

The Order Form

An Overview of the Order Form

The EROL order form

The EROL order form is a critical component of your online store. The order form is where all calculations regarding the cost of item purchased, relevant taxes, shipping destinations and customer details are carried out and/or finalised

Accessing the order form

The order form becomes activated by a visitor to the store when:

- They click on the default 'Checkout' button in the store
- They click on an item to buy it (this is an optional setting and can be controlled in Store Options tab by checking on the '*Auto Jump to Order*' option)

Allowing users to jump straight to the order form

Checking on the '*Auto Jump to Order*' option in the Order Form Settings Tab causes EROL to jump directly to the Order form on a customer adding an item to the basket.

This will also occur automatically if you decide to hide the basket frame where the product basket-thumbnail image normally appears.

Customising the setup of the Order Form

The EROL order form, and all the layout, shipping and tax options relevant to it are controlled by clicking on the Basket tab in the Tree View and then selecting the relevant setting in the Basket tree view structure.

The options available allow for the setup, customisation and control of:

- The Order Form appearance
- Currency
- Destination countries
- Shipment
- Tax
- Payment methods

Laying out the Order Form

Controlling the layout of the order form

The entire EROL order form can be customised to suit the look and feel of your store as well as meet most requirements such as extra form fields to gather additional data from your customers over and above their standard details.

All of the options available for customising the order form are accessed by clicking on Order Form Settings in the Basket tree view structure. Clicking this will activate four Order Form tabs on the right:

- 1) Layout Tab
- 2) General Settings Tab

- 3) Header & Footer Tab
- 4) Form Fields Tab

Limitations on order form layout

The basic layout of the order form fields cannot be changed.

However, you can control all text, colours, graphics, notes and extra fields.

Changing the font style and size of all text in the order form

The size and style of all text on the order form can be controlled using the 'Size' and 'Face' dropdown menus under 'Set the Font Size and Face for the Order Form'.

The colour of the text on the page defaults to black unless altered, for the various areas of the form, using the *Cell Colour* and *Font Colour* options below.

Setting the colours for the various parts of the order form

The order form is made up of a number of default cells or bands. These bands are included by default to ensure that any EROL Order form maintains a logical and workable layout. The colours of these bands and the labels inside them can however be altered. This is achieved using the *Cell Colour* and *Font Colour* dropdown options.

Page: Refers to the background colour of the Order form. You also have the option to alter the colour of the page font (i.e. the order form text sitting outside of any default cells or bands).

Headings Column: Refers to the colour of the cell(s) or band(s) that run along the top of the invoice. You can also set the colour of the label text inside these cells or bands.

Totals Column: Refers to the colour of the cell(s) or band(s) that make up the majority of the cells in the calculation column of the invoice.

You can also set the colour of the label text inside these cells or bands.

This cell also makes up the divider between customers' details and your order notes.

Product Rows: Refers to the colour of the cell(s) or band(s) that contain the purchased product details.

You can also set the colour of the label text inside these cells or bands.

Inserting custom fields onto the order form

You may require your customers to give you further information about the product(s) they purchase. Alternatively you may wish to ask customers to let you know where they heard about your store. It is possible to gather this information by inserting your own custom form fields over and above the standard fields.

Insert custom fields by using the 'Create your own custom fields' options on the Form Fields tab.

You may add a maximum of three custom form fields.

By default the custom fields are not included in the order form. To include one, or all, of the custom fields select 'Include' from the 'Field' dropdown menu. To make your custom field

compulsory for the user to fill in, select 'Required' from the 'Field' dropdown menu to ensure that the new field must be completed.

Label your new custom fields by typing in your desired label, or field description, in the 'Label' field(s).

Selecting fields to be present in the order form

By default, EROL automatically inserts the fields relevant to any online order. These will include shipping address, billing address and credit card details etc should they be relevant to the payment procedures you have chosen for your store. There are however certain fields which you may or may not wish to include. The fields are:

E-mail Address
Phone Number
Fax Number
Additional Info
Part Shipment

EROL allows you the option to include or exclude some (or all) of these or to make some of these fields compulsory to fill in.

The difference between Required | Included | Not Included

The 'Field' dropdown menus on the Form Fields tab allow you to decide the state of certain fields on the order form. The three states are:

Required The field is present in the order form and the customer must complete the field or the order will not be sent.

Included The field is present in the order form.

Not Included The field is not present in the order form.

Laying out and ordering the fields on the page

The Auxiliary fields you add to your order form will, by default, be placed above all regular fields. The positioning of these new fields cannot be altered.

What are Order Notes

Many people using your store may be new to e-commerce and something as simple as filling in the order form may be a difficult task for anyone unfamiliar with the procedure.

