inzant websites

Training Manual

Version 1.4

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1. GENERAL INFORMATION

1.1   PRODUCT OVERVIEW

Inzant Web is a website development product and Content Management System (CMS). In addition to common text/file management and display, the configuration capabilities include:

- Social media links
- Search Engine Optimisation
- Integration with Google Analytics
- e-Commerce functionality
- Cascading Style Sheets
- Java scripting

This manual is intended for administrators with the responsibility of maintaining content and providing functionality in the published website.

1.2   DOCUMENT REVISION CONTROL

Revision Number	Date	Issued By	Checked By
1.0	26th May 2015	SK	MK
1.1	24th Sep 2015	SK	MK
1.2	10th Nov 2015	MK	SK
1.3	3rd Dec 2015	MK	SK
1.4	3rd Mar 2016	MK	SK

1.3   HELPDESK AND SUPPORT

For support enquiries please contact Inzant on:

Telephone:	+61 2 4957 0281
Email:	support@inzant.com.au
Raise a Ticket	Raise a Support Ticket
Online Help Centre	Online Help Centre

To log in to your website, navigate to your URL (as arranged with Inzant) then click on LOGIN and the login page will be rendered as shown below:

You will have been issued a Username and Password by Inzant which will allow access the Content Management System with full administration rights. Logging in with these credentials will allow access to the CMS.

2. SETTINGS

This section details the functions associated with managing and administering your website.

2.1   ADMIN DASHBOARD

Once successfully logged in, the Admin Dashboard will be rendered as shown below:

The Website Settings section contains most of the "site wide" changes that affect multiple widgets or pages at once. The available settings are separated into four main groups;

Website Information
The information displayed here is non editable and allows you to see what "level" or "plan" you have, and you may be asked for this information when raising a support case.

Pricing Settings
The pricing settings in this section are;

Public Ordering Enabled – this determines whether the site allows the public to order from the site, basically allowing you to swap between a "Shop" and "Catalogue".

- Public Pricing Visibility – this setting is only valid when Public Ordering Enabled is Unchecked. It allows the pricing information displayed to public users to be changed from normal price, RRP or be hidden completely.
- RRP Text – this setting is only valid when Public Ordering Enabled is Unchecked and Public Pricing Visibility is set to RRP. The text box allows you to set the prefixing text of the price, for instance "RRP" or "SRP".

Freight Settings
The freight settings in this section are;

- Display Freight (Public) – this determines if the site will display freight costs to public users.
- Display Freight (Account) – this determines if the site will display freight costs to Account users.
- Default Country – this Determines the shipping country of origin – only relevant for AusPost.
- Ship From Postcode – This determines the shipping postcode of origin, only relevant for AusPost.

Email Settings
The email settings in this section are;

- Newsletter Requests To – enter the email which you would like Newsletter requests sent to.
- General Enquiries To – enter the email which you would like general enquiries sent to.
- Account Enquiries To – enter the email which you would like account enquiries sent to.
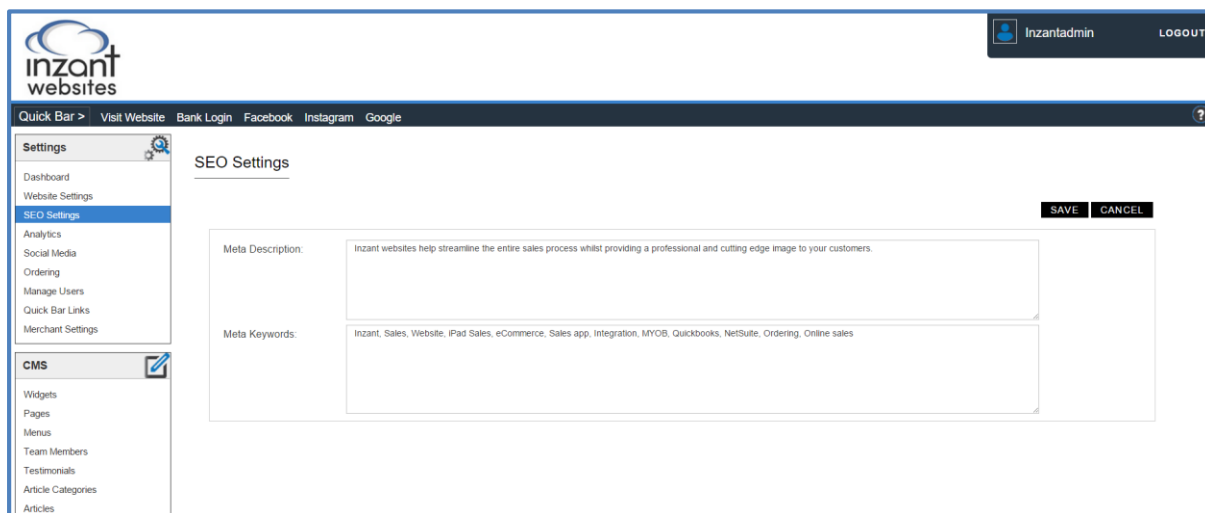
SEO refers to "Search Engine Optimisation" in order to optimize your site for search engines. It is important to update your site's SEO Settings and add Meta Tags and Keywords in order to increase the chances of your site being returned in searches by various engines, e.g. Google, Bing

Walkthrough – Updating the sites SEO Settings

1. To update your site's SEO Settings Select the **SEO Settings** tab, and under **META Description** and **Keywords** enter the relevant information.
2. Click **SAVE**

Please note: It usually takes about one month for Google and other search engines to update their databases and for your site to appear in searches. This section has a character limit of 500.
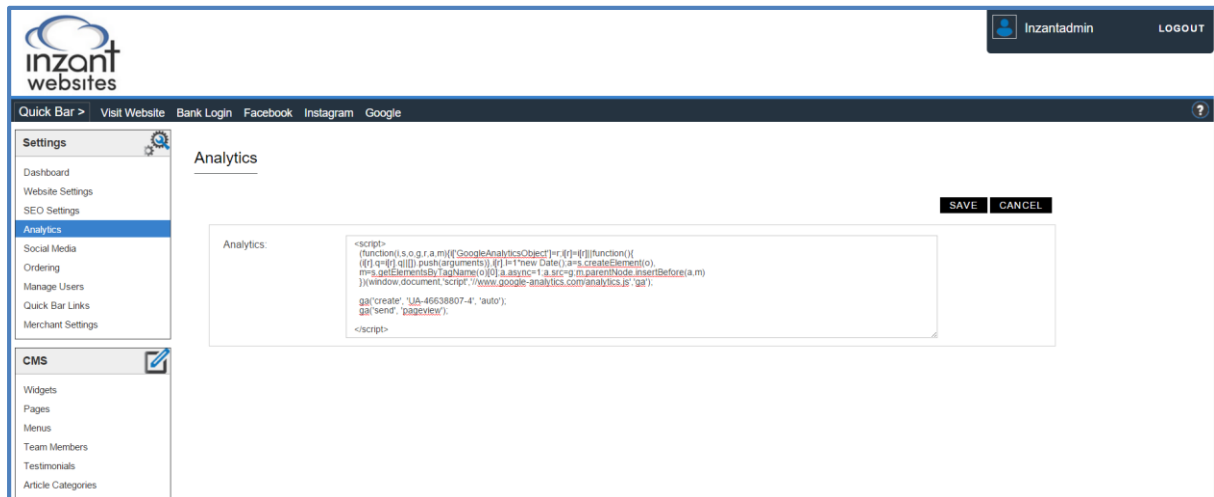
2.4   ANALYTICS

Walkthrough: To start collecting basic data from the website

1. Create a new Google Analytics account if you do not have one. Visit google.com/analytics, click the **Access Google Analytics** or **Create an account** button (top right), and follow the on-screen instructions.
2. Set up a property in the account you have created.
3. Follow the instructions to set up web tracking.
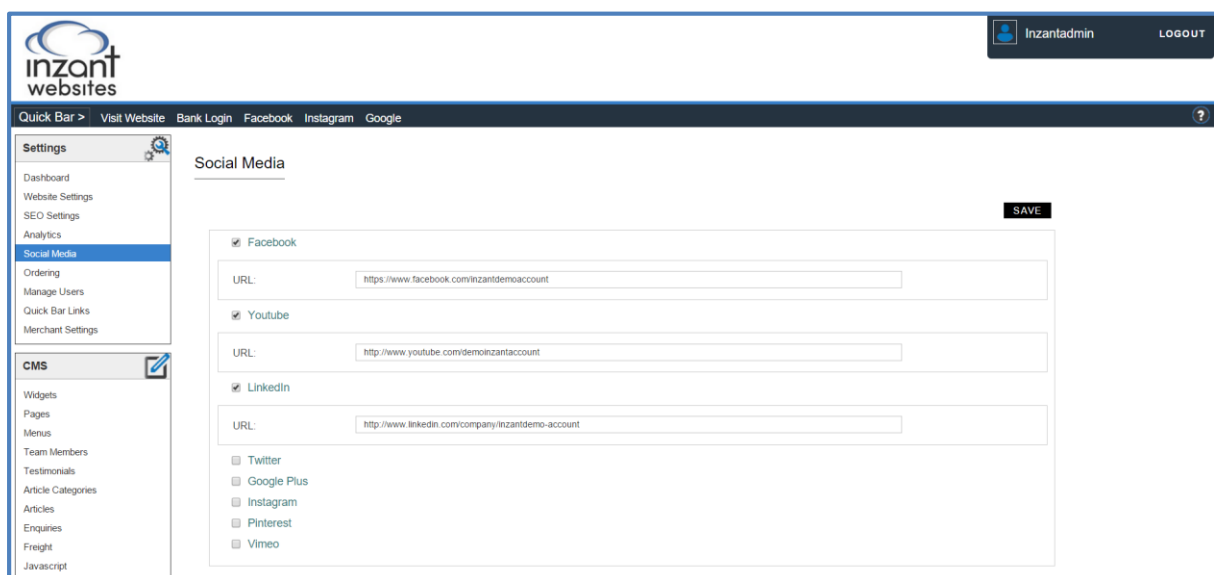
2.5   SOCIAL MEDIA

URL links for Social media sites can be added here. They will subsequently be incorporated into your webpages automatically via the "footer" widget.

Tick the box for the social media link you would like in the footer, then either type or paste the URL in the text box, and save the page.

Please Note: *The Icons and the related URLs can be hidden by turning off the respective checkboxes.*

The CMS allows for a number of configuration options around online ordering capabilities;

- Unit of Measure Pricing
- Unit of Measure Ordering
- Surcharge Cost
- GST (Tax) Visibility
- Out of Stock Message
- Shop Mode Configuration
    - Grid Shop Mode
    - List Shop Mode
    - Previous Order Shop Mode
    - Favourites Shop Mode

Unit of Measure Pricing

The product can display different information depending on the unit of measure in which it is sold. Currently supported are;

- Unit – refers to the product being sold individually.
    - Will display a (x 1 unit) after the name of the item.
- Carton – refers to the product being sold by the carton.
    - Will display a (x [carton qty] units) after the name of the item. Note that for this to work there should be carton quantity information in Inzant Sales on the item.
    - Will display a breakdown of the unit price after the item price, i.e. $14.50 (= $2.15 ea).
- Shipper – refers to the product being sold by the shipper/pallet.
    - Will display (shipper) after the name of the item.

Unit, Carton and Shipper should be stored in the "Sell As" field on the product in Inzant Sales.

Unit of Measure Ordering

The default ordering quantity of each item can be configured to either be individual or in carton quantity lots. Setting this to be Carton Quantity modifies the order mechanism within the site to disable manual quantity entry and make the plus and minus buttons add or subtract in carton quantity amounts.

Order Quantity
Mode: Individual ▼

Surcharge Cost

On the "Ordering" screen in the CMS there is the facility to set a Credit Card Surcharge cost relative to Account users and Public users. These fields simply require a numerical entry and it will be converted to an additional percentage charge on the order in the Checkout Payment page.

Note: this setting is not discretionary depending on the payment gateway the user chooses, so for instance if an Account customer elects to checkout "On Account" but a surcharge of 2% is configured, it will still apply to the order.

GST (Tax) Visibility

On the "Ordering" screen in the CMS there is the facility to set the "GST" to be displayed for Account and/or Public users, in addition to being able to configure the tax rate (i.e. 10%). This field simply requires a numerical entry and it will be converted to an additional percentage charge on the order on the order.

Note: the displaying or not displaying GST applies to the whole shop process, if unchecked no mention of GST will be made throughout the user shop process.

Out of Stock Message

On the "Ordering" screen in the CMS there is the facility to set the "Out of Stock Mode" to be "Stock on Hand". This will require a quantity and message to be configure to display to the website user. The quantity will directly lookup the stock on hand of each product as it is displayed and if the stock on hand is equal to or less than the quantity the order mechanism will be hidden and the message will be displayed.

Note: the zone to display the message is short, please configure a very short message (i.e. Out of Stock).

Shop Mode Configuration

Grid Shop Mode

The grid shop mode displays items within the shop in a grid based view with proportionally larger images than the other shop modes. This mode allows configuration of the number of items per page displayed on the CMS Shop Widget.

Note: This configuration is completed on the Shop Widget.

List Shop Mode

The list shop mode displays items within the shop in a flatter, list based view with proportionally smaller images than the other shop modes. This mode allows configuration of the number of items per page displayed on the CMS Shop Widget.

Note: This configuration is completed on the Shop Widget.

Previous Order Shop Mode

The previous order shop mode will only display items that the customer has ordered (using Inzant) in the past from your business. In addition to this, the shop mode will display the last 4 orders the customer has made from you (using Inzant) in 4 columns. This mode allows configuration of the source of the previous orders using the CMS Shop Widget, allowing "Sales Orders" or "Associated Orders" to be used.

Sales orders is the true Inzant Sales Order history as stored in the database, whereas Associated Orders refer to imported "attachment" versions of orders – most commonly the completed Invoice.

Notes;

- "Using Inzant" refers to orders placed either using an iPad, the Web Client or the website.
- Mobile display doesn't support 4 previous orders displayed in columns.
- This configuration is completed on the Shop Widget.

Favourites Shop Mode

Favourites shop allows the most customisation of the shop modes so that it can be used as a flexible "Favourites"/"Wish List"/"Pantry List" shop mode option on the website. As such all text and images in relation to this shop mode are content managed in the "Ordering" page within the CMS.

The favourite list shop mode is only available to account users, not public users. The favourite order mode allows for the user to add items to a list of "favourite" items, and this list will then be shown in the favourite order mode. The purpose of generating this list of favourites items is to create an organised "order template" for the user, by the user.

