



# Streamline™ ERP

## 2022.4 Release Notes

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# Streamline™ E-commerce Redesign - NEW

## Enhancement

### Overview

The Streamline™ E-commerce website has been redesigned to be mobile friendly and is available on a desktop, tablet or a handheld (mobile) device. The following devices and specifications are recommended for optimum resolution:

- Desktop – 1920px x 1080px
- Tablet – 768px x 916px
- Mobile – 425px x 916px

The tablet uses the desktop display or the mobile display depending on the orientation of the tablet.

The functionality remains largely the same as the original e-commerce, with some new features described in this document.

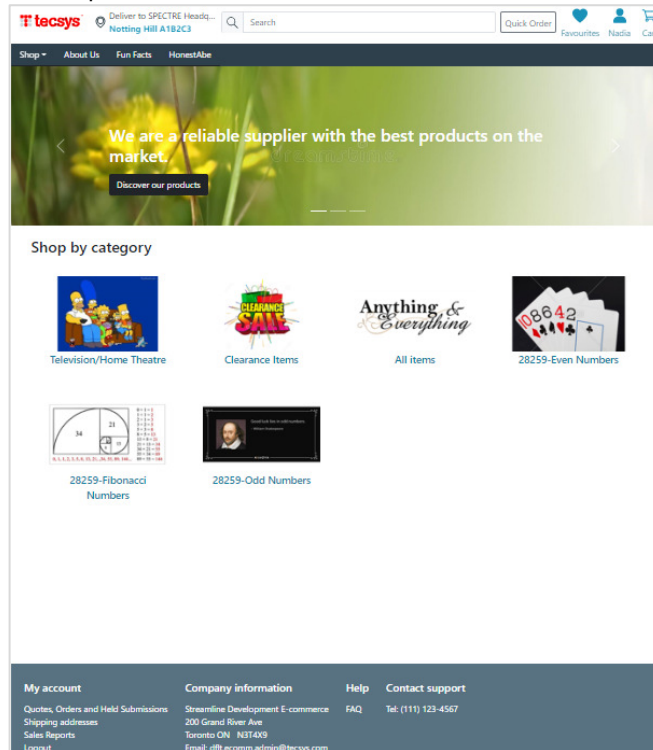
### Home Page

When you launch the website, you land on the home page. The home page includes the following sections:

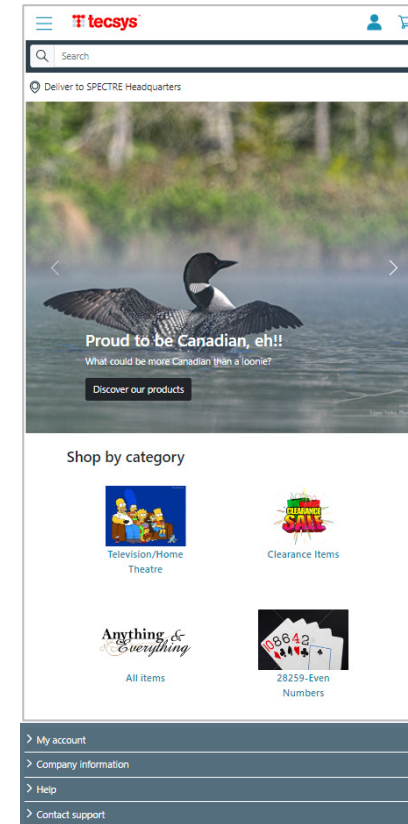
- Webpage Header
- Homepage Body
- Webpage Footer

Here is an example of the home page on a desktop and on a mobile device:

## Desktop:



## Mobile:



## Webpage Header:

The header section at the top of either display includes the following elements for a user currently logged into the website:

- Company Logo - clicking/tapping on the company logo from any page will return you to the Home page.
-  Deliver to – identifies the current ship to address for the user currently logged into the website. Clicking/tapping on Deliver to takes you to a Shipping Addresses page that allows you to select an alternate ship to address if the customer is set up with multiple ship to addresses in Streamline™ ERP. The ship to addresses are now sorted alphabetically by Name.
- Search – allows you to search for products using all the criteria that was available under the Advanced Search. (The advanced search option is no longer available.)

- Quick Order – (found under the  (hamburger) icon for mobile devices) opens the Quick Order page allowing you to enter products and quantities without having to navigate to the product or category pages.
- Favourites  - indicates that there are favourite list(s) for the user currently logged into the website. When the icon is not shaded  then the user has no favourite lists.
- User  - clicking/tapping on the User icon allows you to log into the website. Once you are logged in, the icon changes to the  icon.
  - User IDs can now include symbols and the user ID field has been expanded to 64 characters. This allows an email address to be entered as a user ID.
- Shopping Cart  - allows you to review the items placed in the cart for purchase. The icon indicates the number of products added to the cart (not the quantity of each product). For example, if you add a quantity of 3 for product ABC and a quantity of 5 for product XYZ, the shopping cart will indicate that 2 products have been added: .
- *Menu bar* – the items on the menu bar are available under the  icon on a mobile device. The items on the menu are configurable on the Custom Pages section under Site Administration, available to system administrators only. Menu items may include options like Contact, About Us and so on.
  - The Shop drop list automatically displays on the menu bar when categorization is enabled for the user.

