

# VORTEX

## IAN RAMSEY CENTRE

### M2 BUILD FUNCTIONAL SPECIFICATION

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# Document History

Version	Date	Author(s)	Notes
0.1	28/11/17	James Beasley	Initial draft
1.0	1/12/17	James Beasley	Ready for client approval

## Introduction

This specification represents the full set of project requirements. This document is intended for all project stakeholders and the descriptions should result in the same expectation of the system from both Vortex and the client. It exists for the following reasons:

- i. The project budget is determined by the contents of this document
- ii. It describes the full requirements regarding the operation and management of the website or change;
  - a. Only functionality that is explicitly defined and detailed in the document will be developed as part of the agreed project budget
  - b. In the event of any discrepancy between the design or wireframe and this written specification, this written specification always takes precedence, with no exceptions
- iii. This document is used to design the technical architecture of the system;
  - a. Based on this document the Vortex development team will design the technical foundation and make the technical choices required
  - b. Where no design or explicit instructions (within this document) exist the Vortex development team reserve the right to build functionality in a manner that we deem to be the most logical and efficient within the available budget
- iv. Used as a basis for both client and Vortex testing;
  - a. This document will be used to determine if the completed project meets its requirements

Deviations in requirements can take place by following the documented change procedure (see Appendix).

This document is designed to work in concert with the agreed designs.

# Visuals

- i. The following table details all designs that will be produced as part of this project for desktop (D), tablet (T) and mobile (M)
- ii. All designs require client sign off before use
- iii. All templates will be built for and optimised in browsers at 100% zoom (default zoom level) – Vortex cannot accept responsibility for the behaviour of website elements at custom zoom levels unless this is a specific requirement before project commencement

Page	D	T	M	Comments
Homepage	✓	✓	✓	
Events listing page	✓	✓	✓	Category listing page
Individual events page	✓	✓	✓	
Publications	✓	✓	✓	Category listing page
Publications downloads page	✓	✓	✓	
Personnel	✓	✓	✓	Meet the team
Personnel - Bio page	✓	✓	✓	Individual team member page
Booking Confirmation	✓	✓	✓	Basket / Cart page
Order Confirmation	✓	✓	✓	
Login / Create an Account	✓	✓	✓	
Account Dashboard	✓	✓	✓	
Contact Us	✓	✓	✓	
Blog Landing page	✓	✓	✓	
Individual Blog page	✓	✓	✓	

# Platform & Browser Support

- i. Desktop Browsers
  - a. The current version of Microsoft Edge (Windows)
  - b. The current and previous version of Firefox (Windows, macOS, Linux)
  - c. The current and previous version of Chrome (Windows, macOS, Linux)
  - d. The current and previous version of Safari (macOS)
- ii. Android
  - a. Current version of Chrome on Android 4.1+
  - b. Chrome WebView on Android 4.4+
- iii. iOS
  - a. Mobile Safari on the current and previous major version of iOS
  - b. Current version of Chrome for iOS
- iv. Optimising the site for browsers outside of this list, for example, a new version of a browser will be chargeable at the Vortex hourly rate.
- v. The administration area will be optimised for use in Chrome
- vi. Vortex can optimise the administration area for any other browsers at the Vortex hourly rate
- vii. Screen Resolutions
  - a. Vortex will optimise the site based on the following resolutions, using the default browser in each case:
    - i. Desktop: 1024px and upwards
    - ii. Tablet: 768px - 1023px
    - iii. Mobile: 320px - 767px

## Infrastructure

Hosting with Vortex	Yes
SSL certification required	Yes
DNS manager	Vortex

### Domains

- i. The website will be hosted at <https://www.ianramseycentre.info/>
- ii. The CMS administration area will be accessible at <https://www.ianramseycentre.info/administration>



# Data import and support

## Data disclaimer

Vortex will not unless quoted for manage, support or input any client data into the new site unless stated and agreed in the estimate. Any support surrounding data will be at £90+VAT or can be managed through an SLA if the client has one at the specified hourly rate.

The client (IRC) will be responsible for the transfer of data from their current site to the new one. Vortex will assist where possible by providing advice and a CSV template to populate but any assistance which exceeds this will be classed as chargeable work.

The migration of data can be actioned by Vortex for an additional fee. Please let your account manager / project manager know if this is something you would like to discuss.

# Front End functions

## 1. Site Wide Elements

### 1.1. Header

The header will contain the following:

#### 1.1.1. Main Strip

- i. Logos - Oxford University and IRC
- ii. About Us
- iii. Contact Us
- iv. Search input
  - a. Will submit search by keying enter
- v. Login / Register
  - a. Will link to the Login / Create Account page if a user is not logged in.
  - b. Will feature a dropdown menu with links to pages in the account area and a sign out link if a user is already logged in.
- vi. Booking Confirmation (Basket)

### 1.2. Navigation

- i. On click the menu links will be activated

### 1.3. Footer

- i. The footer will contain
  - a. Newsletter sign up strip
  - b. Social media icons:
    - i. Facebook
    - ii. Twitter
    - iii. YouTube
  - c. Oxford University and IRC Logos
    - i. Which will both link to the homepage
  - d. Content links
  - e. Contact information
    - i. Address
    - ii. Email (mailto: link)
    - iii. Telephone number (tel: link)
  - f. Copyright information

- g. Legal page links

## 2. Homepage

### 2.1. Homepage Hero Banner

The following elements will be managed through the banner manager module in the administration area and can be edited:

- a. Background image
- b. Title
- c. Subtitle
- d. CTA button 1 link
- e. CTA button 2 link
- f. CTA button 1 text
- g. CTA button 2 text

### 2.2. News Alert Banner

- i. Pulls in the title of the latest 5 blog posts based on dates published.
- ii. Clicking the title of the post will link through to the relevant page.
- iii. The titles will scroll automatically and continuously or alternatively, clicking the right hand side arrow will display the next title available.

