Ecom User Guide

Online Store V0019

May 2023 Notes

Page 34-37: More detail about email confirmations for order approvals, and batch reminder emails

June 2023 Notes

Page 10: Account / Expanded on all areas of the account section including:

- **Customer Info**
- Branches
- Saved Shopping Carts
- Template Shopping CartsOrders
- Back in stock subscriptions
- Change password
- Quick Order form
- Order limits



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Ecom User Guide

NOTE: This user guide may differ slightly for different contracts. Please refer to your account manager if unclear on your site and relevant instructions

Login and Registration

https://ecom.ivegrouponline.com.au/??? (???= the last part of the URL for your contract)

Note: You will either login using your email or a specific username format, this would have been communicated to you prior to site release – so use the relevant format. As Ecom uses the email as validation, you cannot share an email address between 2 user/logins.

If you are a new user, simply click the **REGISTER** button and your account will be either **automatically approved** or **be sent for approval** – depending on the business rules on your account. If you are rejected, you will receive an email confirming your rejected status and any rational supplied by the client approver.

If you already have a login, please enter your username and password given to you. You also have the **forgot password** option, at the login page if you know your username but can't remember your password. You will be prompted on reset instructions. **Note:** If you're login does not have the permission to change password, no action will occur when you click the forgot password. Please refer to your release email for your password or check with your Ive Account Manager.

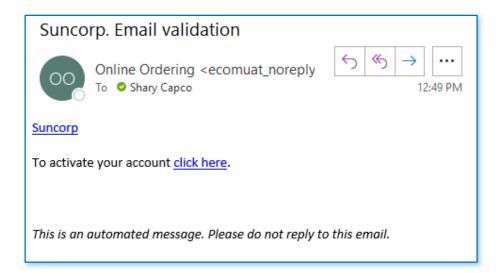


- You will be asked to enter your details. Ensure your password is 8 letters minimum with at least 1 special character – e.g. #\$@% (not alpha numeric)
- After you hit REGISTER you will receive the onscreen confirmation confirming your account is awaiting
 approval, and instructions about the email validation link that will be sent to you.

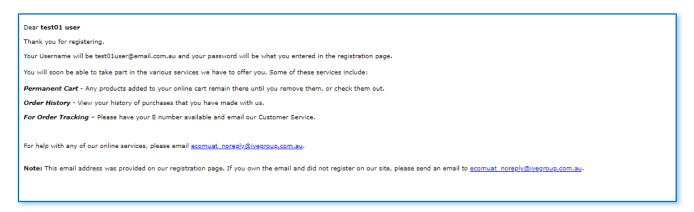




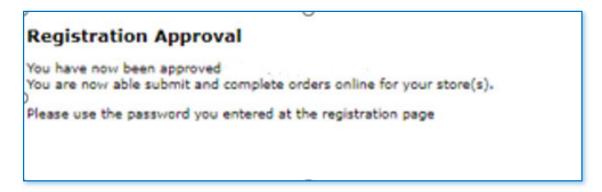
You will get an email Link to confirm your email address – CLICK HERE to confirm and validate your address.
 If you do not get this link in the first 10 minutes, chances are you entered the incorrect email address. Wait 10-15 minutes before lodging a help request in case there are network delays. Even if the registration has been approved, the login will not be active until you ACTIVATE the link



After email validation, you will get a Welcome Email as below. Depending on configuration or business rules, you're registration may need approval from the Client Administrator or an Ive Group Account Manager



Once you have had the relevant permissions & cost centres added (if required) & approved, the user will get a final email confirming the Registration has been approved



User Registration Approval

After the above steps are actioned and you have validated your email address, an email will go to the Client approver to advise them that a new user has registered – so they can approve or deny

Online Ordering

A new customer registered with your store. Below are the customer's details:

Full name: test01 user

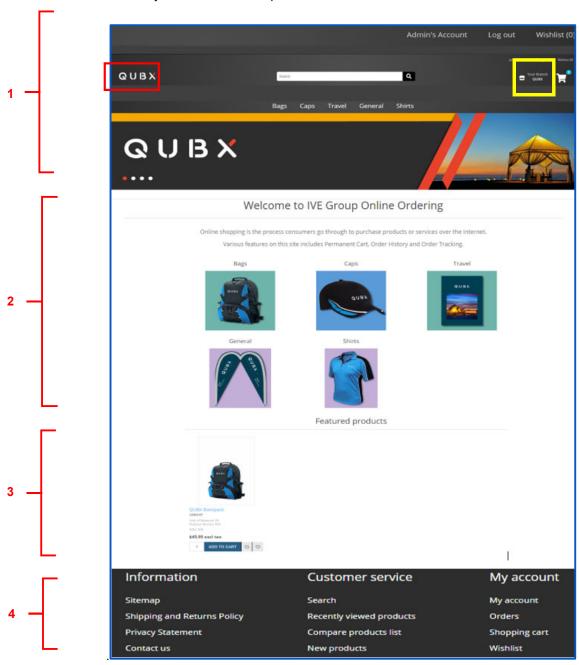
Email: test01user@email.com.au

D 4

Navigating the Website

The Welcome Page

- Section 1: Top right, includes your account information, logout and wish list link. In addition, the LOGO top left
 acts as the section to get you back to HOME (in red). This section also displays the categories / directories at the
 header. You can also access SEARCH and your SHOPPING CART in this section. If you have access to Multiple
 Accounts refer to the icon top right circled in YELLOW. More details on the following page
- Section 2: Ecom also allows you to have images for directories, in addition to the directories on the header. This can be turned off or on. We can also customise certain messaging you wish to appear on the Welcome Page
- Section 3: Optional Items can be chosen to appear on Welcome page as Featured Products
- . Section 4: These are all your footer links that provide access to certain information



My Account

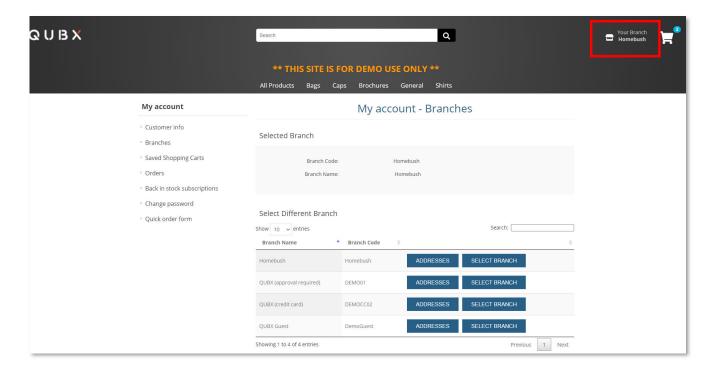
If your login is configured to have multiple accounts, you will see a default account displayed in the top right corner. Clicking on this icon will display any other accounts they have access to. It also exposes other functions on the left panel.