<u>Favourite List Management</u>

- Users can add items to the favourite list via the shop list mode widget, or the product details widget.
- Users can remove items from the favourites list by toggling "Edit Mode" in the favourites shop mode, clicking the remove icon on the required products and then clicking the Save button.
- Users can reorder the sequence in which the products are displayed by toggling "Edit Mode" in the favourites shop mode, using the up and down arrows to resequence items as required and then clicking the same button.

Configuration options within the favourites shop mode include;

1. **Favourites Title** – Modifies the Page title widget to include this text.
2. **Favourites Tooltip** – Mouse over/hover on the favourites shop mode link causes a tooltip to appear, displaying this text.
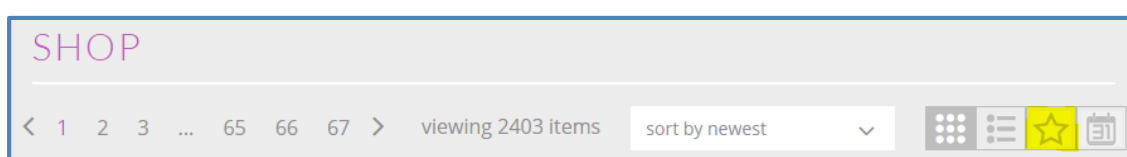
3. **Favourites Image Selected –** Image to display in zone highlighted above on shop widget – selected mode.
   **Favourites Image Unselected** – Image to display in zone highlighted above on shop widget - unselected mode.
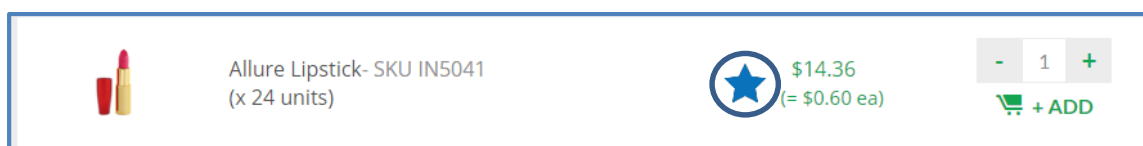
4. **Favourites Image Small Selected –** Image to display in zone circled above on shop list mode – selected mode.
   Favourites Image Small Unselected – Image to display in zone circled above on shop list mode – unselected mode.

5. **Favourites Image Large Selected –** Image to display in zone circled to the right on product details widget– selected mode.
   Favourites Image Large Unselected – Image to display in zone circled to the right on product details widget – unselected mode.
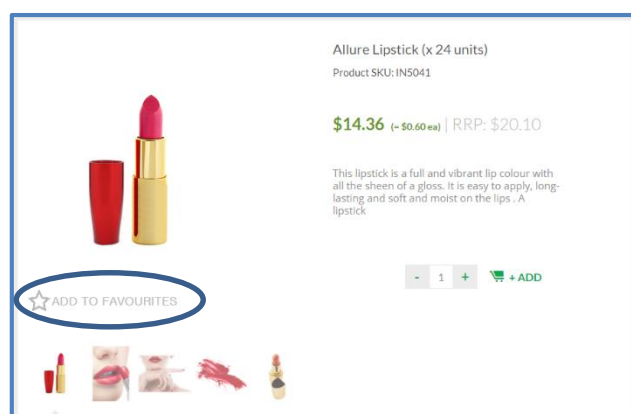
6. **Edit Favourites Button Text** – text to be inserted into the "Edit" button on the favourites order mode page (shown when favourites list is not in edit mode).

7. **Save Favourites Button Text** – text to be inserted into the "Save" button on the favourites order mode page (shown when favourites list is in edit mode).

See our Image Size Requirements section for Recommended Image Sizes.

2.7   MANAGE USERS

Website Users can be Added, Edited or Deleted using this option.
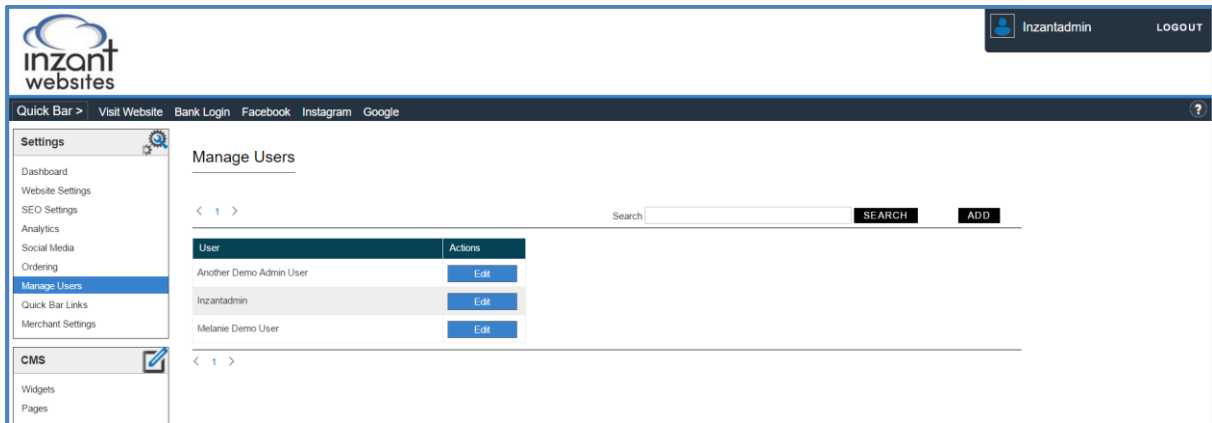
The **User Details** screen allows Usernames and Passwords to be assigned as well as the level of Access the User will have.

Walkthrough: Edit Users

1. Select the **EDIT** button next to the required user in the list
2. Use the Dropdown Arrow to assign **WRITE, READ** or **NONE (no access)** access to **CONTENT MANAGEMENT, STUCTURE MANAGEMENT, CONFIGURATION MANAGEMENT** and also whether or not the user is an **ADMINISTRATOR.**
3. Select **SAVE**
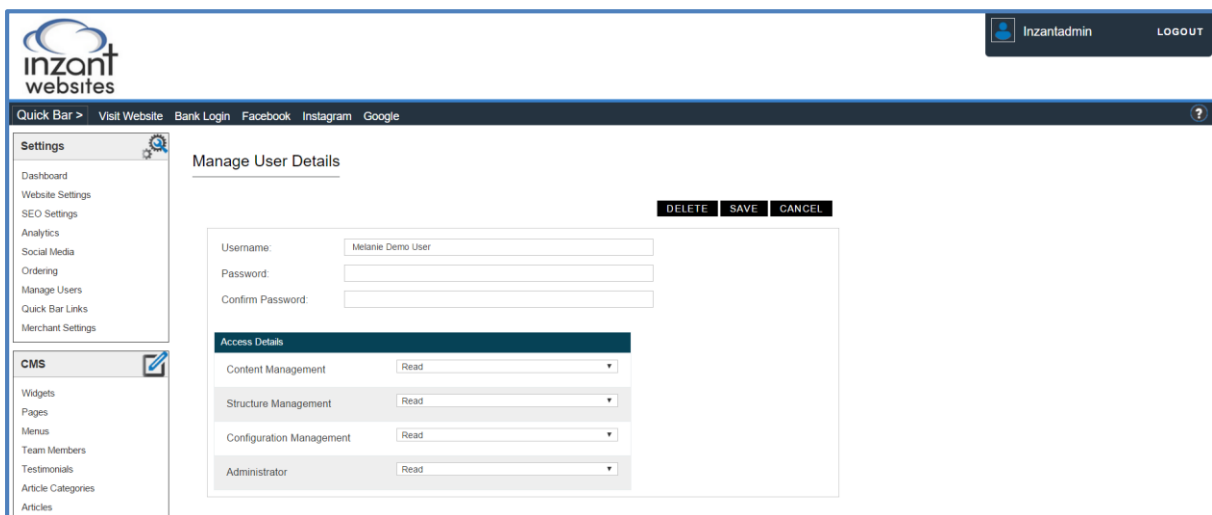
2.8   QUICKBAR LINKS

This feature allows Admin Users to insert URL links into the Header of the Admin CMS site for easy navigation to other websites. When selected, these sites will be displayed in a new tab of the browser.

Quick bar links are managed in the left Navigation Menu item "Quick Bar Links" where they can be deleted, added and modified.


Walkthrough: Adding a Quick Bar Link

1. Select the **ADD** button
2. Assign a Title and a URL to the Quick Bar Link
3. Select **SAVE**

3. CONTENT MANAGEMENT SYSTEM

The content management system works by combining "Widgets" with "Pages". Pages are standard website pages that your users will use to navigate around your website (i.e. Home, About, Shop). Pages are typically broken into main zones (note that in some instances pages might include sidebar zones as well);

| Header Zone | Content/Body Zone | Footer Zone |
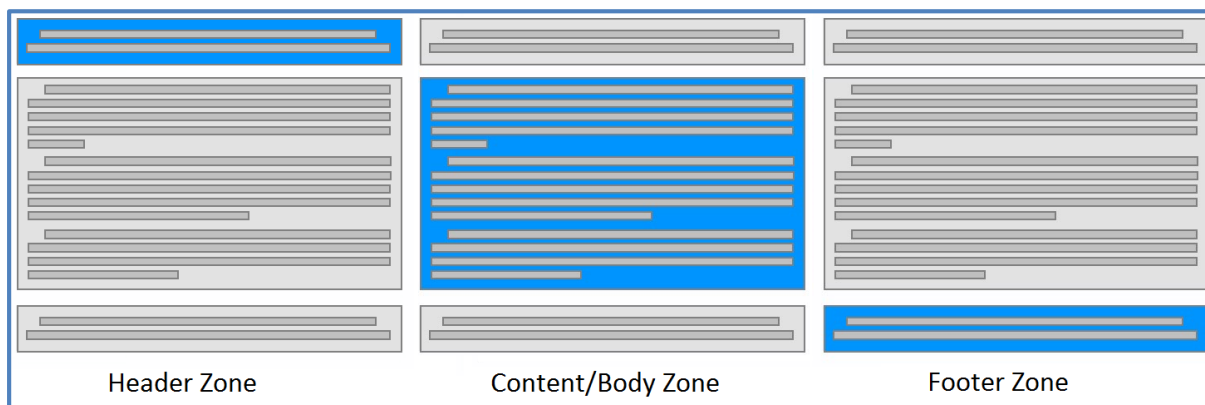
Widgets are the individual components within each zone on a page;
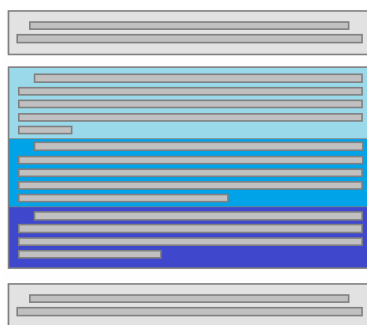
With the large number of widgets on offer in the system this allows for highly customised and dynamic pages to be built.

There are two main ways to manage the widget content within the website;

- Widget content can be managed via the "Widget" section of the CMS. This is effectively "Site wide" widget configuration, applying the changes you have set to all widgets on all pages instantly. This is useful as it allows bulk changes to be applied to many pages easily. This is useful for widgets that appear multiple times in the site that should always look the same, i.e. Footer, Top menu.
- "Pages" page Widget Configuration allows you to customise a widget to have a specific configuration on a page that is not shared by the same widget elsewhere in the site. Setting this configuration will then mean any future changes will need to be applied from the Pages page. This is useful for widgets that appear more than once in the site but need to appear differently each time, i.e. Page Title, Content bar (2 Column).

If a widget is on a page and has some configuration, to remove this and make sure the widget receive updates from Widget configuration you can simply uncheck all the vertical user checkboxes that allow configuration, and the widget will from then on respect the widget updates.

Widgets are configurable components which enable functionality commonly found on web pages.   Widgets can be added to various zones of a web page.

On the respective Widget Details screens you can assign visibility to the following user types;

- **PUBLIC –** Public visitors to the website
- **ACCOUNT –** Logged in account customers
- **REGISTERED** – Public customers that have registered for an online account
- **SUPPLIER** – Company that supplies your business

Widget Visibility

An object like the following will appear at the top of each details page which will allow the widget to be shown or hidden dynamically to the different user types.

Widget Appearance

Widgets can be configured to display different information to the different user types by checking the relevant checkbox in the vertical row and applying a different set of configuration.

Usage Summary

You can quickly see exactly how many times a widget is used throughout your site, in addition to specifically where it is used by looking at the bottom of the widget details screen at the Usage Summary table.

Css URL	Title	Status	Count
/events1	Events1	Published	1
/home	Inzant Home	Preview	1
/home	Inzant Home	Published	1
/home	Inzant Home	Obsolete	1
/newhome	New Home	Published	1
/newhome	New Home	Obsolete	1
/offer	Offers	Preview	1
/offer	Offers	Published	1
/page4	NEWPAGE!	Preview	1

"Content" Widgets

- Action Bar
- Advertisement (Sidebar)
- Advertisement Bar (Full Width)
- Blog Details
- Blog Listing
- Blog Summary
- Breadcrumbs
- Call to Action
- Carousel (Full Width)
- Contact Details
- Content Bar (2 Column)
- Content Bar (Full Width)
- FAQ
- Footer
- HTML Blob
- Image (Full Width)
- Image Group
- Key Items
- Key Statistics
- Page Title (Full Width)
- Page Title (Standard)
- Redirector
- Team Members
- Testimonials
- Title Bar
- Title Bar with Menu
- Top Menu

"Form" Widgets

- Account Enquiry Form
- Enquiry
- Login Form

"Shop" Widgets

- Back to Shop
- Best Sellers
- Cart
- Checkout Payment
- Checkout Shipping
- Featured Products
- My Account
- Order Confirmation
- Payment Gateway
- People Also Bought
- Previous Order
- Product Details
- Product Tags
- Related Products
- Shop
- Shop Sidebar

Action Bar

This widget allows for prominent navigation options to be configured. The configurable options are Title, Link 1 & Link 2. This widget is typically used as part of the Header zone of the website, containing relevant "Call to Action" links, like "Login" or "Shop".

Advertisement Sidebar
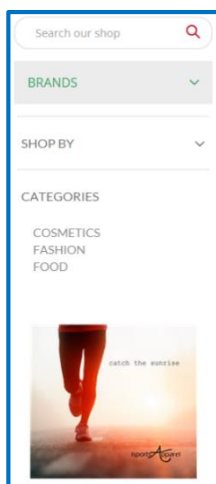
The advertisement sidebar displays an image, with the option to add a URL link for that image. Simply select the image file required and enter the full designated URL for the link. This widget is designed for a sidebar zone and should only be placed in these zones on a page.

