Intouch Webpoint Ecommerce Objects – Overview

Public - Shop

- SCHEDULE
- SHOPPING CART
- ASSIGN
- LOGIN/ REGISTER
- PROMOTION SUBSCRIBE
- SHIPPING
- TERMS & CONDITIONS
- SUMMARY
- AGREEMENTS/ WAIVERS
- PAYMENT NOMINATION
- PAYMENT CC/DIRECT DEBIT INSTALMENT
- RECEIPT/ BARCODE

Public - Register

- LOGIN/ REGISTER
- GROUP DETAILS
- INDIVIDUAL DETAILS
- TERMS & CONDITIONS
- SUMMARY
- AUTHORISATION
- CONFIRMATION/ BARCODE

Agents

- LOGIN
- MENU
- CHECK DETAILS
- SHOP/ REGISTER/ QUOTE
- EDIT
- ALLOCATE
- REPORTS

Administrator

- LOGIN
- SHOP/ REGISTER
- BULK TRANSACTIONS
- TRANSACTION ENQUIRY
- GUEST ENQUIRY
- REPORTS
- MANIFEST

Monitor

- LOGIN
- VISITOR STATISTICS
- SWITCH ON/OFF
- VISITOR REPORTS

Notes

- Object sequences can vary depending on client needs and guest selections.
- Agents and Administrative staff follow the same steps as the public, if they shop or register.
- Agents can also request quotes and hold bookings.
- Scheduling events is only possible if Respoint is used.
- Guests can sign up for newsletters, promotions, etc. Mail-outs are sent via WebCast.

User guide

- A step-by-step help guide is available on some sites and should be a standard. The best example is on AAERentals.

Public – Shop: Detail

Products

PRODUCT SELECTION

SCHEDULE

SHOPPING CART

- PRODUCT SELECTION and SCHEDULE are only used if scheduling is required.
- Scheduling may include products with unlimited capacity.
- Either the 3-frame calendar or the capacity calendar should be options for scheduling.
- It should be possible to return to PRODUCT SELECTION from the other two pages.
- Entry into any of the three pages should be possible via a client's public site.
- SHOPPING CART should have a variable multi-list, if Category and Attribute are not necessary.
- A retail SHOPPING CART format should be developed, such as an illustrated product list.
- If the list of products avaiable is short, PRODUCT SELECTION may be an alternative to a multi-list cart. It may then include quantity selection.
- SHOPPING CART may not be necessary if all products require scheduling.

Guests

ASSIGN

LOGIN/ REGISTER

GUEST DETAILS

PROMOTION SUBSCRIBE

- ASSIGN is only necessary if a product has a guest card associated with it.
- If ASSIGN is not needed, the guest making the transaction should still register their details.
- The registering guest should not have to return to ASSIGN if there is only one product requiring assignment.
- LOGIN should be able to link to FORGOTTEN PASSWORD.
- GUEST DETAILS should be flexible by allowing all fields to be optionally included. This includes photographs, passwords, delivery options and possible client questions. It should also be regionally sensitive. NZSki is a good example of full ASSIGN functionality.
- PROMOTION SUBSCRIBE should appear if the guest elects to receive publicity. This may divert temporarily to Intouch's subscribe.intouch-usa.com portal for that client.

Sumaries & Agreements

SHIPPING

SUMMARY

PAYMENT NOMINATION

TERMS & CONDITIONS

AGREEMENTS/ WAIVERS

- SHIPPING functionality has been included in previous sites and should be a standard option. FCRM is a good model as it contains registered or standard post options for light items (tickets) within one country.
- SUMMARY should include the ability to edit or delete products.
- SUMMARY, PAYMENT NOMINATION AND TERMS & CONDITIONS are usually combined on one page, although elements may be included on the payment page instead.
- SUMMARY should be a fully portable unit that can be displayed in various places throughout the site.
- Signed AGREEMENTS/WAIVERS should be visible via a link in the guest's receipt email.

