Ecom User Guide

Online Store V0020

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Dec 2024

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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

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

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.
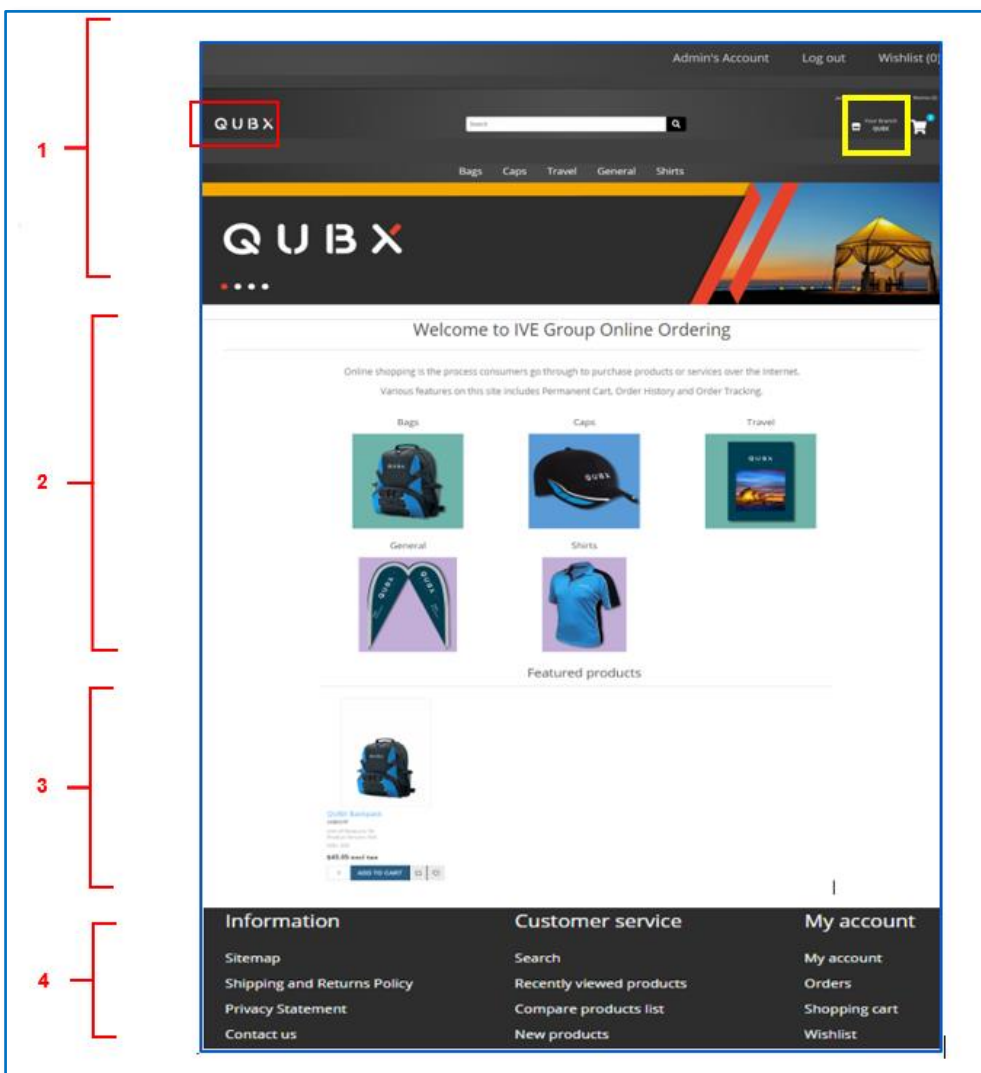
My Account

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

- NBN Users are coming from the Customer Portal so changing passwords has to be done via the Customer portal

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
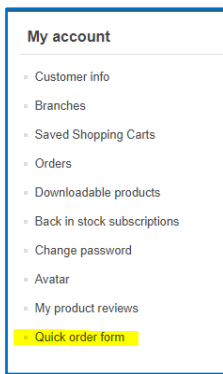
Sample of excel sheet to upload. This sample will be downloaded to your desktop when you click the

CLICK HERE to download sample link

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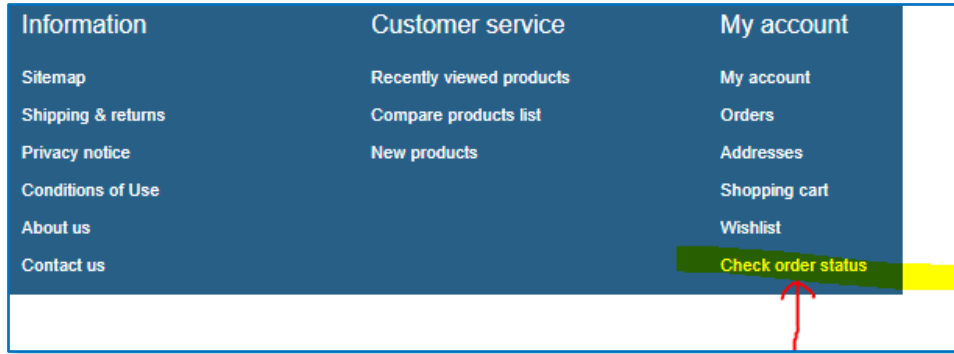
There are a number of footer options that can take you to shortcuts for different areas.

