



**AUTHORISER  
USER GUIDE**

**OFFICEzone**



## ORDERING WEB ADDRESS: <http://officezone.opweb.co.uk>

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## ORDERING WEB ADDRESS: <http://officezone.opweb.co.uk>

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# 1. SITE LAYOUT



Just take a few moments to familiarise yourself with the site layout.

## **Title Bar**

Clicking on the banner at the very top of the screen anywhere from within the site, will take you back to your homepage.

## **User Option Buttons**

The user option buttons below the tile bar can be used to navigate your way around the website. Select the option required by simply clicking on it. The buttons displayed are set according to your assigned user privileges.

## **Search Facility**

Enter a phrase, product code, or word in the “search for a phrase” box on the left hand side and click the **go!** button. The results of the search appear in the main body.

## **Logon/Logoff**

The “Logon” button will return you to the logon screen. The “logoff” button will log you out of the site.

## **Help**

Easy, accessible, on line help is available for you via the “Help” button.

## 2. BUILD AN ORDER



There are a number of tools to assist you with building an order.

### **Browse the Catalogue**

The “Catalogue” button offers a list of product classes for which there are products available. If you click on one of these classes a list of matching products will be displayed. The list presents the product code, product description, unit price and product per for each of these products. Clicking on an individual product description will give you greater detail about that product, showing the full pricing structure of the product and a picture (if one is available).

### **Search Facility**

The search facility to the right hand of the screen can be used to search for a particular product, or group of items. Enter a phrase, product code, or word in the “search for a phrase” box, select your search criteria, and click the **go!** button.

### **Requisitions**

Requisitions are saved lists of products that can help you build up an order more quickly. Requisitions are especially useful if you order particular products on a regular basis. Clicking on the requisition name under the “Requisitions” tab will offer the list of products within that requisition.

### **Favourites**

Once you have placed an order on the system, the most popular items you have ordered will be added to your “Favourites” list automatically. The list can be sorted by product code or by description.

### **Contracts**

The “Contracts” button offers a list of product classes for which there are contract products available. Clicking on a class name offers the list of products within that class that are on contract.

### **Promotions**

The “Promotions” button offers a list of product classes for which there are promotional products available. Clicking on a class name offers the list of products within that class that are on promotion. Some promotions are exclusive to the web.

### **Quick Ordering**

The “Quick Ordering” facility can be used to quickly build up an order for items that you know the product codes of. Simply enter the product codes and the quantities required line by line, then one click adds all the items to your order. If an incorrect product code is entered you will see an on screen message informing you so.

### **Specials**

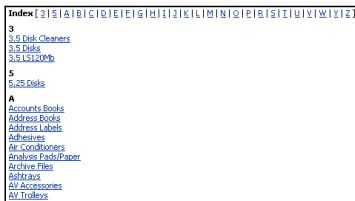
The “Specials” button allows you to order products that are not available within the catalogue. When placing an order for a special, you simply enter the product code (optional), product description, unit price (optional), per (optional), quantity required and price (optional).

# 3. BUILD AN ORDER



## Index

The “Index” offers an alphabetically ordered list of product sub-class for which there are products available. Clicking on the sub-class name will display the list of products.



## Product Page

Click on a product description to drill down to the product page. This page displays the product picture and extended description (if available), pricing information including your price, unit of measure and alternative products.

## Add an Item to an Order

To order a product, simply enter the desired amount in to any screen containing a quantity field, and click on **Add to order**, or press the Enter key. As long as a valid quantity has been assigned to the product, the line will be added to your order, which you will view in the “Your Order” screen.

# 4. YOUR ORDER



Whenever you add to your order, you will return to the “Your Order” screen. If you currently have an order in progress, the list of products you have selected will be displayed. Each order line will display the product code, product description, unit price, per, quantity, total price and notes, if available.

Your Order <a href="#">[saved orders]</a>   <a href="#">[past orders]</a>				
Product Description	Unit price (Per)	Quantity	Total price+	
WT2050 <a href="#">Wt Zambesi 15.5x11.5x1.5s Man Env PK125</a>	£50.86 (1)	<input type="text" value="1"/>	£50.86	<input type="checkbox"/>
2084754 <a href="#">Bostik All Purpose Adh 50ml Clr (Priced per 1, normal pack size is 6)</a>	£1.08 (1)	<input type="text" value="1"/>	£1.08	<input type="checkbox"/>
19054 <a href="#">Mmaker Prof Wh 80g A4 500/Rm 2500/Cn (Priced per 1, normal pack size is 5)</a>	£9.39 (1)	<input type="text" value="1"/>	£9.39	<input type="checkbox"/>
			<b>£61.33</b>	

+ does not reflect any non-updated changes made to Quantity

[Update changes](#) [Clear](#) [Save as requisition](#) [Add  to requisition](#) [Save order](#) [Confirm order](#)

### Change Product Quantities on an Order

To amend the quantities on an order, simply change the quantity for the order line in the quantity field and click on **Update changes**.

### Remove a Product from an Order

To delete a product line from the order, either delete the quantity for the order line, or enter “0” (zero) in the quantity field and click on **Update changes**.

### Clear an Active Order

To clear an active order entirely, click **Clear**.

## 5. CONFIRM AN ORDER



By clicking “Confirm Order” you will be taken to the “Order details” screen on a secure server connection. **Note: You will not be committed to the order until you press the “Send order” button.**

### Order Details Screen

When you are happy with your choice of products choose to “Confirm order”. The fields below will already be populated as your user profile has upload on the system.

- **Contact Name and Email Address**
- **Delivery Address and Invoice Address**  
Select or enter your delivery and invoice address. If you have more than one invoice or delivery address, a list of other addresses can be viewed via the drop down arrow.
- **Notes**  
Any special instructions for the order can be entered into the notes field.
- **Order Reference**  
Select your reference from the “Order reference” field. If you have more than one structured reference, a list of other references can be viewed via the drop down arrow.
- **Order Line Reference**  
If you would like a different reference from the order reference, against an individual order line, select it from the drop down list against the order line.
- **Order Line Notes**  
Any special instructions for an order line can be entered into the notes field.

# 6. CONFIRM AN ORDER



**Order details**  
**You are now using a secure connection**  
Please fill in the details below and click on the 'Send order' button at the bottom of the screen to complete your order

**Contact name:**  
Andrew Smith

**Email address:**  
A.Smith@Fishycerr.co.uk

**Delivery address:**  
[0]: SG18 8EA (Cerr Fishing Supplies, Barbel House, Pike Road Ind. Est., Biggleswade)

**Invoice address:**  
[0]: SG18 8EA (Cerr Fishing Supplies, Barbel House, Pike Road Ind. Est., Biggleswade)

**Payment method:**  
 Account  Online card payment  Card entry

**Card details:**  
Name: Mr A. Smith  
Number: 2724838000783450  
Expiry date: 01 / 03 (month/year)

**Notes:**  
Please deliver to the first floor

**Order reference ([shop]/[staff]/[ord.no.]):**  
NOHA (Northampton) / 123456

Product description	Qty	Total price	Reference ([shop]/[staff]/[ord.no.]):	Notes (no more than 4 lines):
Stress Buster Headrest	1	£18.00	NOHA / 123456	
Stress Buster Footrest	1	£18.00	BEDF / 123456	

**Overall total: £36.00**  
**VAT: £6.30**  
**VAT-inclusive total: £42.30**

## Send Order

When you are happy with the order, and the details are correct, click the **Send order** button. You will see an on-screen "Order Confirmation" informing you of the order number. If you are a user who requires their orders to be authorised, the "Order Confirmation" screen will display the order number and state that the order is awaiting authorisation. An email prompt will be sent to the authoriser informing them that an order requiring their authorisation has been sent.

# 7. SAVE AN ORDER



You can save an order for later retrieval via the “Your order” screen. Once you have built up your list of products, click the **Save order** button; optionally enter some, or all of the order details before selecting to **Save order**. Allocate a name for the saved order (you can have more than one) and select “Save”. Your order will now appear in your saved orders list which can be accessed via the “Saved orders” link under “Your Orders”.