Payment

ORDER

PAYMENT
CC/DIRECT DEBIT
INSTALMENT

RECEIPT/ BARCODE

- An ORDER page may be included. It can include a summary of all of the previous steps (shopping cart, shipping, payment nomination). (See NZSki.) It may be the page on which T&Cs are signed.
- PAYMENT should have the following options available:
  - Summary information
  - Insurance option
  - Instalment option. (See NZSki.)
- Payment options should include credit card and direct debit. (See RAL.) We have also been asked to liaise with a third-party financing portal (RAL), though this request is unlikely to happen again.
- RECEIPT should include the following:
  - purchase summary
  - payment details, including purchaser details
  - collection/shipping instructions
  - barcode
  - contact details for the client.

  (See FCRMVehicles.)

Public – Register: Detail

Login

LOGIN/ REGISTER

- This is the standard LOGIN / REGISTER page.

Registration Details

GROUP LEADER REGISTRATION

GROUP DETAILS

- GROUP LEADER details are based on the standard GUEST DETAILS options.
- GROUP DETAILS are the rental details for the group and will probably vary between clients. We will probably build up a list of options that can be included or left out.

Guest Details

INDIVIDUAL DETAILS

TERMS & CONDITIONS

- iNDIVIDUAL DETAILS will vary from client to clent. We will probably build up a list of options that can be included or left out.

Authorisation

SUMMARY

AUTHORISATION

CONFIRMATION/ BARCODE

- SUMMARY includes a summary of both the rental details and the renters' details.
- AUTHORISATION can be included on the same page and requires the inclusion of the Group Leader's identification details. Without this step, registration cannot take place.
- CONFIRMATION should include the following:
  - rental summary
  - renters' details summary
  - collection instructions
  - barcode
  - client contact details.

Note

The above information is based on one site only: AAE Rentals. This is the first of our registration sites, so functionality and specifications will evolve over time.

Agents – Options

Entry

LOGIN	
MENU	

- All agent sites will start with an agent login.
- Operators may be able to log in individually. This should be universal functionality. (See NP360.)
- Where operators exist, agents logging in can make a sale under the name of a specific operator.
- Most will also have a menu of available options.

All Options

CHECK AGENT DETAILS	This would be an option if, for example, the agent is permitted to edit some of their details or they want to check an account balance. (See NP360.)
SHOP	Agents shop in much the same way as the public, though they may have more options and will usually have different prices. (See Agents - Shop: Detail.)
REGISTER	This has not yet been implemented, though it would follow a similar site-map to Public - Register and should be a possible option.
QUOTE	This is a new request that is yet to be implemented. It would probably only be for agents. (See Agents - Quote: Detail.)
VIEW	VIEW may be in the menu with EDIT to let agents know that they may look at a booking without having to change it. (See Agents - Edit: Detail.)
EDIT	EDIT is currently only on NP360. It should be a universal option for agents, though the section may need a significant amount of work. (See Agents - Edit: Detail.)
CANCEL/UNCANCEL	CANCEL/UNCANCEL is an EDIT function, though it should be available as an option on its own. (See Agents - Edit: Detail.)
ALLOCATE	ALLOCATE is currently only on NP360. It may not be needed again so it can be left off the universal site for the moment.
REPORTS	REPORTS allows agents to see detailed and summarised views of their sales activities. (See Agents - Reports: Detail.)
CONTACT	Links such as a client contact email and Terms & Conditions are useful inclusions on the menu. (See NP360.)

Agents – Shop: Detail

Products

PRODUCT SELECTION

SCHEDULE

SHOPPING CART

- Details are similar to Public - Shop: Detail.
- Pricing for agents can be based on fixed discounts, buy groups or arbitrary agreed amounts.

Guests

ASSIGN/ GROUP ALLOCATION

LOGIN/ REGISTER

GUEST DETAILS

PROMOTION SUBSCRIBE

- Details are similar to Public - Shop: Detail.
- ASSIGN can include assigning to a group as well as individuals. (See SnowTrails.)
- GUEST DETAILS requiring collection may be different to the Public site, such as an Agent reference number. (See NP360.)