- **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.
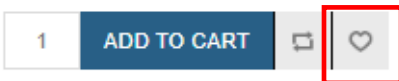
Compared products lists

- **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)**
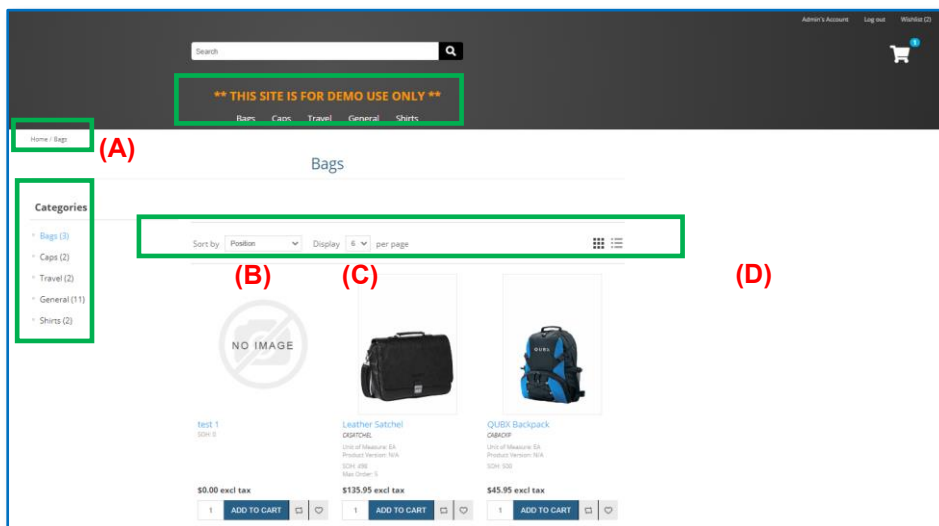
Column View
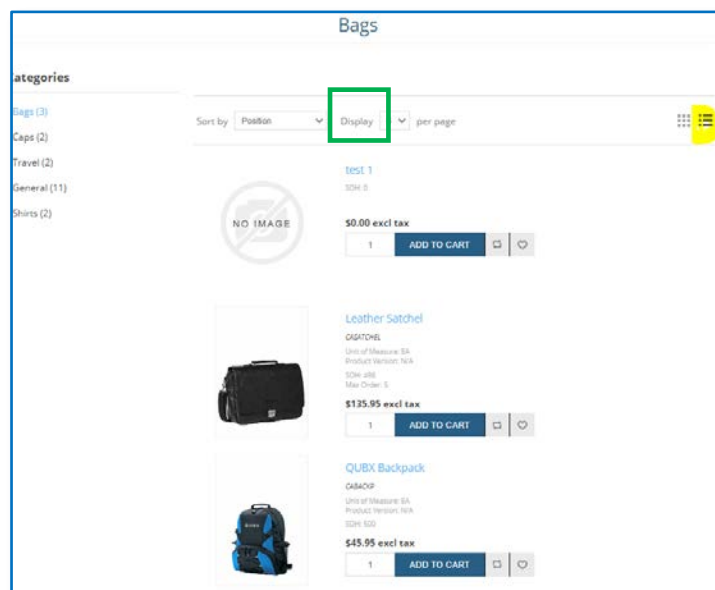
ADD TO CART and back order Status