## Edit the Name of a Saved Order

Click the **e** - edit action link, amend the existing name and click on **Save**.

## View a Saved Order

Click the **v** - view action link to view and print the saved order.

## Amend a Saved Order

Click the **I** – load action link to amend the order lines, order line quantities and add further products.

## Send a Saved Order

When you are ready to send a saved order, click the **I** – load action link, make any amendments as required, then click the **Confirm order** button. Complete the order details and click **Send order**

## Delete a Saved Order

Click the **d** – delete action link to delete a saved order. The order will still appear greyed out in your saved orders list. The order can be retrieved by clicking on the **u** – undelete action link, or completely removed by clicking the **f** – flush action link (these only become active after the order has been deleted).

# 8. REQUISITIONS



Requisitions are saved lists of products that can help you build up an order more quickly.

### Create a Requisition

To save a requisition, click on **Save as requisition** from the “Your order” screen. If you only require certain products from an order to be saved to a requisition, tick the products required and click on **Add to requisition**. You will be prompted to name the requisition, (to save a requisition with product quantities, ensure the “Save product quantities” is checked) and set the access level for other users.

**Requisition details**

**Requisition name:**  
Weekly

Save product quantities

**Allow access by:**

Yourself only

All account users

Yourself and the following selected users\*

andy (andy)  
Manager (Martin)  
mark (mark adams)  
Martin (Martin Rouse)

Save Cancel

\*Click on a user to select, use control click to select multiple users.

### Create an Order from a Requisition

The named requisition can be used as a rapid method of ordering products that you purchase on a regular basis. To access the requisition, click on the **Requisitions** button, and select the named requisition from the list.

A requisition saved with quantities will transfer all the lines to an order when the **Add to order** button is clicked, deleting the quantity from a line in the requisition will prevent that line from being transferred to the order.

On a requisition saved without quantities, you have to enter the quantity for the product that you wish to order and click on **Add to order**.

### Amend a Requisition

To add further items to a requisition, choose the products required from the "Your order" screen and click the **Add to requisition** button. Select the requisition name from the drop down list, and click on the **Go!** button.

To remove products from a requisition, uncheck the items you wish to delete and click on **Update changes (uncheck items to delete)**.

# 9. PAST ORDERS



"Past Orders" displays a list of orders you have placed on the system. Past orders can be accessed via the "Past orders" link under the "Your Orders" button.

### View Your Past Orders

A past order can be viewed by clicking on the order value. If you wish to print a copy of the order, select the **Printer-friendly\* version** link, then Print by choosing File/Print from your browser's menu.

### Extract your Order Data

You can extract and email yourself with a report on your past orders using the "Extract orders" link. Simply enter the email address you require the report to be sent to, and enter the optional dates. Click on **Generate report**.

### View Past Orders for Your Account

To view past orders for your account, click the **Orders** button. View an individual users past orders by selecting their name from the drop down list, then click on **Generate report**. You can extract and email yourself with a report on your accounts past orders using the "Extract order data" link. Simply enter the email address you require the report to be sent to, select the users from the list (multiple users can be selected by clicking on their name whilst holding down the ctrl key, or select a consecutive range by holding down the shift key, select the first name in the range, and the last name in the range) and enter the optional dates. Click on **Generate report**.

Contact name	Date order logged	Date email sent	No	Ref	Order value
<a href="#">Teresa</a>	23/10/2002 09:47	23/10/2002 09:47	315	BEDF/ /123456	<a href="#">£36.00</a>
<a href="#">Teresa</a>	10/10/2002 16:09	10/10/2002 16:09	314	BEDF/ /erwerw	<a href="#">£335.90</a>
<a href="#">gobio</a>	09/09/2002 17:02	09/09/2002 17:02	312	BEDF/ /rwerwe	<a href="#">£0.39</a>
<a href="#">gobio</a>	14/06/2002 11:45	09/09/2002 17:03	313	BEDF/ /123456	<a href="#">£55.46</a>
<a href="#">simon</a>	05/06/2002 11:56	05/06/2002 11:56	311	This is the order ref	<a href="#">£36.45</a>

# 10. RETURNS



If returns have been enabled for your user profile, an "r" - return action link will appear to the left of the order in the "Past Orders" screen.

## **Return an Order**

To return an order, click on the r - return link, by default all lines on the order are marked to be returned. To remove a line from a return order, uncheck the order line. Amend any quantities as necessary for the order lines you do wish to return, enter the reason for the return and click on **Return all quantities**.

# 11. UNAUTHORISED ORDERS



The “Unauthorised Orders” screen displays a list of orders awaiting authorisation. If you have been ‘named’ on another user’s settings as their authoriser for orders, you will receive an email informing you that an order is awaiting authorisation, and the sender of the order will receive an on screen message to the same effect. Upon your next logon, the screen will default to the “Unauthorised orders” window.

When the order has been authorised, edited, or deleted, the user who placed the order will be sent a confirmation email informing them of the action taken.

## **View an Unauthorised Order**

Click the **v** - view action link to view the details of an unauthorised order.

## **Authorise/Send the Order**

Click the **a** - authorise action link to authorise/send the order.

## **Amend an Unauthorised Order**

To amend the order line quantities, add or remove order lines, or to change the order details, click the **l** – load action link.

## **Delete an Unauthorised Order**

Click the **d** – delete action link to delete an unauthorised order. The unauthorised order will still appear greyed out in your unauthorised orders list. The order can be retrieved by clicking on the **u** – undelete action link, or completely removed by clicking the **f** – flush action link (these only become active after the order has been deleted).

# 12. REPORTS



In accordance with your user permissions, you will be able to generate general reports, budget reports and user reports for your online ordering with Prolink Web.

## Graphical Report

Simply click on the **Generate report** button to produce a report. The initial settings generate a report showing total spend by account. The "Report by" buttons allow you to select the way in which the report is totalled, select from "account", "user", "product class", "product", "cost centre", or "reference". The "Report on" buttons allow you to choose between showing the "total spend", "order count" or "line count" for each total. Graphical totals can also be displayed by ticking the **graphical totals** box. The values, by default are rounded to the nearest pound (or euro). Ticking "precise currency values" this will display the pence (or cents).

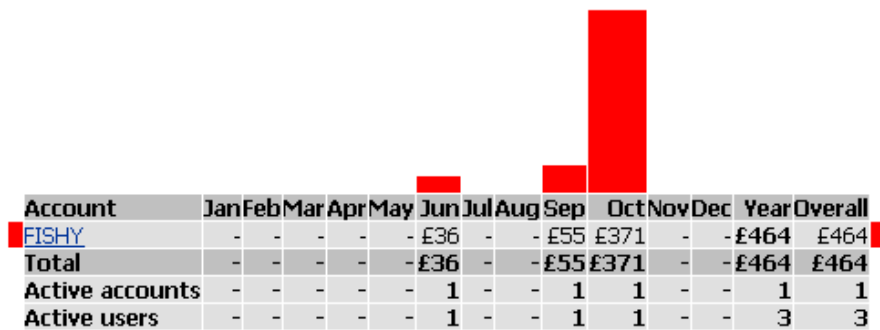
**Graphical reports** [[budget report](#) | [extract order data](#) | [extract user data](#)]

User:

Report by:  account  user  product class  product  cost centre  
 reference

Report on:  total spend  order count  line count

Show:  precise currency values  graphical totals



Click on a row heading to see that row in more detail.

## Budget Report

Displays any budgets set for the account or users of the account, with the spend to date.

# 13. REPORTS



## **Extract User Data**

Generates a report containing the following information: -

Account name, Username, password, contact name, email address, company name, budget value, budget overspend, budget start date, budget end date, authorised by, for orders values over, delivery address, delivery postcode, invoice address and invoice postcode.

## **Extract Order Data**

Generates a report containing the following information: -

Supplier EAN, product code, quantity ordered, unit price paid, total price paid, reference, order number, order date, order time, contact name and account name.