Sumaries & Agreements

SHIPPING

SUMMARY

TERMS & CONDITIONS

AGREEMENTS/ WAIVERS

- Details are similar to Public - Shop: Detail.
- PAYMENT NOMINATION is not included in agent sites as the agent pays on behalf of their guests.
- TERMS & CONDITIONS and/or AGREEMENTS/WAIVERS are sometimes not included in an agent site, so the order and inclusion of the above objects should be flexible.

Payment

ORDER

PAYMENT CC/HOLD/ACCOUNT

RECEIPT/ BARCODE

- Agents can pay via credit card, direct debit or on account.
- Bookings may also be held, either while requesting a quote or to be paid at a later date.
- When holding bookings, an expiry setting should be available, so that it is possible to release the capacity of a held booking if it is not paid for in time. (See NP360.)
- Receipts may not include a barcode, if the booking is held.
- An agent's receipt should have a link to their guest's receipt, so that they can print it or email their guest. The wording for both of these receipts will almost always be different.

Agents – Register: Detail

This is yet to be done, so use Public – Register: Detail as a guide.

Agents – Quote: Detail

Products, Guests, Summary →

Details are the same as Agents - Shop: Detail.

Quote →

ORDER

PAYMENT OPTIONS

CONFIRMATION

- After completing all details required for a transaction, the agent would have the option to pay or request a quote.
- Once a quote has been requested, the agent would receive a confirmation of their order.
- Using Insight/HelpDesk or email, the agent and client would negotiate a price for the bulk order.
- Once agreed, the agent would receive an email with a link that would take them back into the site.

Payment

ORDER

PAYMENT
CC/ACCOUNT

RECEIPT/
BARCODE

- The agent would come back to the site on the order page.
- An additional field would show the adjusted price.
- When proceeding, they would have the normal agent payment options.
- After payment, they would receive a normal agent receipt.

Client Administrator

- The client would receive the quote request via HelpDesk.
- They would use HelpDesk to negotiate with the agent.
- Once a price was agreed upon, they would need to be able to send an email with a link back to the agent's order.

Agents – Edit: Detail

Edit Options

- VIEW TRANSACTION
- EDIT TRANSACTION
- CANCEL/UNCANCEL

- The above options start in a similar way, with the agent choosing a date-parameter for their search.
- The objects need to be independent so that a site can have any one of them.
  View – see FCRMVehicles admin
  Edit – see NP360 agent
  Cancel – see Hollybank agent.

Find Transaction

- DATE PARAMETERS
- SELECT TRANSACTION

- Date paramaters are the key search method.
- Other options for searching may include booking numbers or an agent reference number. (See NP360.)
- The resulting transaction list shows whether items may be edited/cancelled or not.

Cancel / Uncancel / Edit

- SUMMARY
- EDIT OPTIONS
- CONFIRMATION OF CANCEL/UNCANCEL
- EDIT
- CONFIRMATION OF EDIT

- SUMMARY recalls the transaction details.
- Options to edit, cancel or uncancel a booking may be available at this point, if the initial option is to edit. (See NP360.)
- Bookings that are cancelled or uncancelled, need confirmation.
- EDIT shows a summary or shopping cart with editable fields. Not all fields may be editable. (See NP360.)

Payment

- ORDER
- PAYMENT CC/HOLD/ACCOUNT
- RECEIPT/ BARCODE

- If there is a price difference between the edited booking and its original or a booking is reinstated, it needs to be paid for in the usual way. (See NP360.)

Agents – Reports: Detail

Find Report

DATE PARAMETERS

REPORT SELECTION

- Date selection for reports is established functionality. Dates should default to today and should be sticky if they have been selected previously in the same session.
- Clients may request more than one report-type.
  (As these are usually customised, this functionality doesn't need to be standard at this stage.)