### 2.3. Introduction Panel

- i. This will be managed using a WYSIWYG editor in the admin.

### 2.4. Featured Content Slider

- i. Featured events, videos, personnel and publications will be pulled into this slider.
- ii. Content can be filtered using the text links above the slider and will filter content based on their attributes.
- iii. The content will contain:
  - a. Primary product image
  - b. Product name
  - c. Date
  - d. Author
- iv. When more than 4 featured products are populated through they will be displayed in a carousel
  - a. The carousel will be navigated using arrows on the left and right of the featured products

## 2.5. Quote Panel

- i. This will be managed using a WYSIWYG editor in the admin.
- ii. This will be a static banner, not scrolling.

## 2.6. Newsletter Sign up

- i. The user can sign up for marketing newsletters from the homepage by entering their email address
  - a. This will be validated using basic email address validation against @domain.tld
- ii. Clicking the arrow 'sign up' button will display a success message and submit the details to be saved for reference in the admin area.

iii. The newsletter sign up will be synced with Mailchimp using the MailChimp M2 plugin by ebizmart.

## 3. Categories

### 3.1. Category hierarchy

- i. For this project there will be only one category level
  - a. Parent category (e.g. Events)

### 3.2. Category template

- i. Categories with no products assigned to them will display differently to those which are at the lowest level and have products directly assigned to them
- ii. The categories will be hosted at [https://www.ianramseycentre.info/\[category name\]](https://www.ianramseycentre.info/[category name])
- iii. Each category will display the following, if populated:
  - a. Category name
  - b. Category description
  - c. Category Banner (Panel)
    - i. With title, subtitle, and 2 CTA buttons.
    - ii. Each category banner will be editable through the banner manager.
- iv. Categories will display all products assigned directly to them
  - a. Where no products exist in a category, and it has no child categories assigned to it, the following will display: 'There are currently no products available in this category'

### 3.3. Top level Category functions

#### 3.3.1. Active filters

- i. If a filter is selected the active filters will be displayed.

- ii. You can “clear all filters” or you can delete filters by clicking the cross against each filter.
  - iii. Product filtering allows the user to refine a product resultset by one or many attribute values on the category template(s)
  - iv. Filters displayed on the front end of the website will be determined by the attributes (e.g. Size) selected in the administration area
    - a. There is no limit to the number of attributes displayed as filters
  - v. Values will be included dynamically based on the attribute values (e.g. 100 mm) of the products within the resultset
  - vi. Applying a single attribute value within an attribute (by clicking/tapping) will reduce the resultset – only products that have the attribute value will display
  - vii. Active filters will be added above the subcategory filter
  - viii. Removing an active filter will refresh the resultset
  - ix. Applying subsequent attribute values within an attribute will increase the resultset – products that have ‘value A’ OR ‘value B’ will display
- 3.3.2. Pagination
- i. Product listings will paginate to prevent excessive scrolling

## 3.4. Events Category

- 3.4.1. Product containers
- i. Where a product container is shown it will display the following
    - a. Product thumbnail (link to product)
    - b. Product name (link to product)
    - c. Date
    - d. Speaker
    - e. View (>) button

- 3.4.2. Sort by
- i. The display order of products can be amended by the user. Options will be:
    - a. Relevance
    - b. Oldest to Newest
    - c. Newest to Oldest
    - d. A-Z

## 3.5. Publications Category

- 3.5.1. Product containers
- ii. Where a product container is shown it will display the following

- a. Product thumbnail (link to product)
- b. Product name (link to product)
- c. Date
- d. Author
- e. View (>) button

### 3.5.2. Sort by

- ii. The display order of products can be amended by the user. Options will be:
  - e. Relevance
  - f. Oldest to Newest
  - g. Newest to Oldest
  - h. A-Z

## 4. Products

- i. Product URLs will come off the root domain. For example, [https://www.ianramseycentre.info/\[product-name\]](https://www.ianramseycentre.info/[product-name])

### 4.1. Events Product data

- i. The following product information will display if populated in the administration area:
  - a. Product name
  - b. Price
  - c. Quantity (defaulted to '1')
  - d. Dropdown or checkbox of product variants or attributes for configurable products
  - e. 'Register' (Add to basket) button
  - f. Product Description (clicking read more will anchor the user to the tabs below)
  - g. Item Details – populated in the admin area against the product
  - h. Reviews – Ability to add review will be under this tab along with the most recent review
  - i. Delivery Information – populated via a static block in the admin area
  - j. Product image
  - k. Product thumbnails

### 4.2. Thumbnails

- i. The highest priority image will display by default
- ii. Clicking another thumbnail will display it as the main image
- iii. Where no product image is available, a placeholder image will display

- iv. A carousel will be used if there is insufficient space to fit all product thumbnails
- v. No limit to the number of product images selected

## 4.3. Zoom

- i. On clicking the main image a lightbox will open showing an enlarged product image

## 4.4. Add to basket behaviour

- i. Clicking 'Add to basket' will attempt to add appropriate quantity (given user input) into the basket, taking into account the product stock setup
- ii. The user will be alerted of the success/failure on the product page
  - a. [Product name] has been added to your basket successfully. Checkout now

## 4.5. Tabbed information

- i. Item description - Extended description if required.
- ii. Item details - Any technical details or videos.
- iii. Reviews - Any site reviews
- iv. Delivery information
- v. PDF - PDF's can be assigned to products e.g. user guides & instructions.

