

# **Customer Menu Builder for Magento**

## **User Guide**

version 1.0

*created by "IToris"*

**IToris**

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## 1. Introduction

### 1.1. Purpose

This document is a **User Guide** for **Customer Menu Builder module for Magento**. It describes how work with the extension.

**Customer Menu Builder** allows direct management of the dashboard menu customers see when they login to their account. There is ability to create different menus depending on customer groups. Default menu areas can be activated/deactivated for different customer groups. There is also ability to create new menu areas (with content and widgets) as well as insert menu links with redirect.

## 2. Installation and License

### 2.1. System Requirements

The extension works under Magento from 1.4.x and higher.  
The extension works with Apache 1.3.x and higher, PHP 5, Linux or IIS.

The extension's correct work is guaranteed with the following browsers:

- IE7+
- FireFox 4.x+
- Google Chrome 15.x+
- Safari 5.x+

The correct work with other Magento versions, other browsers and Apache/PHP versions is not guaranteed.

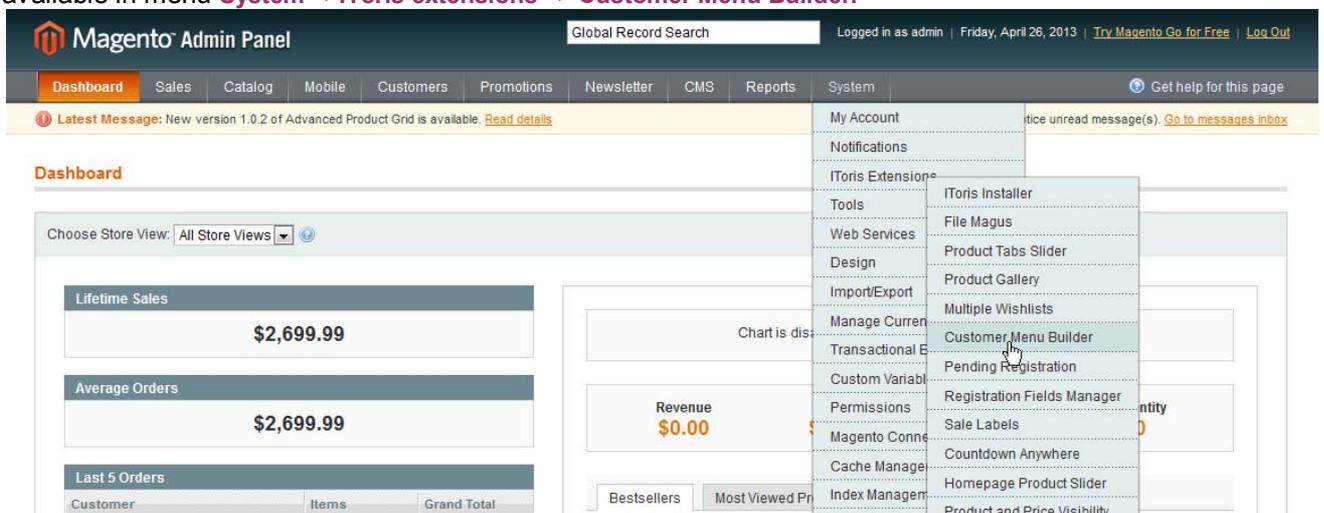
### 2.2. Installation

All our Magento extensions and templates are installed via **IToris Installer**.

Download **IToris Installer** from here <http://www.itoris.com/itoris-magento-installer.html> and un-pack to the root of your website. It will then appear in menu **System ->IToris extensions -> IToris Installer**.

Open it and you will see all our Magento Extensions and Templates, both installed and available. You can install, update and un-install them with one click now.

Find **Customer Menu Builder** in the list of extensions and press **Install** button. It will ask for the license key that you will receive after the purchase. Enter the key and submit. The extension will be installed. It will be available in menu **System ->IToris extensions -> Customer Menu Builder**.



### 2.3. License

**Customer Menu Builder module** has 3 types of licenses - regular, premium and multi-host.

**Regular** license is website-dependent. By ‘website’ here we understand the website in Magento terms. Under one Magento installation one license key of the extension can activate all stores/storeviews within one website.