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

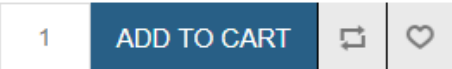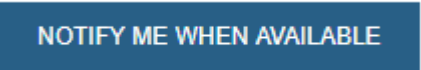| Order Button	Back order and stock availability	In stock subscription global setting
ADD TO CART - BUTTON	• If back orders allowed and stock on hand • If back orders allowed and NIL stock on hand • If back orders NOT allowed, but stock on hand	• Irrelevant
UNAVAILABLE – BUTTON	**ADD TO CART** – Turns 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	**ADD TO CAR**T 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
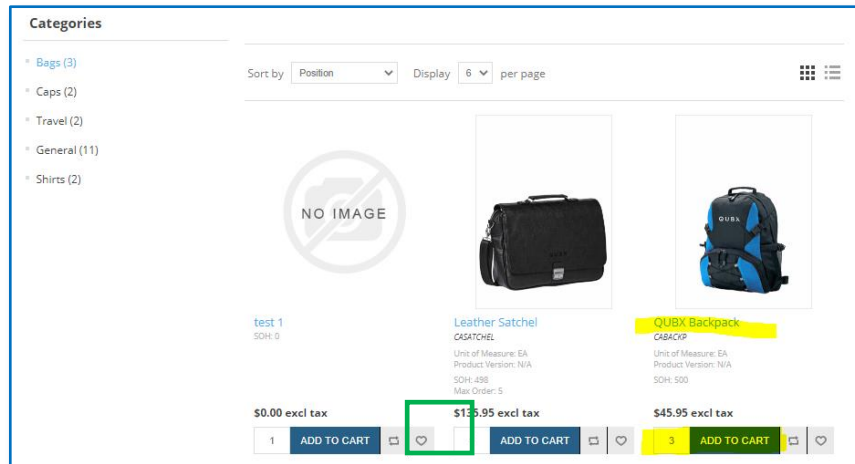
- The details screen provides more detail on the product if they are available and also provides access to **ADD TO WISHLIST** and **COMPARE**
- You can add to cart on this page also
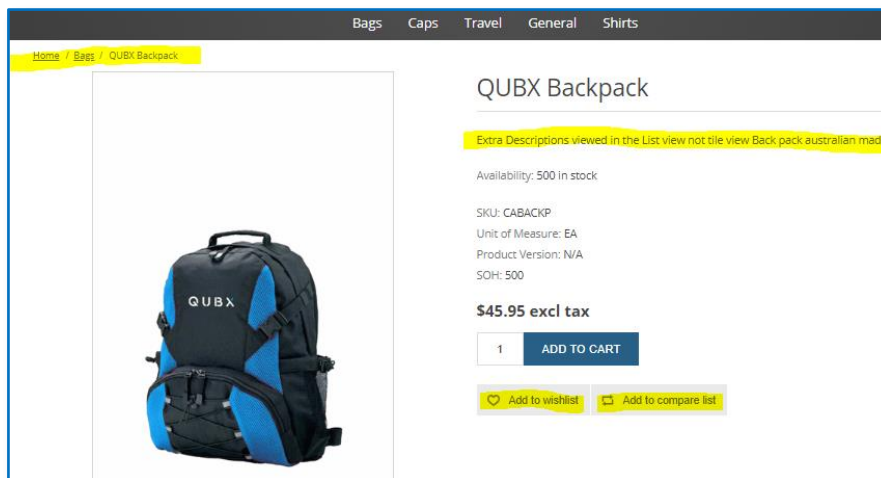
- Click **CONTINUE SHOPPING** to keep shopping
