

#### SUPPORTING CONSTRUCTION

# **Online Ordering Made Simple.**





#### **Table of Contents**

My Account Viewing Ord Viewing Bas My Details		Page 3 Page 4 Page 5 Page 5
SupportHu		Page 6
Col	mpany Details  Managing Company Favourites	Page 7 Page 7
	Adding & Editing Contacts	Page 8
	Adding & Editing Addresses	Page 9
Use	ers Administrator User Permissions	Page 10
Prid	ce List	Page 13
	List	
_	Downloading Price List	
Do	cuments	Page 13
	Uploading Documents	
Oro	Downloading Documents  ders & Requisitions	Page 14
	Pending Requisitions	r ago i i
	Approval History	
	Your Requisitions	
Inv	oices & Proof of Delivery	Page 15
	Downloading PODs	
	Downloading Invoices	
<b>Placing Orders</b>		Page 16
Adding to B	asket	
Editing Basi		
Adding Orde Check Out	er Information	
Check Out		
User Favourites		Page 20
Adding a Fa	vourite	_
Adding to B	asket	
Removing a		
	m Product Page	
Fro	m Favourites List	
Company Favourite		Page 23
Removing C	Company Favourite	
Finding Bespoke Products		Page 24
Contact Information		Page 25

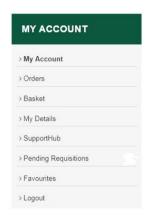






# My Account

After logging into your account on the OnSite Support website your screen will open to the below "My Account" page. From this page you can; review orders, review basket, review details, access the Support Hub, view pending requisitions, view favourites and logout.



#### Welcome to OnSite My Account

Here you can view your details, past orders and also any items you've left in your basket since the last time you were logged in.

Call us on 01293 744 444 or email us at sales.support@onsite-support.co.uk for any help or further information.

#### Your Account Manager:

#### Darren Oliver



#### Experience

Darren has been working at OnSite Support for 4 years now, as a Customer Support Account Manager. He is also in the Website Development Team, and having been so from the start, it's fair to say Darren knows the website inside out. He is best known for the fast efficient service he provides to clients.

#### Top Qualities

- Efficient
- Accurate
- The go-to Website expert

#### What Darren's clients say;

"You know I always have nothing but praise for Darren and therefore OnSite Support as a whole. Darren's a great individual who works fast and accurately – it's a real pleasure to deal with him and he's a great representative for OnSite Support.

- · Quotations are always done accurately and very quickly
- · Invoice queries get sorted in no time at all.
- Any issues with orders including items not delivered, damaged items, replacements etc are done so efficiently.

#### About Us

At OnSite Support our vision is to be the leading experts in construction safety and site support, whilst maintaining excellent ratings in customer service. Keeping our values at front of mind we strive to make a difference for effectiveness, excellence, commitment and innovation. We believe both our vision and our values help us to achieve our mission 'Supporting Construction'.

We provide a quality range of safety, welfare, site equipment, tool and engineering products for the construction and engineering industries. Our Constructor products focus on providing you with what you need, whenever you need it. We know that safety on your site is paramount and our Fallproof range was created to provide tethered tools while working at height.

Telephone: 01293 744 444

Email: darren.oliver@onsite-support.co.uk

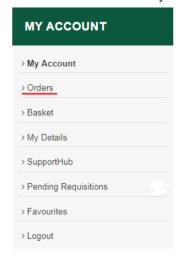
Connect with me on LinkedIn





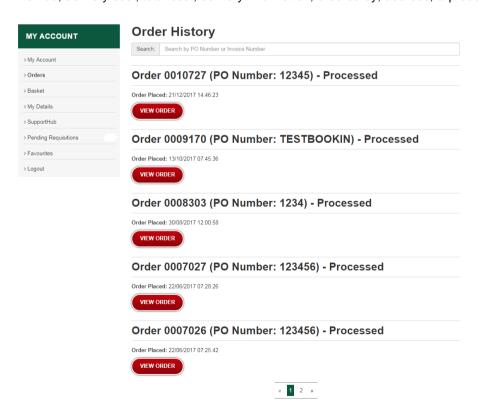
#### Viewing Orders

Select "Orders" from the My Account navigation on the left-hand side of the screen as below.