Modules with regular license are partially encrypted.

Regular license is installed via IToris Installer.

If your configuration has several Magento websites - a separate license will be required for each.

**Premium** license provides 100% open-source modules. It allows activating the whole Magento installation, including all its websites, stores/storeviews.

Premium license is recommended when you plan customizations.

Premium license is installed via IToris Installer.

**Multi-host** license provides ability to install the module to an unlimited number of hosts. It is 100% and is installed as an archive.

You can switch the license from one website to another – login to <http://www.itoris.com> using the credentials you will receive after the purchase. Go to **My Downloads** area, find your key there and reset it from the current website. Then use it again to activate another website.

All licenses also include free life-time updates for the extension.

## 3. How to Use

### 3.1. Activation

To enable the module select **System ->IToris extensions -> Customer Menu Builder**



**Extension Enabled** - this setting activates the module

There is ability to select its own set of settings for stores/storeviews (use Choose Store View drop-down).

### 3.2. Menu Types

There are 3 types of menu available in the module:

- System menu
- CMS menu
- Redirect menu

All menu types can be disabled (by clicking **enable** icon). Only enabled menu items will be visible for customers.

Menu Items						Add CMS Menu	Add Redirect Menu
Title	Menu Type	User Groups	Order	Enabled	Action		
Account Dashboard	System	All Groups	↓	+	Edit		
Address Book	System	All Groups	↑ ↓	+	Edit		
Account Information	System	All Groups	↑ ↓	+	Edit		
My Orders	System	All Groups	↑ ↓	+	Edit		
Billing Agreements	System	All Groups	↑ ↓	-	Edit		

Customers will see menu items (available for their group) in the order they are displayed on the page. There is ability to change the order by using **order arrow** icons

Menu Items						Add CMS Menu	Add Redirect Menu
Title	Menu Type	User Groups	Order	Enabled	Action		
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My Orders	System	All Groups	↑ ↓	+	Edit		
Billing Agreements	System	All Groups	↑ ↓	-	Edit		