You need to select which account you want the order transacted against prior to checkout. You can choose the account by clicking the **SELECT BRANCH** buttons

If your login has only been allocated one Branch / Cost centre – you will still see what branch you have been allocated on the top right – but clicking it will only display the one account or if multiple – several accounts as per below

A standard user can be configured to have access to 1 branch, multiple branches, or a set of branches under a certain division (rather than all branches). This hierarchy is determined before site release. Ask your account manager for more information

Public sites and unregistered users will not have the "Your Branch" Icon in the top left



Adding / deleting an address to your personal address book (not global address book)

- Adding, deleting, editing of personal address book can be done by accessing the My Accounts section (Top right corner), or on the footer
- Please refer to the adding or deleting of personal address book section later in this manual for more detailed description. Public Store Section

Customer Info

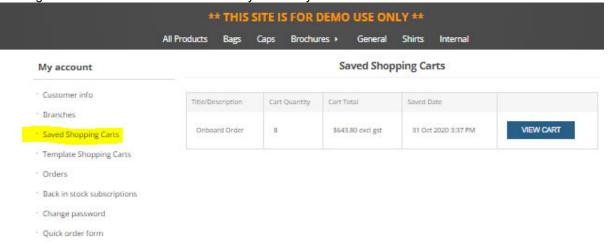
 This section shows the users personal profile information, including addresses they have added to their personal address book. Not the Cost centre address

Branches

- As per above picture - the Branches section displays any branches the user has access to

Saved Shopping carts

- Clicking this section shows if the user has any carts they have saved and not checked out on



Template Shopping Carts

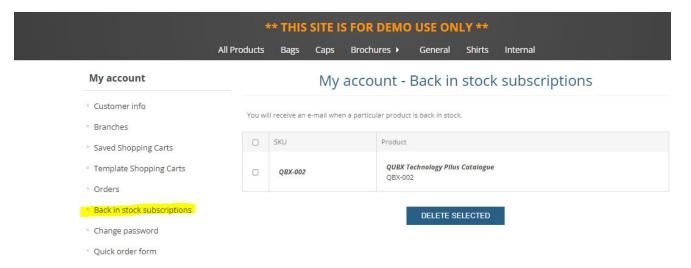
 Displayed in the same style as SAVED SHOPPING CARTS, clicking this section shows any Templated shopping carts created by the user

Orders

- Orders in this section is the same view as orders in the footer - displays all orders by the user logged in

Back in stock subscriptions

 Clicking this section shows you any items where you have clicked "NOTIFY ME" on the product to advise when the product is back in stock



Change password

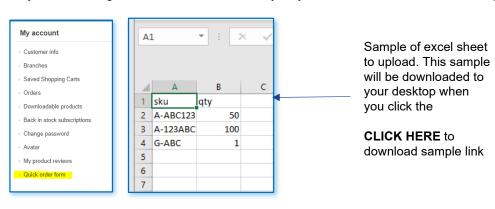
Change password allows the user to change password, if they have that permission

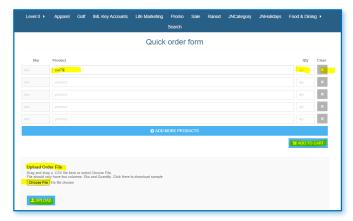
Quick Order Form

Click My Accounts at the FOOTER, and you will see an option called Quick Order Form

This allows users who order a lot of products to use the quick order form or upload from a csv file

- If the form is used the Product field acts like a search field so entering some characters will bring up multiple choices for selection. User then adds quantity and can keep adding products
- If you need more fields on the form simply click the ADD MORE PRODUCTS button
- To upload a bulk order your CSV file should have 2 columns. The SKU number and the QTY, then upload.
- A sample can also be downloaded from the link below
- If the product selected does not allow back orders, a popup message will display.
 Refer last image
- NOTE There is a limit of 100 product lines to be added to cart this way. Please contact your Account Manage if
 you have a large distribution to load and they may be able to load via our Online Help Team



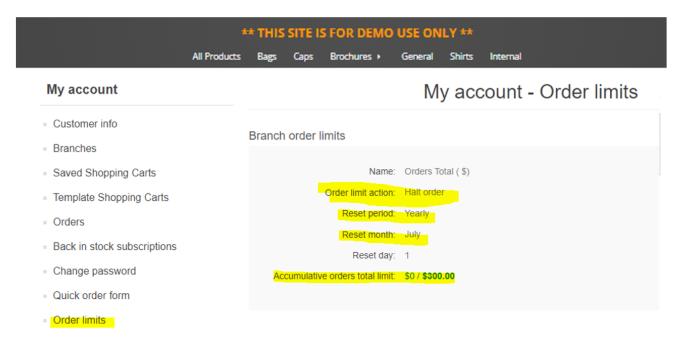


Example if the product you are adding to cart does not allow back orders

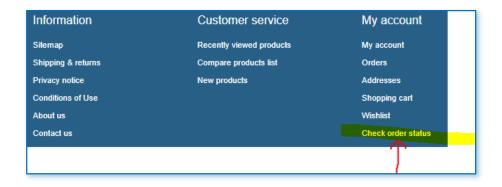


Order Limits

- The order limit section shows the user what type of order limits are imposed on their role, what happens when they exceed their permission, and any accumulative balance.
- In the below case this client has an order limit imposed that says if they exceed any order over \$300 + gst, the order is HALTED
- They will not be able to re-order again until the reset period which is 1st of July yearly
- The accumulative orders limit shows 0/300. The \$0 means they have not spent any money in their orders, so the \$300 means what figure they have to hit before an order is halted
- Every client will have different restrictions so the below will display business rules according to the particular client



Footer Functions



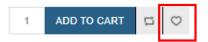
There are a number of footer options that can take you to shortcuts for different areas.

