

Subtotal:

£10.00

Tax:

£2.00

Invoice Total:

£12.00

Outstanding:

£0.00