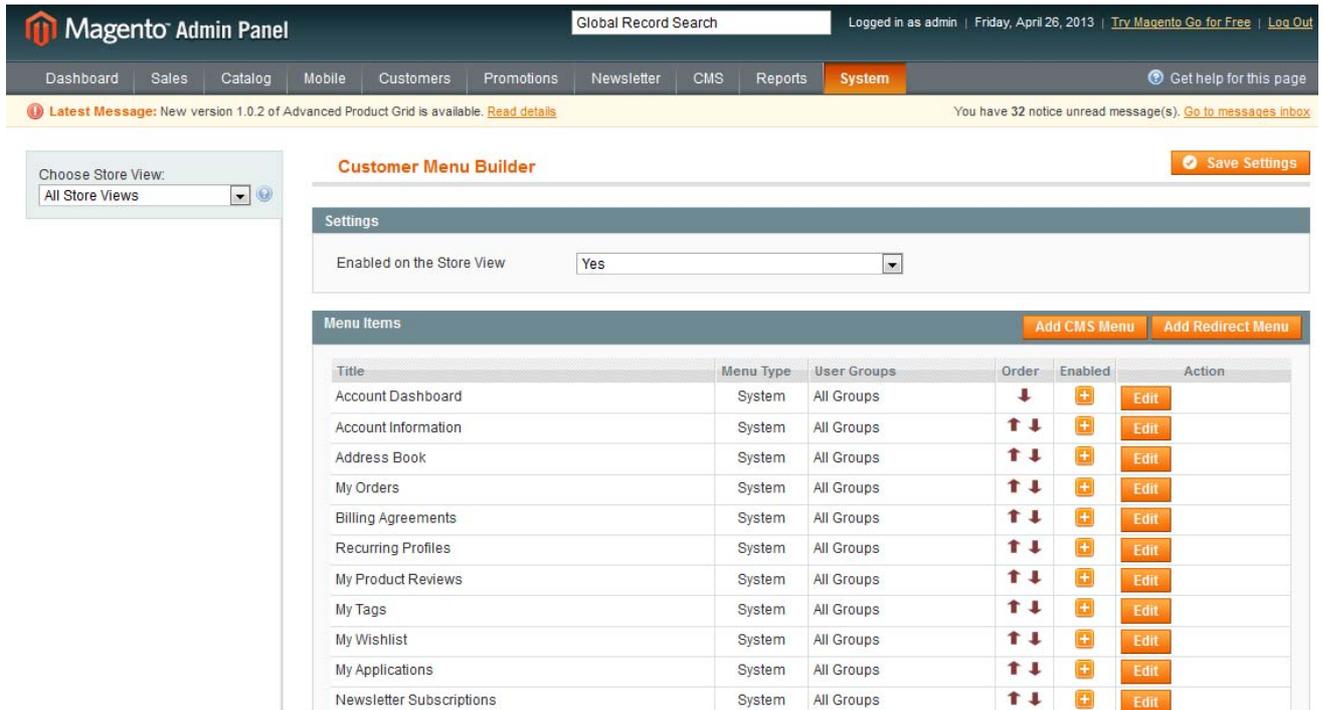
### 3.2.1. System Menu

System menu contains the menu items that are available in customers' dashboard by default (standard Magento customer menu items).

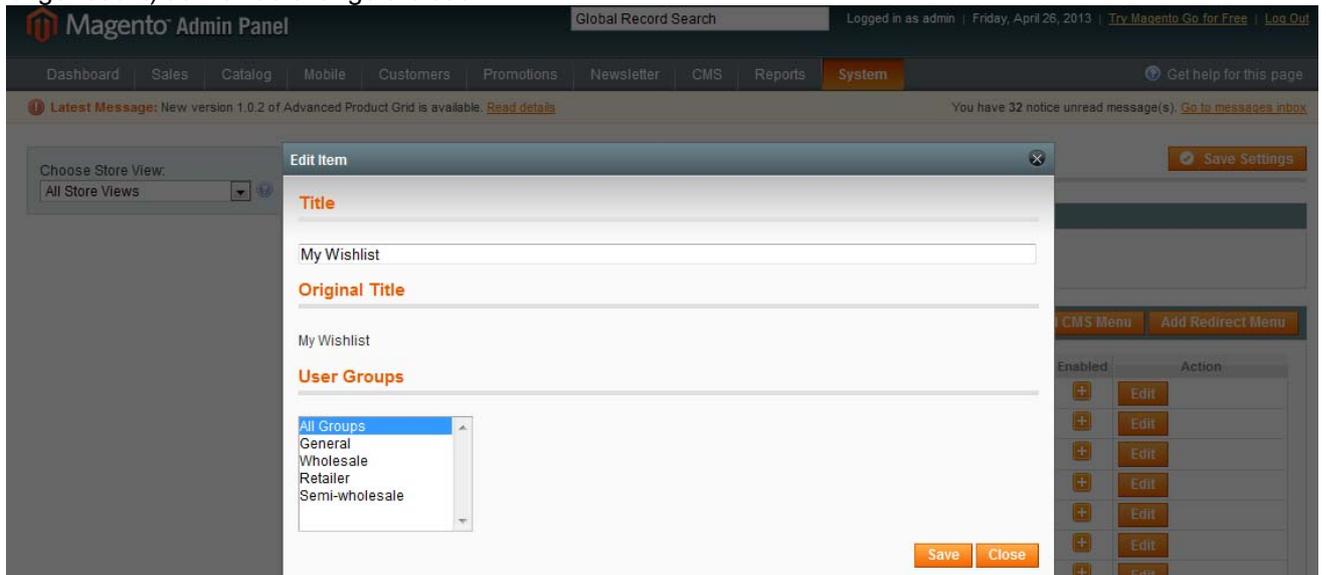
Directly after the installation there will be no menu items as they need to be captured from the front-end first.

