

Storefront Retail Process

Revised March 27th, 2020

Overview

Current Storefront caters for account customers to place orders. Storefront itself does not handle payments. A shopper must be associated with a specific Nexus Debtor account. An Order submitted via Storefront is treated the same as an order created in Nexus ERP, although there is an additional optional process available which allows automated pickslip printing for orders coming into the Nexus system via Storefront.

There has been an increasing demand to expand Storefront's functionality to allow retail customers to place orders. This document is our attempt to specify how the Storefront Retail business process should work if we were to develop this feature. The retail Storefront website will be offered with a different URL to account shoppers.

Guest Shopper browsing

Storefront retail website will allow shoppers browsing through products without first logging in. It also allows guest shoppers to add items to a shopping trolley. However, if the shopper would like to checkout, then he/she will be directed to Registration/login page.

Retail Shopper Registration

If the shopper has not set up an shopping account, then he/she will need to click on the Create a new account link.

Information required for registration

The registration will require the following information

- Email address (to be validated)
- Password
- Best contact number

Email validation

Once registration page is submitted, Storefront will send out a validation link to the registered email address. The shopper needs to click on the link to validate the email address. Once this process is completed, the account is then active, and the shopper can use the registered email address and password to login.

Account Management

A retail shopper, once logged in, can choose to manage his/her user profile. This include

- Shipping address (Multiple allowed), this is only applicable if the business offers delivery service to retail customers. At this stage, no address validation is supported, basic address format is validated.
- Billing address
- Contact phone number

This information will be maintained in Storefront Retail. The shopper can also view past order history.

At this stage, no automated order return or exchange process is planned for Storefront Retail. Any enquiries regarding post sale service need to be handled manually.

Lost password Management

On sign in page, there will be a lost password link. Click that link will initiate an email being sent to the registered email address with a password reset link.

If multiple incorrect passwords attempts have been made (say 5 times), the shopper will be put on hold, and be prompted to click on a reset password link before he/she is reactivated.

Order process in Storefront Retail

If a retail order contains items that are of random weight nature, then the total can only be calculated approximately. The random weight item will be highlighted and a note pops up warning the shopper the cost for this item is estimation only and the final figure may be adjusted based on the true weight of the selected product at a later stage. Upon check out, the shopper will be asked to tick a box to acknowledge and authorise the adjustment of the final order price and be directed to the pre-authorisation of payment process.

Regardless whether an order contains items that are of random weight nature, Storefront Retail will do a pre-auth payment upon checkout. The shopper will be directed to a Payment Gateway to process payment via credit card or Paypal account.

- If the pre-auth payment is successful, then an order is created in Nexus, and the shopper receives
 - o an Order Number and **payment pre-authorized message** showing on screen
 - o an Order Acknowledgement email with order number and payment pre-authorized message
 - o a PDF attachment to the email showing ordered items
- If the pre-auth payment is unsuccessful, the shopper will be advised and taken back to the payment page where he/she can try again. If the pre-auth payment is not eventuated, the items will remain in the shopper's trolley, and no order will be created.

Order process in Nexus

When the order created in Storefront Retail is processed by Nexus operators for picking, after weighing the random weight item, the sales order will be updated per normal. Before it can be released to an invoice, a **pre-payment process** needs to take place. During this process, Nexus will send a new transaction request to the payment gateway with the previously issued pre-auth ID, and try to process the payment for the finalised total amount.

If the payment is successful, then

- a receipt is created for the sales order in Nexus
- an email update is sent to the shopper (Nexus will store the email address against the Debtor) informing the shopper that the payment is finalised, and the total charged amount.
- The fulfillment of the order will be handled per normal including releasing to an invoice, delivery and so on

If the payment is unsuccessful, then manual intervention is needed, as this could be due to insufficient balance on the card or the card has been cancelled since the pre-authorisation. The operator may need to call the customer to collect the payment over the phone, advise the customer to pick up and pay at the counter or arrange for payment at delivery, which is a choice of the business.

Pick up or Delivery

Storefront Retail will support both goods Pickup and Delivery. It's our client's business decision to offer either or both.

If pickup is selected, then a predetermined warehouse address for pick up will be provided to the shopper. Storefront Retail at this stage will NOT be able to handle ordering across multiple warehouses, nor selection of pick up locations.

If delivery is offered by the business, and the shopper selects delivery, then deliver addresses saved by the shopper will be presented with one being selected as a default. If no delivery address has been saved, then the shopper will need to enter a delivery address and this address will be saved in the shopper's account profile.

At this stage, only a flat delivery fee can be added to all deliveries. Client may have disclaimers to limit deliveries within certain post codes list.

Nexus Debtors created via Storefront Retail and customer services

Unlike current Storefront for account customers, all shoppers registered via Storefront Retail will be created as an unique INACTIVE Debtor in Nexus based on a pre-defined template, with default warehouse and default values in many master fields, with a Debtor Code prefix ZZ. No orders can be created by an operator for these debtors, and these debtors do not appear in the Debtor lookups used in sales processes. However, an operator can still enquire about a Debtor in this category, view sales history, and access the Debtor Master Maintenance and make this Debtor to be Active if necessary (This will be applicable if the Debtor is to be turned into an account Debtor).

Nexus Operators can update the Shopper details including delivery addresses just like any other Debtors. Should the shopper ring up about an order, the Operator can also perform the following tasks

- update the delivery address or add delivery note for that order if necessary
- cancel the order and initiate a refund if the order is already paid for
- alter the quantity and process additional payment or refund where applicable

Storefront Retail Future Enhancements

Certain functionalities will not be included in the initial implementation of Storefront Retail. However, we do envisage the following features to be added in later releases.

- Image support on products including thumbnails and larger images.
- Fact sheet attachments for products
- Multiple Warehouse support, so shoppers can purchase products across multiple warehouses
- Address validation with external address database (Integration with 3rd party product needed)
- Varied delivery fee based on post codes