## 4.6. Related products strip

- i. Products can be added as a 'related' product in the admin area
- ii. Where products have been selected (at product level) they will display in the strip up to a maximum of 4

## 5. Login / My Account

- i. It will display the following fields:
  - a. Email\*
  - b. Password\*
- ii. If either field is not completed correctly, a validation message will appear at the top of the page as "Invalid login or password"
  - a. These fields will be deemed incorrectly completed if both the email and password entered do not exactly match the user's login details
- iii. Login button will submit form when selected and link to user's My Account page if email and password have been entered correctly

## 6. Create an Account

- i. The following fields will be displayed:
  - a. First name\*
  - b. Last name\*
  - c. Email\*
  - d. Password\*
  - e. Confirm password\*
- ii. Sign up for newsletter tick box will be left blank by default
  - a. A tick will display in tick box of Sign up for newsletter when selected
  - b. When submitted, this function will add user's email address to newsletter list
- iii. Create account button will submit form when selected, provided fields are filled in:
  - a. If mandatory fields are not filled in, the validation message "This is a required field" will display below the field in question
  - b. If an email address is entered into Email in any format other than example@domain.com will display validation message "Please enter a valid email address"
  - c. If Password and Confirm Password have not been filled in identically, Confirm Password will display validation message "Please enter the same value again"
  - d. If either the password or confirm password fields has fewer than 6 characters entered, will display validation message "Please enter 6 or more characters"

## 7. Basket

- i. The basket will be accessible from the header

### 7.1. Basket display

- i. Line items will display in the order they were added to basket
- ii. Each product line item will display:
  - a. Product name
  - b. Thumbnail
  - c. Product code (SKU)
  - d. Unit Price
  - e. Quantity (selected by the user)
  - f. Remove option
- iii. Both the product name and thumbnail will link to the product page
- iv. Quantity can be adjusted by typing a new value and clicking "Update basket"



- a. Stock quantities will be taken into account
- v. Removing an item will refresh the basket automatically, and recalculate all totals

## 7.2. Basket totals

- i. The basket total will be recalculated on every interaction with the basket and will display the subtotal

## 7.3. Additional elements

### 7.3.1. Basket Summary

- i. A summary tab will always display in the basket. It will include:
  - a. Estimate shipping
    - This will show:
      - i. Country dropdown
      - ii. County dropdown
      - iii. Postcode
  - b. Sub total
  - c. Grand Total
  - d. Checkout button

### 7.3.2. Related products

- i. Related products will display in the basket based on the items in the basket

## 8. Checkout

### 8.1. Login or proceed

- i. When the user has progressed through the basket they will have the option to login (if they are an existing user) or continue as a guest (and they can create a password later during checkout if they wish)
  - a. A link will be included in the checkout header which when clicked will display a pop-up.
  - b. Forgotten password function will be available
  - c. Users will also be able to sign in using their social media profiles. Sign in through Facebook, Twitter, Instagram or Google + will be available using the Magento 2 Social Login Extension by MagePlaza.
- ii. Once logged in the pop-up will close and the user will be able to continue with the checkout process.

## 8.2. Shipping Address

- i. The following fields will require input if not logged in;
  - a. Email Address
  - b. First name\*
  - c. Last Name\*
  - d. Contact Number
  - e. Street Address
  - f. City / Town
  - g. Country (defaulted to 'United Kingdom')
  - h. Post Code\*

### 8.2.1. Create Account

- i. A checkbox will be presented if the user is not logged in and doesn't have an account already.
- ii. Clicking the checkbox will display 2 additional fields:
  - a. Password
  - b. Confirm Password

### 8.2.2. Billing Information

- i. An option to "Use shipping details" will be available
- ii. If not selected the same fields as shipping address will be available

### 8.2.3. Shipping Method

- i. First Class Recorded - £2.99 (Items under specified weight - TBC)
- ii. First Class Recorded - £4.99 (Items over specified weight - TBC)
- iii. Free Shipping - £0.00 (Basket value is £75.00 or over)

### 8.2.4. Payment information

- i. The following payment methods will be accepted and must be active within the payment gateway control panel:
  - a) Paypal
  - b) Sagepay
- ii. Payment capture will be requested immediately

### 8.2.5. Apply promotional code

- i. A single field with an apply button will be present.
- ii. An error message will display if the code is invalid.

- iii. A success message will be displayed if the code is valid and the promotion applied will be listed underneath the field.

## 8.2.6. Newsletter sign up

- i. A checkbox will be displayed which when ticked will add the users email address to the newsletter mailing list.
- ii. The checkbox will be ticked by default.

## 8.2.7. Order Summary

- i. Details of items in the users basket will be listed here and the quantities can be updated. Items can also be removed.
  - a. Updating the quantities or removing an item will update the total order value, the delivery options, and any promotions applied.
- ii. The values for the order subtotal, any shipping fees, and any discounts applied will be displayed underneath, along with the order total value.
- iii. Finally a place order button will be displayed which when clicked will take users to the payment gateway.
  - a. Users will only be able to progress to the payment gateway as long as all the mandatory fields have been populated.

## 8.2.8. Order Confirmation / Review

- i. Authorised payments that have passed 3D secure successfully will be taken to the "thank you" page where the agreed content and order reference number will be displayed
- ii. A system generated email will be generated and sent to the user

## 9. Account

- i. A registered customer user, once logged in, can follow a link to visit their My Account area

### 9.1. Profile

- i. The user can amend and save the following information:

Field	Type	Description
Title*	Dropdown	Mr, Mrs, Miss, Ms
First name*	Plain text	User first name
Last name*	Plain text	User surname

#### 9.1.1. Address Book

- i. The user is presented with a list of stored addresses
- ii. The user may add an address using the fields detailed within the 'Checkout' section of this

document

- a. Each address is marked as either 'Billing' or 'Delivery' and will be made available to the relevant part of checkout
- iii. The user may edit a stored address
- iv. The user may delete a stored address
  - a. Deleted addresses cannot be recovered

## 9.1.2. Change my password

- i. The user may change their currently stored password by completing the following form:

Field	Type	Description
Current password*	Plain text	The current password
New password*	Plain text	The new password
Confirm new password*	Plain text	The new password (must match the above)

- ii. If the current password is correct, the password will be changed, effective immediately.