- To edit your order (remove product or update quantity) make the changes then click **UPDATE SHOPPING CART**
- Or click **CHECKOUT** to place the order
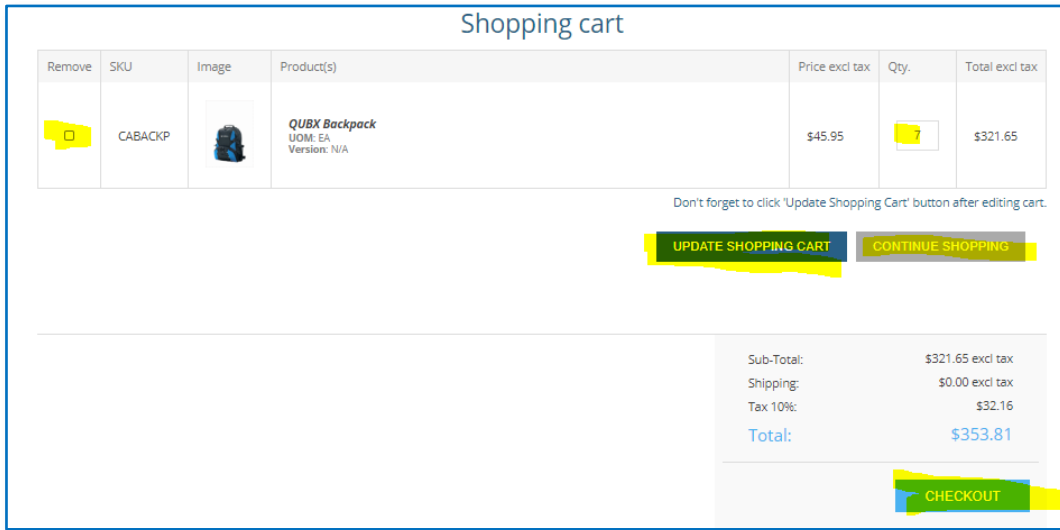
- You will be presented with a checkout screen
- If the **Attention to** field is left blank, confirmations and delivery information will be populated by the name that is registered against the user/login. This provides a user with appropriate "Permission" to deliver to alternate contact other than the 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
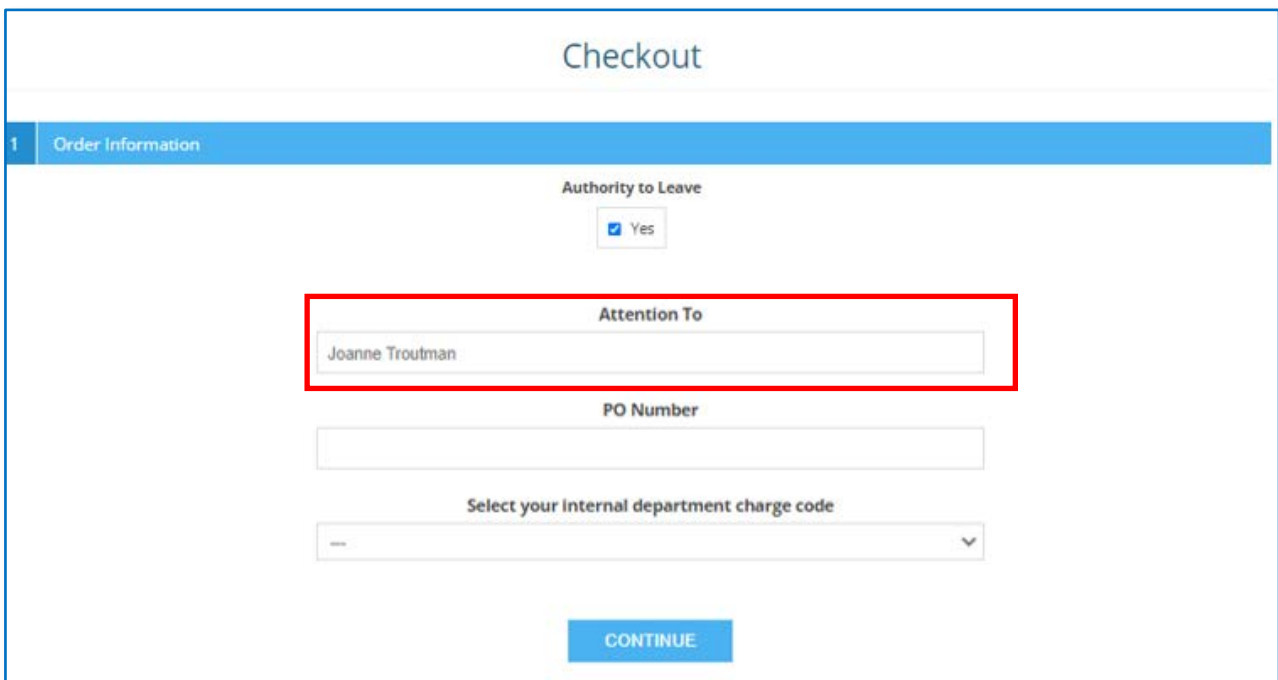
- This will take you to the checkout screen where you select the delivery address from the drop down.
- Depending on your permission, you will be able to select from an address/s allocated to you, or you may be able to add a **NEW address** to your address book. Hit the **CONTINUE** button
- Note: If 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,