The screenshot shows the Magento Admin Panel interface. At the top, there is a navigation bar with tabs for Dashboard, Sales, Catalog, Mobile, Customers, Promotions, Newsletter, Help Desk, CMS, Reports, and System. A message banner indicates a new version of Attachments Anywhere is available. The main content area is titled 'Customer Menu Builder' and includes a 'Save Settings' button. Below this is a 'Settings' section with a dropdown menu for 'Enabled on the Store View' set to 'Yes'. The 'Menu Items' section shows an empty table with columns for Title, Menu Type, User Groups, Order, Enabled, and Action, and a message 'No records found.'

Please login from the front-end as a customer and update the back-end page then, the menu items will appear.



System menu items cannot be removed. They can be edited - press **Edit** button near an item. There will appear a window where you can choose which customer group(s) should see this menu item (the rest will no longer see it) as well as change the title.

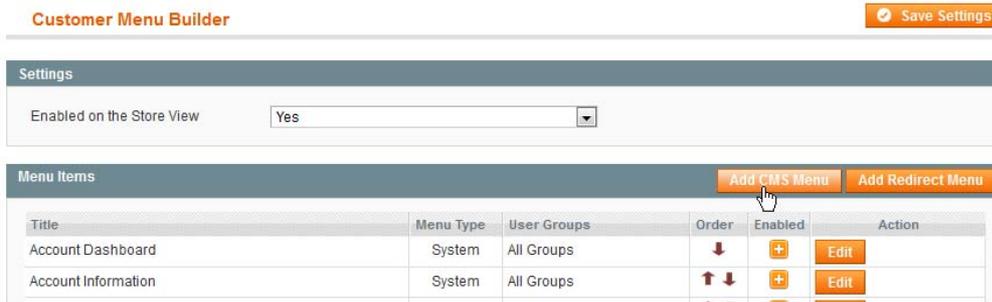


System menu can be managed this way, so that as a result different customer groups see different dashboard menus when they login.

### 3.2.2. CMS Menu

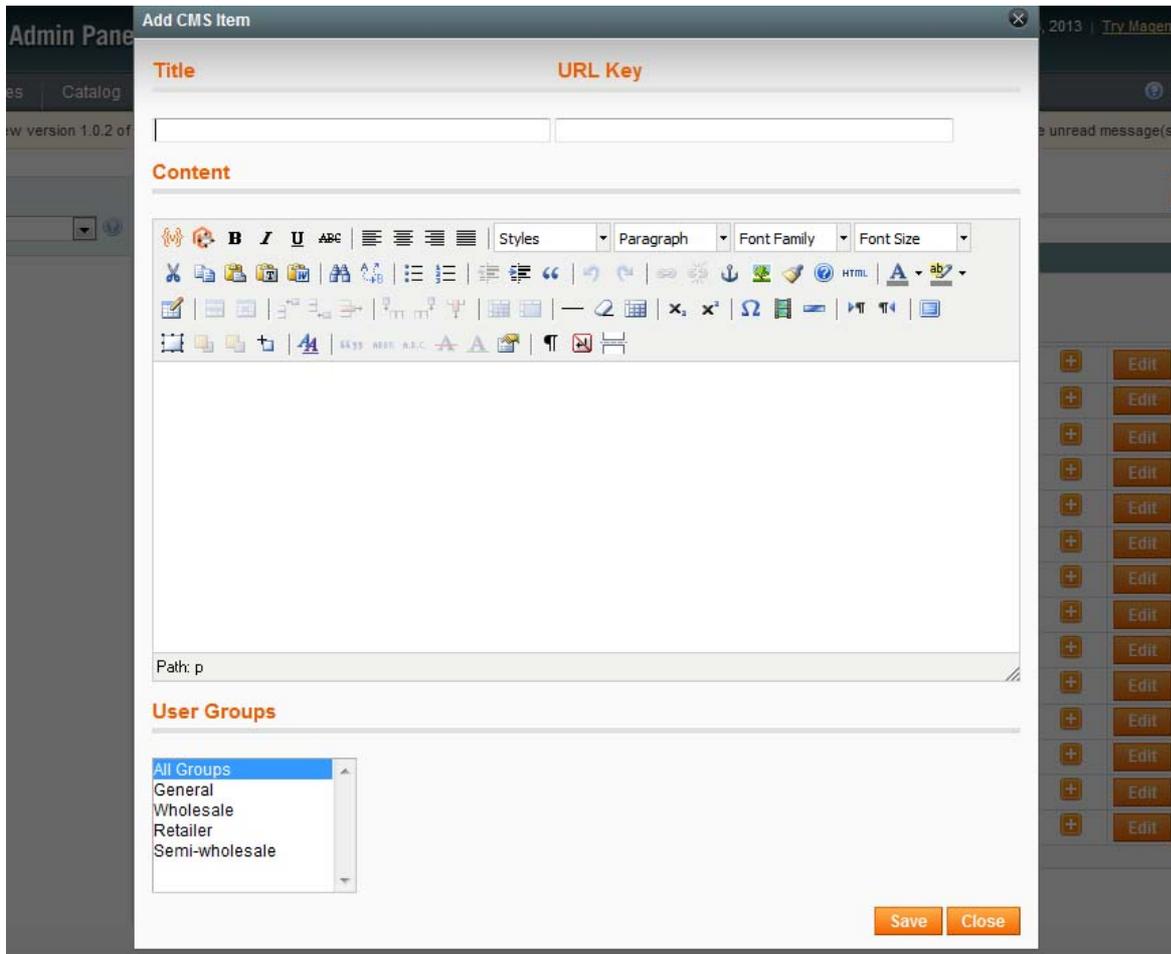
CMS menu provides menu items that you can create and add yourself to the customers' dashboards.