This page displays all the orders previously placed by a user plus their status (Pending Approval, Processed, & Rejected). You can filter the orders down by PO number or invoice number. The orders are paginated and are output in chronological order.

Clicking on a "View Order" button will direct you to a page displaying the details of the order. Such as delivery method, delivery cost, total cost, delivery information, ordered by, address, & products ordered.

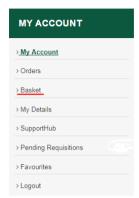






#### Viewing Basket

Select "Basket" from the left hand My Account navigation as below.



This page will either show the products the user has put in the basket, or it will inform the user that the basket is empty. Products can be removed from the basket from this page by selecting "Remove" on the variant required or "Empty Basket" to clear the basket completely. Once items are removed from the basket they can only be added back manually. The user can proceed to checkout from this page.

#### Your basket



#### My Details

This page will output the user's contact information and associated address(es). You have permission to edit your login details, including password. You also have permission edit your contact details via the link shown, as below.

EDIT CONTACT DETAILS IN SUPPORTHUB

You can add addresses via the link shown or edit the existing address(es) listed in SupportHub.





# Support Hub

This is the service we provide when you sign up to an online account with us and offers a personalised portal for each client. It gives you access to your details, price list, documents, orders and requisitions and proof of delivery.

#### Who is an Account Admin?

A user set up on the website who is associated with a company account and is responsible for the management of users for a company.

#### Who is an Account User?

A user set up on the website who is associated with a company account.

#### What can they do?

What an Account Admin is able to access the following within the SupportHub:

- View company general (invoice) information.
- View, add, edit and delete company contacts.
- View Company invoices.
- View, add, edit and delete company users.
- View and edit company price list
- Download company documents (set by OnSite Support)
- View previous orders/requisitions.
- Approve/reject requisitions





# SupportHub as an Account Admin

#### Company Details:

This is where you can view the following information:

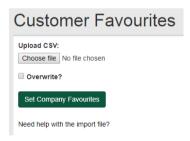
- Account Number
- Name
- Invoice Address 1
- Invoice Address 2
- Invoice Address 3
- Invoice Town
- Invoice County
- Invoice Country
- Invoice Post Code
- Email Address
- Telephone

As an admin, you will also be shown the following four buttons:

- Manage Favourites
- View Contacts
- View Addresses
- View Invoices

### Managing Company Favourites:

Company favourites can be managed by admin users within the SupportHub. Select "Company Details" from the main navigation at the top of the Support Hub page, and then select "Manage Favourites" from the options at the bottom of the page. A CSV file can be uploaded to replace or add to the existing favourites list, as shown below.



Should you require help, please don't hesitate to reach out to our Customer Support Team.

Call: 01293 744 444

Email: sales.support@onsite-support.co.uk

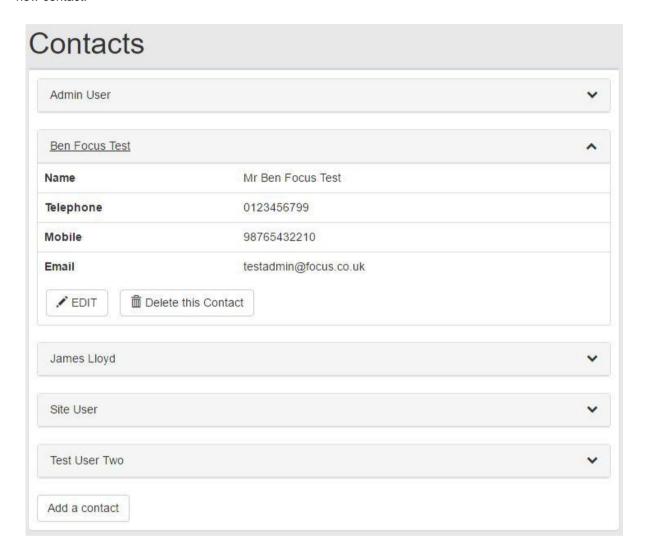






#### **View Contacts**

The user is shown a list of all of the contacts associated with the company. Each contact has an accordion drop down to reveal more information about the contact. Once active, a button to edit and to delete the contact is revealed. Beneath the list of contacts, there is a button to allow the user to add a new contact.



#### Adding a Contact

A user can fill out the form to add a contact to OnSite Support's e-procurement system. All information provided will be stored securely and will not be shared.

Please Note: A telephone number is required for users who will be placing orders.





#### View Addresses

The user is shown a list of all the addresses associated with the company. Each address has an accordion drop down to reveal more information about the address. Once active, a button to edit and to delete the address is revealed.



#### Adding an Address

When an address is created, a user can then be associated with it allowing them to place orders to be delivered to that address.

Please Note: Unless a user is associated with an address they will not be able to place orders for it.





#### **User Management**

This is available to all account users who have the "Administrate Users" permission. The page lists all the users associated with their company who are currently using the OnSite Support website. The list shows the login email and associated contact as well as an option to delete the user. Deleting the user will remove the user's login functionality but will not delete the contact or any orders placed.

Under the list of users is a prompt to "Create a User". Clicking the "Create a User" button will direct to a form where the users details can be edited. The following can be changed from here:

- User Email
- Associated Contact
- User Password
- User Permissions
- User's Requisition Admin
- Available Addresses

The user email address is used as the user's login username.

Contacts can be created/edited under the "Company Details" section of SupportHub. New login details can be created within the user creation field, as shown below. Passwords are set by users upon user creation and is GDPR compliant.



User permissions are a series of check boxes to denote what the user has permission to do, as example below. A user who can "Administrate Users" can only assign permissions that they also have access to.

# Set User Permissions Access Customer Details Access Customer Contacts Adminstrate Users Access Price List

To set which user(s) get notified when a user places a requisition and who has permission to approve or reject the requisitions made, simply tick an approved user as shown below. At least one admin must be selected unless the user is granted the "Directly Place Order" permission in which case the field is not relevant.

#### Select Requisition Approver for user

howto@video.comadmin.user@onsite-support.co.uk

Available Addresses set which address the user can deliver items to when placing an order or requisition.







#### **User Permissions**

The following can be set for each user.

Permission	Description
Access Company Details	Can access the "Company Details" page SupportHub
Administrate Users	Can create, edit and remove users
Access Price List	Can access the price list in SupportHub
Add Company Addresses	Can add an address in SupportHub
Delete Company Addresses	Can delete an address in SupportHub
Edit Company Addresses	Can edit an address in SupportHub
View Company Addresses	Can view all addresses in SupportHub
Add Company Contacts	Can add a contact in SupportHub
Delete Company Contacts	Can delete a contact in SupportHub
Edit Company Contacts	Can edit a contact in SupportHub
View Company Contacts	Can view all contacts in SupportHub
Access Documents	Can access Company Documents in SupportHub (documents in navigation)
Directly Place Order	User can place orders without them needing to be approved by an administrator
Can approve requisitions	User can approve requisitions placed by non-admin users (only users that have this user assigned as their admin)
Can decline requisitions	User can reject requisitions placed by non-admin users (only users that have this user assigned as their admin)
Can view user history	Can view approval and rejection history of the user in SupportHub
Can hide processed/declined requisitions	User can hide requisitions that have been approved or rejected in SupportHub
Ignore terms and conditions	When placing an order the user does not have to agree to Terms and Conditions
Can view prices	Can see prices. If not selected the user will not see prices throughout the entire website at any stage of the order process





Can access non-company approved products	The user can access items that the user does not have as part of their prices table. Prices for these items are set as standard price. If the user does not have this permission products not on the price list will not appear on the website for this user
Can see stock number	Can see stock numbers – Please contact us for further information.
Can participate in rewards scheme	Can access reward scheme – Please contact us for further information.
Can see favourites	Can view their favourites list containing variants in the My Account section of the website.
Can use vouchers	Can use valid vouchers in the checkout process
Access Company Reports	Can access Company Reports in the SupportHub navigation set by OnSite Support – Please contact us for further information.
Can see invoices	Can access the invoices section in SupportHub