See our Image Size Requirements section for Recommended Image Sizes.

Advertisement Full Width

The advertisement bar (full width) displays an image, with the option to add a URL link for that image. Simply select the image file required and enter the full designated URL for the link. Note that you can have the link open in the same window or a new window.

See our Image Size Requirements section for Recommended Image Sizes.

Blog Details

There are no configuration options available for this widget. This widget is required for the Blog details page to display individual blog articles.

Please Note: *The Pages section of this manual demonstrates how these widgets can be used, and the Blog Management section of this manual demonstrates how Blog Articles & Categories can be managed.*

Blog Listing

There are no configuration options available for this widget. This widget is required for the Blog List page to display a summary of each of the articles in the system.

Please Note: *The Pages section of this manual demonstrates how these widgets can be used, and the Blog Management section of this manual demonstrates how Blog Articles & Categories can be managed.*

Blog Summary

This widget can be configured to display 3 recent/featured blog articles. This is designed to site on a content page and direct users viewing the site to navigate to the blog to read an article.

Breadcrumbs

This widget allows for the configuration of "Breadcrumbs" which provides a secondary navigation method, usually used for returning to recently visited or related pages. This is typically the topmost widget within the Content zone on a page (directly under the header).

Call to Action

This widget allows for a Heading zone, a text content zone and a large Button. It is designed to engage the user with a brief description, prompting them to click the button (hence "Call to Action"). The text content zone is populated using a fully featured text input editor called "CK Editor", see a quick guide on using the CK Editor tool **here**.

To read a quick guide on how to set URL's for the hyperlink (button), click here.

Carousel (Full Width)

This widget displays a full width Image slider of up to 10 images in the Carousel. Include a URL for the images in the slider to become links (i.e. internally to filtered shop pages), and an Alt Tag to optimise search engine optimisation for the images in the slider.

See our [Image Size Requirements](#) section for Recommended Image Sizes.

Contact Details

Various contact options can be configured on this widget and will render as shown below. If you do not wish for certain contact elements to be displayed (i.e. feedback email) then uncheck the component in the CMS and both the title and content will be hidden.

Content bar (2 column)

The Content bar (2 column) has the option of displaying both text or an image (in either column) and a URL link for that image. Simply select the desired image file and enter the designated URL for where it will link to.

The text option will contain a fully featured text editor called "CK Editor", see a quick guide on using the CK Editor tool **here**.

See our Image Size Requirements section for Recommended Image Sizes.

Content bar (full width)

The Content Bar (Full Width) is allows for a full width content zone on a page. Using CK Editor this widget can be used in a very versatile way, allowing lists, tables, headings and many other rich text functionality to be configured.
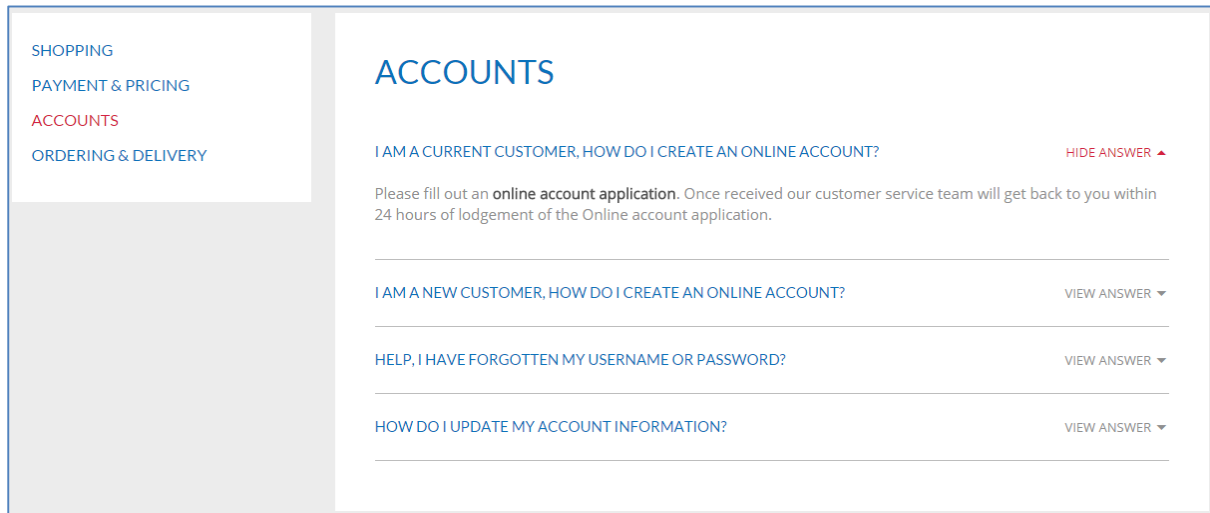
See a quick guide on using the CK Editor tool **here**.
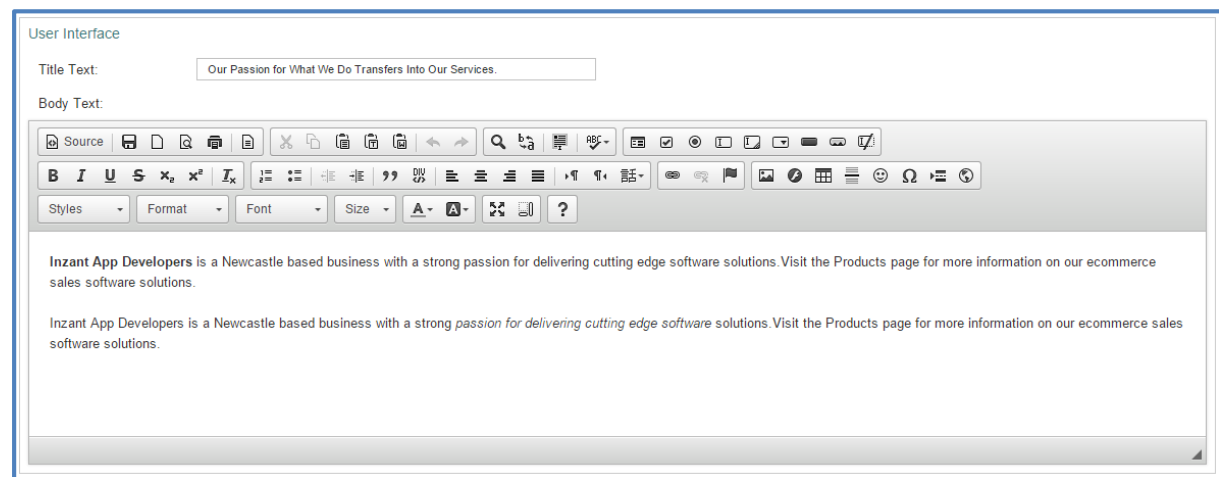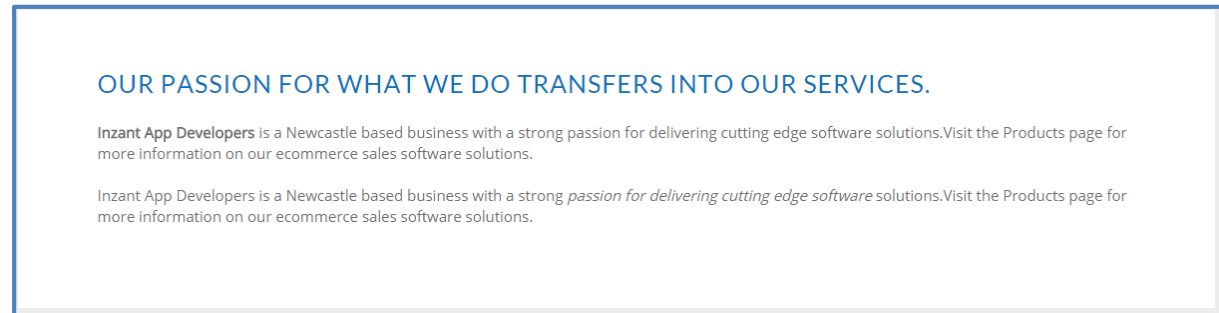
FAQ's

The FAQ widget itself doesn't have any configuration available, it will simply display all published Categories & published FAQ's within those categories when it is on a Published page.

Management of FAQ Categories & FAQ's is described in more detail **here**.

SHOPPING
PAYMENT & PRICING
ACCOUNTS
ORDERING & DELIVERY

ACCOUNTS

I AM A CURRENT CUSTOMER, HOW DO I CREATE AN ONLINE ACCOUNT?   HIDE ANSWER ▲

Please fill out an **online account application**. Once received our customer service team will get back to you within 24 hours of lodgement of the Online account application.

I AM A NEW CUSTOMER, HOW DO I CREATE AN ONLINE ACCOUNT?   VIEW ANSWER ▼

HELP, I HAVE FORGOTTEN MY USERNAME OR PASSWORD?   VIEW ANSWER ▼

HOW DO I UPDATE MY ACCOUNT INFORMATION?   VIEW ANSWER ▼

Footer

The footer widget contains two columns with the following content managed elements;

- Two "tagline" text zones – CMS managed via footer widget.
- Sitemap style menu – Menu selectable via footer widget.
- Copyright text – CMS managed via footer widget.
- Provision for two "Terms and conditions" style links – CMS managed via footer widget.
- Social media links – Managed in "Social Media" settings tab in CMS.
- Newsletter signup form – proposed integration with Mailchimp. Can be hidden with CMS checkbox on this widget.

HTML Blob

This widget allows for a "blob" of HTML to be pasted into the widget for a completely customized zone or page within the site. This zone will specifically allow for CSS and JavaScript to be written "in line" – allowing the widget to be styled and function in a completely inconsistent way with the rest of the site without any code changes being required to the product.

Image (Full Width)

The advertisement bar (full width) displays an image that will always take up 100% of the screens width, with the option to add a URL link for that image. Simply select the image file required and enter the full designated URL for the link. Note that you can have the link open in the same window or a new window.

See our Image Size Requirements section for Recommended Image Sizes.

Image Group

This widget displays a group of up to 12 images and allows for the creation of hyperlinks from each individual image. An image "Alt Tag" can also be attributed (for SEO purposes). **See our [Image Size Requirements](#) section for Recommended Image Sizes.**

Key Items

The Key Items Widget displays 6 styled boxes, each highlighting a particular service or feature. If you leave the "Key Item" field blank on the widget, the relevant box zone in the design will not be displayed, meaning you can determine how many key items to display by omitting text from the key items field. **See our Image Size Requirements section for Recommended Image Sizes.**

The CMS Widget allows for the configuration of;

- Widget Title (Simple text).
- Item Title (Simple text).
- Item Image (Image selector).
- Item Descriptive Text (rich text zone). See a quick guide on using the CK Editor tool **here**.

Key Statistics

This widget allows for the display of 4 styled Key Statistics, with a short descriptive text line and an image to accompany each statistic. **See our Image Size Requirements section for Recommended Image Sizes.** The CMS Widget allows for the configuration of;

- Key statistic (Simple text).
- Descriptive text (Simple text).
- Statistic Image (Image selector

Page Title (Standard)

This widget is utilised to provide a heading to the page, with optional descriptive text. This variation of the Page Title widget is designed for pages that have a normal width template, specifically all pages using the "Login", "RightBar" and "Single Column" templates.

Page Title (full width)

This widget is utilised to provide a heading to the page, with optional descriptive text. This variation of the widget is specifically designed for pages that utilise a full width template – specifically any pages using the "Shop" (or LeftBar) template.

The configuration is identical to the standard width version of the widget, however the design will dynamically stretch to fill out the full width zone in the page.

Team Members

The team members' widget allows for pre-configured "Team Members" to be shown in the zones by selecting them from a dropdown list. The widget can display the team Members in 2 per row or 4 per row, and allows for a custom title and body content zone which allows for rich text editing (See a quick guide on using the CK Editor tool **here**).

Team Member details are not entered on the widget, by via the Team Members section of the CMS, see more information **here**.

OUR MANAGEMENT TEAM

Our Management team are a bit querky, but also the best in the business.

Amy Williamson
General Manager

Amy runs a tight ship, and has a very hands on approach to all areas of the business.

In her spare time she has numerous board roles in charities, as well as an avid (if not slightly weird) enthusiam for roller derby.

Zoe Forster
Marketing Manager

Zoe manages our entire marketing team and generates most of our collateral herself.
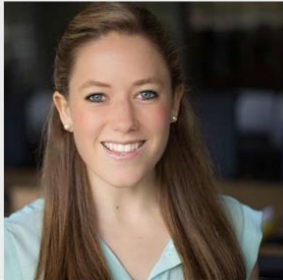
She is into Ballet big time, and the entire office has been dragged to several of her performances - which were great!

Wallis Smith
Project Manager

Wallis is a fantastic team member who is always first in, but also first out!

He loves fishing and wont stop raving about his pet iguanas, toads & wolverines - seriously its a bit annoying.

Jeanine Russell
Sales Manager

Jeanine manages our national sales and provides excellent instruction for the team.

Jeanine has recently come back from a trip to Borneo and is trying to get the entire office into meditation - it hasnt caught on.

Testimonials

Testimonials are statements testifying to an Organisations qualifications or conduct. The widget can display up to 10 testimonials. The testimonials widget is shown below; the drop-down lists are populated by the Testimonials configuration function discussed **here**. This widget allows preconfigured testimonials to be displayed on a widget – allowing for unique configuration across different testimonial widgets.

TESTIMONIALS

"Lorem ipsum dolor sit amet, consectetur adipiscing elit. Praesent rhoncus facilisis efficitur. Proin auctor purus at ipsum euismod, sed semper quam sollicitudin. In quis fringilla mauris. Morbi condimentum enim et enim dapibus,sed semper quam sollicitudin. In quis fringilla mauris. Morbi condimentum enim et enim dapibus enim et enim dapibus, sed accumsan neque facilisis. Aenean gravida velit eget erat ultrices, vitae sagittis odio faucibus."