To create a new CMS menu item press **Add CMS Menu** button:



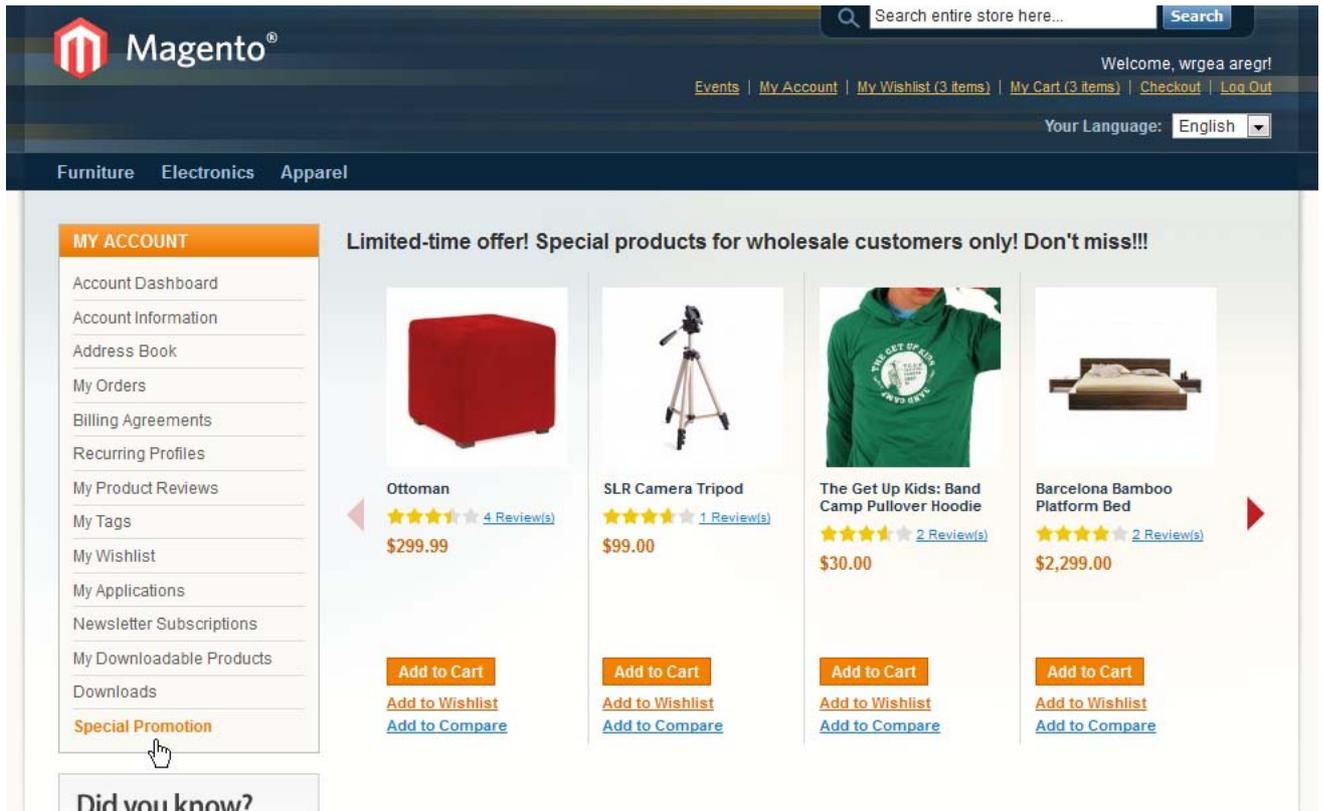
There will appear a window to add a new menu item as well as create its content. You can enter the following information when creating a new CMS menu item:

- **Title** - enter the name of the menu item your customers will see in the dashboard
- **URL Key** - enter the URL key of the new page that will open up when this menu is clicked
- **Content** - here you can create any content as with a regular CMS page - add texts, images, links and so on.  
Please note, that you can insert there widgets as well
- **User Groups** - select which customer group(s) will see the menu item in their dashboards.



There is ability to delete created CMS menu items.

3.2.2.1. Example of a CMS Menu Item



Here a new CMS menu “Special Promotion” has been created. It is available for wholesale customer group only, other customers will not see this item in the dashboard.

When this menu item is pressed, there opens up a new area with text and a widget of [Homepage Product Slider](#) module inserted.

3.2.3. Redirect Menu

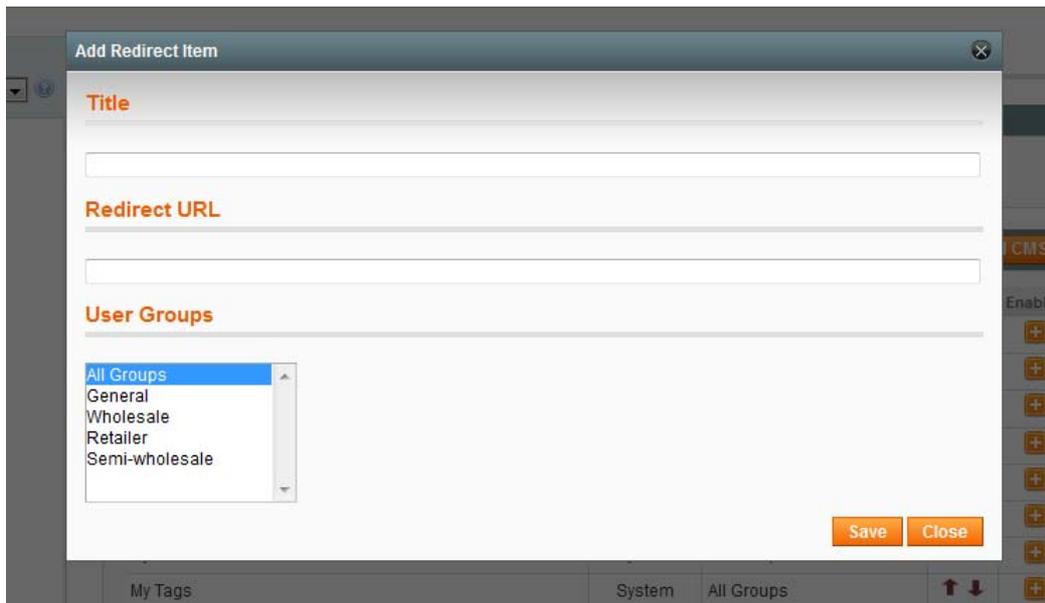
Redirect menu item is a link that redirects to another page on the website or another website. It is added as the rest of menu items to the customers’ dashboard, yet when it is clicked there is a redirect applied.