- Site Map is an overall view of directories
- Shipping and Returns policy as described
- Privacy Policy as described
- Contact us Account Manager details
- Search search for products
- Recently viewed products Shows products you would have recently viewed
- New Products Displays items marked as New in the admin panel
- My Account

Shows your account details other functions as listed below:

Allows you to go a SAVED Shopping cart, to finish a draft order Allows a Quick order form – refer quick order form in additional functionality section Allows you to change password

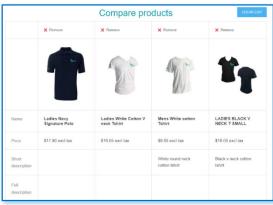
- Orders shows your order details See detailed instructions
- Shopping Cart takes you to your shopping cart 100 line maximum
- Wish List takes you to items you have marked as a wish list item. 100 line maximum. You can add to cart from there. See detailed wish list instructions.



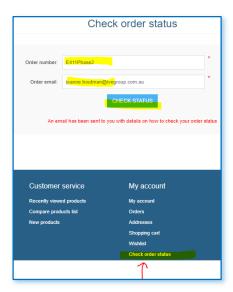
Compared products lists

• Compare products list – By clicking the COMPARE PRODUCTS icon in the add to cart section, you can compare up to 4 products side by side. You can remove existing choices to compare more products

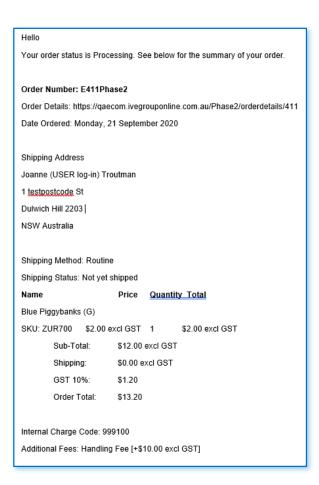




• Check Order Status – When clicking this section on the footer, the entry fields below popup and once entered and submitted via CHECK STATUS, an email is sent to that address on how to check your order status. This is only reserved for sites that are PUBLIC SITES where a user does not have to be registered

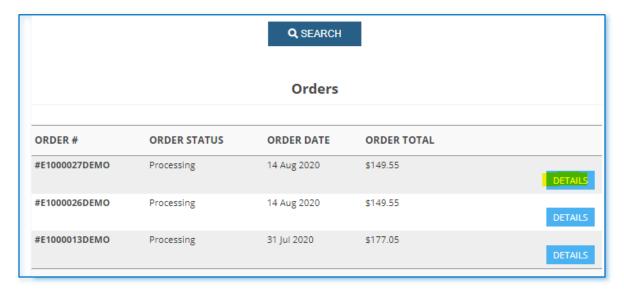


EMAIL EXAMPLE



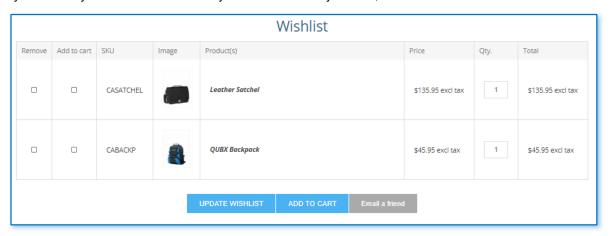
Orders

Displays a snapshot of your orders to review in detail. Refer to below diagram



Wishlist

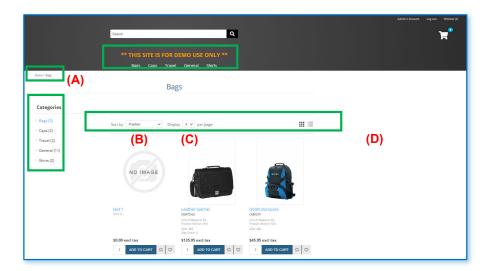
Displays items on your wish list and allows you to add them to your cart, 100 line maximum



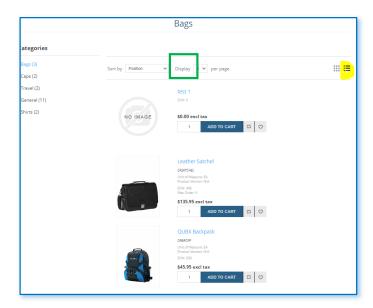
Public Store View

Tile View

- You can search for a product in the Search Box using either the item code, or partial / full descriptions
- Alternatively, you can click one of the directories on the header or on the side panel to display product
- Once directories are clicked you will see products under that directory
- Top left are the breadcrumbs to show you what level you are on the site (A)
- You can sort by different categories, example Name A to Z or vice versa, price high to low (B)
- You can also display up to 9 tiles per page (C)
- You can view the product tiles in Tile view or Column View (D)



Column View



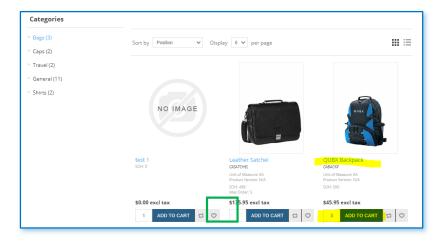
ADD TO CART and back order Status

The following buttons will appear when the below conditions are met. These will already be configured based on agreed business rules for the account.