Mark Priston, Manager, NYC

User Interface

Testimonial 1:	Mark Priston ▼
Testimonial 2:	Steve Buscemi ▼
Testimonial 3:	John Johnson ▼
Testimonial 4:	---Select--- ▼
Testimonial 5:	---Select--- ▼
Testimonial 6:	---Select--- ▼
Testimonial 7:	---Select--- ▼
Testimonial 8:	---Select--- ▼
Testimonial 9:	---Select--- ▼
Testimonial 10:	---Select--- ▼

Title Bar

This widget provides a title area for a page which includes the logo zone (supports 1 or 2 images) and 'My account' login link. This is primarily a Header widget that should be used in conjunction with "Top Menu". **See our Image Size Requirements section for Recommended Image Sizes.**
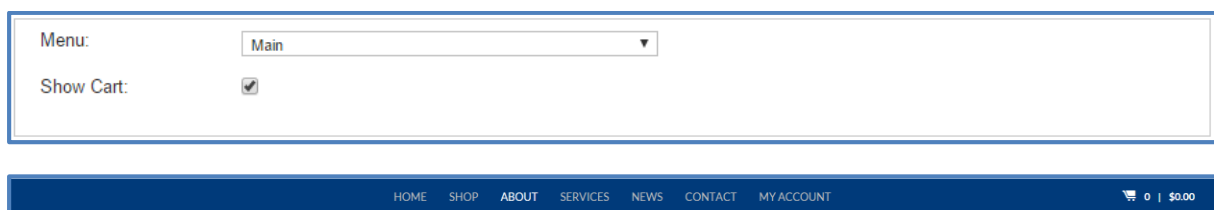
Title Bar with Menu

This widget provides a title area for a page which includes the logo zone (up to 2 logos/images), 'My account' login link, cart summary/link button and a menu. This widget effectively combines the functionality found within the "Title Bar" and "Top Menu" widgets, and can be an alternative as a standard website "header". **See our Image Size Requirements section for Recommended Image Sizes.**

Top Menu

This widget displays the main website menu that users will use to navigate the site, in addition to the main Cart preview / link they will use to progress to the site checkout. This is primarily a Header widget that should be used in conjunction with "Title Bar".

Account Enquiry Form

There is no configuration available for this widget. This Widget is used as a form new Account customer Enquiries. The email the enquiry is sent to is managed in the [Website Settings](#) section of the CMS.

COMPANY DETAILS

CONTACT NAME *	COMPANY NAME *
TRADING NAME *	ABN *
EMAIL ADDRESS *	PHONE NUMBER *
FAX NUMBER *	MOBILE NUMBER

BILLING DETAILS

ADDRESS LINE 1*

ADDRESS LINE 2 (OPTIONAL)

SUBURB / CITY *	STATE *
POSTCODE / ZIP *	COUNTRY *

SHIPPING DETAILS

ADDRESS LINE 1 *

ADDRESS LINE 2 (OPTIONAL)
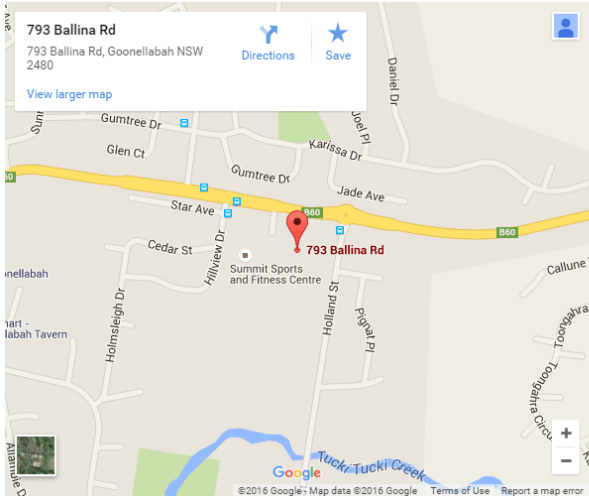
SUBURB / CITY *	STATE *
POSTCODE / ZIP *	COUNTRY *

NOTES ABOUT YOUR ENQUIRY

SUBMIT ENQUIRY >

Enquiry

This widget provides the facility for general customer enquiries. The email address the enquiry is sent to is managed in the [Website Settings](#) section of the CMS. This Widget also contains a configurable embedded map.

Login Form

There is no configuration available for this widget. Refer to **Password Management** for details on user password management workflows.

Back to Shop

This widget returns the user back to the shopping page. If the user has arrived at the product details page from a filtered shop page, the back to shop button will return them to that filtered shop page. The only configuration option for this widget is content managed text that will appeared in the right hand side of the widget (next to the button). The widget will only reside typically on the Product Details page.

Best Sellers

This widget displays the 4 bestselling products. Filter options are configurable if the relevant lists are being calculated and stored in the system. This widget is designed for a sidebar zone and should only be placed in these zones on a page.

Cart

The Cart widget will display to the user the amount and quantity of products in the cart, as well as the cart totals. Updating quantities will force the user to update the cart prior to allowing them to proceed to the checkout process. If the relevant freight type is configured, information will be displayed on this page showing freight total. The link to the cart is displayed within the Top Menu widget.

There are no configuration options available on this widget.

Checkout Payment

This widget is the last step in the checkout process before order submission and payment. It provides the user with an overview of their cart including a breakdown of Items, Quantities & Subtotal, Freight, GST and Cart Total. Freight will always be recalculated upon this page being loaded.

Payment options can be configured and set up on this widget for both Account and Public website users. Please note that different user types can have completely different checkout methods configured. I.e. Account Customers can check out "On Account", and Public via "PayPal" and "SecurePay".

CHECKOUT

ORDER SUMMARY

Art-deco Silver Ring with Green Stone (x 1 unit) x 1	$168.62
Allure Lipstick (x 24 units) x 4	$57.44
Assorted Candy Bags red (x 8 units) x 4	$67.40
Bifold Black Leather Wallet (x 1 unit) x 3	$91.95

Order subtotal:	$385.41
GST:	$31.80
Total:	$417.21

PAYMENT METHOD

○ ☎ Phone Payment

○ ▭ Bank Deposit

◉ P PayPal

Pay via PayPal, you can also pay with your credit card if you don't have a PayPal account.

MAKE PAYMENT

User Interface

Display PayPal:	☑
Payment Gateway:	None ▼
Show Account Based Payment:	☐
Account Based Information Text:	
Show Phone Based Payment:	☑
Phone Based Information Text:	Someone will be in touch shortly to organise payment for your order. Please N
Show Bank Deposit Payment:	☑
Bank Deposit Information Text:	Please deposit the funds into the following account; Acc #: 12345656 BSB: 12
Error Message:	freight failed to caluclate, you will be contacted by our office after submitting the

Checkout Shipping

This widget is the 2nd last widget in the checkout process, and requires the user to enter the required level of "Shipping" information. Account and Public users will see different forms as account customers will already have detailed delivery information stored. "Optional" freight rules (i.e. Auspost API) that allow the user to select between different freight methods like Standard or Express shipping will be shown on this page.

Featured Products

The "Featured Products" widget is designed to showcase certain products. These Products can be configured by selecting how many products per row – 0, 2 or 4, as well as configuring which products are visible in the widget.

Product visibility is by either "Filter" or "Product List". Filter allows the website to automatically select products randomly from a certain pool of products, ie "New Products". Product List requires the products to be displayed in the widget to be listed in the widget – by the Manufacturer Code field.
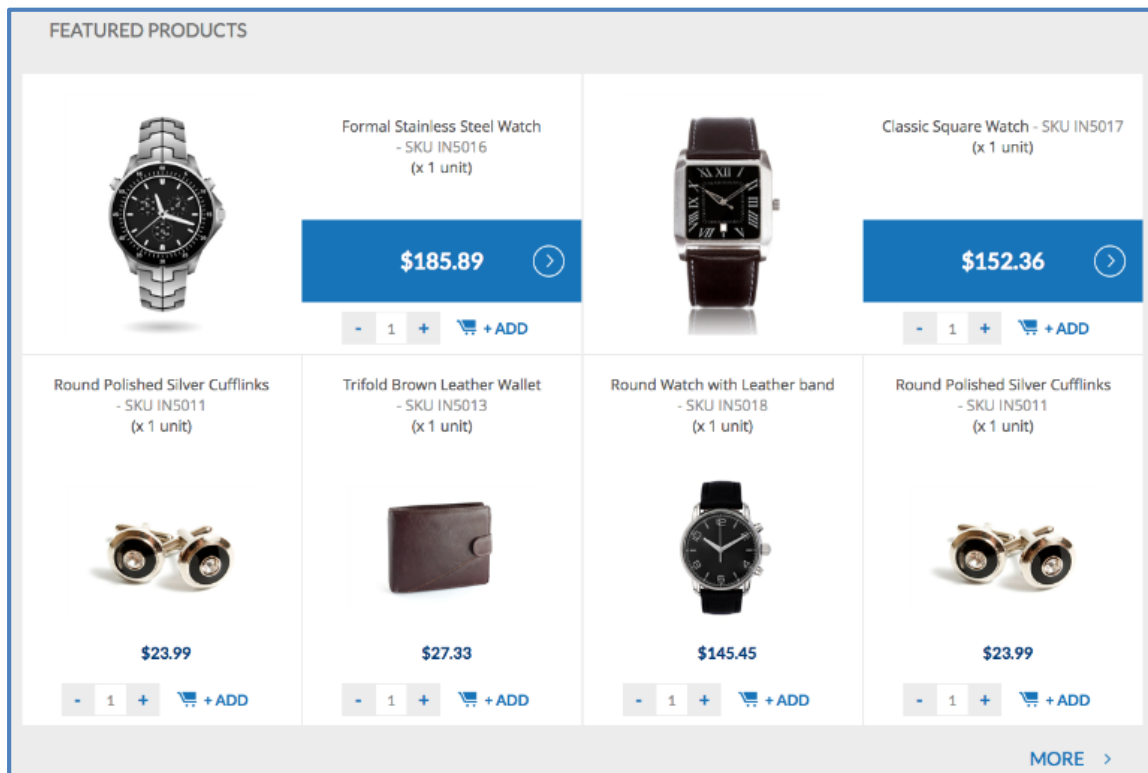
My Account

This is the widget that allows you to configure the account customers Member portal interface. There are a number of optional pages, all of which allow the user to interact with your site in different ways;

Account Information
Displays a content managed title and text zone in addition to basic customer information that is stored within the Inzant Sales web client (on the Retailer page).

Downloadable content

Displays a content managed Title, in addition to a list of PDF files for download. The PDF files are content managed within the CMS widget. To Upload a PDF use the "Select PDF" button, then either select the PDF to insert from the PDF library or upload a new file using the file selector. You can then manage the existing visible PDFs Order and availability from the widget.

Previous Orders

This page allows the user to view their entire previous order history stored within Inzant Sales. This can be configured to display either "Sales Orders" or "Associated Orders" (Invoices imported from ERP system).

Make a Payment
This page allows the user to make a payment on an overdue account as per for "Financials" tab in the Inzant Sales web client. Please note that this field will be relying on what is stored on the Financials tab within the Inzant Sales web client (on the Retailer page), and will continue to display whatever is stored until it is updated – usually from the ERP system on a nightly basis.

Loyalty Program

Loyalty program custom fields can be configured to have data imported into them and displayed in the My Account customer portal.

Change Password

Refer to **Password Management** for details on user password management workflows.

User Interface

☑ Account Information

Heading Text: WELCOME TO YOUR ONLINE ACCOUNT

Body Text:

Here you'll have the ability to request changes to your contact and address information and also manage your login details. In addition to this we've made your online account a comprehensive account management portal, with the ability to download our latest PDF catalogues and other marketing content, view all your previous orders, keep your account up to date with our online payment gateway and keep track of all your advantage loyalty program points. Test

☐ Downloadable Content

☑ Previous Orders:

Heading Text: Previous Orders

Previous Orders Source: Associated Orders ▾

☑ Allow users to duplicate previous orders

☐ Make a Payment

☐ Loyalty Program

ACCOUNT INFORMATION
PREVIOUS ORDERS
CHANGE PASSWORD
LOGOUT

WELCOME TO YOUR ONLINE ACCOUNT

Here you'll have the ability to request changes to your contact and address information and also manage your login details. In addition to this we've made your online account a comprehensive account management portal, with the ability to download our latest PDF catalogues and other marketing content, view all your previous orders, keep your account up to date with our online payment gateway and keep track of all your advantage loyalty program points.

CONTACT INFORMATION	ADDRESS INFORMATION	COMPANY INFORMATION
Name	Postal Address	Company Name
.	.,.,	Public Websales
	Kotara,.,.,	
	Australia	Account Number
Phone Number		000532
.	Street Address	
	.,.,	Username
Email Address	Kotara,.,.,	
support@inzant.com.au	Australia	

Order Confirmation

There is no configuration available for this widget. This is the last step in the online order process, at which point a shopping cart is converted into a Sales Order in Inzant Sales, and it will follow the usual workflow of orders – either being emailed or transferred via EDI into an ERP system.

Thank you. Your order has been received.

Order:	Date:	Total:	Payment Method:
#7467	February 25, 2016	$417.21	Phone Payment

Order Details

Art-deco Silver Ring with Green Stone (x 1 unit) **x 1**	$168.62
Allure Lipstick (x 24 units) **x 4**	$57.44
Assorted Candy Bags red (x 8 units) **x 4**	$67.40
Bifold Black Leather Wallet (x 1 unit) **x 3**	$91.95
Order subtotal:	$385.41
GST:	$31.80
Total:	$417.21

Customer Details

Name:
test

Company Name:
test

Shipping Address:
test
test
test
test test
Australia

People Also Bought

There are no configuration options for this widget. This widget should only be on the Product Details page, and displays products that have been purchased most in conjunction with the product being viewed. Products to be displayed in this widget are managed via an automated processor that runs on a daily basis to keep the "People Also Bought" widget current based on sales trends.

PEOPLE ALSO BOUGHT

Art-deco Silver Ring with Green Stone (x 1 unit) $170.00	Assorted Candy Bags red (x 8 units) $16.85 (= $2.11 ea)	Bifold Black Leather Wallet (x 1 unit) $30.65

Previous Order

There are no configuration options for this widget. This page is the subpage for the My Account "previous orders" tab, and is required for users to view the previous order detail information.

Product Details

This widget allows for the management of basic product information to be displayed from the data stored within Inzant Sales. The main zones to be managed are the;

- Main "landing zone"
- Description tab
- Product Information tab
- Videos tab
- Downloads tab

Product Tags

There are no configuration options for this widget. This widget is configured to be on the "Product Details" page, and displays keywords that have been entered against the product. Please note that keywords are space separated – strings or sentences will be broken into individual words when being displayed as keywords.

The widget is will not be displayed if a product does not have any keywords configured, however will be shown when a product does have keywords configured.

Related Products

This widget is configured to be on the "Product Details" page, and displays related products that have been entered against the product. Please note that related products should be comma separated with no spaces in the Inzant Sales web client.