## 9.2. Forgotten password

- i. A forgotten password option will be available
  - a. User clicks 'forgotten password?'
  - b. User inputs email address (this must match an email address held in the database)
  - c. A plain text email will be sent to the email address specified. This will contain a unique link to reset the password
  - d. The user will be taken to the website and asked to input a new password twice
    - i. Passwords must match
  - e. The user is then free to login

## 9.3. Orders

- i. Within the account a user can view their previous orders placed on the new website
- ii. Information available will include:
  - a. Order number
  - b. Items
  - c. Total
  - d. Date purchased

## 10. Contact Us

- i. Details of the store(s) will be presented including the following details:
  - a. Name of store
  - b. Address
  - c. Contact number
  - d. Google map integration with location shown
  - e. The train line that can be taken to reach the store including the type of line available (overground, underground, etc.)
  - f. The nearest stations and the walking distance (populated manually in the admin).
- ii. The following form fields will be present, and will use text inputs unless specified otherwise:
  - a. Name\*
  - b. Email\*
  - c. Phone
  - d. Message\*
- iii. Google reCAPTCHA will be included to help filter spam messages
- iv. On successful submission the user will be taken to a content managed 'thank you' page using the standard content page template

## 11. Sitemaps

### 11.1. XML

- i. An XML sitemap will include all website pages and will be re-built nightly
- ii. It will be hosted at /sitemap.xml

## 12. 404 page

- i. Where the user (or robot) attempts to visit a URL that does not exist a 404 (Page not found) page will be returned

## 13. Blog

### 13.1. Blog landing page

Upon accessing the blog, user will be presented with the blog landing page which will feature:

- i. Topic (Category) selector

- a. A drop down list displaying all available category options based on content populated in the admin.
- b. Only categories from active blog posts will be displayed in the list.
- c. The list will be sorted alphabetically.
- d. Choosing a category will filter the blog landing page, displaying only blog post which match the category selected.
- ii. Popular posts
  - a. A list of blog posts which can be set in the admin.
- iii. Featured post
  - a. The first blog post displayed on the landing page.
  - b. Larger than the other posts, taking up 2 columns instead of 1.
  - c. The featured post can be set in the admin.
- iv. Blog posts
  - a. Sorted by date published from most recent to the oldest.
  - b. 12 posts are displayed as standard. If more than 12 posts are available then a load more button will appear.
  - c. Upon clicking the load more button, up to another 12 posts will appear below.
  - d. The load more button will continue to display and will continue to load up to 12 more blog posts each time it is pressed until no more blog posts can be displayed.
- v. All blog posts, including the featured and popular blog posts, will display the title, category, posted date (in the format x days ago), and author (if populated in the admin).
- vi. Featured and standard blog posts on the landing page will display summary text as well, pulling in the first 120 characters from the associated post.

## 13.2. Blog post page

Each blog post will include the following:

- i. Hero banner
  - a. The background image can be set in the admin
- ii. Title
- iii. Published date
  - a. In the format 'Published x days ago on July 17, 2017'
- iv. Author (if specified in the admin)
- v. Category / Topics
  - a. A list of category of topics the blog post has been associated with will show here (if specified in the admin)
  - b. Each category / topic will be a hyperlink that when clicked will take users back to the blog landing page and will filter the results based on the link selected.
- vi. Social sharing links

- a. These will need to set up in the admin and will be set for all blog posts, not individually per post.
- vii. Main body
  - a. The main body content will be entered through a WYSIWYG editor in the admin.
- viii. Other blog posts
  - a. This will pull in the 3 most recent blog posts that have been added to the same category as the current blog post.
  - b. If no category is set against the current blog post then the 3 most recent blogs across all categories will be displayed.

# Integrations and Modules

## 14. Banner Manager module

- i. Will control the following:
  - a. Homepage Banner
  - b. Category Page Banners (Panels)

## 15. Search

- i. The site will Elastic Suite predictive search.
- i. When a search is carried out, dependent on the phrase input, the user can search for the phrase they have input but they will also be presented with relevant search results in a drop down menu. There will be split into products and categories as standard but results can also be separated into attributes as well.
- ii. There will be no search function for content pages.
- iii. There will be no maximum or minimum number of characters for search terms.
- iv. Examples of searches possible include;
  - a. Product name
  - b. Description
  - c. Category name

### 22.1.1. Product results

- i. Search results pages will be marked 'no-index' and will not therefore be shown to search robots
- ii. Canonical tags will be included on all pages of results
- iii. Where a search term yields no specific results and a suggestion cannot be found, an error message will be displayed and users will be presented with a list of the bestselling products instead.

## 16. Reviews

- i. Magento standard on site product reviews

## 17. Mailchimp integration

- i. Using the MailChimp M2 plugin by ebizmarts.