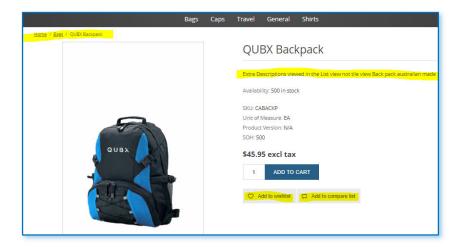
Order Button	Back order and stock availability	In stock subscription global setting
ADD TO CART DITION 1 ADD TO CART ©	 If back orders allowed and stock on hand If back orders allowed and NIL stock on hand If back orders NOT allowed, but stock on hand 	Irrelevant
UNAVAILABLE – BUTTON UNAVAILABLE	ADD TO CART – Turns into UNAVAILABLE button when the below conditions are met. If back orders NOT allowed and NIL stock on hand The button is greyed out and generates no action for the user	In stock subscriptions is DISABLED
NOTIFY ME – BUTTON NOTIFY ME WHEN AVAILABLE	ADD TO CART turns into the NOTIFY button when the below conditions met Back orders not allowed, and NIL stock on hand Clicking the button will generate an action to email you when stock on hand is replenished	In stock subscription is ENABLED

Placing an Order

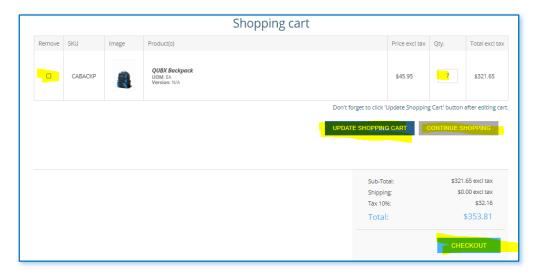
- Once you've located your item, enter desired quantity in the quantity box, and select the
 ADD TO CART button. That will automatically add the product into your cart. If you click
 the ADD TO CART multiple times it will add the number of items you entered in the field,
 multiplied by the number of times you clicked, into the cart
- Clicking on the product name will get you into the details screen



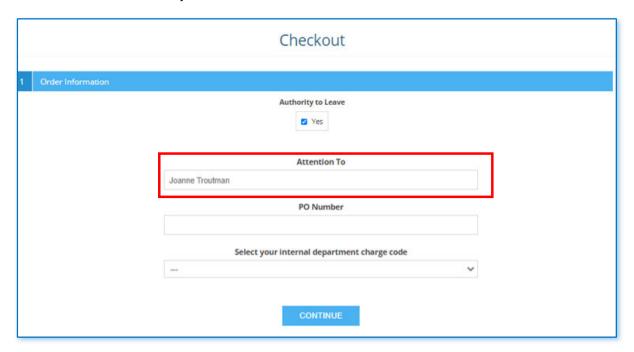
- The details screen provides more detail on the product if they are available and also provides access to ADD TO WISHLIST and COMPARE
- You can add to cart on this page also



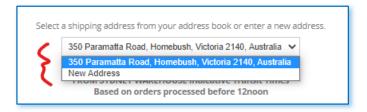
- Click CONTINUE SHOPPING to keep shopping
- To edit your order (remove product or update quantity) make the changes then click UPDATE SHOPPING CART
- Or click CHECKOUT to place the order

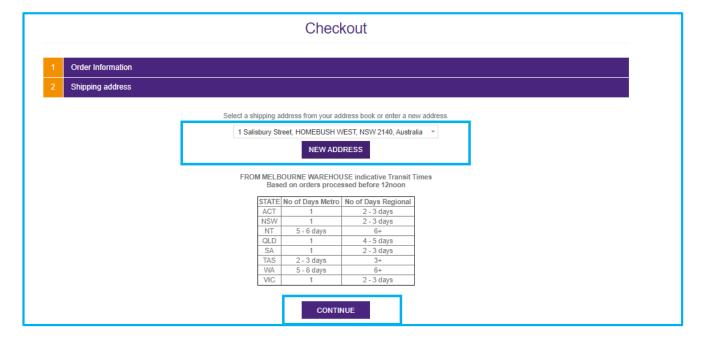


- You will be presented with a checkout screen
- If the **Attention to** field is left blank, confirmations and delivery information will be populated by the name that is registered against the user/login. This provides a user with appropriate "Permission" to deliver to alternate contact other than the registered user.
- If that field is populated, this overrides the delivery contact name under the registered user/login
- If that login/username is a shared login for multiple people we can configure the attention to as a
 mandatory field so they always populate with a personal name rather than the generic registered name like
 "Store Manager" appearing automatically.
- We can configure the site to exclude the Authority to Leave, PO number field and internal charge code or make them non mandatory fields

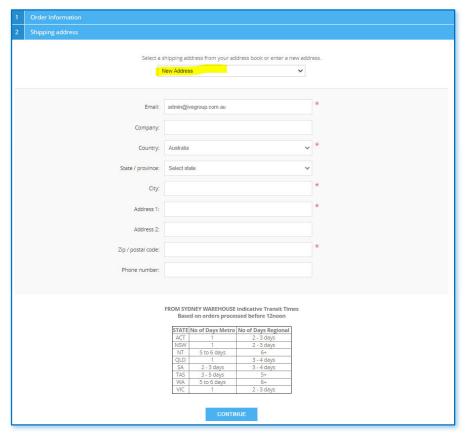


- This will take you to the checkout screen where you select the delivery address from the drop down.
- Depending on your permission, you will be able to select from an address/s allocated to you, or you may be able to add a NEW address to your address book. Hit the CONTINUE button
- Note: If you have the permission to add "new addresses", the drop down at the checkout page will contain your allocated branch addresses, plus any "New Addresses" you have added,

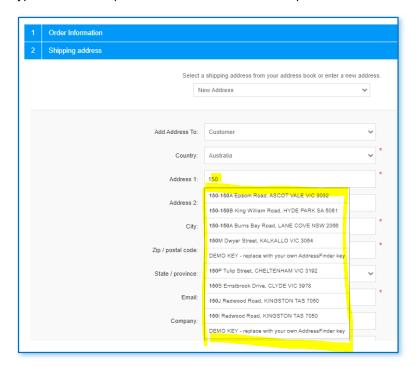




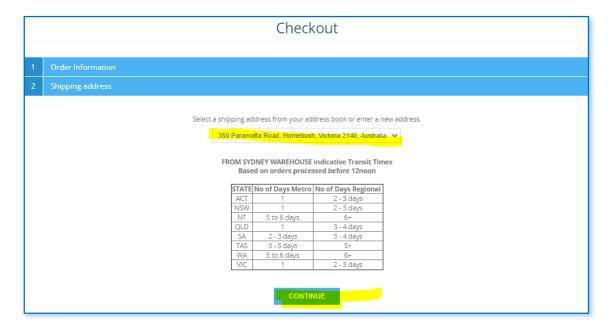
- If you have a new address you want typed select NEW in the drop down or the NEW ADDRESS button
- Fill in your new address details then hit the CONTINUE button