Select a shipping address from your address book or enter a new address.

350 Paramatta Road, Homebush, Victoria 2140, Australia ∨
350 Paramatta Road, Homebush, Victoria 2140, Australia
New Address

FROM SYDNEY WAREHOUSE Indicative Transit Times
Based on orders processed before 12noon

Checkout

| 1 | Order Information |
| 2 | Shipping address |

Select a shipping address from your address book or enter a new address.

1 Salisbury Street, HOMEBUSH WEST, NSW 2140, Australia ▾

NEW ADDRESS

FROM MELBOURNE WAREHOUSE indicative Transit Times
Based on orders processed before 12noon

STATE	No of Days Metro	No of Days Regional
ACT	1	2 - 3 days
NSW	1	2 - 3 days
NT	5 - 6 days	6+
QLD	1	4 - 5 days
SA	1	2 - 3 days
TAS	2 - 3 days	3+
WA	5 - 6 days	6+
VIC	1	2 - 3 days

CONTINUE

- 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
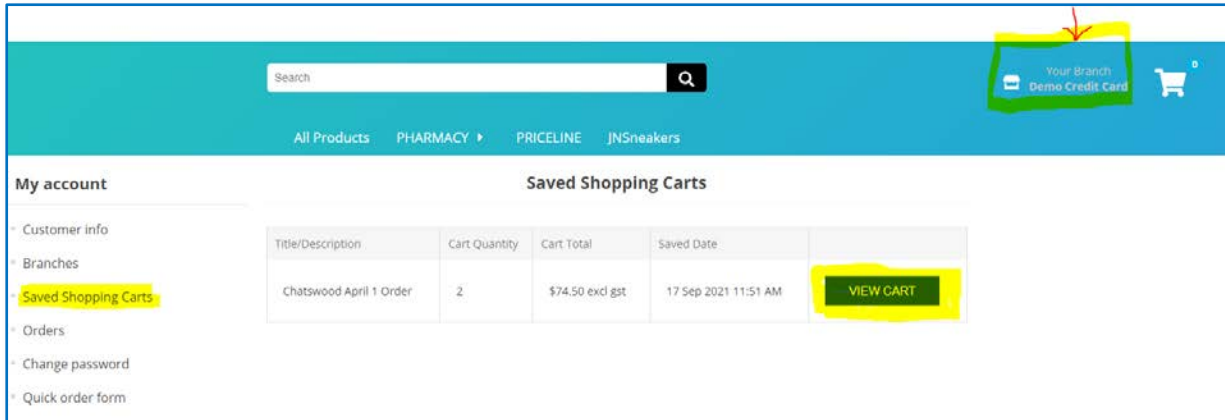
- If you have multiple accounts available to you, ensure you have selected the branch you ordered for in the saved order – as only the orders you saved for that store will appear
- Click the top right icon, then select one of the branches you have access, click SAVED SHOPPING CARTS, and restore or delete as per previous instructions
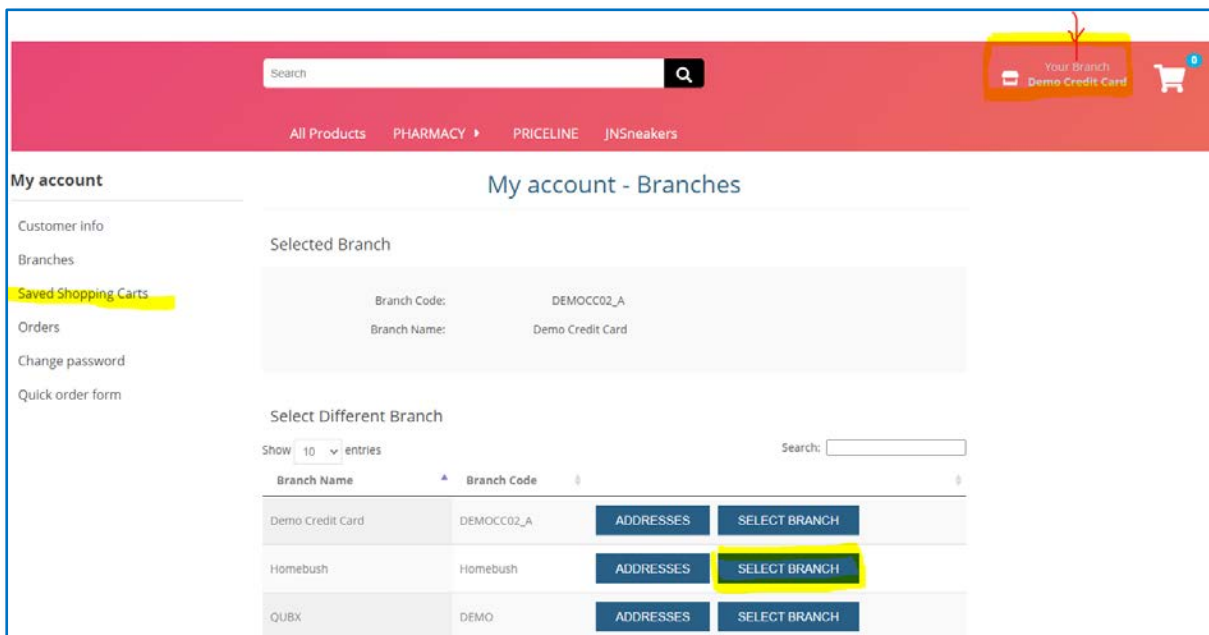
Adding, editing or deleting an address from personal Address book (Not Global Address)

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
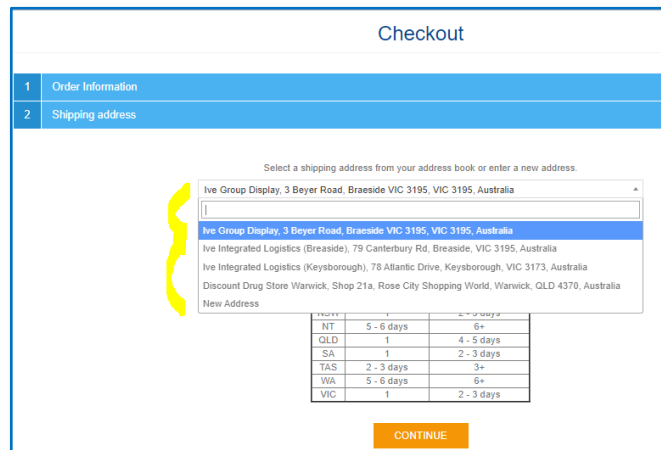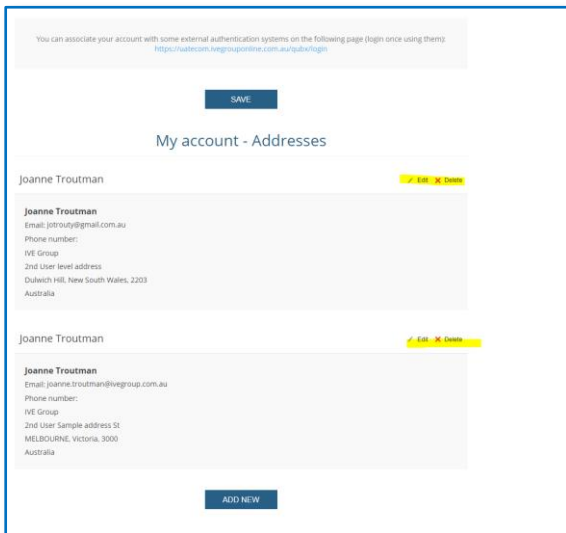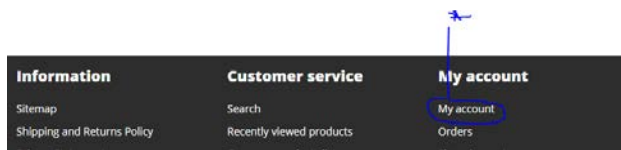
After placing an order – (Post Order)