If the Related Product s field is blank on an item, it will automatically display products within the same category of the product being displayed, unless that category is empty in which case the widget will not be displayed.

Shop

The shop widget controls the shop functionality for the "body" section of the Shop page. It allows for 3 of the 4 shop modes to be configured, in addition to advertisement zones on the page.

Grid and List shop modes can be turned on or off as required (on a public or account user basis), in addition to the number of items appearing per page being configurable (an optimal number would be 36 products per page). These modes allow the user a traditional online shop interface, however allow the way products are displayed to change between in a grid with larger images, to products displayed in rows with smaller images.

The Previous Order Shop Mode does not have pagination (all items are displayed in one page) and allows the user (account user only) to see a page that only displays products they have ordered in the past, in addition to showing the last 4 orders in separate columns with item quantities ordered. This mode can be switched to pull sales history from Sales Orders or Associated Orders.

Shop Sidebar

The Shop Sidebar widget allows for the management of the sidebar zone in the "Shop" web page. The Category filter tree and search box are fixed zones within the widget, however the "Shop By" accordion, "Specials & Promos" accordion and the Dropdown selection box are all optional shop filters. The options within the Shop By are limited to the following fields, which can be renamed to appear on the website as required;

- New products
- Featured Products
- Merchandising Products

The Specials and Promos accordion will draw filtering options from "specials" campaigns configured in the Inzant Sales system – filtered to only users who have access to them. The Dropdown filter can be configured to point toward a number of the existing product fields on Products in Inzant Sales, as well as a large number of custom fields.

3.3   USING CK EDITOR

CK Editor will allow for a high level of customisation of text content for widgets that contain the editor. A good example of this is "Content Bar (Full Width)". Some basic commands are described below, with a link to a comprehensive tutorial library also provided below.

Paste from Existing Document

CK Editor will allow you to paste in content you have already created from a text file or a word document via the Paste icons in the top row of the ribbon. This will keep the existing formatting you have applied in the previous document, for instance in a word document if you have applied headings, lists, hyperlinks and other general formatting – this should copy across into CK Editor.

Text Styling

The editor allows for normal text styling to be applied like Font, Size, Bold, Underline, Italic, Colour, Background Colour and paragraphing as per a normal text editing client like word or email clients.

Text Layout

The layout of the text can be managed in much the same way as other rich text editing tools like Word or email clients. It allows for text indentation, block quotes (indent & italic) and horizontal dividing lines.

Rich Text

CK Editor supports a large variety of rich text options and for a full understanding please visit the link below and view the online tutorials. The basic rich text components that you will likely want to incorporate include;

- Links, emails and anchors
- Lists (bulleted or numbered)
- Tables of data
- Special Character insertion

CK Editor also supports useful tools like a spell checker, to proof your work prior to publishing. A full guide on using CK Editor can be viewed on the CK Editor website here.
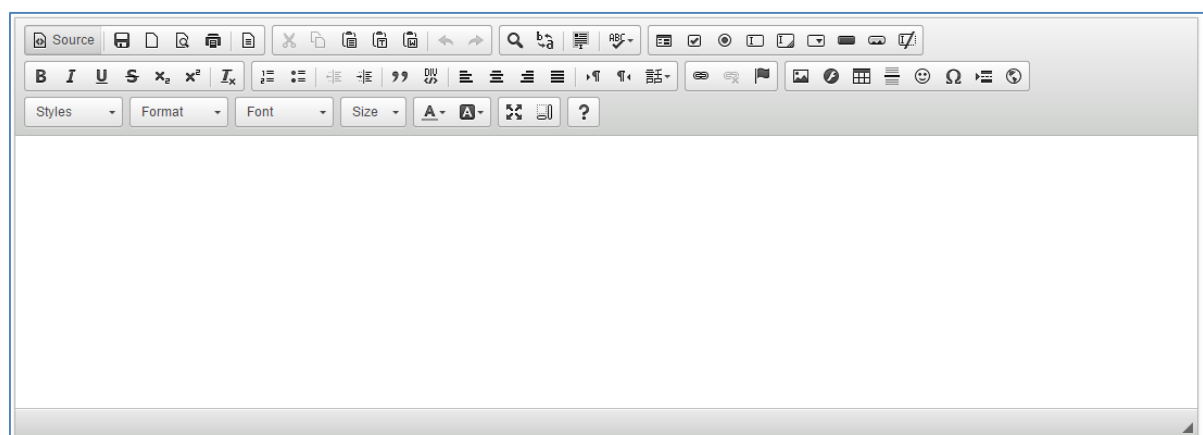
3.4   IMAGE SIZE REQUIREMENTS

See below a table detailing the image size requirements throughout the site, with notes on specific widget limitations.

Widget	Image Size (Pixels)	Notes
Advertisement Bar (Full Width)	1200 w x 145 h	Width is the only limitation, height of the widget will scale dynamically as per the image.
Advertisement Bar (Sidebar)	250 w x 250 h	Width is the only limitation, height of the widget will scale dynamically as per the image.
Blog Article	880 w x 720 h	Exact dimensions should be followed – image may distort otherwise.
Carousel	1200 w x 525 h	Exact dimensions should be followed – image may distort otherwise.
Content Bar (2 Column)	600 w x 300 h	Should be created in consultation with the image or text also in the widget (in the other column).
Image (Full Width)	1920 w x 250 h	The Image will always fill 100% width of screen, make sure the image quality is good. Height is completely optional.
Image Group	140 w x 60 h	No Limitations – although exact dimensions should be followed for a consistent design.
Key Items	95 w x 90 h	No Limitations – although exact dimensions should be followed for a consistent design.
Key Stats	155 w x 90 h	No Limitations – although exact dimensions should be followed for a consistent design.
Team Member	350 w x 350 h	No Limitations – although exact dimensions should be followed for a consistent design.
Title Bars (Logo)	300 w x 120 h	No limitations – width size should be respected so logo renders on mobile design properly.
Favourite Shop Mode Images (Selected & Unselected)		
Favourite Order Mode Icons	32 w x 28 h	Exact dimensions should be followed – image & widget may distort otherwise.
Add to Favourites Small Images	32 w x 32 h	No Limitations – although exact dimensions should be followed for a consistent design.
Add to Favourites Large Images	120 w x 32 h	No Limitations – although exact dimensions should be followed for a consistent design.
File Sizes		
Where possible avoid uploading any images that are in excess of 1MB as a blanket rule, this will cause performance issues in terms of page load times. A generally acceptable image size is in the order of 100KB, however where the image contains lots of detail it may not reduce down to this level, so a practical maximum size of 300KB might be more sensible.		

There are two main areas within the CMS that hyperlinks can be created;

- In a specific content zone provided by a widget.
- In the CK Editor content entry zone.

Specific Content Zone Links

A good example of a specific content zone for links to be created is the Call to Action widget. In the text box labelled "Link" a URL can to be entered, and when the user clicks the button on the widget it will redirect the user to the specified URL. For all Specific Content Zone links there are three potential outcomes when configuring a URL;

1. Start the URL with Http – this will recognise the link as belonging to an external website and will attempt to send the user to the URL as entered – for instance;
   https://www.google.com.au/

2. Start the URL with a Forward Slash – this will recognise the link as being part of the website and will direct the user to the specific page the path is directing them to. Examples of this would include;
   /contactus
   /contactus/accountenquiries
   /shop
   /product/example_product

Note that for both points 1 and 2 there is the option to open the link in a new window or the same window. A general rule would be open internal links in the same window, and external links in a new window.

3. Certain widgets – like Call to Action – support mailto links, meaning when a user clicks on a link instead of opening a new browser it prompts the local mail client to open an email. Inputting "mailto:" and then the desired recipient's email address will perform this action, for instance;
   mailto:support@inzant.com.au

CK Editor Content Entry Zone Links

To create a link in CK Editor highlight the desired text and then click the link button in the ribbon (chain icon). See the below link for a detailed guide on creating links, mailto's and anchors within text, however the three most used functions are often;

4. Internal Site links – ensure "Link Type" is set to URL, and "Protocol" is set to *Other*. Then either paste or type in the relative URL – for instance /contactus

5. External Site Links – Ensure the "Link Type" is set to URL and the "Protocol" is set to *http://* or *https://*. Then either paste or type in the complete URL – for instance www.google.com

6. Mailto – Ensure the "Link Type" is set to *Email* and then prepopulate the email's recipient, subject and body with the required information.

Note that for points 1 and 2 there is the option to open links in another window rather than the same window. Click on the second tab "Target", and set it to "New Window" for this to occur.

For a detailed guide on creating links using CK Editor please click here.

3.6   PAGES

Pages form the basis of how users will interact with and navigate the website. Pages can be added, modified and deleted via the "Pages" sidebar link in the CMS. The Pages list page displays all current pages in the website, including the existing "versions" of each page.

A page can have 3 versions at any one time. A "Preview" version is the only editable type of version, and is not publically viewable yet. A Published version is non editable and is the current "live" version of the page. An Obsolete version is the previous "Published" version. The obsolete version is able to be published, effectively allowing the page to be "rolled back" to its previous state.

The Live preview button will allow the current configuration of the version to be viewed in the sites design, and the Edit Page button will navigate to the details page for that page versions configuration.

Preview versions (editable versions) can be created from the Published page versions details page.

Adding a New Page

New pages can be added from the Page List screen by clicking on the ADD button. This will render the page below. When creating a new page ensure to enter a page URL and Title – and either select a template design or an existing page to copy before saving the new page.

The respective templates contain default style sheets and java scripts. Please note that the URL is relative to the domain name, so should always have a leading forward slash, e.g. **/about**

The newly created page will be in Preview status until Published. For the page to be visible on the website it will have to be either linked via hyperlinks from the various content zones within the site – see instructions **here**, or more typically added to one of the menus within the site – see instructions **here**.

The different zones of the page – Header, Left Sidebar, Content, Footer – are separated into accordion's which allow the management of widgets independently of one another. To add or remove widgets to zones open the "Settings" option which will be the top of every zone accordion and add widgets with the dropdown selection box, remove widgets by clicking the cross and reorder widgets by dragging and dropping the blue square into the position in which it needs to move to.

Page SEO

Although site wide meta description and keywords can be managed via the site wide SEO Settings, it is advisable to create unique meta descriptions and meta keywords for each individual page within the website. To do this create a preview version of the page, then within the "Page" accordion open "Page SEO" and enter unique content for each of the text boxes.

3.7   MENUS

Navigational menus can be added to pages. Note that these are independent of widgets and pages. To manage the menus, select the CMS left navigation item called "Menus". The Menu list page will display all existing menus configured within the site. To add or edit a menu, click on the relevant links on this page.
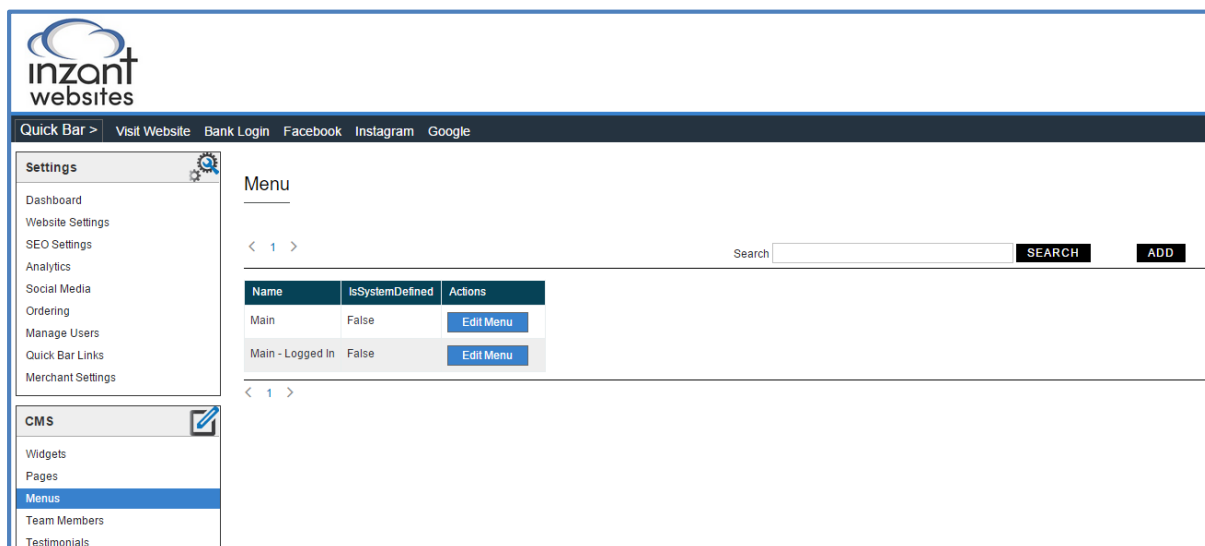
Menu Name can be changed as required on the Menu detail page, in addition to the Title, URL and position of each link in the menu. Links can be added or removed as required.
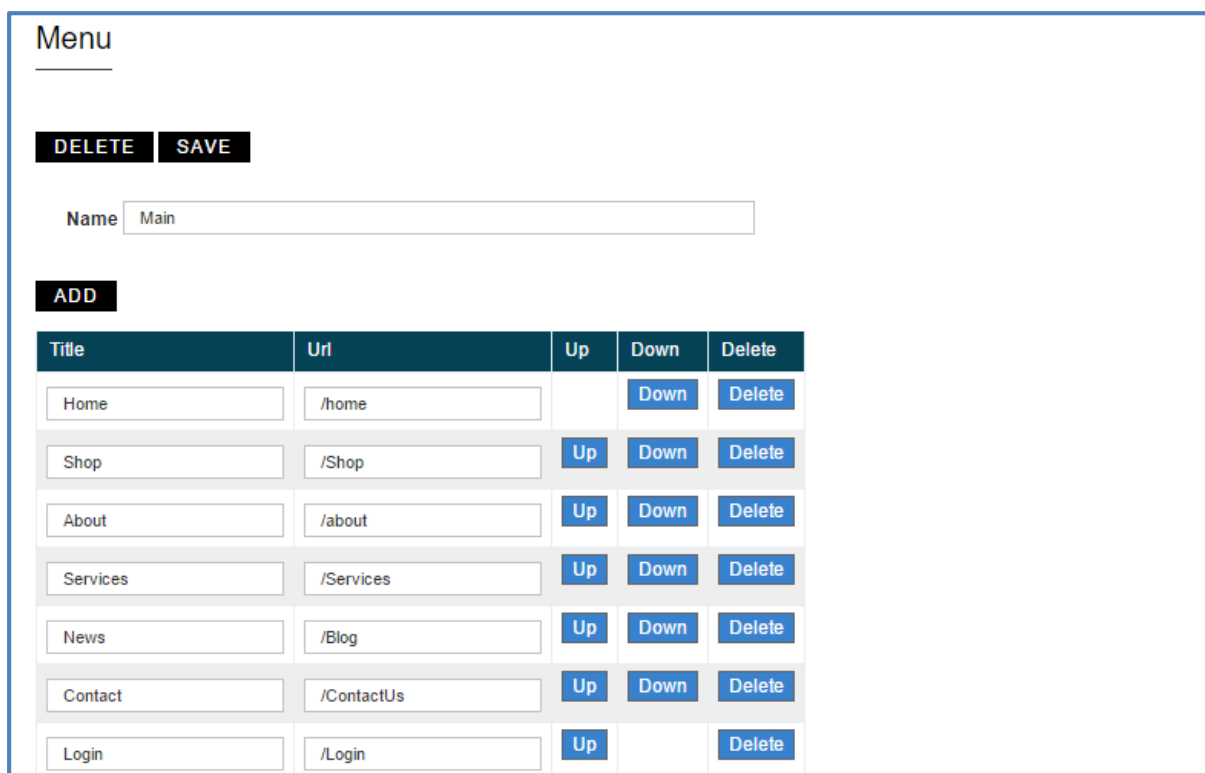
Menus are added into the site by selecting them within widgets, for instance the Top Menu, Title bar with Menu and Footer widgets all allow for menu's to be selected. Creating multiple menu's that cater for different user types (i.e. public and account) will allow the widgets to be configured to only display the relevant menu to the intended user type.