# Administration Area

## 24. Administration Dashboard

The following items are available on the administration dashboard:

- i. Store View
- ii. Lifetime sales
- iii. Average order
- iv. Last orders
  - a. Customer name
  - b. Items
  - c. Total
- v. Revenue
- vi. Tax
- vii. Shipping
- viii. Quantity
- ix. Latest search terms
- x. Top search terms

## 25. Sales

### 25.1. Orders

#### 25.1.1. Orders Dashboard

- i. Dashboard has the following features:
  - a. Search by keyword
  - b. Actions dropdown
    - i. Cancel
    - ii. Hold
    - iii. Unhold
    - iv. Print invoices
  - c. Export
    - i. As CSV or Excel XML
  - d. Quick view
    - i. Select all
    - ii. ID
    - iii. Purchase point

- iv. Purchase date
- v. Bill-to Name
- vi. Ship-to Name
- vii. Grant total (base)
- viii. Grand total (purchased)
- ix. Status
- x. Action

## 25.1.2. Create new Order

- i. There are two options:
  - a. Create new customer
  - b. Select a customer

### 25.1.2.1. Create new customer

- i. Add products
  - a. This allows any products on the store to be selected
    - i. Search by ID, SKU, Product name
  - b. Quantity can be edited
  - c. Add selected products to cart
- ii. Apply coupon code and update
- iii. Account information
  - a. Group\*
  - b. Email
- iv. Address information - Billing
  - a. Prefix - Mr. Mrs. Ms. Miss.
  - b. First Name\*
  - c. Middle name / Initial
  - d. Last Name\*
  - e. Suffix
  - f. Company
  - g. Street Address\*
  - h. City\*
  - i. Country\* - Dropdown
  - j. State / Province
  - k. Postcode/ZIP\*
  - l. Phone number\*
  - m. Fax
  - n. VAT Number
  - o. Option to save in address book
- v. Address information – Shipping address

- a. Same as billing address checkbox
  - b. If not selected enter same fields as billing address
- vi. Payment and Shipping information
  - a. Cheque / Money order
- vii. Shipping Method
  - a. Get shipping methods and rates
  - b. These will be pulled through from Stores > Configuration > Sales > Shipping methods or any integrated service
- viii. Order Total
  - a. Order comments – plain text input
  - b. Order totals
    - i. Subtotal
    - ii. Shipping and Handling
    - iii. Grand total
    - iv. Email order confirmation checkbox (Selecting will send the order confirmation to the email entered)
- ix. Submit order

### 25.1.3. Select a customer

#### Without a basket

- i. When selecting a customer, you add products in the same way as for new customers but all billing and address data has been entered
- ii. This data can be manually entered if required

#### Customer has created basket

- i. Change order currency
  - a. This will be a dropdown of set up currencies
- ii. Update shopping cart function
- iii. Basket item list
  - a. Delete
  - b. Pass to order
- iv. Clear shopping cart
- v. Wish list items
- vi. Products in comparison list
- vii. Update changes

### 25.1.4. View orders

- i. Order view contains:
  - a. Information
    - i. Order number
    - ii. Status

- iii. Account information
- iv. Address information
- v. Payment and shipping method
- vi. Items ordered
- vii. Order total
- b. Invoices
  - i. Invoice number
  - ii. Invoice date
  - iii. Order number
  - iv. Order date
  - v. Bill-to name
  - vi. Status
  - vii. Amount
- c. Credit memos
- d. Shipments
  - i. Shipment number
  - ii. Ship date
  - iii. Order number
  - iv. Order date
  - v. Ship-to name
  - vi. Total Quantity
- e. Comment history
  - i. Timestamp of status change and notes for order

## 25.2. Invoices

### 25.2.1. Invoices Dashboard

- ii. Dashboard has the following features:
  - a. Search by keyword
  - b. Actions dropdown
    - i. PDF Invoices
  - c. Export
    - i. As CSV or Excel XML
  - d. Quick view
    - i. Select all
    - ii. Invoice number
    - iii. Invoice date
    - iv. Order date
    - v. Bill-to Name

- vi. Status
- vii. Grant total (base)
- viii. Grand total (purchased)
- ix. Action

## 25.3. Shipments

### 25.3.1. Shipments Dashboard

- iii. Dashboard has the following features:
  - a. Search by keyword
  - b. Actions dropdown
    - i. PDF Shipments
  - c. Export
    - i. As CSV or Excel XML
  - d. Quick view
    - i. Select all
    - ii. Shipment number
    - iii. Ship date
    - iv. Order number
    - v. Order date
    - vi. Ship-to Name
    - vii. Total Quantity
    - viii. Action

### 25.3.2. View Shipments

- i. You can view existing shipments through the dashboard
- ii. When in the shipping view the user can:
  - a. Print
  - b. Send tracking information
    - i. This will send the shipping confirmation email

## 25.4. Credit Memos

### 25.4.1. Shipments Dashboard

- iv. Dashboard has the following features:
  - a. Search by keyword
  - b. Actions dropdown
    - i. PDF Credit memos
  - c. Export
    - i. As CSV or Excel XML

- d. Quick view
  - i. Select all
  - ii. Credit memo number
  - iii. Created date
  - iv. Order number
  - v. Order date
  - vi. Bill-to Name
  - vii. Status
  - viii. Refunded
  - ix. Action

## 26. Products

- i. The products module allows control of the product catalog and creation and management of categories.