To add a new Redirect menu item press **Add Redirect Menu** button



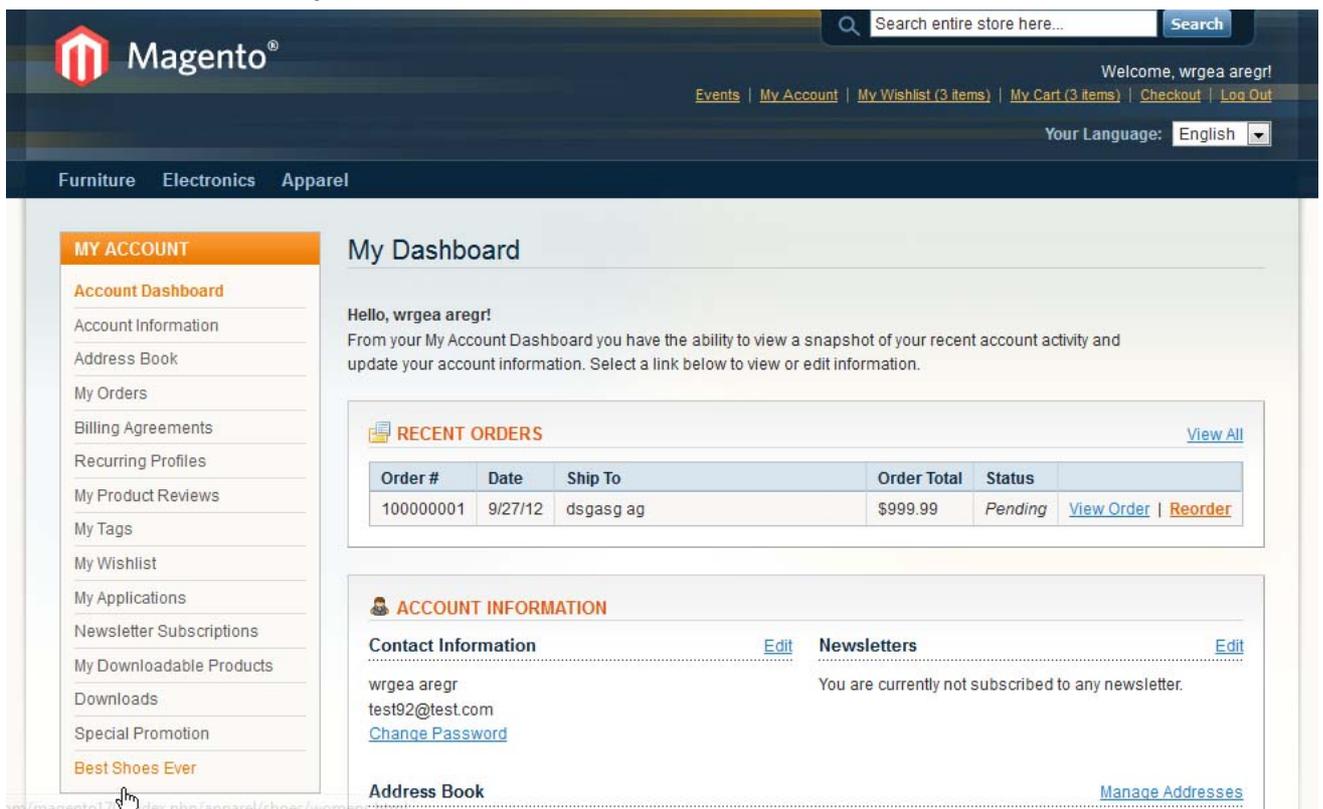
There will appear a new window to add the menu item. You can add the following information there:

- **Title** - name of the menu item your customers will see in the dashboard
- **Redirect URL** - the URL the customers should be redirected to when this menu is selected
- **User Groups** - which customer groups should see this menu item



There is ability to delete created Redirect menu items.

### 3.2.3.1. Example of a Redirect Menu Item



Redirect menu item [Best Shoes Ever](#) looks like a regular menu item, yet when it is clicked there is a redirect to the shoes catalog.