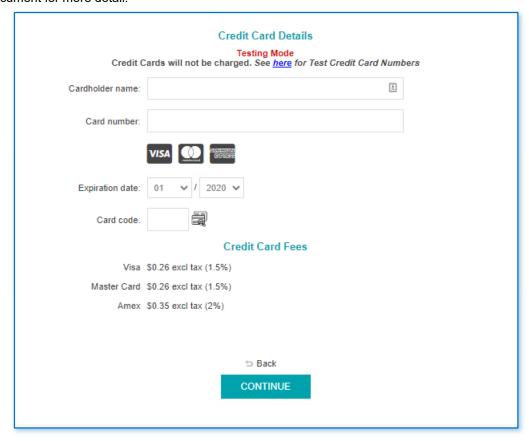
Any manual addresses typed will be auto predicted and linked to Australia post data for more accuracy



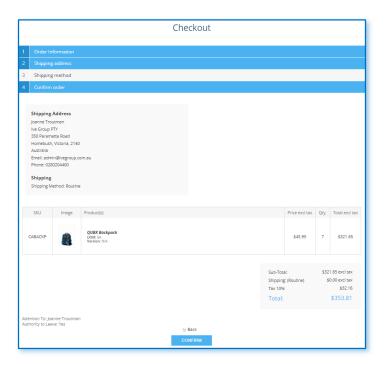
 If you are only delivering to one of your allocated addresses, select the address choice from the drop down and hit CONTINUE



- If your account is configured to pay by credit card, the PayPal credit card screen will display. Fill out and **CONTINUE**
- If your account is configured on account, it will skip this PayPal payment screen
- If your login is configured for Credit card, you will be able to print an invoice from the ORDERS section on the footer a screen message will display on confirmation of order to take you to that section. In addition, an invoice link will be sent to you when the funds are captured. Refer to "Post Order" section at the end of this document for more detail.



- A screen summary of your order for confirmation will display
- Select BACK to make alterations or CONFIRM to proceed after checking all your details



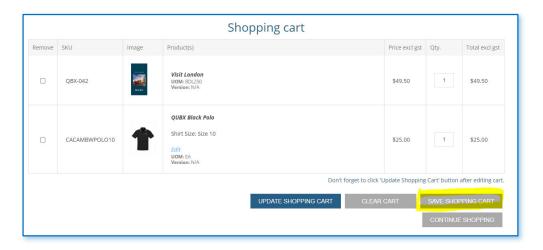
Draft Order & Saving / Restoring an order

Draft order

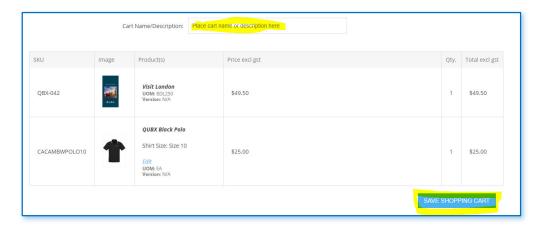
Once you add to the cart, the order becomes a draft. The item will stay in your cart when you leave the site, and you can add to the cart, checkout, or save the cart for a later date

Saving an order

- Once you add to the cart, you can go to the cart and CHECKOUT, or you can choose the SAVE option to save for another day
- Click the SAVE SHOPPING CART button

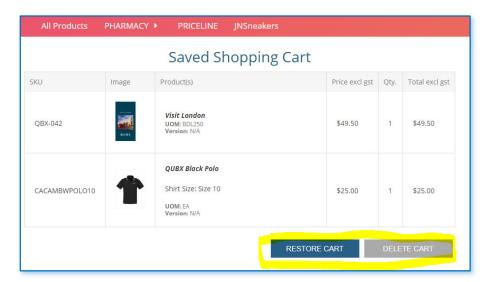


• Name the Shopping cart – EG: Chatswood April 1 Order, and SAVE the cart



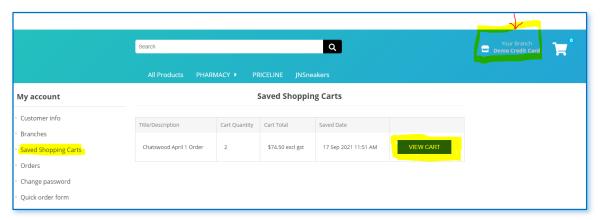
- You will see a screen display of the saved cart, that you can restore at a later date
- If you click the VIEW CART button, you will be prentd with 2 more options
- RESTORE CART, so you can add items and or checkout or
- DELETE CART, which deletes the saved shopping cart



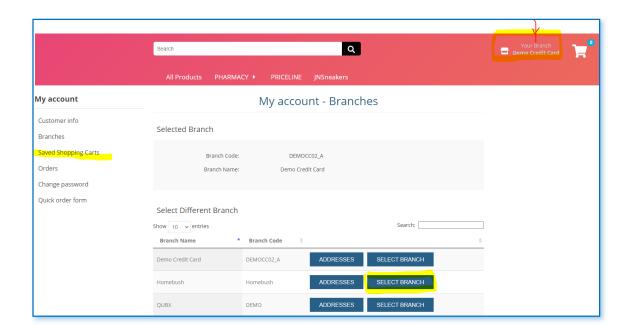


Restore the Cart

- To restore a cart, click your account icon top right, then go to SAVED SHOPPING CARTS on the left panel
- View the cart, then RESTORE same as restore instructions above
- If you have multiple accounts available to you, ensure you have selected the branch you ordered for in the saved order – as only the orders you saved for that store will appear



- If you have multiple accounts available to you, ensure you have selected the branch you ordered for in the saved order as only the orders you saved for that store will appear
- Click the top right icon, then select one of the branches you have access, click SAVED SHOPPING CARTS, and restore or delete as per previous instructions

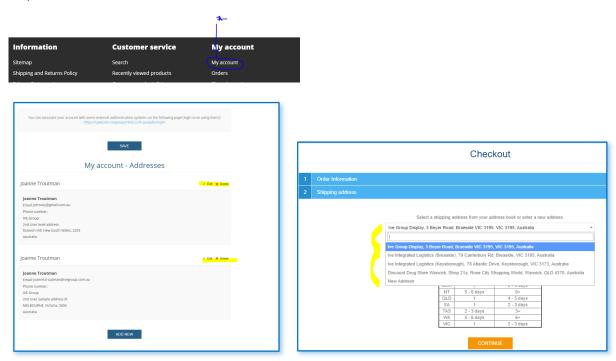


Adding, editing or deleting an address from personal Address book (Not Global Address)

If you're login has permission to add to an address book, you can also delete or edit these addresses. Branch addresses of your Cost centre, are allocated through our Management information system (Prism), so those addresses cannot be deleted. Cost Centre account addresses need to be changed via your Account Manager via our Prism system.