Report

REPORT SUMMARY

REPORT DETAIL

- A standard agent report should be developed, which includes:
  - Date
  - Reference number
  - Guest booking name
  - Products
  - Price.
- NP360 reports can be viewed in summary or detail. This should be standard.
- Reports should have a printable version.

Administrator – Options

Entry

LOGIN	
MENU	

- All admin sites will start with a login.
- Most will also have a menu of available options.

All Options

SHOP	Shopping should be a standard option for Administrator sites. The process will be the same as for agents, with options to hold bookings which may be processed through SalesPoint.
REGISTER	This has not yet been implemented, though it would follow a similar site-map to Public - Register and should be a possible option.
BULK TRANSACTIONS	Functionality exists to allow bulk credit-card processing for instalment plans. (See NZSki.) It should be a standard option as the functionality may be useful for other purposes.
TRANSACTION ENQUIRY	Functionality exists to view a transaction. (See FCRMVehicles.) This should be extended to allow editing and cancelling/uncancelling bookings. (See Agents - Edit: Detail.)
GUEST ENQUIRY	Functionality exists to view/edit guest details. (See NZSki.) This is based on the contact page in Insight/Respoint. It should be a standard option. (See Administrator – Guest: Detail.)
REPORTS	REPORTS have been added to some administrator sites. These are usually customised. A standard report could be added to administrator sites, (See Agent – Reports: Detail.)
MANIFEST	MANIFEST is currently only on Hollybank. It is useful functionality that should be included as a standard. (See Administrator – Manifest: Detail.)

Administrator – Guest Enquiry: Detail

Guest Search

SELECTION PARAMETERS

- A range of selection options should be available for guest selection. These should mirror ResPoint/SalesPoint, using first and last name as the minimum.

Guest Selection

GUEST SELECTION

- A list of possible hits should show basic guest details, such as a contact number, country and transaction ID. (See NZSki.)

Guest Detail

GUEST DETAILS

- This form should show details similar to ResPoint/SalesPoint and include as options other details that are requested from the guest when they register.
- NZSki guest details also includes transaction information and the ability to adjust credit-card details. This may be a useful option to tie it in with transaction information. However, the card number should be encrypted.

Note

The above information is based on one site only: NZSki. However, guest detail collection is common on our software and should reflect its various uses.

Administrator – Manifest: Detail

Tours

TOUR SELECTION

- The tour for which a manifest is required is selected.

Dates

DATE SELECTION

TOUR TIME DETAIL

- The date is selected, defaulting to today.
- A detailed view will show details for only those time-slots that have bookings.

Check In/Out

CHECK IN CHECK OUT

SAVE / PRINT

- Currently, functionality exists to click on a radio button for the check-in and check-out times. This relies on the user selecting the options at exactly the right time. In future, the time may need to default to the current time but be editable.
- Saving the form sets the time.

Manifest

FORM

- Currently, a hand-made form is printable as a manifest. This form pulls in some values from the database.
- The form may need to have more user-controlled options in future.

Note

The above information is based on one site only: Hollybank. However, it is useful functinality that should be part of the Ecommerce Model Site, to extend the Admin facilities.

Monitor: Detail

Login

LOGIN

MENU

- All monitor sites will start with a login, as they are an extension of an admin site.
- If there are numerous options availbable, a menu may follow login.

Overview

VISITOR STATISTICS

SWITCH ON/OFF

- Standard options that should be available on a site monitor are summary statistics and the ability to turn the site on and off.
- The summary statistics include information that will inform the user if there is too much load on the system or it is not functioning.
- Summary statistics are drawn directly from Webpoint's monitor.
- The statistics relate to today's usage.

Reports

VISITOR REPORTS

- Visitor reports are yet to be made.
- They will look at similar statistics to the previous page but over a selectable period of time.
- These reports should not duplicate sales report information.

Note

The above information is based on one site only: NP360. However, it is useful functinality that should be part of the Ecommerce Model Site, to extend the client's control over the site.