### 26.1. Catalog

- i. The catalog section has a dashboard which allows searching of products based on various parameters listed below
- ii. Products are created in the catalog part of the products module
- iii. The following product types are available:
  - a. Simple
  - b. Configurable
  - c. Grouped
  - d. Bundle

#### 26.1.1. Catalog Dashboard

- i. Dashboard has the following features:
  - a. Actions dropdown
    - i. Delete
    - ii. Change status
    - iii. Update attributes
  - b. Number of records found
  - c. Filters
    - i. ID
      - 1. From
      - 2. To
    - ii. Price
      - 1. From
      - 2. To

- iii. Quantity
  - 1. From
  - 2. To
- iv. Store View Dropdown
- v. Name
- vi. Type
  - 1. Simple
  - 2. Configurable
- vii. Attribute Set
  - 1. Taken from created attribute sets in the store module
- viii. SKU
- ix. Visibility
- x. Status
  - 1. Enabled
  - 2. Disabled
- d. Export
  - i. As CSV or Excel XML
- e. Quick view
  - i. Select all
  - ii. ID
  - iii. Thumbnail
  - iv. Name
  - v. Type
  - vi. Attribute set
  - vii. SKU
  - viii. Price
    - 1. Advanced pricing
    - 2. Special price
    - 3. Special price from and to
    - 4. Cost
    - 5. Tier pricing
      - a. Website dropdown
      - b. Customer group dropdown
      - c. Quantity
      - d. Price
    - 6. Manufacturer's suggested retail price
    - 7. Display actual price – Dropdown
      - a. Use config

- b. On gesture
- c. In cart
- d. Before order confirmation
- ix. Quantity
- x. Visibility
- xi. Status
- xii. Websites
- xiii. Action

## 26.2. Adding new product

- i. Products are created through: Products > Catalog > Add New product
- ii. Items marked with a \* are mandatory for all product types

### 26.2.1. General

The following fields are available:

- i. Enable page – Yes/No
- ii. Attribute set – Dropdown of attributes set created in the Store module
- iii. Product Name\*
- iv. SKU\*
- v. Price\*
- vi. Product code
- vii. Tax Class
  - a. None
  - b. Taxable goods
- viii. Quantity
- ix. Stock Status
  - a. In stock
  - b. Out of stock
- x. Weight
- xi. Categories – Dropdown
  - a. User can select multiple categories via a checkbox
- xii. Visibility
  - a. Catalog
  - b. Search
  - c. Catalog, Search
  - d. Not visible individually
- xiii. Set product new from
  - a. Date picker to choose from and to dates



- xiv. Country of manufacture – Dropdown of all available countries
- 26.2.2. Content
  - i. Description Text Editor – This is the content area for the page. Content can be entered in HTML, or through an editor
  - ii. Short description Text Editor – This is the content area for the page. Content can be entered in HTML, or through an editor
- 26.2.3. Configurations
 

Configurable products allow customers to choose options (eg shirt colour)

  - i. Create configurations
    - a. Select Attributes to configure – eg colour
    - b. Select Attribute Value (multiple checkboxes) – eg Black, Blue
    - c. Bulk images, price and quantity
      - i. Images
        - 1. Apply single set of images to all SKUs
        - 2. Apply unique images by attribute to each SKU
        - 3. Skip
      - ii. Price
        - 1. Apply single price to all SKUs
        - 2. Apply unique price by attribute to each SKU
        - 3. Skip
      - iii. Quantity
        - 1. Apply single quantity to all SKUs
        - 2. Apply unique quantities by attribute to each SKU
        - 3. Skip
      - iv. New Product Review
        - 1. Show overview of image, SKU, quantity, attribute label and price
- 26.2.4. Image and videos
  - i. Browse or drag image input
    - a. Add Video
    - b. URL\* - Vimeo and Youtube supported
      - i. Title\*
      - ii. Description
      - iii. Preview image
- 26.2.5. Search Engine Optimisation
  - i. URL Key
  - ii. Meta Keywords
  - iii. Meta Description
- 26.2.6. Related products, up-sells and cross-sells

- i. Related products
- ii. Up-Sell products
- iii. Cross-Sell products
- 26.2.7. Customizable options
  - i. Custom options let customers choose the product variations they want
  - ii. Add new option
  - iii. Option title\*
  - iv. Option type – Dropdown\*
    - a. Text
      - i. Field
      - ii. Area
    - b. File
    - c. Select
      - i. Dropdown
      - ii. Radio buttons
      - iii. Checkbox
      - iv. Multiple select
    - d. Date
      - i. Date
      - ii. Date and time
      - iii. Time
  - v. Required
- 26.2.8. Product in Websites
  - i. Store View – This is the store in which the content page is viewable

## 26.3. Categories

- i. Category structure shows on the left hand side with options to:
  - a. Add root category
  - b. Add subcategory
- 26.3.1. Adding and editing categories
 

Adding and editing categories have the same actions:

  - i. Enable category
  - ii. Include in menu
  - iii. Category name\*
- 26.3.2. Content
  - i. Category image upload
  - ii. Description – limited text editor
  - iii. Add CMS Block – dropdown of all static blocks created

- 26.3.3. Display settings
  - i. Display mode – drop down
    - a. Products only
    - b. Static blocks only
    - c. Static blocks and products
  - ii. Anchor
  - iii. Sort Products by\*
    - a. Position
    - b. Product name
    - c. Price
    - d. All
  - iv. Default product sorting\*
    - a. Use config settings
    - b. Position
    - c. Price
  - v. Layered navigation price step\*
- 26.3.4. Search engine optimisation
  - i. URL Key
  - ii. Meta Title
  - iii. Meta Keywords
  - iv. Meta Description
- 26.3.5. Products in Category
  - i. Select from the products quick view filter
- 26.3.6. Design
  - i. Layout – dropdown
    - a. No layout updates
    - b. 1 column
    - c. 2 columns with left bar
    - d. 2 columns with right bar
    - e. Empty
  - ii. Display after info column – dropdown
    - a. Product info column
    - b. Block after info column
  - iii. Layout update XML
  - iv. Apply design to products checkbox

## 27. Customers

- i. Customers deals with the users and their records for all user types and groups