- 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

Thank you

Your order has been successfully processed!

ORDER NUMBER: E1000004DEMO
Click here for order details.

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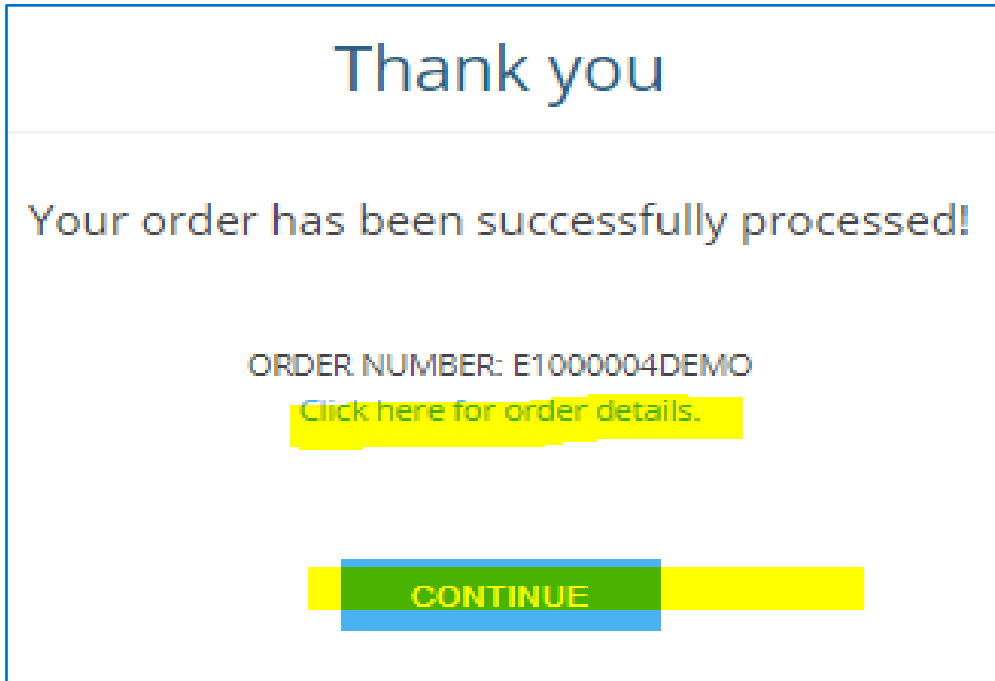
- After clicking the above link, the below screen will be displayed. The **PDF INVOICE** button will only appear if your login was configured for credit card payment
- This screen is also available by clicking the **RE-ORDER** function on the footer

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

Hello Joanne_Ive Troutman,

Thanks for your order. Below is the summary of the order.

Order Number: E1000025G-OPTUS
Order Details: http://uatecom.ivegrouponline.com.au/Optus/orderdetails/1000025
Date Ordered: Friday, 17 July 2020

Shipping Address
Joanne Troutman
IveGroup
test 2 st
Sydney 2000
New South Wales Australia

Shipping Method: Routine

Name	Price	Quantity	Total
LADIES BLACK V NECK T SMALL Sizes: L SKU: OPT0022L	$16.05 excl tax	1	$16.05 excl tax
Yes Black Cap SKU: OPN8Y06	$8.10 excl tax	1	$8.10 excl tax
LADIES BLACK V NECK T SMALL Sizes: 2XL SKU: OPT00222XL	$16.05 excl tax	1	$16.05 excl tax
		Sub-Total:	$40.20 excl tax
		Shipping:	$0.00 excl tax
		Tax 10%:	$4.02
		Order Total:	$44.22

Attention To: Joanne Troutman

- 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

Priceline

Hello Store Manager,

Thank you for your payment. Order Reference: #E1001843V-PRICEL. Below is the summary of the order.

Order Number: E1001~~~~PRICE~
Order Details: https://ecom.ivegrouponline.com.au/~~~~~~~~~~~~~~~~~
Date Ordered: Tuesday, 28 December 2021

Shipping Address
~~~~~~ Sutherland
~~~~~~~~~ Highbury,
SUTHERLAND 2232
NSW Australia

Shipping Method: Routine

Name	Price	Quantity	Total
Fragrance Cards SKU: PL010010 Customer Stock Code: 446731	$0.77 excl GST	5	$3.85 exc

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

Order Date: Friday, 31 July 2020
Order Status: Processing
Order Total: $177.05

Shipping Address
Joanne Troutman
QUBX
350 Parramatta Road
Homebush, New South Wales, 2140
Australia
Email: joanne.troutman@ivegroup.com.au
Phone:

Shipping
Shipping Method: Routine
Shipping Status: Not yet shipped

Shipments

Shipment #	Tracking number	Date shipped	Date delivered	View details
1	TCG23557	Wednesday, 14 August 2019	Not yet	View details

Product(s)

SKU	Name	Price excl tax	Quantity	Total excl tax
CASATCHEL	**Leather Satchel** UOM: EA Version: N/A	$135.95	1	$135.95
CABLCAP	**QUBX Baseball Cap** UOM: EA Version: N/A	$25.00	1	$25.00

Sub-Total:	$160.95 excl tax
Shipping:	$0.00 excl tax
Tax 10%:	$16.10
Order Total:	**$177.05**

Shipment has been delivered
Shipment number: AVCF258385
Delivery date: 31 May 2021

Share   Watch

| Shipment details | Freight details |

Sender details	Receiver details	Business unit	Service type
Erskine Park NSW AU	Fortitude Valley QLD AU	Toll Priority	Parcels - Off Peak
		Reference 835176.907003; Customer po# promo user 835176.907003	Number of items 1

MORE INFO

Tracking Details   JOURNEY   MAP

	Shipment created	27 May 2021 01:32 PM	Botany, NSW	VIEW MORE
	Picked up		Erskine Park, NSW	
	In transit	27 May 2021 06:38 PM	Bungarribee, NSW	VIEW MORE
	Out for delivery	31 May 2021 07:13 AM	Fortitude Valley, QLD	VIEW MORE
	Delivered	**31 May 2021 11:40 AM**	Fortitude Valley, QLD	VIEW MORE

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.

All the following functions can be configured by Ive Group IT, please refer to your Account Managfer
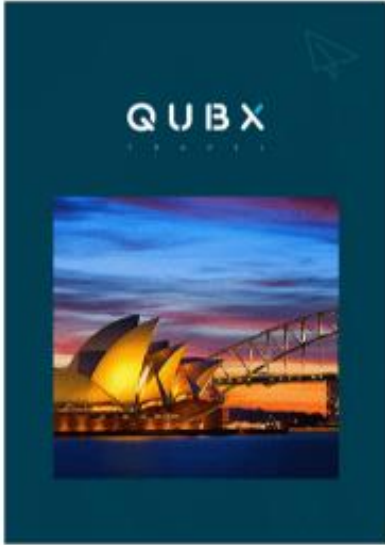
**Tier Pricing**: on products QUBXBROC1 and CAFRONTCAP

Required products: on QUBXLHD1 will auto add QUBXENVDLX1 to cart

Related products: enabled on QUBXLHD1 and QBX-012

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
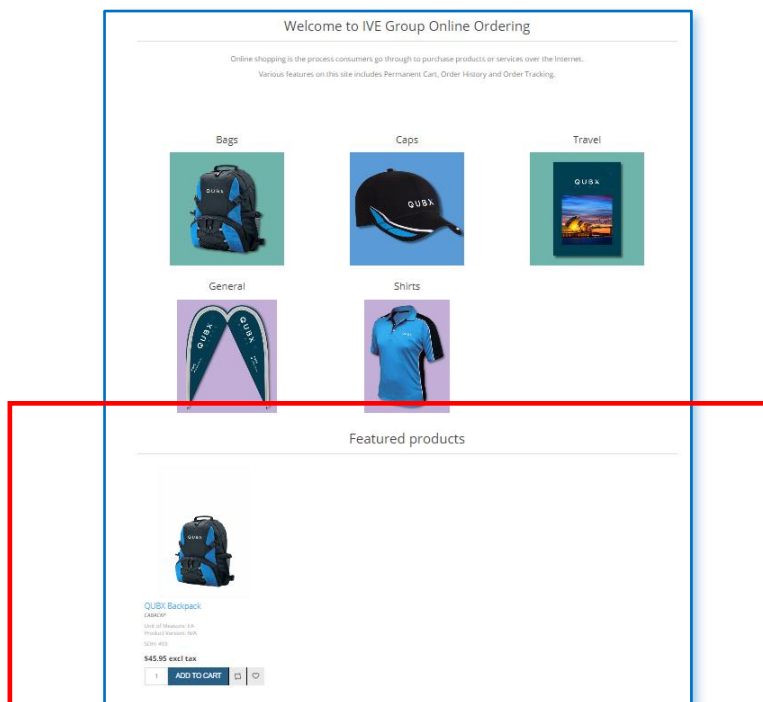
Matrix Order Mode