3.8 TEAM MEMBERS

Team member information is configured within the "Team Member" CMS location rather than in the widget itself. This allows for a large number of team member's to be configured within the database, and each individual team member widget to simply reference a set of team members.

This allows the team member data to be managed without opening the page or widget configuration – for simple team member information changes. The required information for each team member is a Name, a Title, an Image and a description field which supports rich text. See a quick guide on using the CK Editor tool **here**.

See our Image Size Requirements section for Recommended Image Sizes.
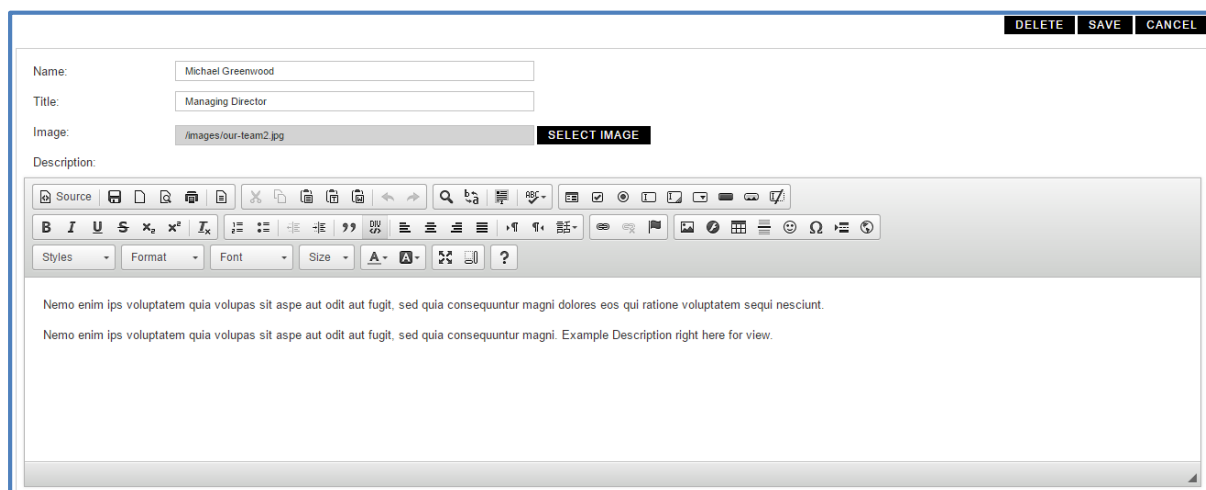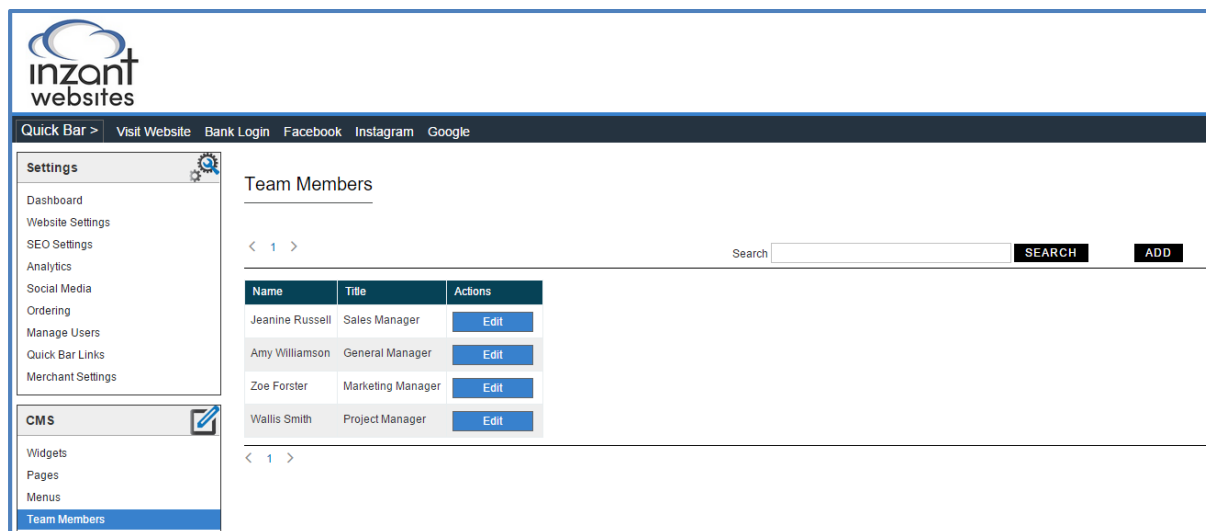
3.9   TESTIMONIALS

Testimonial information is configured within the "Testimonial" CMS location rather than in the widget itself. This allows for a large number of testimonials to be configured within the database, and each individual testimonial widget to reference only the required testimonials.

This allows the testimonial data to be managed without opening the page or widget configuration – for simple testimonial information changes.

3.10 BLOG ARTICLE MANAGEMENT

Articles

This enables users to add news articles or edit and delete ones existing ones. From the summary page below an Article can be added, edited or previewed. **See our Image Size Requirements section for Recommended Image Sizes.**

Whilst on the Article Detail page (when adding or editing an article) the following fields are available;

- Title – the name of the blog article, is required.
- Author – the name of the author of the article, is required.
- Category – the category of the article, selected from a list of available categories, is required.
- Image – the image displayed with the blog article, selected using an image selector, is required.
- Synopsis – is the "preview" text that displays on the blog summary and blod listing widgets.
- Content – is the body content (actual content) of the blog – using a rich text editor. See a quick guide on using the CK Editor tool **here**.

Article Categories
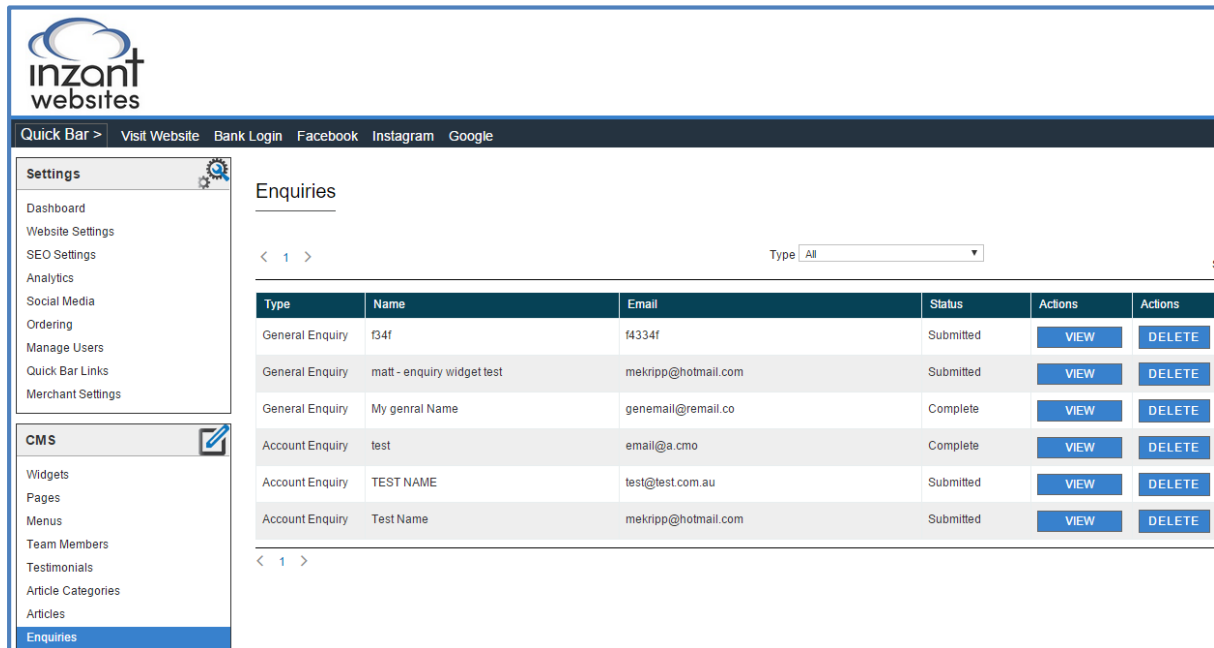
Article categories allow the user to group blog or news articles. Categories that have been created will appear in the drop-down list for category when adding or editing an Article. A Category cannot be deleted if there are Articles assigned to that category. To add or edit a category, simply select on the sidebar option "Article Categories" and either edit an existing category or add a new one.

3.11   ENQUIRIES

When enquiries are made using the enquiry forms within the site (account enquiry form and general enquiry form) they will be displayed here. They can be viewed and deleted from this page, in addition to an email notification containing the enquiry being sent out at the time the enquiry is made.

Enquiries are not automatically deleted, so if you ever need to review the details of an enquiry you will be able to find it in the CMS of the website.

The email which enquiries are sent to is managed in the Website Settings section of the CMS.

3.12   FILE LIBRARY

This facility allows for the uploading of image files for use on respective web pages. Files can be added, overwritten and viewed in this library module.

3.13   FAQ'S

Frequently Asked Questions are managed via the FAQ's tab on the CMS menu.
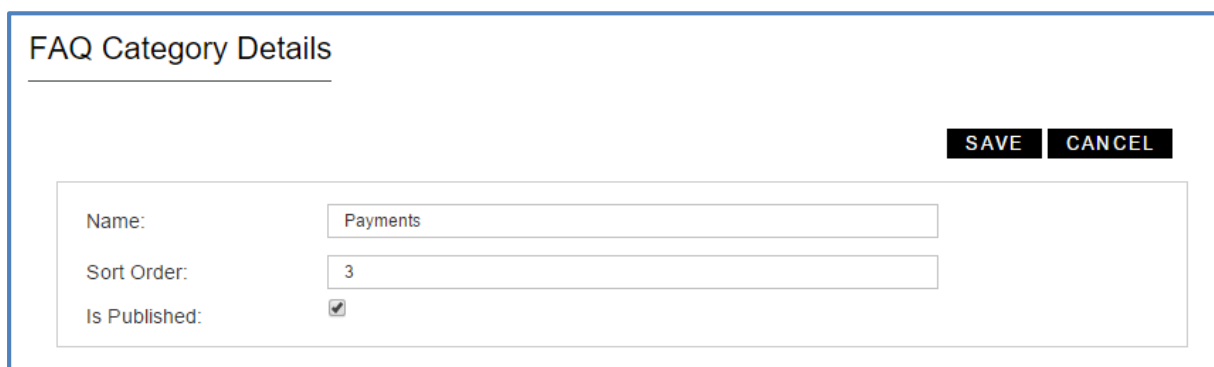
FAQ Categories

FAQ categories must first be configured so that FAQ's can be assigned to a category (this process is the same as creating Article categories). In the public website widget the categories will be displayed as tabs in a left menu. The order of the categories is managed by modifying the "Sort Order" field on each category.

FAQs

Creating an FAQ requires the following fields;

- Category – Selected from the list of configured categories.
- Frequently Asked Question – The question that appears for the user to view, simple text.
- Sort Order – defines in which order the FAQ's appear in the list (by category).
- Published – determines if the FAQ is viewable or not.
- Answer – Rich text answer to the question, allowing links and complex formatting. See a quick guide on using the CK Editor tool **here**.

4. CONFIGURATION

This section of the manual covers areas within the site that allow you to configure for certain results – i.e. freight costs be applied to the order, users be prompted to pay for the order online, if product pricing includes tax etc.

4.1   FREIGHT

The following freight rules are available for use in the Inzant Sales integration website. Please also refer to the examples provided with each rule. Please note all freight costs are assumed to be including GST.

Freight rules can be applied to either all web user types, Public web users or Account web users. This allows for different freight rule types to be configured for Public or Account customers should that be required, or for a singular freight rule type across all customers.

To automatically hide all notion of freight for the website user, use the checkbox settings in "Site Preferences" to turn on or off freight for the different user types. If you do elect to use freight, please ensure the setting for public users, account users or both are checked as required.

The existing freight rule types available are;

- Order Total by Postcode Percentage
- Item by Product Group
- Supplier Total by Threshold Amount
- Order Total by Threshold Amount
- Percentage of Order Total
- Australia Post Integration

Note: the website will respect the checkbox setting under "Site Preferences" regarding displaying freight. If this setting is checked but no freight rule is configured, the checkout process will not work properly. If you have the setting unchecked then regardless of any freight rule being configured it will not be applied to the order.

Order Total by Postcode

This freight rule is designed to allow you to modify the freight charges in your system on a postcode by postcode basis, whilst also allowing you to create a "cover all" charge that will apply to postcodes you haven't created rules for. This rule doesn't apply in conjunction with other freight rules. The following attributes are applied to each individual rule (postcode);

- **A minimum freight charge**
  Every order raised within this postcode attracts the minimum freight charge by default.
- **A maximum freight charge (cap)**
  When the total of the order causes the % charge figure to exceed the min freight value, then the % charge applies to the order.
- **Percentage based freight charge**
  When the % charge figure exceeds the Max freight value then the Max freight value applies to the order – this is effectively a freight cost "cap" on the order.