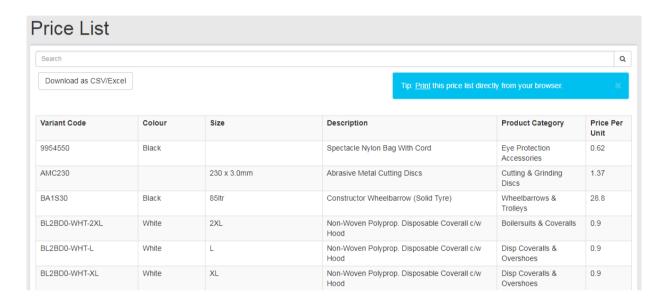


#### **Price List**

If the user has permission, they can view the price list of all company-approved products. The list shows the following for each product:

- Variant Code (Individual code for differing size, colour or other product variations)
- Coloui
- Size
- Description
- Product Category
- Price Per Unit

The list can be filtered using the search function to help find the relevant product quickly. The user can also export the price list to CSV.



#### **Documents**

If the user has permission, they can download any documents that have been assigned to their company by OnSite Support. The list is in chronological order with the upload date and title of the item listed. Contact OnSite Support if you would like a document uploaded to your SupportHub.







#### Orders and Requisitions

The orders and requisitions section is split into 4 sections. Each section has an option to filter their list of requisitions by PO Number or Invoice number.

#### Pending:

Displays all pending requisitions waiting to be approved or rejected. It is only accessible to users with appropriate permissions. The requisitions are paginated and chronologically ordered. Each requisition is an accordion, clicking a requisition will trigger the accordion to show more details. Once dropped down, the requisition can be edited by increasing or decreasing the quantity of the items, which will detach any vouchers associated. A PO number has to be set before approving or rejecting the order. The user can approve or reject (depending on their permission level) the requisition from here once the quantities and PO number has been set.

#### **Approval History:**

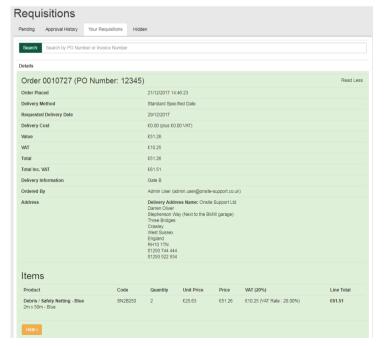
The approval history section will display all the requisitions that the user has previously approved or rejected. The section is only accessible to users with the "Can view customer history" permission. The background of the requisition will be red if it was rejected and green if approved. Each requisition is an accordion, clicking a requisition will show more details. There is a prompt to hide the requisition (if the user has permission). If hidden a requisition will not appear in the list again.

#### Your Requisition:

The "Your Requisitions" section displays all the past requisitions placed by the user. The background of the requisition will be red if it was rejected and green if approved. Each requisition is an accordion, clicking a requisition will show more details. There is a prompt to hide the requisition (if the user has permission). If hidden, this will not appear in the list again.

#### Hidden:

The hidden section outputs all requisitions hidden in the previous sections that have been approved by the user. Hidden requisitions cannot be retrieved.





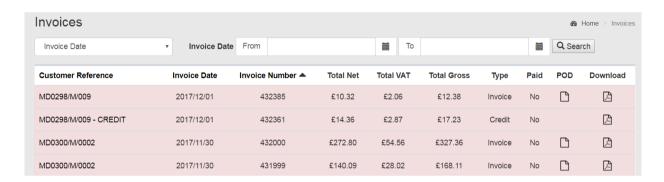




#### View Invoices

Users with permission can view invoices associated with the company. The invoice list will show details of the invoice as well as the tracking links for all the delivery associated with the invoice (if present). There is also a PDF icon in the listing which opens the invoice in PDF format to allow the user to print a copy. If the invoice is unpaid the background is marked as red. If the invoice is paid the background is green.

Proof of Delivery(POD) notes can also be downloaded on the invoices page. These are available for both OnSite Support and Tuffnells deliveries.



Within the invoices area, the user can see the display of the company's aged balance along with details of how the balance can be paid.







# **Placing Orders**

#### Adding to the basket:

Users can add product variants to their basket using the - and + signs to increase/decrease the quantity they wish to purchase. Alternatively, they can type the quantity desired directly into the field.

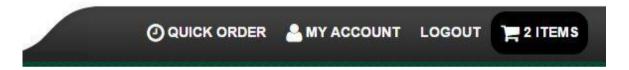
Please Note: If the product is already in the basket this quantity will be appended to the current quantity.