Additionally you may wish to allay customers' fears about the security of online ordering through your store by explaining how your order security works. All of these details can be included in the order notes. The order notes will appear adjacent to the customer details fields.

Editing and laying out the order notes

The order notes you include on your order form can be input, laid out and edited on the General Settings tab.

Double-clicking the Order Notes field, or clicking the 'Launch HTML Editor' button will launch the EROL HTML editor. Here you can edit your order notes to your exact requirements.

What should be included in the order notes

A good set of order notes should include some or all of the following:

Instructions on how to place an order
Your Shipping And Handling fee structure
Details for ordering from other countries
Indication of delivery schedule
How you charge tax/VAT
Credit Card Security
Your Guarantee policy
Your Returns policy
Contact Information
Customer Service phone number
Your Privacy Policy

Advanced layout control over the Order Form

Although the basic layout of the cells or bands on the order form is fixed, you are not limited to the overall page properties and any free-form HTML or design elements above or below the actual pre-set order form.

The Header & Footer tab allows for any amount of your own free-form HTML above and below the EROL created Order Form.

Adding your own scripts to the Order Form

You can add any of your own JavaScript, VBScript as well as set CSS styles to your Order Form page using the Script sub-tabs on the Order Form Settings tab.

Inserting custom JavaScript onto your Order Form

To insert your own JavaScript onto your page,

1. Select 'Order Form Settings' in the Basket tree view
2. Flip to the Settings sub-tab
3. In the Scripts sub-tabs set, flip to the JavaScript sub-tab
4. Write your code in the JavaScript field, ensuring that you do not include the <SCRIPT> tags
5. If you are pasting in JavaScript from an external source, strip the <SCRIPT> tags from the code, then paste the script into the field.

Do NOT include the <SCRIPT> tags in your code.

Remember EROL does not support double quotes (") and will strip and replace all double quotes with single quotes ('). If you are experiencing problems with your JavaScript make sure the stripping of the quotes has not affected the functionality of the script.

Inserting custom VBScript onto your Order Form

To insert your own VBScript onto your page,

1. Select 'Order Form Settings' in the Basket tree view
2. Flip to the Settings sub-tab
3. In the Scripts sub-tab set, flip to the VBScript sub-tab
4. Write your code in the VBScript field, ensuring that you do not include the <SCRIPT> tags
5. If you are pasting in VBScript from an external source, strip the <SCRIPT> tags from the code, then paste the script into the field.

Do NOT include the <SCRIPT> tags in your code.

Remember EROL does not support double quotes (") and will strip and replace all double quotes with single quotes ('). If you are experiencing problems with your VBScript make sure the stripping of the quotes has not affected the functionality of the script.

Applying CSS styles to your Order Form

EROL provides the facility to add basic CSS functionality to your store, such as removing underlines on hyperlinks, and making text links change colour on mouseover.

To set the CSS properties for your page,

1. Select 'Order Form Settings' in the Basket tree view
2. Flip to the Settings sub-tab
3. In the Scripts sub-tab set, flip to the CSS sub-tab
4. Select the functions you would like to apply
5. Test your new CSS functions by rolling your mouse over the link text in the preview field.

Remember that older browsers will ignore any CSS properties you add to your Order Form.

Adding pre and post-HTML formatting to the Order Form

Free-form HTML or design elements above or below the actual pre-set order form by simply creating your own HTML in the Header (i.e. 'Pre-formatting') and Footer (i.e. 'Post-formatting') fields on the Header & Footer tab.

You can cut and paste your own HTML into these fields or create it using the EROL HTML editor.

Security

An overview of EROL order security

Security is a primary concern for all vendors and their customers. As a result, EROL 2.0 has many security features embedded as an assurance of order integrity.

Security features include:

SSL payment area

Secure encrypted sending of orders

Order verification to prevent tampering

Security at the point of purchase

Whether you use a built-in Payment Gateway or EROL's proprietary secure ordering method, all credit card transactions will take place on a secure server running industry standard levels of security 40/128-bit SSL (Secure Socket Layer). Your chosen Payment Gateway can provide you with further details on security.

If you receive orders securely via EROL's secure server method, your order details and credit card data is encrypted using up to 1024-bit PGP encryption so that orders are only able to read by a single computer with a matching key for unlocking.

Preventing tampering and verifying orders

If your website has a cgi-bin with Perl 5 capability EROL will automatically run an order verify script. This feature relies on you inputting the path to your cgi-bin in the host details.

The order verification script enables you to have order verification set on all orders especially those coming from any offline source i.e. CD ROM.

The script will compare the prices submitted with the prices on your actual web store which will check that the prices are the same. This process will also allow any orders coming from CD ROM to be updated with current prices automatically if they have changed since publication.

Your customer will be made aware of these changes before they continue with their order.