- 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

Hello John Smith,

Order E1000010DEMO has been submitted for approval. You will be notified via email of the response

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
350 Parramatta Road
Homebush 2140
New South Wales Australia

Shipping Method: Routine

Name	Price	Quantity	Total
Leather Satchel SKU: CASATCHEL	$135.95 excl tax	1	$135.95 excl tax
		Sub-Total:	**$135.95 excl tax**
		Shipping:	**$0.00 excl tax**
		Tax 10%:	**$13.60**
		Order Total:	**$149.55**

Internal Charge Code: Internal

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

Order E1000010DEMO is awaiting your approval.

Order Details:

Order Number: E1000010DEMO
Client Code: %ClientCode%
Client Name: %ClientName%
Order Details: http://uatecom.ivegrouponline.com.au/QUBX/orderdetails/1000010
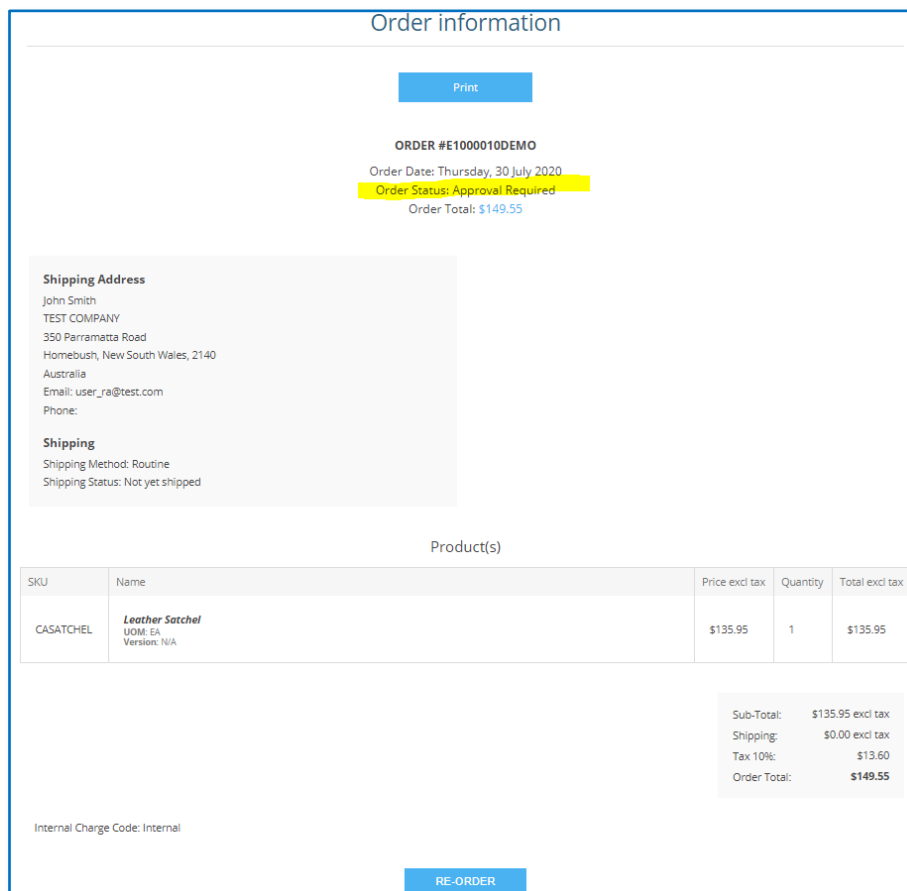Date Ordered: Thursday, 30 July 2020

Shipping Address
John Smith
350 Parramatta Road
Homebush 2140
New South Wales Australia

Shipping Method: Routine

Name	Price	Quantity	Total
Leather Satchel SKU: CASATCHEL	$135.95 excl tax	1	$135.95 excl tax
		Sub-Total:	**$135.95 excl tax**
		Shipping:	**$0.00 excl tax**
		Tax 10%:	**$13.60**
		Order Total:	**$149.55**

Internal Charge Code: Internal

Go To Order

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, ALL approvers get 1 batched list of all unapproved orders – they
  get this once daily to avoid multiple emails of different orders. This is just a reminder for them to go to their
  dashboard, where they will only see their specific orders. This batch summary can be disbled by client
- They continue to get the 1 batched email per day until the order/orders are approved and fall off the summary
- After 30 days the order is auto rejected