## 27.1. All customers

- i. Dashboard has the following features:
  - a. Search by keyword
  - b. Actions dropdown
    - i. Delete
    - ii. Subscribe to newsletter
    - iii. Unsubscribe to newsletter
    - iv. Assign to customer group
    - v. Edit
  - c. Export
    - i. As CSV or Excel XML
  - d. Quick view
    - i. Select all
    - ii. ID
    - iii. Name
    - iv. Email
    - v. Group
    - vi. Phone
    - vii. Zip
    - viii. Country
    - ix. State / Province
    - x. Customer since
    - xi. Website
    - xii. Confirmed email
    - xiii. Account created in
    - xiv. Action

## 27.2. Add/edit users

### 27.2.1. General Features

- i. Delete customer
- ii. Reset
- iii. Create order
  - a. Takes the user to the sales tab for order creation
- iv. Reset password
  - a. Customer receives an email with a link to reset password

- v. Force sign-in

## 27.2.2. Account information

- i. Associate to Website\*
- ii. Group dropdown\*
- iii. Prefix - Mr. Mrs. Ms. Miss.
- iv. First Name\*
- v. Middle name / Initial
- vi. Last Name\*
- vii. Suffix
- viii. Email Address\* - The email address is used to recover the account if password is forgotten by the user
- ix. Date of Birth
- x. Tax / VAT Number
- xi. Gender

## 27.2.3. Addresses

- i. Prefix - Mr. Mrs. Ms. Miss.
- ii. First Name\*
- iii. Middle name / Initial
- iv. Last Name\*
- v. Suffix
- vi. Company
- vii. Street Address\*
- viii. City\*
- ix. Country\* - Dropdown
- x. State / Province
- xi. Postcode/ZIP\*
- xii. Phone number\*
- xiii. VAT Number

## 27.2.4. Orders

The following information is provided:

- i. Order number
- ii. Purchased date
- iii. Bill-to Name
- iv. Ship-to Name
- v. Order Total
- vi. Purchase point

## 27.2.5. Product Review

The following information is provided:

- i. ID
- ii. Created date
- iii. Status – Approved, pending, not approved
- iv. Title
- v. Nickname
- vi. Review
- vii. Visibility – based on the store view
- viii. Customer type
- ix. Product
- x. SKU

#### 27.2.6. Wish list

The following information is provided:

- i. Product name
- ii. User description
- iii. Quantity
- iv. Add locale – based on store view
- v. Add date
- vi. Days in wish list

## 28. Marketing

### 28.1. Promotions

28.1.1. Catalog price rules – used to offer products at discounted price based on conditions. These promotions are triggered before a product is placed into the cart.

#### 28.1.1.1. Conditions

- i. These are used to set the rules that initiate the actions
- ii. If rule applies to all products don't set up conditions
- iii. Any of the attributes that are set up to be available in catalog price rules are available

#### 28.1.1.2. Actions

The following actions are available:

- i. Apply
  - a. Apply as a percentage of original
  - b. Apply as fixed amount
  - c. Adjust final amount to this percentage
  - d. Adjust final price to discount value
  - e. Discount amount\*

28.1.2. Cart price rules – Apply to discounts to items in the shopping basket

Search cart price rules

## 28.1.2.1. Actions

The following actions are available:

- i. Apply
  - a. Percent of product price discount
  - b. Fixed amount discount
  - c. Fixed amount discount to whole cart
  - d. Buy X get Y free (where Y is discount amount)
  - e. For shipment with matching items
  - a. Row total in cart

## 28.2. Communications

28.2.1. Email Templates – Define the layout, content and formatting of automated messages.

### 28.2.1.1. Dashboard

- i. ID
- ii. Template name
- iii. Added
- iv. Updated
- v. Subject
- vi. Template type
  - a. HTML
  - b. Text
- vii. Action

### 28.2.1.2. Create new template

- i. Load default template from Store > Configuration – Dropdown
- ii. Template name
- iii. Template subject
- iv. Template content
- v. Template styles

28.2.2. Newsletter Templates

### 28.2.2.1. Dashboard

- i. ID
- ii. Template name
- iii. Added
- iv. Updated
- v. Subject
- vi. Sender
- vii. Template type

- a. HTML
  - b. Text
- viii. Action
- 28.2.2.2. Add new template
  - i. Template name\*
  - ii. Template subject\*
  - iii. Sender name\*
  - iv. Sender email\*
  - v. Template content\* - Using WYSIWYG editor
  - vi. Template styles
- 28.2.3. Newsletter Subscribers
  - i. Search for subscribers will be present
  - ii. Subscribers can be exported as CSV or Excel XML

## 28.3. SEO and Search

- 28.3.1. URL Rewrites
  - i. Create URL rewrites for:
    - a. Custom
    - b. Category
    - c. Product
    - d. CMS page
  - ii. The following information can be populated
    - a. Store\* – dropdown
    - b. Request path\*
    - c. Target path\*
    - d. Redirect type
      - i. No
      - ii. 302
      - iii. 301
    - e. Description
- 28.3.2. Search and synonyms
  - Adding a new search result
    - i. Search Query\*
    - ii. Store\* – dropdown
    - iii. Redirect URL
    - iv. Display in suggested terms
      - a. No
      - b. Yes



Add a new synonym group

- i. Scope\* - dropdown of all websites linked to account
- ii. Synonyms\*

### 28.3.3. Sitemap

Admin user can add a new sitemap and has the following fields:

- i. Filename\* - example: sitemap.xml
- ii. Path\* - example `"/sitemap/` or `"/` for base path

## 28.4. User Content

### 28.4.1. Reviews

Reviews will be managed by the Magento standard reviews functionality.