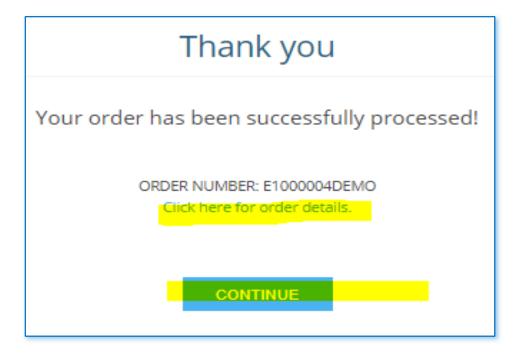
TO delete a personal delivery address created. Go to MY ACCOUNT in the footer or top right Account icon. Scroll down to the bottom and you will see addresses you have created. ADD, EDIT or DELETE as you see fit. The addresses you add in this personal section will appear as an option at the checkout screen dropdown, in addition to any addresses attached to the selected cost centre - as per image on the right.

If your login has permission to add a NEW ADDRESS, the NEW ADDRESS option will also appear on the checkout drop down



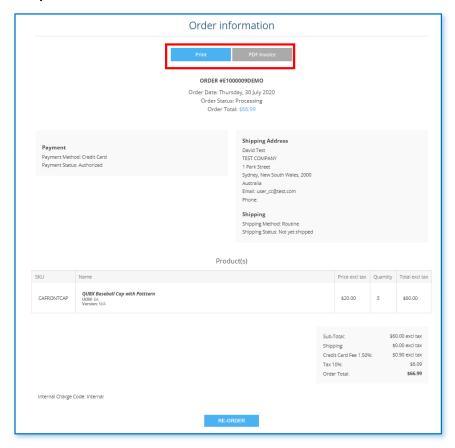
After placing an order – (Post Order)

- Once you hit confirm, if your account is configured for account payment, you will receive a screen display
 advising that your order has been successfully processed. An email confirmation will
 also be sent
- Click the link Click here for order details

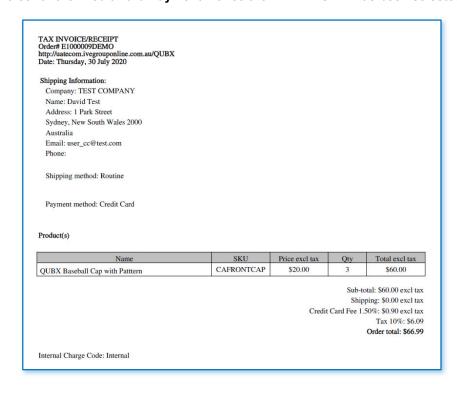


- After clicking the above link, the below screen will be displayed. The PDF INVOICE button will only appear if
 your login was configured for credit card payment
- This screen is also available by clicking the RE-ORDER function on the footer

Order Information Sample



Sample of an invoice for the Credit Card Payment - once the PDF INVOICE has been selected



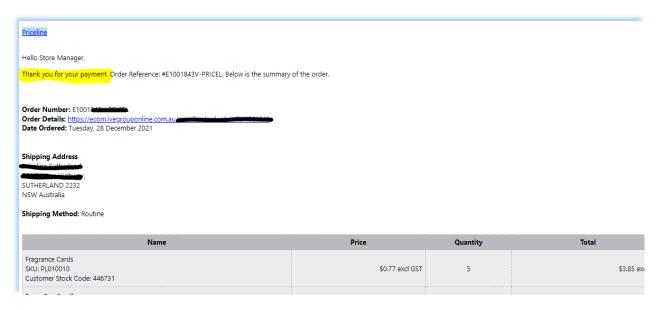
Sample of Email confirmation

A confirmation email is also sent out on completion of order



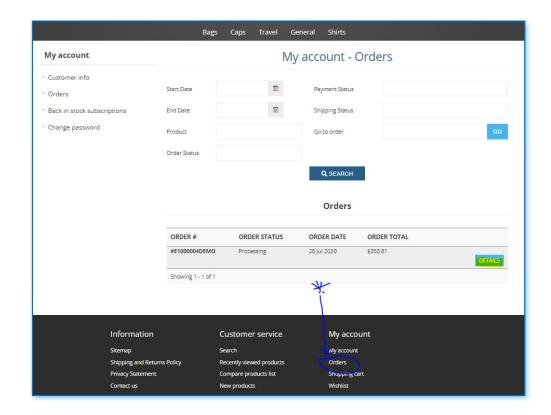
 FOR CREDIT CARD PAYMENTS ONLY: In addition to the above email, once an order is shipped or partially shipped, our systems integrates with Paypal so the funds are captured at that point. You will get an email the next day after it has been shipped with a pdf link. The pdf will be the same as above, but the only difference is the pdf will say:

"Thank you for your payment", instead of "Thank you for your order", and it advises who what company you will see on your bank statement