See below 3 example orders based on the below attributes on a freight rule;

- Min freight value $15.00
- Percentage Charge   10 %
- Max Freight Value $100.00

1	Product	Quantity	Line Total
	PRD001	2	$20.00
	PRD003	2	$30.00
Subtotal			$50.00
Freight	10% * Subtotal Equals < Min Freight Amount, therefore Freight =		$15.00

2	Product	Quantity	Line Total
	PRD001	14	$140.00
	PRD003	4	$60.00
Subtotal			$200.00
Freight	10% * Subtotal Equals > Min Freight Amount, therefore Freight =		$20.00

3	Product	Quantity	Line Total
	PRD001	100	$20.00
	PRD003	50	$30.00
Subtotal			$1,750.00
Freight	10% * Subtotal Equals > Max Freight Amount, therefore Freight =		$100.00

A "Default" rule can be implemented by assigning values to a rule with the postcode 0000. This freight rule will then be applied to any cart where the user enters a postcode that no rule currently exists for.

Item by Product Classes

This freight rule is designed to group items that cost the same or similar amounts to ship and apply freight charges to the order based on the quantity in each class.

Each product is attributed with a class value in the "Freight Class" field in Inzant Sales, and then in the freight module in the CMS you can configure the following options for each freight class;

- **1st Product Freight $ value**
  Applies this $ value for the 1st item in this class added to the order.
- **Subsequent product freight $ value**
  Applies a $ value per item to the order per additional item from 2 onwards.
- **Min freight value**
  Applies a minimum freight charge to the order when any items in this class are added to the order – this value is applied to the order when the total freight cost for this class on an order is less than the min freight value. When the total freight cost for this class (derived from the first item + subsequent item components) exceeds the min freight value then it is not applied.
- **Max freight value**
  A cap for the total freight cost for this class.

See below four example orders using the following two example rules;

Rule	First Item	Subsequent Items	Min Value	Max Value
FR001	$ 5.00	$ 1.00	$ 0.00	$ 9999
FR002	$ 10.00	$ 5.00	$ 0.00	$ 9999

1	Product	Rule	Quantity	
	PRD001	FR001	1	= $5.00

2	Product	Rule	Quantity	
	PRD001	FR001	2	=$5.00 + $1.00

3	Product	Rule	Quantity	
	PRD001	FR001	2	=$5.00 + $1.00
	PRD002	FR001	1	= $1.00

4	Product	Rule	Quantity	
	PRD001	FR001	2	=$5.00 + $1.00
	PRD003	FR002	2	= $10.00 + $5.00

Supplier Total by Threshold Amount

This freight rule allows you to apply a freight rule per supplier/pricelist in your Inzant Sales system. The rule specifically allows you to apply a pre-threshold freight value to an order, a threshold value, and then a post threshold value.

This rule is often used to encourage users to buy over a certain amount of stock and receive free or discounted freight. The following values are applied on each rule (1 supplier/pricelist per rule);

- **Pre Threshold Charge**
  A default $ charge applied to the order when 1 or more items are added and the total is less than the threshold amount.
- **Threshold**
  A $ value that separates the two freight charges.
- **Post Threshold Charge**
  When the total of an order is equal to or greater than the threshold, the Post threshold charge applies.
- **Supplier**
  This refines the rule to only applying to a specific Supplier/Pricelist.

Example – Supplier/Pricelist A

- Pre Threshold Charge $35.00
- Threshold $150.00
- Post Threshold Charge $0.00

1	Product	Quantity	Line Total
	PRD001	2	$20.00
	PRD003	2	$30.00
Subtotal			$50.00
Freight	Subtotal Equals < Threshold, therefore Freight =		$35.00

2	Product	Quantity	Line Total
	PRD001	14	$140.00
	PRD003	4	$60.00
Subtotal			$200.00
Freight	Subtotal Equals > Threshold, therefore Freight =		$0.00

A "Default" rule can be implemented by assigning values to a rule with the Supplier of 0. This means when items on an order are from a supplier that currently has no specific rule, it will use the default rule to implement freight pricing.

Order Total by Threshold Amount

This freight rule allows you to apply a website freight rule across all suppliers in your Inzant Sales system. The rule specifically allows you to apply a pre-threshold freight value to an order, a threshold value, and then a post threshold value.

This rule is often used to encourage users to buy over a certain amount of stock and receive free or discounted freight. The following values are applied on each rule;

- **Pre Threshold Charge**
  A default $ charge applied to the order when 1 or more items are added and the total is less than the threshold amount.
- **Threshold**
  A $ value that separates the two freight charges.
- **Post Threshold Charge**
  When the total of an order is equal to or greater than the threshold, the Post threshold charge applies.

Example

- Pre Threshold Charge $35.00
- Threshold $150.00
- Post Threshold Charge $0.00

1	Product	Quantity	Line Total
	PRD001	2	$20.00
	PRD003	2	$30.00
Subtotal			$50.00
Freight	Subtotal Equals < Threshold, therefore Freight =		$35.00

2	Product	Quantity	Line Total
	PRD001	14	$140.00
	PRD003	4	$60.00
Subtotal			$200.00
Freight	Subtotal Equals > Threshold, therefore Freight =		$0.00

Percentage of Order Total

This freight rule is designed to apply a basic flat percentage rate to all orders raised in the system. This rule doesn't apply in conjunction with other freight rules. The following attribute is available on each rule;

- **Percentage based freight charge**
  Applies a simple flat % rate to the order – viewable on Cart and Checkout screens by the user.

See below example;

- Percentage Charge   10 %

1	Product	Quantity	Line Total
	PRD001	2	$20.00
	PRD003	2	$30.00
Subtotal			$50.00
Freight	10% * Subtotal Equals		$5.00

Australia Post Integration

This freight rule allows the website to generate a freight cost on an order based on Inzant sending the order information to Australia Post and receiving a cost to ship the order. The freight rule is configured on the "Checkout Shipping" widget to display on the front end website, and both account and public users can have different rules configured as required.

International standard, International Express, Domestic Standard & Domestic Express Australia Post freight rules are all supported. Should more than one option be configured the user will be able to swap between the rules with radio buttons, and check the cost with an "estimate" button.

Data Requirements
- This freight rule relies on the product dimension and weight data being accurate to generate a cost, meaning all products should have a weight, height, width and depth stored.
- This freight rule "boxes" the order into standard boxes, meaning a standard set of shipping box sizes will need to be provided to Inzant to configure the rule correctly.

 The following attributes are available for each rule;

- **Weight Factor**
  Applies a simple flat % increase to the weight of the total order – allowing for the compensation of packaging material at the admin users discretion (e.g. mark-up weight by 15%).
- **Volume Factor**
  Applies a simple flat % increase to the volume of the total order – allowing for the compensation of packaging material at the admin users discretion (e.g. mark-up volume by 25%).

Please note that increases applied by the factors are not always linear as it could cause the order to "jump" into larger box sizes which require a much greater volume and increased cost. This is CMS configured and can be refined as required.

A "Default" postcode can be implemented on each different freight rule (Standard Domestic, Express Domestic etc.). This means when a user enters a postcode that doesn't exist in the AusPost database (i.e. they mistype the postcode and include letters) then it will use the default postcode. Typically this will be a postcode that is expensive to ship to so as to guarantee covering unknown freight costs.

4.2 JAVASCRIPT

Custom java scripts can be added using this facility. Note that standard scripts are supplied and template pages contain default scripts which can be edited. Inzant will provide required updates to JavaScript where required.

4.3   CASCADING STYLE SHEETS

Custom style sheets can be added using this facility. Note that standard CSS's are supplied and template pages contain default scripts which can be edited. Inzant will provide required updates to CSS where required.

4.4   CART MANAGEMENT

The Cart Management CMS screen allows for the CMS admin user to view and administer any open or locked carts in the website at any time, in particular highlighting transactions pending payment approval.

An Active cart is a website cart that a user has begun, but not submitted (ie they are halfway through inputting an order). A Locked cart will occur when a user has completed the cart and begun the process of making payment for the cart, however for some reason the payment wasn't completed properly.

A cart is only ever locked under certain scenarios. Please note that similar cases exist for all payment gateway options;

- Inzant does not receive feedback from the payment gateway regarding whether a payment has been successful;
  - When a user tries to pay using PayPal and successfully pays, but then closes the browser without returning to the website. The website has not received confirmation from PayPal that the payment was successful, so the cart remains locked until the admin user either unlocks it, deletes it, or confirms it as an Order.
- The site is configured to lock carts in certain scenarios;
  - When the PayPal payment gateway is configured, PayPal will allow users to pay using eCheques. eCheques return Inzant with a "Pending" result rather than a successful payment result, and in the CMS carts submitted using this payment method can be automatically made into an order, or alternatively made to be locked pending administrator review.

Via the Locked Carts list screen, a summary of all the existing carts can be seen. "Editing" a cart will navigate to the Cart Details screen, and allows the admin user to perform different actions based on whether it is active or locked. If a cart is Active an admin user may Delete the cart or Convert it to an Order. If a cart is Locked then the admin user may Unlock the cart, Delete the cart or Convert it to an Order.

Site User	Cart Amount	Payment Gateway	Status	Order Date	Actions
Public Websales	$41.00		Locked	07-Sep-2015	Edit
A Family Pharmacy	$982.12		Locked	02-Nov-2015	Edit
Public Websales	$28.72		Locked	05-Nov-2015	Edit

The workflow of all existing payment gateway options follow the same simple diagram below, all of which contain the potential for an inadequate response to be returned from the payment gateway and the cart to remain 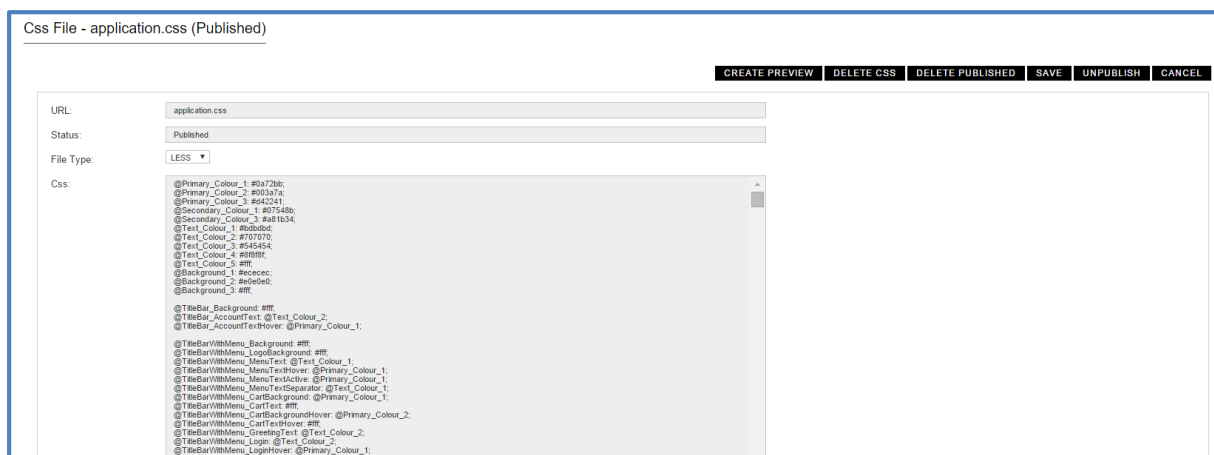locked. When a cart is locked it will send a notification to the admin user (30 minutes after being locked) to alert of its existence, and it can then be managed in the CMS as required.

Note: When an admin user confirms or deleted a cart the website user will have to close the browser to be able to continue ordering. This is due to a session needing to be recreated. When providing support to users please notify them to close and reopen the browser should a cart ever be deleted or converted to an order.

```
                    ┌─────────────────────────┐
                    │                         │
                    │    Checkout Payment     │
                    │                         │
                    └────────────┬────────────┘
                                 │
                                 ▼
                          ╱─────────────╲
                         ╱  Place Order  ╲
                         ╲  (Process      ╱
                          ╲ Payment)     ╱
                           ╲───────────╱
                                 │
                                 ▼
                    ┌─────────────────────────┐
                    │ Cart gets assigned      │
                    │ "IsPaymentPending" =    │
                    │ 1 and "PaymentMethod" = │
                    │ XX and locked – no      │
                    │ further edits allowed   │
                    │ until above flags are   │
                    │ removed.                │
                    └────────────┬────────────┘
```

External To Inzant Website

Payment Processed via Gateway Integration

Successful Payment:
Cart Converted to Sales Order, User returns to Order Confirmation Page. Cart deleted.

Failed Payment:
User is returned to Checkout Payment page and Error is displayed. Cart has"IsPaymentPending" = 1 and "PaymentMethod" = XX flags deleted and becomes editable.

No Response:
Where Payment Gateway hasn't returned response then cart should remain locked with "IsPaymentPending" and "Payment Method" flags still attached. **Locked Carts are managed via the Locked Carts screen in CMS.**

4.5 CHECKOUT METHODS/PAYMENT GATEWAYS

The following Checkout Methods/Payment Gateways have been made available for use in the Inzant Sales CMS website;

- On Account – no payment taken upon checkout
- Phone Payment – no payment taken upon checkout
- Bank Deposit – no payment taken upon checkout
- PayPal – payment taken upon checkout
- ANZ Secure Gateway – payment taken upon checkout
- SecurePay – payment taken upon checkout

On Account

On Account allows the Account based website user to checkout of the shop and submit an order without incurring any payment requirements at that point in time. A custom message can be configured to be displayed to the user upon this method being selected. Please note this checkout method is only available to account customers – not public users.

Phone Payment

Phone Payment allows the website user to checkout of the shop and submit an order without incurring any payment requirements at that point in time. A custom message can be configured to be displayed to the user upon this method being selected. This checkout method can be made available for all users.

Bank Deposit

Bank Deposit allows the website user to checkout of the shop and submit an order without incurring any payment requirements at that point in time. A custom message can be configured to be displayed to the user upon this method being selected. This checkout method can be made available for all users.

PayPal

The PayPal payment gateway can be configured within the website via the "Merchant Settings" tab in the CMS Settings zone. Note that PayPal allows the user to pay via a number of methods, including using their PayPal account, via credit/debit cart and bank/cheque deposits.