#### Homepage Body

- Banner – you can configure a banner or carousel of banners to be displayed on the home page. This is set up in the Banner Maintenance section under Site Administration, available to system administrators only.
- Discover our products – clicking on the Discover our products hyper link in the banner section launches the Products page for the web user currently logged in. The Products page is based on the web user's E-commerce Page Display Defaults set up in Streamline™ ERP.
- Shop by category/product – you will see Shop by Category if categorization is enabled for the current web user or Shop by Product if categorization is not enabled.

#### Webpage Footer

- My Account – for Guest Users, Login is the only option available. For logged in users the following options are available: Login, Quotes, Orders and Held Submissions, Shipping Addresses, Sales Reports and Logout.
- Company Information – displays the company name and address. This information is taken from Company Setup > Company Info.
- Contact Support – displays the company phone number. This information is taken from Company Setup > Company Info.

#### My Account

For users logged into the website, clicking/tapping on the User  icon opens the My Account menu on the desktop; on a mobile device this information is available under the  icon. The following options are available on the My Account menu:

- Quotes, Orders and Held Submissions
- Shipping Addresses
- Sales Reports
- Logout

#### Favourites

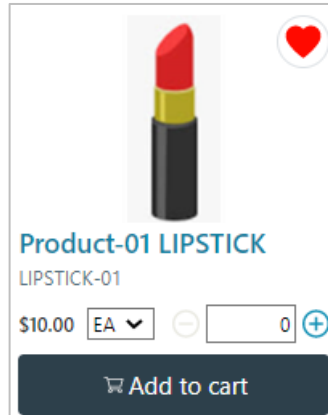
Currently, the system only supports one Favourites list per user. This list is the Default Favourites list.

- If you had multiple Favourite lists before upgrading to the redesigned e-commerce, these lists will still be honoured for filtering, but adding a new product to a favourite list will add that product to the designated Default list only. Removing a product from a favourite will remove that product from all lists (for the current ship to).

## Product Pages

The product page list and tile views now look like this:

List view:



Tile view:



- In Streamline™ ERP > E-commerce Default Controls for Page Display, the fields on the Products (List View) and Products (Tiles View) have been pre-selected and sorted. Both views are query only and cannot be modified. This was done to ensure consistent design and display of product information on the e-commerce website.

When categorization is enabled, breadcrumbs appear below the menu bar when you are browsing through the categories. You can click/tap on any of the categories in the breadcrumb list and go directly to that category. Here is an example:

[MASTER PRODUCT INDEX](#) / [TV & HOME THEATRE](#) / [TELEVISIONS](#) / [LED TVS](#) / [40 - 49 LED TVS](#)

## Checkout Process

The cart checkout is a 3-stage process:

1. Shipping Information – includes contact, shipping address, billing address, delivery method and additional information (PO number, PO release number and additional instructions).
  - Guest users must enter their shipping information. Logged in users will find most fields prepopulated and can edit certain fields only as required.
  - Logged in users of a customer that is set up with multiple ship to's in Streamline™ ERP can now select an alternate ship to address and all product permissions and pricing will update on the cart.

2. Payment Information – determines the method of payment for the order: On Account, Credit Card on File or Credit Card.
  - Credit card information will be saved in Streamline™ ERP when the order is created (see Final Review below for more details).
    - For users that are logged in, the information will be linked to the order and to the customer associated with the web user.
    - For guest users, the information will be linked to the order.
3. Final Review – allows you to make changes to the shipping or payment information, create a quote or create an order.
  - If you change the shipping address, the system will automatically update product pricing, including freight and taxes, as required.
  - When an order is created, if credit card information is entered, a pre-authorization request is sent directly from e-commerce to the payment gateway (Payroc); pre-authorization must be successful for the order process to continue. The credit card information is encrypted via the payment gateway and, for users currently logged into the website, the credit card information is sent to Streamline™ ERP in the form of a token which is stored with the appropriate customer and ship to, as applicable.
  - When a quote is created, if credit card information is entered, the system will not send a pre-authorization request to the payment gateway and the credit card information is not sent to Streamline™ ERP.

### **Streamline™ ERP E-commerce Default Controls for Page Displays**

In addition to the changes made in version 2022.2 to the Products (Details View), Products (List View) and Products (Tiles View), the following changes have been made:

- Quote Submissions/Order Submissions/Held Submissions – the following fields on the Details View screens have a fixed position on the website Quote, Order and Held Submissions Details pages:
  - Product Description
  - Product ID
  - Sell Price
  - Sales UOM
  - Order Quantity

Although you can modify the settings on the List Views and Details Views, these changes will not appear on the website with this release. Removing any of the fields listed above may result in an incorrect display of data on the website and/or errors on the website.

- E-commerce Defaults for Cart Review – the following fields on the Shopping Cart/Checkout (Details View) screen have a fixed position on the website Shopping Cart review page:
  - Product Description
  - Product ID
  - Sell Price
  - Sales UOM
  - Order Quantity

Although you can modify the settings on the List Views and Details Views, these changes will not appear on the website with this release. Removing any of the fields listed above may result in an incorrect display of data on the website and/or errors on the website.

### **Ascending/Descending Order for Quotes, Orders and Held Submissions**

Because columns are not used on the web page, to display an option in ascending or descending order, select an option, for example QuoteNo, from the Sort By drop list and the label will automatically adjust to display QuoteNo - Descending; if you wish to sort in ascending order, select QuoteNo from the list (immediately below QuoteNo – Descending) and the label will automatically adjust to display QuoteNo – Ascending.