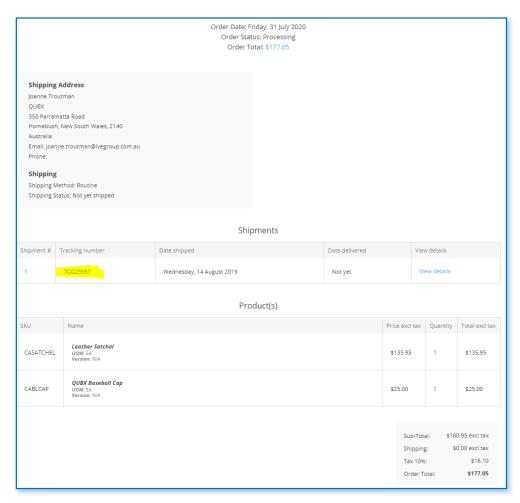


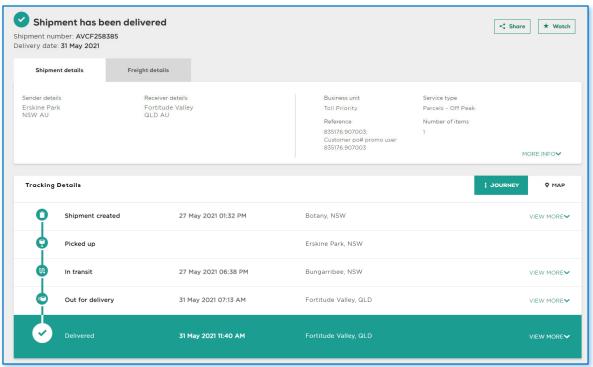
Order History or tracking URLS – looking up Order information

- You can view order history via the ORDERS function at the footer. By clicking the DETAILS button, you can
 drill down to further details
- The Order Information screen can be viewed again at this DETAILS section refer to Order information sample on previous page



• Hitting the **DETAILS** will also display the **Tracking URL** if the order has been shipped





Additional Functionality

The Ecom application also allows the following additional functionality. Please contact your account manager if you wish to enable any of these options against a specific product.

Tier Pricing: on products QUBXBROC1 and CAFRONTCAP

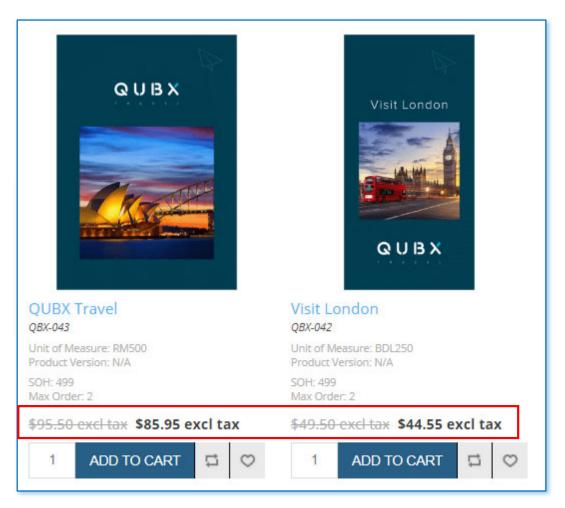
Required products: on QUBXLHD1 will auto add QUBXENVDLX1 to cart

Related products: enabled on QUBXLHD1 and QBX-012 – extra products appear on specifications section

Cross Sell - on product CASATCHEL - appears on bottom of check out page

Price discount displayed

Ecom has the ability to show the previous price of an item to demonstrate the discount



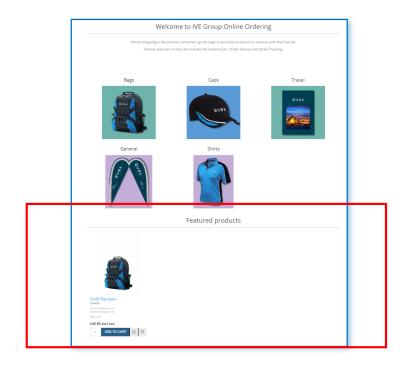
Matrix Order Mode

• If a product is selected that has multiple attributes – example size, once the product is selected a button called **TOGGLE MATRIX ORDER MODE** will appear. By clicking this icon, another display will appear so the user can enter multiple quantities if they wish to place orders of all the different sizes



Featured Product

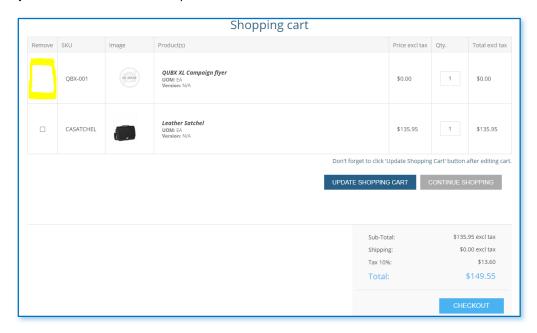
Ability to show an item on the home page in addition to its usual directory. This shows up in Featured products at the base of the Welcome Page – just above the footer



Required product function

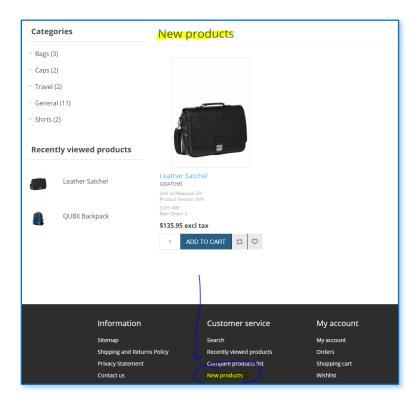
Ability to automatically add a specific required product to the cart when they order an item.

E.g. when you order product A), product B) automatically appears in your cart. The remove tick box is not available on the **required product**. Please note – both products have to be in stock for this to be enabled to add to cart



New Product

Any product marked as **NEW** (by your account manager), will show in the **NEW PRODUCTS** section available on the footer. A date range for this item to appear and disappear in the **NEW PRODUCTS** area is also available



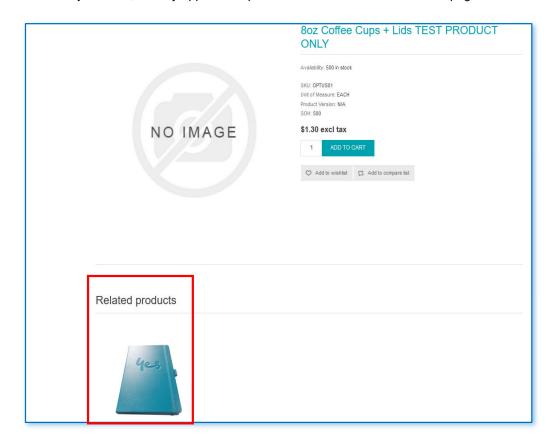
Cross Sell

Ability to add **CROSS SELL** items, so they will appear as additional product options at the bottom of your checkout cart as below. There is also the opportunity to **ADD TO CART** at this point



Related Products

Ability to add Related products, so they appear as options at the bottom of the checkout page

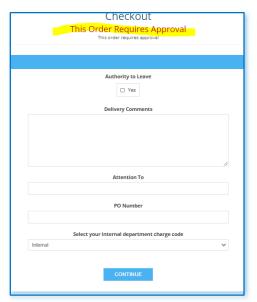


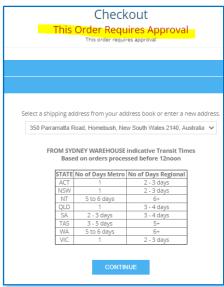
Approval workflow Scenario – if applicable

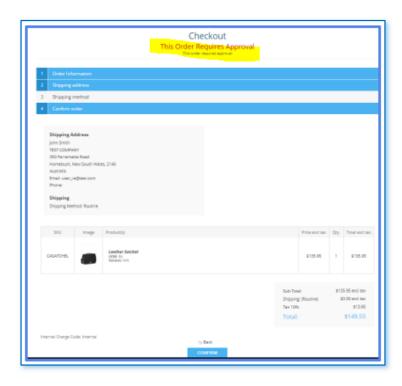
There are several artwork approval workflows we can impose depending on the client's business rules. Please refer to your Ive Account Manager on the approval scenarios for your contract

Order approval notifications

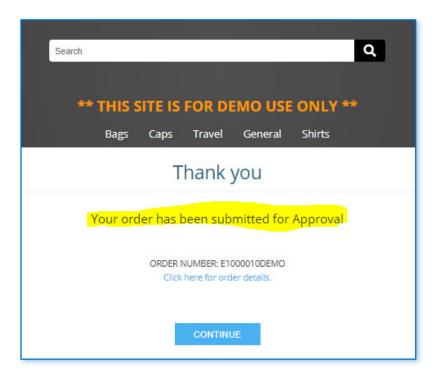
If your cost centre is configured for approval you will receive the same standard screen and email messages, however, there will be a line indicating this order requires approval.



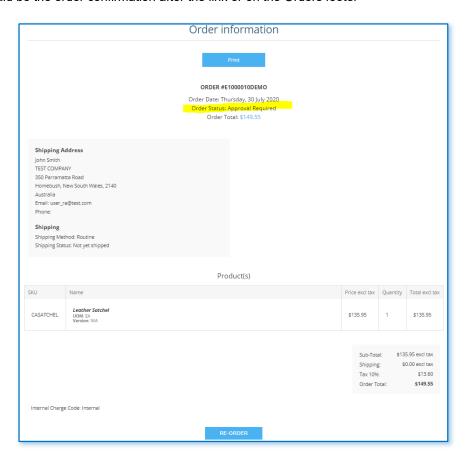




• An on-screen link is displayed



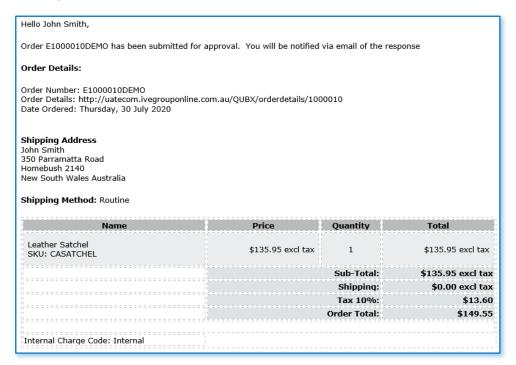
• This would be the order confirmation after the link or on the Orders footer



Order approval email trail

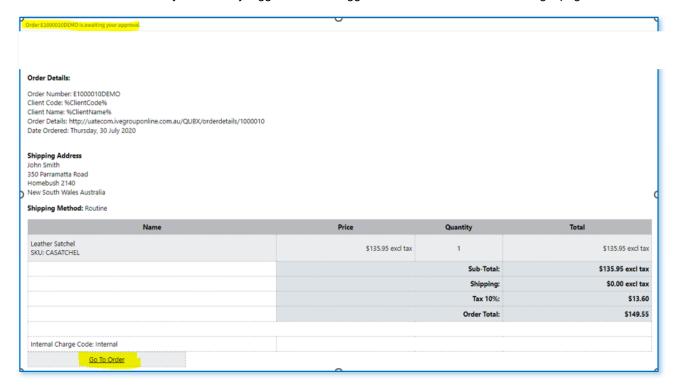
User confirmation email sample

Email to user once they have hit the CONFIRM order button



Approver email sample

Email to approver outlining what is in their Approval Dashboard to approve. The URL link will get them straight into Ecom via a second tab if they are already logged in. If not logged in the url takes them to the login page



Confirmation of approval sample - once order approved

Email to user confirming their order has been approved.

Please note – if the account is configured for credit payment, the message prompts you to make a payment in the **Orders Section**. The order will not be processed till the payment is submitted

An additional email is sent, confirming the order has been successfully processed after approval

Hello John Smith,

Your order below has been approved, if no payment is required your order will ship, otherwise please complete a payment for your order to allow shipping fulfilment to commence.

To make a payment, go to 'Orders' in My Account and access the 'Pay now' button.

Order Details:

Order Number: E1000010DEMO

Order Details: http://uatecom.ivegrouponline.com.au/QUBX/orderdetails/1000010

Date Ordered: Thursday, 30 July 2020

Shipping Address

John Smith TEST COMPANY 350 Parramatta Road Homebush 2140 New South Wales Australia

Shipping Method: Routine

OPTIONAL APPROVAL EMAILS

If there is more than one approver, the other approvers will get an email notifying that:

"Order E1000XXXX has been approved by <approvername>"

All the order details and shipping address will also be attached

BATCHED EMAIL REMINDERS

The system has a default setting of 1 day for reminders and 30 days for order cancellations, these can be changed. The reminders work as follows:

- If order has not been approved the next day, an approver gets a batched list of all unapproved orders they get this once daily to avoid multiple emails of different orders
- They continue to get the 1 batched email per day until the order/orders are approved
- After 30 days the order is auto rejected