The following information should be configured for PayPal to be operational;

- <u>Use Live Account</u>: Allows the account to be swapped between sandbox (testing) and live modes.
- <u>PayPal Email Address</u>: The PayPal email address/username of the admin user/companies PayPal account.
- <u>PayPal Token</u>: The PayPal token is the unique PDT token which is used to verify the payment status.
- <u>PayPal Item Name Text</u>: The name of the order in PayPal the user will see, i.e. "Inzant Website Order".
- <u>PayPal Item Number Prefix</u>: Allows a prefix to be placed in front of a unique number Inzant is generating for the number displayed to the user.
- <u>PayPal Currency Code</u>: The code for the country in which the payments will be being taken (AU).
- <u>Process Pending Payments</u>: Allows the admin user to process payments marked as "pending", or treat them as a locked cart. Payments set to process when pending is returned will have the full pending reason added to the order notes. This setting is of note as ALL payments completed via PayPal using "eCheques" will be marked as pending, so depending on the required business workflow the cart can either be locked or processed successfully as an order.
- <u>Locked Cart Pending Message</u>: If a cart is returned as pending and these are set not to process, the message to be displayed to the user.
- <u>Failed Payment Message</u>: If PayPal is either unable to confirm the transaction, or is able to confirm the transaction but it failed then the failed message will be displayed to the user.
- <u>Error Message</u>: If PayPal is not able to successfully be communicated with, an error message will be displayed.
- <u>Cancelled Payment</u>: If a blank response is returned from PayPal the cancelled message will be displayed (blank responses denote the user cancelled the payment attempt).
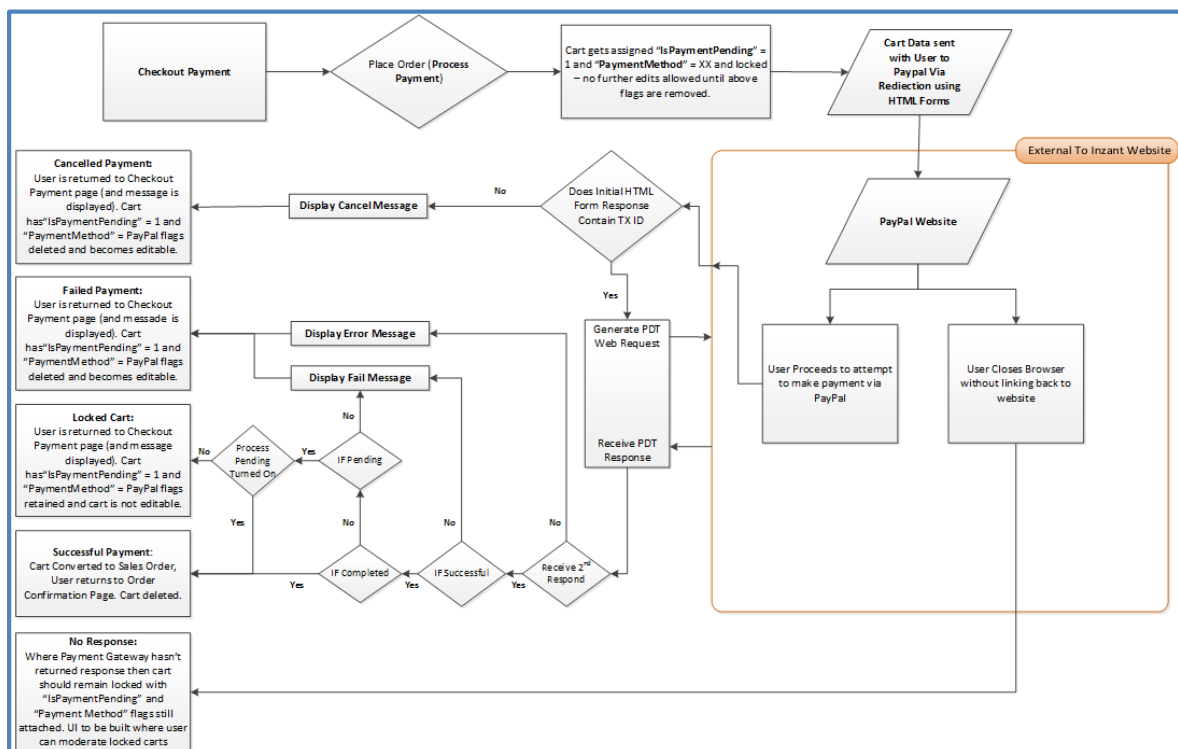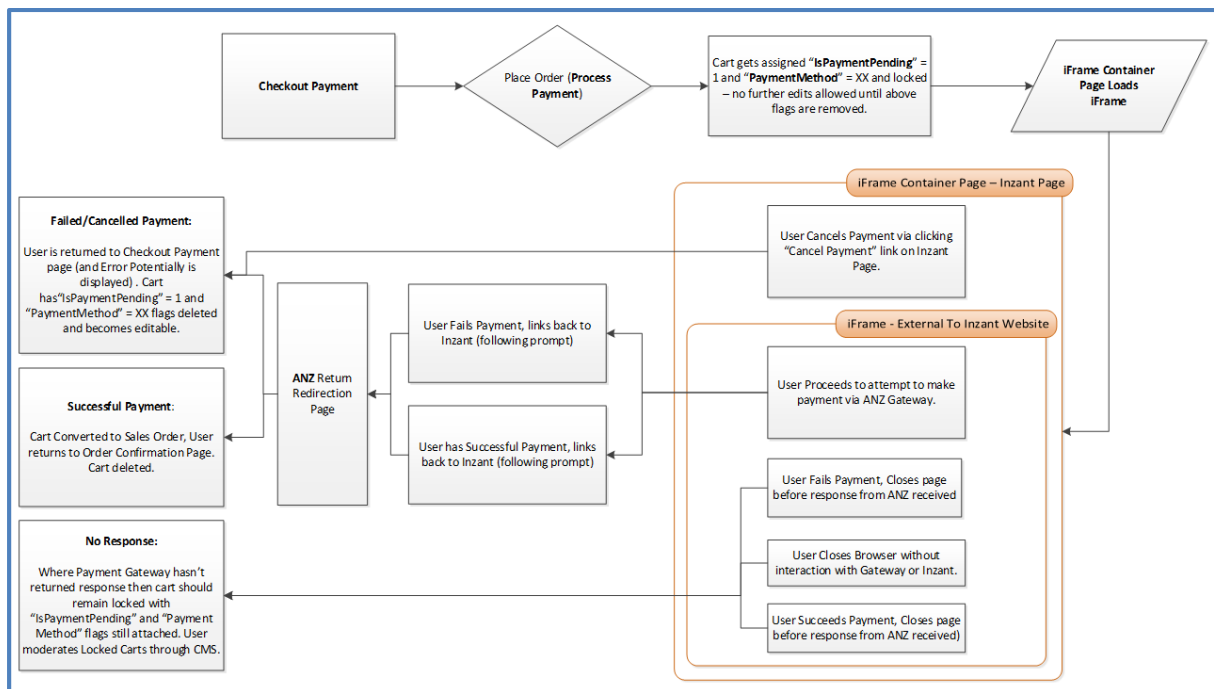
ANZ Secure Gateway

The PayPal payment gateway can be configured within the website via the "Merchant Settings" tab in the CMS Settings zone.

The following information should be configured for PayPal to be operational;

- Profile Name: The type of "Secure Gateway" payment method.
- Profile ID: Personalised ID available in the admin users Merchant Account portal.
- Access Key: Personalised Access Key available in the admin users Merchant Account portal.
- Secret Key: Personalised secret key generated by ANZ Secure Gateway, available in the admin users Merchant Account portal.
- Currency: The code for the country in which the payments will be being taken (AU).
- Failed Payment Message: If ANZ returns a failed payment, this message will be displayed on the checkout page.
- Use Live Account: Allows the account to be swapped between testing and live modes.

The comprehensive workflow diagram for the PayPal payment gateway can be seen below.

SecurePay

The PayPal payment gateway can be configured within the website via the "Merchant Settings" tab in the CMS Settings zone.

The following information should be configured for PayPal to be operational;

- <u>Use Live Account:</u> Allows the account to be swapped between sandbox (testing) and live modes.
- <u>Merchant ID:</u> SecurePay provided Company unique Merchant ID
- <u>Merchant URL:</u> SecurePay provided URL, required for the iFrame to load
- <u>Merchant Password:</u> SecurePay provided Company unique Merchant password
- <u>Test Merchant ID:</u> SecurePay provided Testing Company unique Merchant ID
- <u>Test Merchant URL:</u> SecurePay provided Testing URL, required for the iFrame to load
- <u>Test Merchant Password:</u> SecurePay provided Testing Company unique Merchant password
- <u>Currency:</u> The code for the country in which the payments will be being taken (AU).
- <u>Declined Payment Message:</u> If SecurePay returns a declined payment, this message will be displayed on the checkout page.
- <u>Cancelled Payment Message:</u> If the user cancels the payment, this message will be displayed on the checkout page.

The comprehensive workflow diagram for the PayPal payment gateway can be seen below.
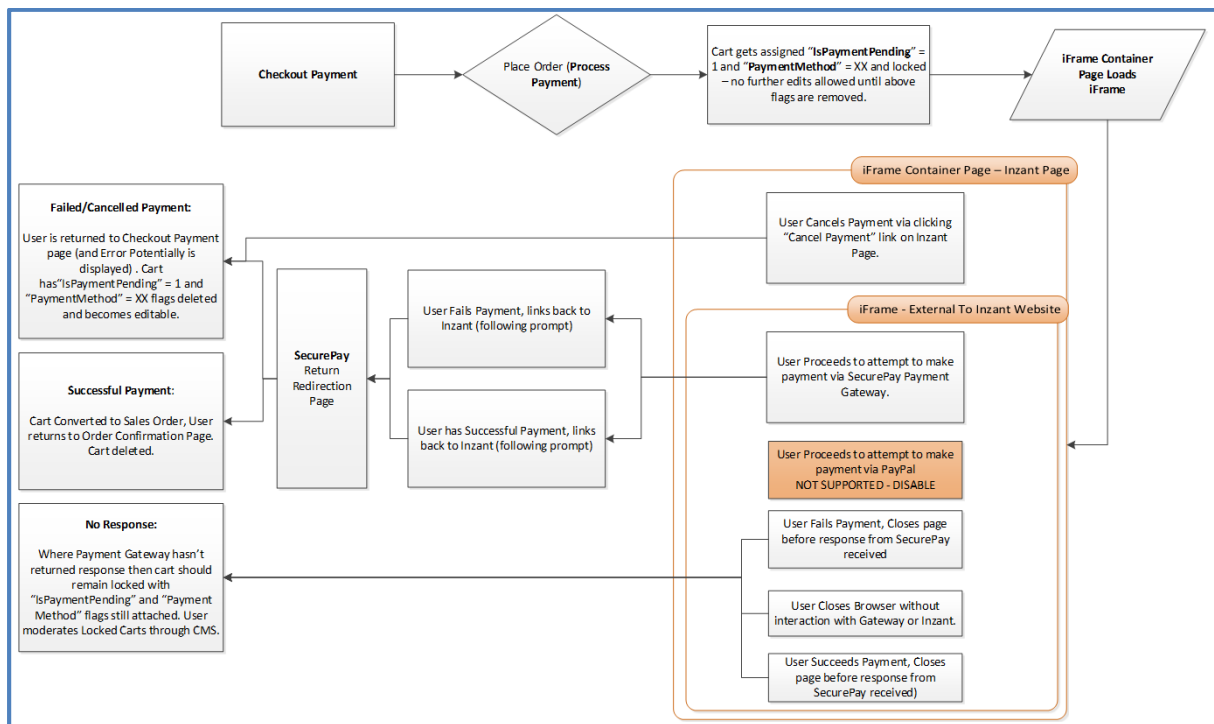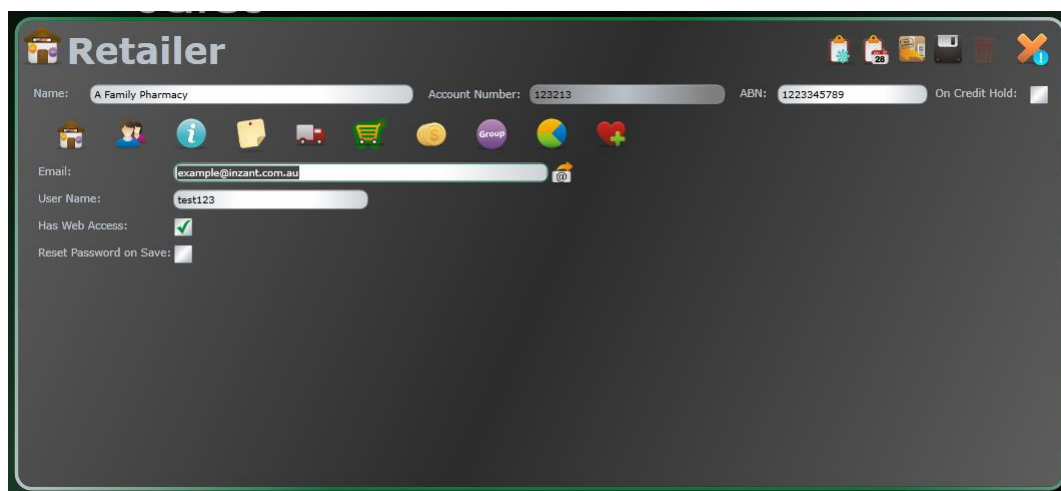
4.6   USER PASSWORD MANAGEMENT

Passwords are not managed by the admin CMS user, but entirely by the account user themselves. There is the potential for the admin user, an Inzant Sales iPad user and the account user to reset their password, generating a temporary password and providing temporary access to their online portal. Passwords require a minimum of 8 characters and enforce the user to include at least 1 number and at least 1 alphabet character.

Admin Users

A Username should be provided by the admin user using the Inzant Sales Web Client – specifically on the "Retailer" page, see a screenshot below. Each time a customer has "Has Web Access" checked and saved their password will be reset to a temporary password, with this being emailed to them and prompting them to login and change it. From this page the admin user can also reset the Account user's password at any time using the "Reset Password on Save" checkbox – then clicking "Save" in the top right corner.

Note: it is essential that the account users have email addresses stored within Inzant Sales.

Website Users (Account Customers)

Users can reset their own passwords using the "Forgot Your Password" link on the login form. This will open another form prompting the user for their username. If the user correctly enters their username, an email will be sent to the email address stored on the account customer with a temporary password. Using the temporary password the user will be able to login and will be prompted straight away to change their password.

iPad Users

iPad users will have the ability to see if an account customer has been enabled for website access or not, in addition to the ability to enter a username and reset a password. This allows the iPad user to create an online account for the Account customer. Reset password's prompt the Account user to follow the same process as if they had elected to reset it themselves via the website, or if the admin user had reset the password.