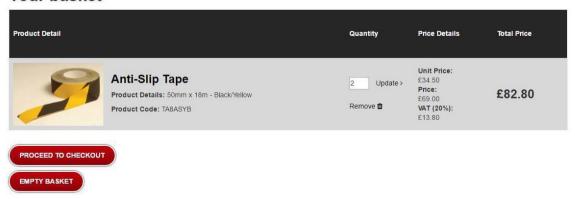
#### Editing the basket:

The user can view the basket and its current items by clicking the shopping cart with the item quantity listed in the website header.



This displays the list of the items in the basket including their price and quantity. The user can update the quantity or remove the item entirely. The user can also click the "Empty Basket" button to remove all items from the basket, this cannot be reversed after clicked. The "Proceed to checkout" button will send the user to the next screen to begin the checkout process.

#### Your basket





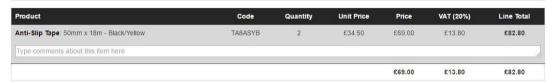




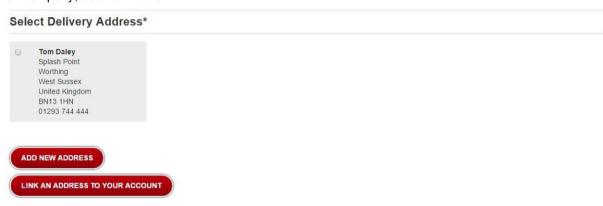
#### Adding order information

The first checkout screen allows the user to add notes for each individual product with a maximum of 255 characters (optional).

#### Order summary:



Following this, the user can select an address for this to be delivered to. Addresses are linked to company and users. An address might be associated with a company but not a user. If this is the case then this address will not be selectable for this user and will need to be set by a user with permission in SupportHub. If they have the correct permissions they can also add a new address or link an address already associated with their company, as shown below.



The user then selects the delivery method.

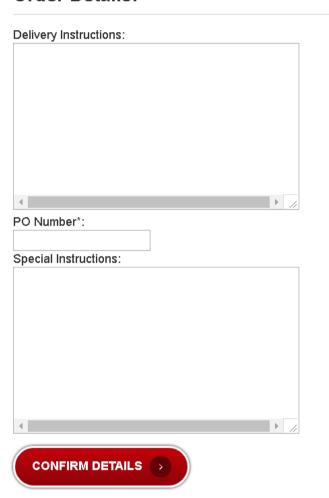






Any additional information can be added below including a PO Number (required for Account Users). Once ready, the user can click the "Confirm Details" button to proceed to the next stage of the checkout process.

#### **Order Details:**



The next stage allows a user to add a voucher code, if they have the permission to do so.

# Checkout Add Voucher Code:



The user is then shown all of the previously added data relating to their basket/checkout process and are given a chance to go back to edit anything that may be an issue. The user can click the "Download Sales Order PDF" button to generate a PDF with the basket/checkout information. Once happy with the order the user can click "Place Order" or "Send Requisition for Approval" button.

If the user has permission to directly place orders they will see the "Place Order" button otherwise they will see the "Send Requisition for Approval" button.



If the user clicks the "Place Order" button they will be shown an overview of their order plus a message stating that their order has been placed. They will also be emailed a confirmation of their order.

If the user clicks the "Send Requisition for Approval" button they will be shown an overview of their order along with a message to tell them their requisition has been sent to their admin. The user will be emailed a confirmation of their requisition, as will any users set as their admin so they are able to approve or reject their requisition.



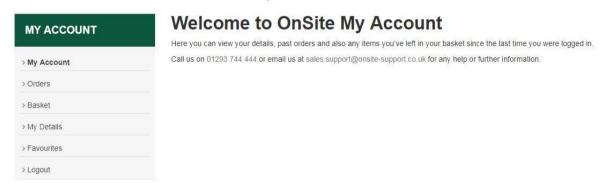


# **User Favourites**

The Wishlist functionality has now been replaced with Favourites. When logged in a user can now select a product to be added to their Favourites list.

#### My Account

A user can view their Favourites list within "My Account":



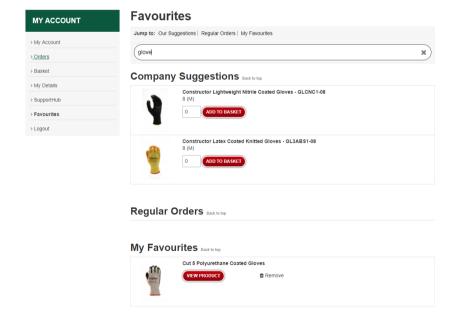
In this section a user will see three different options:

My Favourites: Selected by individual users and limited to 80

Company Suggestions: Company suggestions from the Company Admin User and limited to 80

Regular orders: Favourites which pull in automatically based on what the individual purchases and limited to 80

A user can search for a particular product by typing into the search bar.

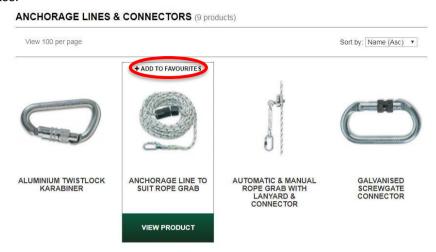






## Adding a Favourite

To add a product to their favourites a user can hover over a product on the product overview page and click + Add to Favourites.



Alternatively on a product page they can click + Add to Favourites

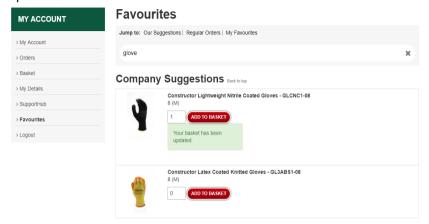






#### Adding to Basket

From the favourites section the user can add products directly to their basket. If a product requires a variant (e.g. they need to choose a size) the user can click the view product button for more details and follow the standard purchase process.



#### Removing a Favourite

Once a product has been added to Favourites it can also be removed in the same way, on either the product overview and product page. They can also be removed by clicking the Remove button in the Favourites list.

#### From the product overview



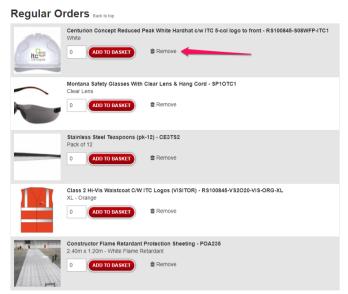
#### From a product page





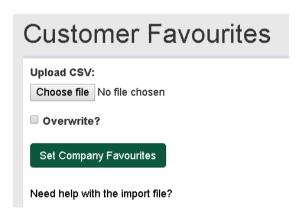


#### Favourites list



#### Company Favourites

Admin Users also have the ability to overwrite company favourites and upload their own list. This can be completed by any admin user logging into the account. To remove company favourites contact our Customer Support Team – 01293 744 444.

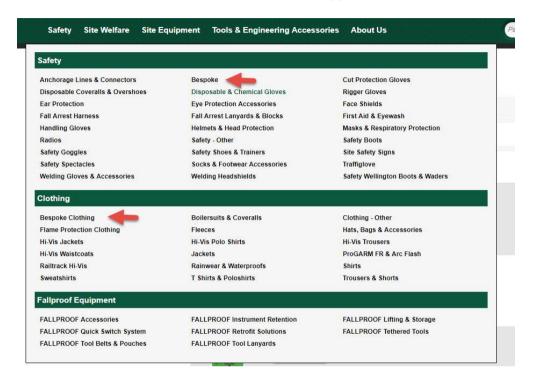






# Finding Bespoke Products

Users who have bespoke products, e.g. safety helmets with company logos on them, can automatically find them under bespoke sections. Please ensure you are logged into your account.



When a user clicks through they can select their bespoke product options.



**Please Note:** Contact your account manager or the Customer Support Team for further information or questions regarding bespoke products – 01293 744 444





# **Contact Information**

For any queries regarding the website, contact your dedicated account manager. Their information can be found on the "My Account" page and will include your account manager's information.

Queries to speak with your account manager may include but are not limited to:

- bespoke products
- products not showing correctly on the website
- adding products to a price list
- users and user administration
- user permissions
- user errors
- creating/editing users and addresses
- website performance
- page errors/malfunction

Alternatively, if you cannot contact them or if you have not been allocated an account manager, contact OnSite Support's Customer Support Team – 01293 744 444.