## 29. Content

### 29.1. Pages

- i. Pages are created through: Content > Pages > Add New Page
- ii. The actions to add or edit a page are the same
- iii. The following fields are available:
  - a) Enable page – Yes/No
  - b) Page title\*

#### 29.1.1. Content

- i. Content Heading\* - used as the content page heading as marked up as `<h1>` (heading 1)
- ii. Text Editor – This is the content area for the page. Content can be entered in HTML, or through an editor

#### 29.1.2. Search Engine Optimisation

- i. URL Key
- ii. Meta Keywords
- iii. Meta Description

#### 29.1.3. Page in Websites

- i. Store View – this is the store in which the content page is viewable

##### 29.1.3.1. Design

- i. Layout – dropdown
  - a. No layout updates
  - b. 1 column
  - c. 2 columns with left bar
  - d. 2 columns with right bar
  - e. Empty

- ii. Layout update XML

## 29.2. Banner manager

The Vortex Banner manager will allow the following panels to be manageable on the homepage:

- a. Homepage banner
- b. Ad boxes at the bottom of the homepage

For each Panel the following can be edited:

- i. Image
- ii. Link destination

## 29.3. Blocks

Blocks are created through: Content > Blocks > Add New Block

The actions to add or edit a block are the same

- i. The following fields are available:
  - a. Enable block – Yes/No
  - b. Block title\*
  - c. Identifier\*
  - d. Store View\*
  - e. Text Editor – This is the content area for the block. Content can be entered in HTML, or through an editor

## 29.4. Widgets

Widgets are created through: Content > Widgets > Add New Widget

The actions to add or edit a widget are the same

Settings:

- i. Type – dropdown
  - a. CMS Page link
  - b. CMS static block
  - c. Catalog category link
  - d. Catalog new products list
  - e. Catalog product link
  - f. Catalog products list
  - g. Recently compared products
  - h. Recently viewed products
- ii. Widget Title\*
- iii. Assign to Store views\*
- iv. Sort order

- v. Display on – dropdown of all available pages / products for the widget to display on eg available product types, pages etc.
- vi. Container – dropdown of all available locations for the widget to be displayed eg before footer, after header, main content area

## 30. Reports

The report section contains generic reports for the following items. All of these can be exported as a .CSV

### 30.1. Marketing Reports

- i. Products in cart
- ii. Search terms
- iii. Abandoned carts

### 30.2. Sales

- i. Orders
- ii. Tax
- iii. Invoiced
- iv. Shipping
- v. Refunds
- vi. Coupons

### 30.3. Customers

- i. Order total
- ii. Order count

### 30.4. Products

- i. Views
- ii. Bestsellers
- iii. Low stock
- iv. Ordered

## 31. Stores

## 31.1. Settings

Store Configuration is dealt with through the general settings

This includes:

- i. Contact us and sales emails
- ii. Category configuration for stock options and placeholder images
- iii. Payment method configuration
- iv. Shipping – Using DPD (DPD integration is not quoted for this will be managed manually)?
  - a. Unsigned for £3.30
  - b. Signed for £5.94
  - c. Delivered to your desired pickup location “DPD Pickup” £XYZ

## 31.2. Taxes

Tax rules can be created and assigned through Stores > Taxes

### 31.2.1. Tax Rules

The following fields are required:

- i. Name\*
- ii. Tax Rate\* - this can be selected from existing tax rates or new rates can be added

### 31.2.2. Tax rates and Zones

New rates and zones can be added manually in the administration area

Each new rate requires:

- i. Tax Identifier\*
- ii. Zip / Post Code\* – this can be a From-To range
- iii. Country\* – Dropdown
- iv. Rate percent\*

## 31.3. Currency

- i. The admin user can set the import service and currency symbols
  - a. Exchange rates will be dealt with in the administration area

## 31.4. Attributes

### 31.4.1. Product

- i. Attributes are pieces of product information that are populated/selected through the administration area and optionally display on the front end of the website
- ii. Attributes can be created and assigned to sets to ease product maintenance

#### 31.4.1.1. Product attributes

- i. The attribute type will determine the type of input used within the product editing screen

- ii. Available attribute input types are:
  - a. Text field
  - b. Multi-select
  - c. Boolean (Yes/No)
  - d. Dropdown
- iii. Values Required - Yes / No to make the attribute required

#### 31.4.2. Attribute sets

- i. Attribute sets ease product maintenance by allowing attributes to be selected and grouped
- ii. Where products require different information to be populated it's recommended that multiple attribute sets are created

### 31.5. Customer Groups

- i. Customer groups are used to select pricing display options such as tier pricing and market segmentation
- ii. You can create customer groups through the settings in the administration area

## 32. Search

- i. The site will Elastic Suite predictive search.

## 33. Blog

#### 33.1.1. Posts

The following fields will be available to populate in the admin area

- i. Header Image
- ii. Thumbnail
  - a. To be shown on the category page
- iii. Title
- iv. Short description
  - a. To be shown on the category page
- v. Date
- vi. Content
- vii. Categories

#### 33.1.2. Blog Category

Blog category pages will display

- i. Most recent post
  - a. This will display the header image from the blog post

- ii. Blog posts displaying in date order
  - a. These will consist of:
    - i. Thumbnail image
    - ii. Date
    - iii. Short description copy
- iii. List of categories

# Appendix

## 34. Change procedure

A change is any new/amended requirement not included or explicitly stated in the functional specification document. All change requests should be raised through their project manager where they will be fully scoped by Vortex.

At Vortex's discretion, changes from the agreed specification are subject to the following conditions:

- i. Additional budget may be required
- ii. Existing time plans may be reviewed and amended
- iii. Any impact on third parties is outside of Vortex's control

# Approval

Approval of this document authorises Vortex to proceed with the development explicitly defined for the agreed project budget. Any changes or enhancements requested after approval may be subject to further specification and costs at Vortex's discretion.

If required for legal purposes this document will be submitted as evidence of the agreed contract of work.

Version: 1.0

Signed on behalf of the Client:

Name:

Date:

Signature: