sp.

Gardiner Pole Systems
client specification document

28/03/19

Document History:

The following versions of the document have been produced:

Ver.	Issue Date	Author	Reason for Issue
1.0	16/04/19	Rob Peterkin	First draft published for client review
1.1	16/04/19	Rob Peterkin	Added information for Bundles / sub-bundles
1.2	17/04/19	Rob Peterkin	Updated specification to include client feedback
1.3	23/4/19	Rob Peterkin	Updated specification to include client feedback
1.4	25/4/19	Rob Peterkin	Updated specification to include client feedback

Project Reference Documentation:

Ref.	Document Name	Author	Document details	Issue Date
1	Client Specification	Screen Pages	This document	See Project Plan
2	Client Mocks	Screen Pages		See Project Plan

Project Contacts:

Name	Company / Role	Email	Telephone
Tom Day	Screen Pages Managing Director	thomas.day@screenpages.com	01932 359 166
Sarah Willcocks	Screen Pages CEO	sarah.willcocks@screenpages.com	01932 333 598
Anthony Smyrk	Screen Pages Business Development Manager	anthony.smyrk@screenpages.com	01932 359 162
Rob Peterkin	Screen Pages Project Manager	robert.peterkin@screenpages.com	01932 333 165
Mat Brown	Screen Pages Designer	max.dodson@screenpages.com	01932 333 599

Table of Contents

sp.

sp.

sp.

1.   Executive Summary

The main objectives of the project are:

- To deliver an e-commerce website that will take advantage of the best online retail practices
- For the site to be simple to use and update and will allow Gardiner Pole Systems to easily create content, product placements and organise campaigns
- For the site to be designed for maximum search engine performance
- To facilitate intelligent analysis of site traffic and customer trends, thereby enabling improved service

This document outlines the main deliverables of the project in the sections that follow.

1.1. Target Domain Name

The primary domain for the project will be:

www.gardinerpolesystems.co.uk

Any and all other Gardiner Pole Systems domain names can route customers to the new website, i.e., if the customer enters another domain, such as the .com version, the customer will immediately be directed to the .co.uk domain name.

The process to achieve this should be checked with your DNS host (the company from whom you bought the domains in question).

1.2. Document Purpose

The purpose of this document is to define the business requirements for the Gardiner Pole Systems website.

- The document covers the general layout of the site, defined as the c-shape navigation and the various pages including home, category, sub category and product.
- The document then goes through the checkout and account pages covering the functional aspects of these pages, with clarification of the process customers will follow through the process.
- The final part of the document covers the back office systems (if appropriate) and the site reporting.

Before work on the site can commence, this document must be accepted by Gardiner Pole Systems as an accurate representation of the requirements. Once approved, this document will define the final and agreed customer requirements, and form the basis on which the project will proceed.

Please Note: Only requirements specified in this document will included in the project. Any requirements not detailed in the document will not be included as part of the project. Whilst we have taken every effort to ensure that all details contained herein reflect the discussions to date, it is the Client's responsibility to approve this information.

sp.

1.3. Disclaimer regarding data integration

Screen Pages provide e-commerce services and have no visibility or knowledge of the back-office systems that will be used by Gardiner Pole Systems. The e-commerce site will not have real-time integration into any of Gardiner Pole Systems's back-office systems and all data imports / exports must be scheduled. Specifically, these scheduled interfaces are not monitored by Screen Pages' personnel and it is the Client's responsibility to ensure that they operate.

1.3.1. Data Imports

- All data imported by Screen Pages must conform to the agreed format detailed in this and accompanying specifications.
- Files must be placed onto the Screen Pages servers at the agreed intervals.

1.3.2. Data Exports

- Data will only be exported by Screen Pages in the format detailed in this and accompanying specifications.
- Files will NOT be placed directly onto any back-office systems belonging to Gardiner Pole Systems. Files must be retrieved by Gardiner Pole Systems from the Screen Pages server
- Screen Pages are not responsible for importing / processing any of the information contained within the files into back-office systems belonging to Gardiner Pole Systems
- Gardiner Pole Systems accept full responsibility for importing and processing all exported data into their back-office systems and must ensure that they have suitable resources within their own organisation to do so

1.4. Screen Pages Project Team

Screen Pages will allocate the following resources to this project at the required stages:

Project Role	Name
Designer	Mat Brown
Project Manager	Rob Peterkin
QA Lead	Mike Berry
Trainer	James Burrage

sp.

2. Summary of Project

2.1. Scope

Screen Pages will build and host an e-commerce site for Gardiner Pole Systems that meets the functional requirements detailed in the agreed quote spreadsheet.

The next section details the areas that are considered "within scope" as well as those that are considered "out of scope".

2.1.1. In Scope

The following key items are considered within the scope of the project:

- Site build and implementation on Magento Open Source v2.3.1
- Set up of web servers and staging/live environments
- Set up of SFTP account to allow upload/download for data transfer to and from our network
- Secure certificate (SSL) ordering and set-up
- Establish agreed content managed areas with copy provided by Gardiner Pole Systems (where appropriate). Gardiner Pole Systems may update these content managed areas using the content management tools.
- Initial import of product data from spreadsheet completed by Gardiner Pole Systems
- Set up & design of a standard Magento website & Admin Panel
- The items set out in the Client Quote spreadsheet named Gardiner Pole Systems – Magento 2 Scope of Work & Quote March 2019 – Bespoke V2.xls

2.1.2. Out of scope

Certain items are not considered to be within the scope of the project and will therefore not be covered in this document. These include:

- The cost of purchasing a FTP software licence if required by the Gardiner Pole Systems IT policy. Screen Pages recommends FileZilla as this is free and supports the required FTP settings.
- Additional product and category set-up not covered by the initial product import.
    - o Once the initial product catalogue has been imported from the spreadsheet supplied to Gardiner Pole Systems by Screen Pages, Gardiner Pole Systems are responsible for the creation and management of products and categories.
- Supply, sizing and quality of product images and other imagery required for the site.
- All site copy.
- Domain registration setup.
    - o The existing domain may need to be updated to allow a SSL certificate to be orders and when the site launches (main WWW or A record).
- Content management activity.
    - o Updating the agreed content managed areas, text/image changes or product / category data changes on the site.
- Definition of applicable VAT rates outside of the default rates set up by Screen Pages.
- Definition of acceptable payment cards outside of the default cards set up by Screen Pages.

- Any other functional areas that are not specified and defined in this document.
- Time spend resolving issues with 3rd party modules or the Magento core platform where the functionality differs from that described or where bugs are found that affect the use of that functionality.
- Implementation of any tracking systems, tools or tags outside those specified in this document.

2.2. Change Control and Delivery Date

Once this document has been reviewed, agreed and signed off by Gardiner Pole Systems, future changes of requirements, whether they are new requirements entirely or modifications to existing requirements will become subject standard to "change control" procedures, as set out in the agreement between Screen Pages and Gardiner Pole Systems.

We would also like to point out that changes to the specification are likely to **extend** the delivery date of the project beyond the currently planned dates and may increase the cost of the project.

Please Note: Changes to specification received during the user acceptance phase of the project will not be carried out until the initial project has gone live – i.e., **changes cannot be executed during the user acceptance phase of the project**.

2.3. Visual Design Requirements

The detailed aesthetic requirements for the website will not be addressed within this document. Design mock-ups for the appearance of the website will be provided separately and accompany this document in determining how the site works and functions.

Please Note: Designs are subject to confirmation by Gardiner Pole Systems. In addition, Gardiner Pole Systems must supply any images required for the design and replication of corporate branding such as logos. Screen Pages will supply Gardiner Pole Systems with details of required image dimensions where requested to follow the approved designs.

2.4. Browser Compatibility

Screen Pages develop and test websites appropriate for current major desktop browsers and recent versions thereof as they become generally available however **we do not support beta or pre-release versions**.

We do not develop and test for old browser versions in line with market practice and usage profiles or where the version is more than one version less than the currently standard issue version.

We will test and support this website based upon the browsers available at the time of specification sign off. From time to time, future versions or browsers (and related technologies) may cause certain features on the website to function incorrectly. Screen Pages reserves the right to quote and charge for the provision of the fix at its discretion.

At time of writing this specification, Screen Pages will ensure that the site is fully compatible with the following browsers:

sp.

Browser	Version	Platform	Notes
Internet Explorer	11	PC	
Microsoft Edge	N/A	PC	These browsers automatically updates themselves without user intervention
Chrome	N/A	PC & Mac	
Safari	N/A	Mac, iPad & iPhone	

Please Note: Screen Pages has not quoted for development and testing of the Website on other browsers. Website and software support and maintenance will only apply to the browsers listed above.

Please Note: The below browsers versions are specifically not supported by Screen Pages:

- Microsoft Internet Explorer 10 or older
- Safari X where X is not the current version number
- Chrome X where X is not the current version number
- Microsoft Edge X where X is not the current version number
- Mozilla Firefox

Issues that typically occur in older browsers are generally limited to layout issues rather than functional issues, i.e. the site works but doesn't look exactly as it does in supported/tested browsers. Screen Pages can provide fixes or workarounds for those issues as and when identified but reserves the right to quote and charge for the provision of those fixes at its discretion.

Please Note: Magento warrant the Admin Panel application as being supported with the following browsers:

- Internet Explorer 11 or later
- Microsoft Edge, latest–1
- Firefox latest, latest–1 (any operating system)
- Chrome latest, latest–1 (any operating system)
- Safari latest, latest–1 (Mac OS)
- Safari Mobile for iPad 2, iPad Mini, iPad with Retina Display (iOS 7 or later)
- Safari Mobile for iPhone 4 or later; iOS 7 or later
- Chrome for mobile latest–1 (Android 4 or later)

Where latest–1 means one major version earlier than the latest released version.

2.5. Use of Cookies

Screen Pages sites require the customer's browser to accept the storage of cookies – this is the default setting for new browser installations. It is necessary to store cookies in order to recognise and retrieve individual customer profiles. Even as an unregistered or guest customer, the system stores the customer's basket information. The cookies that are stored by this site do not contain any personal or sensitive information. Typically, a cookie might contain a unique alphanumeric string used as an identifier for the customer or simply a true/false value.

If a customer attempts to add a product to their basket with Cookie support disabled, they will be directed to a content manageable page explaining how to enable cookies within several different browsers. Gardiner Pole Systems will be able to manage the content of this page through the Admin Panel content management tools.

Please Note: the account registration and checkout process cannot function without the use of cookies.

2.6. Use of JavaScript

Screen Pages sites require the customer's browser to accept the use of JavaScript – this is the default setting for new browser installations. It is necessary to use JavaScript in order to process customer actions on the website such as adding products to the basket or validating form completion.

If a customer enters the site with JavaScript support disabled, they will be notified that they need to enable JavaScript in order to use the website.

Please Note: the account registration and checkout process cannot function without the use of JavaScript.

2.7. Search engines

Whilst Screen Pages will take every effort to ensure the full and accurate indexation of the website by search engine robots using widely accepted knowledge and its own experience, it cannot influence with finality the frequency, completeness and content of this activity.

2.8. Order processing and payment

Screen Pages cannot control the effective functioning of order and payment processing systems used in relation to sales made through the Website, as it has no visibility of client's back office or accounts systems.

It is the CLIENT'S sole responsibility to perform frequent reconciliations to ensure that the monies received for sales processed through the Website tally with the value of the goods sold through the Website and promptly to bring any discrepancies to Screen Pages' attention.

sp.

3. Content Management - Admin

Throughout this document there are numerous references to the content mangement tools. Admin is the *web-based* content management tool that will be used by Gardiner Pole Systems to manage their site. Admin Panel is the inbuilt content management tool available on the Magento platform.

3.1. Accessing the application

The application is hosted securely on our servers. Gardiner Pole Systems can access it through their internet browser software using details that will be provided by Screen Pages during the user acceptance testing phase of the project and at launch.

3.2. What is the application used for?

Admin will be used to keep the website content up to date and includes options for managing:

- Sales information
- Products
- Stock information
- Reviews
- Categories
- Customer information
- Offers & promotions
- Content areas & pages
- Shipping & tax rates

3.3. Application modifications

The application functionality, design & process flow will not be modified from the standard during the course of this project unless specifically requested by Gardiner Pole Systems and agreed with Screen Pages with the exception of the below items.

3.3.1. Website Setup

Screen Pages will create the following websites during the initial setup of the Gardiner Pole Systems website.

Website	Currency	Language	URL
Default	GBP	EN-GB	www.gardinerpolesystems.co.uk

3.3.2. Non-Saleable Product Flag

Screen Pages will create a product level flag that when enabled, hides the price for that product wherever it is on the site. The following elements would be removed from the page for products where this flag is enabled:

- Homepage
  - Product price display in:
  - Menu
  - Feature products carousel
- Category page
  - Product price display
  - Product quick view overlay
- Product page

- - Product price display in:
- Main product page
  - Up-sells
  - Product variant selection & add to basket functionality

3.3.3. Trade Pricing by Customer Group

Group specific pricing by product will be used by Gardiner Pole Systems. An example will be set and tested as part of the site development. Setting the prices and customer groups will be the responsibility of Gardiner Pole Systems.

3.3.4. Customer Comment Adding/Editing

Screen Pages will implement functionality that will allow Gardiner Pole Systems to add and edit a customer "comment" attribute. Information in this section will not be visible to the customer. Information in this attribute will be displayed when an Admin Panel user accesses the customer account through the Admin Panel or attempts to create an order for that customer. An example of how this area will be used is: *"Only deal with this customer via email and not over the phone.".*

3.3.5. Order Comment Adding/Editing

Screen Pages will implement functionality that will allow Gardiner Pole Systems to add and edit an order "comment" attribute. Information in this section will not be visible to the customer. Information in this attribute will be displayed when an Admin Panel user accesses the order through the Admin Panel. An example of how this area will be used is: *"Ensure customer is contacted before delivery".*

3.3.6. Distributor Stock Handling

If a customer is part of the distributor customer group any order that they place will not have an impact on the stock quantities when they place an order, i.e. the stock level of the products they purchase will stay as it was before their order was placed.

Instead the stock quantity will only be updated/reduced when the order has been confirmed by Gardiner Pole Systems at which point the stock levels will be decremented by the quantity included in the customer's order.

This will be developed as a background process that acts on the order save process to record the stock levels that should be reduced and by how much when a orders reach a certain state in the Admin Panel.

3.3.7. Commercial Invoice printing

Screen Pages will create a commercial invoice template to include:

'Country of Origin'
'Commodity Code'

3.3.8. 503 Page Styling

The Magento 503.php error page will be styled to be in-keeping with the Gardiner Pole Systems. The styled page will also include a message stating that the website is temporarily unavailable for maintenance and will include an email address and a contact phone number for Gardiner Pole Systems.

3.3.9. Sub-Bundle Product Type

Screen Pages will create a new product type in Magento called "sub_bundle". This product will be based on the bundle product type and is expected to only be used in conjunction with a parent bundle product.

The sub-bundle product will be modified from the standard bundle product functionality in the following ways:

Sub-Bundle Option Changes
The sub-bundle product editing/creation screen in the Admin Panel will be modified so that:

- Sub-bundles can only have one "option" added to them.
  - Creating or editing a bundle product more than option will have all but the first option removed upon saving.
- Sub-bundles will only be able to use the input type "check-box".
  - Creating or editing a bundle product with any other input type will cause the validation in the Admin Panel to fail.
- Sub-bundles must have the "is default" option checked for all products in the option.
  - Creating or editing a bundle product with the is default option not set for all products in the option will cause the validation in the Admin Panel to fail.
- Sub-bundles must have a quantity defined for all products in the option.
  - Creating or editing a bundle product with the quantity not defined for all products in the option not set will cause the validation in the Admin Panel to fail.

3.3.10. NQB

3.3.10.1. admin panel grid edit

Screen Pages will update the grid options for the product grid in the admin panel to include another column titled "NBQ".
This will show the information that is held in the product attribute 'notify_stock_qty'.

The 'notify_stock_qty' attribute will be populated under the stock information section of the product and have the title: 'Notify for Quantity Below'

3.3.10.2. NQB email send
When the stock level hits the same value as the NQB attribute and an email will be sent out to a specified email address informing them that the product NQB has been reached. The email address will be set in the Magento admin panel.

3.4. Magento Extension Installation

The following Magento extensions will be downloaded, installed and tested on the Gardiner Pole Systems website, Links are also present against the titles to the specific 3rd Party extension URLs:

- Ebizmarts Sage Pay Suite Pro
  - Provides SagePay payment integration on the front and Admin Panel

- PayPal Express Checkout

- Provides PayPay Express Checkout functionality to the site
- Packaged within Magento so no purchase required

- Amasty Actions Log
  - Adds Amasty actions log functionality to the site.
  - Adds security and data protection enhancements to the site.

- Scommerce Mage Google Tag Manager Tracking for Magento 2
  - Provides google tag manager tracking functionality to the site

- Xtento Two-Factor Authentication
  - Provides Xtento 2-factor authentication functionality to the site

- IWD Agency Order Management
  - Adds IWD Agency Order Management functionality to the site.
  - Adds functionality to edit orders without creating a new order

- Amasty Duplicate Categories
  - Adds Amasty Duplicate Categories functionality to the site.

- Yireo Sales Block 2
  - Adds Yireo Sales Block functionality to the site
  - Provides functionality to block orders based on a rule based system

- Infomodus Fedex Shipping Manager
  - Adds Infomodus Fedex Shipping Manager functionality to the site

- Amasty Shipping Table Rates
  - Adds Amasty Shipping Table Rates functionality to the site.

- Aheadworks Product Questions
  - Adds Aheadworks Product Questions functionality to the site.

- Webrotate360
  - Adds Webrotate360 functionality to the site.
  - Allows for 360 degree product images

- Loquat Address, Email and Phone Validation for Checkout Forms
  - Adds Postcode lookup functionality to the site.

- Amasty Payment Restrictions
  - Provides the functionality to restrict payment methods by customer group

- Magestore Store Credit
  - Adds Magestore store credit functionality to the site.

- Fooman PDF Customeriser
  - Adds Fooman PDF Customiser functionality to the site.

- Amasty Store Locator
  - Provides Amasty Google Maps Store Locator functionality to the site

- Aheadworks Blog
  - Provides Aheadworks blog functionality to the site

Commented [AG1]: WE currently have a Distributor status and a Distributor Complete status with their own colours. We would want to maintain these

Commented [RP2R1]: IWD advertise that the colour status's are included within so no extra work required to set this up.

Commented [AG3]: Ideally this should be set up so that any internal credit a client has is automatically selected to be used first when placing their next order

Also any orders that are paid with Internal Credit should go to Pending Status so that our Dispatch Team do not overlook them (currently they go to processing which makes it look like they are already being dealt with – probably a bug on our current build)

Commented [RP4R3]: These items should be fine and work as you have stated above "out of the box" if not we will have to review this in UAT.

- o   An example page will be created but not styled and will use the default theme.
- Aheadworks Advanced Reports
  - o   Adds additional Magento Admin Panel reports not available as standard

3.5. Magento Attribute Creation

3.5.1.Products

The following product attributes will be created during development for use on the Gardiner Pole Systems website:

sku	small_image	use_config_max_sale_qty
_type	small_image_label	is_in_stock
_category	special_from_date	notify_stock_qty (name of attribute in admin panel = Notify for Quantity Below)
_root_category	special_price	use_config_notify_stock_qty
_product_websites	special_to_date	manage_stock
allow_only_fedex	status	use_config_manage_stock
aw_cp_disable_price	tax_class_id	stock_status_changed_auto
aw_cp_disable_product	technical_info	use_config_qty_increments
cost	thumbnail	qty_increments
country_of_manufacture	thumbnail_label	use_config_enable_qty_inc
created_at	updated_at	enable_qty_increments
description	url_key	is_decimal_divided
image	url_path	_links_related_sku
image_label	visibility	_links_related_position
meta_description	webrotate_path	_tier_price_website
meta_keyword	weight	_tier_price_customer_group
meta_title	qty	_tier_price_qty
name	min_qty	_tier_price_price
news_from_date	use_config_min_qty	_group_price_website
news_to_date	is_qty_decimal	_group_price_customer_group
not_for_sale	backorders	_group_price_price
pdf_download	use_config_backorders	_media_attribute_id
price	min_sale_qty	_media_image
required_options	use_config_min_sale_qty	_media_lable
short_description	max_sale_qty	_media_position

3.5.2.Category

The following category attributes will be created during development for use on the Gardiner Pole Systems website:

- No additonal attribtes to be created.

3.5.3. Customer

The following customer attributes will be created during development for use on the Gardiner Pole Systems website:

- Phone number
- Delivery notes (specified later in this document.

3.6. Content Managed Areas

Throughout this document, references are made to content managed areas/blocks. These will enable Gardiner Pole Systems to add further copy or promotional content to the page header which can incorporate links to other areas of the site. These areas can include:

- Text
- Images
- HTML
- Embedded scripts (e.g. YouTube embeds)
- Flash etc

Gardiner Pole Systems will be able to manage this content at any time using the Magento Admin Panel. All content areas/blocks will initially be set to match the designed content.

3.7. VAT Rates

Screen Pages will create a default set of VAT rates for all current EU countries. Gardiner Pole Systems will be responsible for setting up any other VAT rates required by the functionality of the website.

3.8. Retina Imagery

Screen Pages will upload all site imagery at 200% of the size displayed on the site to allow for sufficient image quality when the site is viewed on retina devices. This includes but is not limited to the following image types:

- Site template imagery
    - Logo
    - Buttons
    - Icons
- Category and sub-category imagery
    - Thumbnails
    - Banner images
- Product imagery
- Content managed area imagery

Gardiner Pole Systems should follow this convention for any content managed imagery added to the site to keep a consistent image quality.

3.9. Data & Content Migration

The following types of data & content will be migrated from the Gardiner Pole Systems Magento 1 site to the Magento 2 site at or before launch.

3.9.1. Sales
Order Data

Order, invoice, delivery & refund data will be migrated using the data migration tool provided by Magento at launch.

Tax
VAT rate & rule data will be migrated by Screen Pages during development on the project.

3.9.2.Catalogue
Product & Category Data
Product and category data will be exported from the existing Magento 1 site, provided to Gardiner Pole Systems to adjust/enhance where required and will be re-imported into the site prior to launch.

URL Re-Writes
Gardiner Pole Systems will need to review and provide an updated list of URL re-writes required for the new site during the UAT period, although these can be bulk imported into the site.

Search Synonyms & Redirects
Search synonym & redirect data will be migrated using the data migration tool provided by Magento at launch.

3.9.3.Customers
Customer Data
Customer data and customer groups data will be migrated using the data migration tool provided by Magento at launch. All customer accounts present on the site at the point of launch will be migrated over to the Magento 2 site and customers will be able to login as normal.

Please note: No active shopping basket data or saved payment method detail will be migrated across due to the differences in underlying structure between the two systems.

3.9.4.Promotions
Promotional Rules
Gardiner Pole Systems will need to manually re-create any required promotional rules or settings during UAT, having tested the new site promotional functionality to see which are still required.

3.9.5.CMS
Content Pages & Blocks
Gardiner Pole Systems will need to manually re-create any required content managed pages or blocks during UAT, having verified that the content is still accurate and correct.

3.9.6.Configuration
Screen Pages will duplicate all System > Configuration settings present in the existing Gardiner Pole Systems Magento 1 site for extensions that are being retained.

sp.

sp.

4. Site Layout

4.1. General Page Layout

Generally all pages on the site will consist of four main display elements:

- Page header - displayed along the top of the screen
    - Used to display informative content such branding, mini basket, product search function, account and login links
- Left menu - displayed in a column along the left side of the screen
    - Used to display category and filter functions when in the catalogue or my account function links in the my account section
- Main content area – displayed between the other elements
    - Used to display the specific content and functionality of the relevant page being viewed
- Page footer - displayed along the full width of the screen
    - Used to display links to the content managed and non-critical functions of the website, e.g. terms and conditions, about us

The areas will be laid out in a standard "C" shaped format whereby the header, left navigation and footer form a "C" shape. The remaining area in-between the header and footer is used to display the main content of any particular page.

Functionality included on the page header, left navigation or page footer can be accessed by the customer regardless of what page they have selected i.e. these elements appear on every page.

Most of the screen area is occupied by the **Main content area** and will display the content for a particular page, e.g. a list of products, the main product page, the shopping basket etc.

Please Note: When individual pages are referred to in subsequent sections of this document, it is the content of this area that is being referred to unless otherwise stated.

4.1.1. Responsive Layouts

Screen Pages will follow the below logic when building each page template and element to ensure the best experience for browsers with different screen widths:

- Below 320px
    - Mobile layout, fixed at 320px wide.
- Between 320px & 767px
    - Mobile layout, stretching to fill 100% of the available screen.
- Between 768px & 1024px
    - Desktop layout, fixed at 1024px wide.
- Between 1024px & 1920px
    - Desktop layout, stretching to fill 100% of the available screen.
- Above 1920px
    - Desktop layout, fixed at 1920px wide.

4.2. Site Navigation

The main forms of navigation on the site for the customer are:

- Header, which will display links to the shopping basket and feature the search input box and may contain other links to key areas of the web site including the main product catalogue.
- Left navigation, which may display links to the main product catalogue sub-sections, my account functionality or checkout progress menu.
- Footer, which will display links to the content managed pages on the site.

Additional links to categories and products will appear within the main content area as the customer browses through the site. This will include the category, sub-category, search results and product pages.

Finally, Gardiner Pole Systems can create links to pages by way of customised content areas that they will manage the content for. These are detailed in the relevant page sections where applicable.

4.3. Page Header

The page header appears on all pages and will contain the following elements:-

4.3.1. Cookie Message Block

Screen Pages will create a function that displays a CMS block called "**Header_Cookie_Message**" at the top of the site the first time a customer visits the site. Once the customer moves to another page, the cookie message block will not be shown again. The customer will have to take no action to create this "message seen" cookie, other than having viewed a single page on the site.

A "first time visitor" to the site will be determined by the presences of a persistent cookie created on the visitor's machine after seeing one page of the Gardiner Pole Systems website. This cookie will then prevent the cookie message block being made visible again until the cookies are deleted by the customer.

This element will be present in both mobile and desktop layouts.

4.3.2. Logo Content Managed Area

Screen Pages will create a content managed area called "**Header_Logo**" that will be displayed in the top left corner of the website. When the customer clicks on the logo they will be directed to the homepage regardless of what page they are on.

This element will be present in both mobile and desktop layouts.

4.3.3. Category Links – 2 Levels

Links to the top level categories of the product catalogue will be displayed. The categories will appear in a single line and will be generated dynamically based on the entries made in the database:

- Gardiner Pole Systems can add or remove top level categories using the Magento Admin Panel.
- There is no character limit for category names

Any top-level categories that have sub-categories assigned to them in the Magneto Admin Panel will display a drop-down menu that lists the sub-categories when the customer moves their mouse over the top-level category name. As the customer moves their mouse off the top-level category name or sub-category display area, the

drop-down menu will be hidden. Customers can then click through to any of the sub-categories or through to the main top level category.

The categories entered through the Magento Admin Panel will need to be constructed according to the below logic in order to be displayed correctly on the site.

Top Level Category Only
This will appear on the top level and open the menu below if any sub categories are assigned.

2 Category Levels
The 2nd level categories will then become the column of sub-categories that the customer has available

Please Note: Due to the fixed limit of the screen width, care should be taken not to add too many top level categories or too many characters to the category name. Category names will be left aligned in the header so care should be taken to keep the number of categories appropriate to the space available.

Once the site has gone live, Gardiner Pole Systems are responsible for managing the links that appear in this section. Category information can be managed using the Magento Admin Panel.

This element will be present in both mobile and desktop layouts and will be re-presented in an accordion section behind the menu drop-down on the mobile layout.

4.3.4. Your Account Link

A text link to the login page will appear at all times. This link will contain the text "Account".

- If the customer has not already logged in when the click the link, they will be directed to the login page.
- If the customer has logged in when the click the link then they will be directed to the account dashboard page.

This element will be present in both mobile and desktop layouts and will be presented as part of the account drop-down on the mobile layout

4.3.5. Login/Logout Link

A text link to the login/logout page will appear at all times.

- If the customer has not already logged in:
    - When the click the link, they will be directed to the login page.
    - The text of the link will say "Log In"
- If the customer has logged in:
    - When the click the link then they will be directed to the log out page.
    - The text of the link will say "Log Out"

This element will be present in both mobile and desktop layouts and will be presented as part of the account drop-down on the mobile layout.

4.3.6. Product Search

A product search facility will be displayed in the page header. This will consist of:

Commented [AG5]: I would prefer that for PC desktop we retain our current method where when the 'All Product' top banner link is hovered over it shows a drop down with all categories and sub categories displayed. One of my pet hates is opening sub-categories list that appear but disappear when your mouse happens to slide off it!

Obviously, this function does not appear on the mobile versions.

Commented [RP6R5]: This is how your current site works as the only top level menu item / category (ALL PRODUCTS) has sub categories assigned to it. So this will work as expected.

- A text input box
- A submit button

When a page initially loads, the input field will be pre-populated with a text value of "***keyword or code***". This is removed when the customer starts typing into the field.

Customers enter a search by typing the criteria into the input field and clicking the submit icon. When the customer submits an entry a product search will be executed. The page will be refreshed and the appropriate search results will be displayed in the main content area.

This element will be present in both mobile and desktop layouts and will be presented as part of the search drop-down on the mobile layout.

4.3.7. Shopping Basket Summary

A summary of the customers shopping basket contents will be displayed on the right of the page header. This will consist of:

- A text link "My Cart"
- Total number of items in the basket
- Total value of items in the basket
- A shopping bag graphic

All the items will form a text link to the main shopping basket page:

- When the customer clicks the link, they will be directed to the shopping basket page

If any items were loaded into their shopping basket in a previous session, they will be retrieved from the profile and loaded into the customer's current shopping basket. The shopping basket summary will be updated to reflect this.

Please Note: This only refers to items that a returning customer did not purchase. In addition, any changes such as prices will also be updated to reflect the **current** product catalogue and not the price when the item was originally loaded into the basket.

This element will be present in both mobile and desktop layouts.

AJAX Mini Basket
The AJAX mini basket will open over the header basket information and will contain the following information:

- A text link "My Cart"
- Total number of items in the basket
- The text "Recently Added Items"
- Product list with each item showing:
    o Product thumbnail image
    o The name of the product
    o The quantity of the product
    o The total price of the product
- Basket total

View Cart button:

- If the customer clicks this option, they are directed to the main shopping basket page.

Checkout button:
- If the customer clicks this option, they are directed to the main shopping checkout page.

4.3.8. Header Banner Content Managed Area

Screen Pages will create a content managed area called "**Header_Banner**" that will be displayed immediately under the menu. It is expected that this CMS block will contain promotional information as indicated on the designs.

4.3.9. Notification Banner Content Managed Area

Screen Pages will create a content managed area called "**Notification_Banner**" that will be displayed immediately under the header_banner. It is expected that this CMS block will contain notification information as indicated on the designs.

4.3.10. Breadcrumb Trail

The breadcrumb navigation will be located in the page header. This consists of a series of text links that make up the category path that the customer has chosen to get to their current location. As a customer navigates down a category tree, each level is displayed as a text link, allowing the customer to:

- See which category they are currently located in
- Navigate back up to any previous level in the category path

All the links are displayed in a single line. With the exception of the current category being viewed, (i.e., last in the navigation), each category name displayed in the breadcrumb navigation will link through to the appropriate category page to display details of that category. Multiple category names will be clearly separated by use of space and >.

By default, the breadcrumb will not be displayed on the home page.

Please Note: The breadcrumb will always contain a "home" link as the first link in the trail. This will link to the homepage of the website.

This element will be present in both mobile and desktop layouts.

4.4. Left Side and Navigation

The Left Navigation is used to present the main navigation options to the customer. As the customer navigates throughout the site, the navigation menu will operate in one of three modes, depending on the area of the site the customer has accessed:

- If the customer is navigating through the site normally, browsing content, the main **category navigation** menu will be shown. The elements of this are described in detail in the sections that follow
- If the customer has accessed their account details or they are registering, the "**My Account" navigation** menu will be shown. This menu is described in detail in the "My Account" section of the document

- If the customer is going through the basket/checkout process, the left-menu will not be displayed

Please Note: The left navigation will not be displayed on the homepage.

The following sections describe the content that will be displayed in the left navigation while the customer is browsing the site normally:

4.4.1.Category Navigation

When the customer starts to navigate into the product catalogue or lands there from an external site link, the category page will be displayed and the category filtering menu will appear on the left side of the screen.

The menu will consist of a list of links that will allow the customer to view and navigate through the sub-categories of the selected category.

- The menu will display a list of sub-categories of the currently viewed category or other categories at the same level if no other sub-category levels are present
- Each category will be a text link, consisting of the category name which forms a link to the category page

To select a category, customers click on the text link. When a customer selects a category:

- The appropriate page is loaded in the main content area

Please Note: Only one category can be expanded at any time – i.e., the customer can only be browsing through one category branch at a time.

Categories and sub-categories can be added / updated / removed as required by Gardiner Pole Systems using the Magento Admin Panel. Gardiner Pole Systems will be responsible for managing all the category data.

Please Note: Unless stated otherwise, the category navigation menu(s) will appear on the category and search results pages.

This element will be present in both mobile and desktop layouts.

4.4.2.Compare Products

When the customer clicks on the compare products option it will add the products to the list on the left hand navigation under the "Compare Products" the information that will show is:
- An "X" which will remove the product from this list
- The name of the product

Underneath all items in the compare list there will display a compare button that will open the Magento product compare pop-up.

A clear button will also display that will remove all products from the compare list.

4.5. Main Content Area

The Main Content area will display the content for a particular page, e.g. a list of products, the main product page, the shopping basket etc.

4.6. Page Footer

The footer will round off the display of each page on the site and it will contain the following elements:

4.6.1. Footer Top Links Content Managed Area

Screen Pages will create a content managed area called "**Footer_Top_Links**" that will be displayed as the top footer content.

This element will be present in both mobile and desktop layouts.

4.6.2. Footer Links Content Managed Area

Screen Pages will create a content managed area called "**Footer_Links**" that will be displayed as the main footer content. In the designs this is shown to have email address and phone number information.

This element will be present in both mobile and desktop layouts.

4.6.3. Copyright and Logos

Screen Pages will create a content managed area called "**Footer_Logo**" that will be displayed under the footer_links content block. It will contain logo images and the copyright text for Gardiner Pole Systems.

This element will be present in both mobile and desktop layouts.

4.6.4. Search Engine Information

The default SEO information used on the homepage of the site includes:

- Page Title
- META Description
- META Keywords

Gardiner Pole Systems will be able manage this content at any time using the Magento Admin Panel.

Please Note: it is unwise to change the content of the SEO fields unless the full SEO strategy is understood as this may impact upon the ranking your site achieves in the Search Engines.

sp.

5. Home Page

5.1. Layout

The Home Page is displayed when a web site visitor enters the web site URL or clicks on an internal or external link to the Home page. These links can occur in or as part of:

- the Gardiner Pole Systems logo
- content managed areas of the site
- advertising, campaign document/emails
- external links targeted at the site

The page will be displayed within the "main content area" as explained in the Site Layout section.

Gardiner Pole Systems will be responsible for the creation and management of all content displayed within the content managed areas.

5.2. Content Managed Areas

Gardiner Pole Systems can manage the data for the content managed areas on the homepage at any time directly using the Magento Admin Panel.

Please Note: The content areas are of fixed width however the height is not and can be extended by the content. In this case, content simply appears further down the page.

5.2.1. Content Blocks

Content blocks will be created and included in the CMS home page in the same initial layout as the designs. Each of these blocks will be populated with the content from the initial mocks but Gardiner Pole Systems can make changes to these at any point after access is given to the Admin Panel during testing.

Gardiner Pole Systems will be able to control the layout of the homepage by moving the block references around.

This element will be present in both mobile and desktop layouts.

5.2.2. Sliding Banner

Screen Pages will create a sliding carousel banner that appears as the main homepage content. Gardiner Pole Systems will be able to control the number of slides that appear, as well as the content of each whether that be images, text, HTML, etc. Each slide will be shown for five seconds before sliding right to the next slide in the list. If a website user has hovered over the banner, then the slide show action will be paused.

Customers can click a button to move to that slide or slide the carousel up and down if using a touch screen device.

This element will be present in both mobile and desktop layouts.

5.2.3.Category link blocks

Screen Pages will create a content banner widget that Gardiner Pole Systems can embed into the CMS pages and blocks displayed across the site. This widget will take inputs listed below and arrange them into a row of a maximum of 6 items in a row.

- An image
- Foreground HTML title
- Destination URL

It is expected this widget type will be used for the "find products by category" section of the homepage designs.

These elements will be present in both mobile and desktop layouts
This element will be present in both mobile and desktop layouts.

5.2.4.What's New Product List

Screen Pages will create a special category that will be displayed on the homepage but not appear within the main product catalogue listings elsewhere on the site.

- This category will be hidden and will not appear in the main category navigation
- Gardiner Pole Systems will assign the popular products to this category using the content management tool
- There is no limit to the number of products that can be assigned to the category however only the first **four** will be displayed be default when the homepage loads.
- Customers will be able to move between different products from this category, one product at a time by using the left and right scroll arrows at either end of the category area

For each product to be shown on the page, the following information is displayed:

- A thumbnail image of the product
- Product name
- Product price, including was/now price rules

The image and name will form a clickable link to the product page. When selected, the customer will be directed to the product page where details of the chosen product will be displayed.

This element will be present in both mobile and desktop layouts.

5.2.5.Content Left/Right Image Block

Screen Pages will create a content left/right widget that Gardiner Pole Systems can embed into the CMS pages and blocks displayed across the site. This widget will take inputs listed below and arrange them into a full width banner section of the page/container they appear on:

- Default text colour
- H2 title text
- HTML copy
- Button to link to specified URL

It is expected this widget type will be used for the 1/2 sections of the homepage designs.

These elements will be present in both mobile and desktop layouts.

sp.

6. Category Page

6.1. Layout

The standard category page is displayed when a customer clicks on a link to a category. This will be from:

- a category link anywhere on the site
- including a category link in the left navigation
- including a category link that has been placed in content managed areas on the site
- advertising, campaign document/emails
- external links targeted at the site

6.2. Content Areas

The data for all of the content managed areas on the page will be managed by Gardiner Pole Systems using the Magento Admin Panel.

Please Note: The exact dimensions of each content managed area on the page will be detailed by the design process, outside the scope of this document.

6.2.1. Title

The category name will be displayed at the top of the category page. This copy is assigned to the category by Gardiner Pole Systems using the Magento Admin Panel and should, where possible contain search engine friendly keywords.

- For search engine optimisation purposes the category name will be displayed within a "H1"

This element will be present in both mobile and desktop layouts.

6.2.2. Sort By Drop Down

A drop down box is displayed at the top and bottom of the product list that allows the customer to order the products in ascending or descending order based on the following criteria:

- Position
- Alphabetically by Product Name
- Price

When the customer makes a selection from this list the page is refreshed and the appropriate order of products is displayed. The customer can then reverse this sorting by clicking the "arrow" image next to the drop down box.

This element will be present in both mobile and desktop layouts.

6.2.3. Grid/List Link

An option is provided that allows the customer to switch between grid & list layouts of the category page.

When selecting the alternate view, the page refreshes and the previous filtered & sorted group of products is displayed in the alternate layout.

The functionality to switch to list view will be restricted to the trade customer group.

This element will be present in both mobile and desktop layouts.

6.2.4.View Per Page Drop Down

Customers will be able to choose how many products are displayed on each category page. Gardiner Pole Systems will be able to control the options that appear in this drop down as well as the default.

When the customer makes a selection from this list the page is refreshed and the appropriate number of products is displayed.

This element will be present in both mobile and desktop layouts.

6.2.5.Quick View

Customers will be able to click a "Quick View" button against a product which will then show them a sub-set of the product page information in a light box pop-up.

The quick view information will be accessible when the user hovers over the product image on a category page. The addition options appear (basket icon & Compare icon) the quick view pop up will appear if the user clicks on the basket icon.

The information contained within the quick view light box will be loaded directly from the product page and use the same styling and functionality as detailed in the product page.

Only the following elements will be shown:

- Product left column
  - Image
  - Alternate images
  - Video
- Product right column
  - Name
  - Price
  - Short description
  - Variant selection
  - In stock indicator
  - Add to bag button

No other elements of the product page layout will be shown.

This element will be present in desktop layout only.

6.2.6.Pagination Links

If the number of products within the selected category exceeds the number in the basic pagination field within the Admin Panel, links are included the additional pages of products.

This element will be present in both mobile and desktop layouts.

Commented [RP7]: @Alex - What action would you like to activate this function?

Commented [AG8R7]: Ideally the client can hover the mouse over the product shown and the option to click a 'Quick Buy' button would appear. This is also referenced in 6.2.8

Commented [RP9R7]: This would be a conflict as the hoover function enables the product highlight action which shows the add to basket button and the add to compare function. We could enable this pop -up when a user clicks on the basket icon on the product highlight is shown?

sp.

6.2.7. Product Count

A numerical count of the products currently being displayed will be shown giving details on the current products being viewed and the total number in the category.

This element will be present in both mobile and desktop layouts.

6.2.8. Product Grid Display

Products within the category will be displayed below the sorting options.

* Up to 6 products can be displayed on a single row

For each product to be shown on the screen, the following information is displayed:

* Thumbnail image
* Name
* Price
* "Plus 20% VAT" text

Hover display (desktop only)
When a customer hovers over the product it will display an overlay displaying more functionality which includes:

* Add to cart logo (logo will change when user hovers with cursor over it)
* Add to compare link (logo will change when user hovers with cursor over it)

This action will also highlight all the product information and the text.
The text will also change from black to white, except price that will change to yellow.

The image & name items will form a link to the product page. When selected, the customer will be directed to the product page where details of the chosen product will be displayed. Other links, such as add to compare will take customers to the appropriate page/perform the appropriate action as described elsewhere in this document.

If the product is available without variant options, the product will be added to the basket immediately when the customer clicks the buy now button and the customer informed through the add to basket action described elsewhere in this document.

Gardiner Pole Systems will be responsible for maintaining the following using the Magento Admin Panel.

* Assigning products to the category for display
* Maintaining the product data, including was / now prices

Please Note: Was / Now rules will apply to the display of the product price. If the product contains a Was and a Now price, the current product price (Now price) is displayed in red, before the previous price of the product (Was). The previous price will be struck through (i.e., with a line through it) to emphasise the current price.

e.g.: £20.00 ~~£25.99~~

Please Note: If elements of the product information fall onto more lines than have been included in the design, product title, was/now pricing, product reviews, etc, then the main product elements may not line up horizontally. For this reason it is important to think carefully about the information that is displayed against these products and that if necessary they are ordered to minimise the disruption to the page.

This element will be present in both mobile and desktop layouts.

6.2.9. Product List Display

Products within the category will be displayed below the sorting options.

For each product to be shown on the screen, the following information is displayed

- Thumbnail image
- Name (logo will change when user hovers with cursor over it)
- Price
- "Plus 20% VAT" text
- Review link (takes you to the product reviews page)
- Add Your Review link (takes you to the product reviews page, scrolled down to add review section)
- Short description
- Add to cart link (logo will change when user hovers with cursor over it)
- Add to compare link (logo will change when user hovers with cursor over it)

The image & name items will form a link to the product page. When selected, the customer will be directed to the product page where details of the chosen product will be displayed. Other links, such as add to compare will take customers to the appropriate page/perform the appropriate action as described elsewhere in this document.

If the product is available without variant options, the product will be added to the basket immediately when the customer clicks the buy now button and the customer informed through the add to basket action described elsewhere in this document.

This element will be present in both mobile and desktop layouts.

Commented [RP10]: @Alex – do you want this to be visible for all customers or just trade customers?

Commented [AG11R10]: Looking through my Specifications I cannot see the need for this type of view – I do not think that we currently have this. Not sure what this has come from on our original specification requests.

Commented [RP12R10]: This would be for the trade list view functionality set in the SOW. If this is not useful though we can remove this option. Most sites do not have both grid and list view these days.

sp.

7. Product Search

7.1. Overview

Customers will be able to use the standard Magento product search functionality. This method will search the product database for matches based on text criteria entered by the customer. Results are displayed on a separate listing page – identical to the category page - where the customer can link directly to the product details.

7.2. Basic Search

An input box is displayed to capture the customers search keywords in the page header. Upon entering search keyword(s) a search is executed on the product catalogue.

By default, the following product data will be searched:

- Product code
- Product name
- Product description (short and long)
- Product features
- Other attributes added to the search index through the Admin Panel

The search keywords entered by the customer are matched against the catalogue content using the following criteria:

- Each word entered and separated by a single space is treated as an individual keyword
- The content is searched for occurrences of all the individual keywords
- Results are ranked numerically based on the number of keywords found in the content item and their proximity to each other (i.e., how close each keyword is to each other)
- Content items that have more key words with a closer proximity are ranked higher than those with less keywords and a lower proximity
- Partial matches will be returned (i.e. a search for shoe will return products with the word shoes in them.
- The search doesn't support phrase searching (i.e. a search for "blue shoes" will not search for that phrase it would search for the string "blue shoes" including the " marks)

Gardiner Pole Systems will be able to change the basic operation of the search function, if required, by altering the 'Indexing Mode' from LIKE & Full Text Index Combined (as described above) to either LIKE or Full Text or by changing the attributes included in the search index.

7.3. Results Page

Search results will be returned on a page along with a summary of the results and a reminder of what was selected for the search.

"Search results for '{search term}'"

The list of matching products returned will be displayed in an identical manner to the category page.

This element will be present in both mobile and desktop layouts.

7.4. Results Page – Zero results

If no search results are returned the Search results page will be returned and display the following message:

"Your search returned no results"

Screen Pages will create a content managed area called **"Search_No_Results"** that will be displayed below the search results message, initially be populated with the text:

"We're sorry you didn't find what you're looking for.

If you entered a product code it's possible that product isn't available any more.

If you searched on a specific product name, please try again using a more general search term."

This element will be present in both mobile and desktop layouts.

7.5. Google Analytics Tracking

The use of the site search function will be tracked using Google Analytics by inserting the search query variable "q" into the site search configuration field in the Analytics Setting screen within Google Analytics.

sp.

8. Product Page

8.1. Layout

The product page is displayed when a customer clicks on a product link from

- the category or sub-category page
- the search results page
- a link in a content managed area that directly points to a product
- advertising, campaign document/emails
- external links targeted at the site

8.2. Content Areas

The product data displayed on this page will be managed by Gardiner Pole Systems using the Magento Admin Panel.

Please Note: The exact dimensions of each content managed area on the page will be detailed by the design team outside of this document.

The following content is displayed:

8.3. Product Left Column

8.3.1. Breadcrumb / Category trail

The breadcrumb trail will show in the top left area of the main content. This will also highlight the category as a H2 text underneath as per the design.
It is assumed that if the product is in multiple categories it will show the first category the product has been assigned too.

8.3.2. Product Images

When the page loads the main product image will be displayed on the page.

This element will be present in both mobile and desktop layouts.

8.3.3. Webrotate360 images

Webrotate 360 extension functionality will be implemented that will allow the user to rotate the main product image.

8.3.4. Alternative / Multiple Images

The page will display multiple product images, if they are available. For each alternative image a thumbnail image will be displayed below the main image. When the customer clicks their mouse on the thumbnail image, the main image is replaced with a full sized version of the thumbnail image.

- This process repeats as the customer clicks their mouse on the thumbnail images
- One of the thumbnail images will be of the image that was displayed when the page loaded

This element will be present in both mobile and desktop layouts.

8.3.5. Image Supply

Gardiner Pole Systems are responsible for the supply of all product images for each individual product in the largest size used by the website. These can be managed using the Magento Admin Panel.

Please Note: Image dimensions will be specified outside of this document.

8.3.6. Product Video

Gardiner Pole Systems will be able to define a video to be displayed on the product page. The video to be displayed will be entered into the product data using its "embed" code from the video hosting partner.

Any product with a video will be shown in the additional images section, after the additional images with a "video" play icon.

Clicking this will replace the main image with the HTML entered into the video attribute. Customers will be able to return to the main image(s) by clicking the small thumbnails. This will the show the full sized image in place of the video.

This element will be present in both mobile and desktop layouts.

8.4. Product Right Column

8.4.1. Name

The product name of the product will be displayed on the page. The name will be displayed using a "H1" HTML tag for search engine optimisation purposes.

This element will be present in both mobile and desktop layouts.

8.4.2. Rating & Reviews

A link to the reviews of this product and a link to create their own review. Further details of the review page functionality can be found in the reviews section below. If no reviews are currently marked as approved no reviews content will be shown in this section of the page.

This element will be present in both mobile and desktop layouts.

8.4.3. Price

The product was/now price will be displayed on the page as per the design mock-up. The pricing displayed will be the one appropriate to the website/currency/customer group appropriate to the customer viewing the page.
Price will be displayed excluding VAT and under the price the text "Plus 20% VAT" will be displayed.

Tiered Pricing will also be available and will load as per default Magento.

This element will be present in both mobile and desktop layouts.

8.4.4. Stock Status

The stock status message of the product will be displayed for simple products. This message will be pulled from the product "stock_availability_message" attribute.

Commented [AG13]: This also needs to work for Bundled products where one of the simple default products that make up the bundled is also out of stock.

Commented [RP14R13]: Do you have bundles where default options are displayed when the customer lands on the page? The only ones I have found have nothing selected but have required options. If the option in the bundle is out of stock the user will not be able to add it to the bundle.

Commented [RP15R13]:

Commented [RP16R13]: (your comment didn't load on this version)
If the simple pole is a default item this will show as out of stock.

Commented [RP17R13]:

This element will be present in both mobile and desktop layouts.

8.4.5.Short Description

The product short description will be displayed below the name and price. Gardiner Pole Systems should make sure that this copy contains search-engine friendly keywords or phrases (as used by the general public) where possible.

This element will be present in both mobile and desktop layouts.

8.4.6.Bundles and Sub Bundles

Gardiner Pole Systems will be using bundle products so the customers can build their own customizable products. These bundles products will be created with a number of options and with each option containing a drop-down set of choices, as per the standard Magento functionality.

Each choice in each option of the bundle can either be a:
- Simple Product
- Sub-bundle Product
    o As defined in section 3.3.9 of this document

An example of the bundle product configuration possible on the Gardiner Pole Systems website is:

- o Bundle Product:
    - ▪ Option 1:
        - Simple Product 1 or
        - Simple Product 2 or
        - Simple product 3
    - ▪ Option 2:
        - Simple product 4 or
        - Sub-bundle product 1 or
            o *Simple product 5 & simple product 6*
        - Sub-bundle product 2
            o *Simple product 7 & simple product 8*

The bundle will be added to the basket as per the standard Magento bundle product functionality and will continue throughout the rest of the customer process as a standard bundle product.

8.4.7.Quantity

The quantity box will be displayed that will allow customers to change the quantity of the items that they wish to add to the cart. By default this will be set to 1.

8.4.8."Add to Cart" Button

An "Add to Basket" button will be shown beneath the variant selection options.

If the product selected is in stock the add to basket button is active and can be clicked by the customer and the product is added to the basket. The page will be refreshed and the customer informed by an onscreen message that the product has been added to the basket.

If the product selected is out of stock the add to basket button is replaced with a message saying "out of stock".

If the product selected is out of stock and doesn't have allow backorders enabled the add to basket button is replaced with an "Email When Back In Stock" button. If the customer clicks this button when logged in the page will be refreshed and the customer informed by an on screen message that an alert was created for this product. If the customer is not logged in when clicking the link, the customer will be taken to the login page where they can create an account or login before being shown the above success message.

Magento will automatically email any customers who have signed up for alerts on a daily basis if a product comes back into stock. The email template sent to customers can be changed by Gardiner Pole Systems.

If the customer has made an invalid selection or hasn't selected from all the required options when they click the button, an error message will be displayed to inform the customer of their mistake.

This element will be present in both mobile and desktop layouts.

8.4.9.PayPal
PayPal checkout button will display under the "Add To Cart" button. This will direct the user to the PayPal Payment method.

8.4.10.Add To Compare
Add to Compare button will be present and add the product to the compare function described elsewhere in this document.

8.4.11.Email To A Friend
Email To A Friend button will appear and when selected this will direct the customer to the email to a friend page that is specified later in this document.

8.4.12.Tier Prices
Gardiner Pole Systems will also be using Tier price functionality. If Tier Prices are set against the product the tier price information will show under the product price.

8.5. Product Bottom

8.5.1.Description & Features Tab
The main product description will be displayed as the first tab shown on the product page.

A bullet point list of product features will be displayed below the product description.

Gardiner Pole Systems should make sure that this copy details the unique features of the product, especially if they are terms used by the general public.

This element will be reformatted to an expandable section displayed in a vertical list with the other tabs on the mobile layout.

8.5.2.Technical Info Tab

A bullet point list of product technical information will be displayed under its own tab.

Gardiner Pole Systems should make sure that this copy details the unique features of the product, especially if they are terms used by the general public.

This element will be reformatted to an expandable section displayed in a vertical list with the other tabs on the mobile layout.

8.5.3.Ask A Question Tab
A contact form will be displayed under its own tab.
The contact form will contain the fields:
- Name*
- Email*
- Query*
- Recapture validation

This functionality will utilize the Aheadworks Product Questions extension.

8.5.4.Related Products
A related product section will be displayed below the above page content.

- Gardiner Pole Systems can assign related products to the product being viewed using the Magento Admin Panel
- Related products are displayed in a table containing the following elements

Please Note: Related products **cannot** contain variants to allow them to be added to the basket easily by the parent product add to basket action

For each related product in the list, the following will be displayed:

- A product thumbnail image
- A product name
- Price (including was/ now and trade price rules)
- "Add" checkbox

Any related products that have the add checkbox checked when the customer clicks add to basket will be added to the customers basket at the same time.

This element will be present in both mobile and desktop layouts.

8.5.5.Write You Own Review
A contact form will be displayed at the bottom of the product page where the customer can add their own review.

The contact form will contain the fields:
- Nick Name
- Review Summary of Your Review text area
- Review text area
- Recapture validation

The customer can then submit the review that will be added to the pending reviews.

sp.

8.6. AJAX Add-to-basket

AJAX "Add-to-basket" functionality will be implemented on the site. This means that when the customer adds an item to their shopping basket, their browser no longer executes a full page refresh and the "add" action is confirmed by the displaying of message, which will appear over the top of the product page content.

When a customer clicks the "Add to basket" button, an AJAX overlay is displayed on the screen.

Please Note: The product page will no longer execute a full page refresh when the customer adds an item to their basket and the confirmation text will no longer be displayed at the top of the product page.

8.6.1. Location

The overlay will be displayed in the top right hand corner of the visible screen area.

8.6.2. Display and Close

When the overlay is displayed, it appears by scrolling downwards from the top right hand corner of the screen.

When the overlay is closed, it disappears by scrolling upwards to the top right hand corner of the screen.

8.6.3. Information

The following information will be displayed:

- The name of the product variant added to the basket
- The quantity of the product variant added to the basket
- The total price of the product variant added to the basket

In addition, two action buttons will be displayed on the overlay:

- Proceed to checkout button
  - o If the customer clicks this option, the layer is closed and they are directed to the main shopping basket page.
- Continue shopping button
  - o If the customer clicks this option, the layer is closed and the customer remains at the same position on the screen as when they clicked the "Add to basket" button.

8.6.4. Default Time Out

If the customer has taken no action five seconds after the overlay has been displayed, the overlay will close automatically.

8.6.5. Shopping Basket Summary

The standard shopping basket summary will be updated with the details of the item added to the basket:

- The total items will be increased by the quantity added
- The total value will be increased by the value of the goods added

Please Note: The page will not require a refresh to update the summary.

8.7. Reviews

Customers clicking the links to read reviews or write their own will be taken to the "reviews" product page that shows the normal product page content above the review read/write functionality.

Customers will be able to submit their own reviews by entering their details in the "Write your own review" form. This form will ask for the following information:

- Review title
- Customer name
- Review content
- Product ratings

Gardiner Pole Systems will be able to specify what product ratings appear for the customer to complete (e.g. price, quality, service, etc).

Customers will also be able to read all the reviews posted by other customers and approved by Gardiner Pole Systems.

This element will be present in both mobile and desktop layouts.

sp.

9. Basket Page

9.1. Layout

The main shopping basket page is displayed when a customer clicks on the appropriate link on the site or via the shopping basket summary (as per the design mock-up). The page will be displayed within the content managed area explained in the Site Layout section.

This page will show the customer a summary of the items that they have placed in their shopping basket.

- Details of each product in the basket are listed
- Summary information shows the order totals
- Offer code input box allows the customer to enter a discount / offer code
- Up-sell products

9.2. Copy

The following default copy is displayed on the basket page:

- Page Title – "Shopping Cart"

This element will be present in both mobile and desktop layouts.

9.3. PayPal

PayPal checkout button will display. This will direct the user to the PayPal Payment method.
After confirmation, the customer is returned to the website's Order Confirmation page, showing a payment method of "My PayPal Account". The customer proceeds as set out elsewhere thereafter.

This element will be present in both mobile and desktop layouts.

9.4. "Proceed To Checkout" Button

A "Proceed to Checkout" button is shown at the top right of the page. When clicked it takes the customer to the first stage of the single page checkout process details of which are given in a later section of this document.

This element will be present in both mobile and desktop layouts.

9.5. Basket Line Items

Each product variant that the customer has added to their basket will be displayed as a single line item on this page.

The following will be displayed for each line item:

- Thumbnail image of the product
- Product name
  - Product chosen options
- Item price

- An input box with the total quantity of this variant added to the basket – this can be adjusted by the customer
- Line item total
- A "remove item" link
- A "edit" link – this will take the customer back to the product page

This element will be present in both mobile and desktop layouts.

9.5.1. Out of Stock items

Items that have been added to the basket but that are now out of stock cannot be ordered:

- A message will be displayed at the top of the basket page to indicate to the customer that changes will need to be made to the contents of their basket.
- A message will be displayed alongside each product that it out of stock.
- Customers will be unable to checkout with out of stock items in their basket.

9.5.2. Returning customers with incomplete orders

All items added to a customer's basket are stored in a cookie on their local machine. If the customer does not complete the checkout process or abandons their session (e.g. by closing their browser), the values remain stored in the cookie. When the customer next logs into the site, the values are retrieved from the cookie, if it has not expired and the contents of the customers previous basket are displayed when the customer views the basket page.

If any of the items are out of stock, the out of stock display rules detailed previously apply and a message is displayed at the top of the page to inform the customer that their basket has been updated.

9.6. Shipping & Tax

Customer will be able to give summary information about their desired delivery address (country, county, post code) and get an indication of the tax & shipping they are going to pay for delivery to that location.

Gardiner Pole Systems can create and manage shipping & tax rates from within the Magento Admin Panel.

Upon submission of the form the tax rates & shipping options are displayed as radio buttons on the basket page, the customer can then select the desired shipping method and re-submit the page to show the total cost of the order including tax & shipping.

This element will be present in both mobile and desktop layouts.

9.7. Basket Summary

The total value of items in the basket is summarised below the list of order items and the above described elements.

The following is shown:

- The total price of the line items in the basket excluding VAT

- The VAT cost of the line items in the basket
- The delivery method cost the customer has selected, if one has been selected
- The value of any discounts awarded through offer codes awarded to the customer
- The total price the customer will pay for this order

This element will be present in both mobile and desktop layouts.

9.8. PayPal

PayPal checkout button will display. This will direct the user to the PayPal Payment method.
After confirmation, the customer is returned to the website's Order Confirmation page, showing a payment method of "My PayPal Account". The customer proceeds as set out elsewhere thereafter.

This element will be present in both mobile and desktop layouts.

9.9. "Proceed To Checkout" Button

A "Proceed to Checkout" button is shown at the bottom right of the page. When clicked it takes the customer to the first stage of the single page checkout process details of which are given in a later section of this document.

This element will be present in both mobile and desktop layouts.

sp.

10. Two Step Checkout Process Summary

The main checkout page is displayed when a customer clicks on the appropriate link on the site or via the shopping basket "Proceed to Checkout" button. The page will be displayed within the content managed area explained in the Site Layout section.

The checkout is presented on two steps or pages, one to capture the customer's email address and delivery information, the other to capture the customer's payment information.

10.1. Checkout Layout

The standard site header/footer are removed when the customer is in the checkout process and replaced with the content described below.

10.1.1. Checkout Header

The checkout header consists of the following elements:

Logo
This behaves in the same way as the logo outside the header.

10.1.2. Checkout Basket Summary

The right hand section of the page will show a summary of the customer's basket contents.

The section will show the detailed contents of their basket item, including the following:

- Total number of items in cart
- Product image
- Product name
- Product selected options
- Product price

This element will be present in both mobile and desktop layouts.

10.1.3. Checkout Footer

The copyright and developer credit elements from the main site template are shown in the footer of the checkout process.

This element will be present in both mobile and desktop layouts.

10.2. Customer Identification & Delivery Details

10.2.1. Customer Identification

Customers will be asked to confirm the email address they would like to associate with their order.

If the customers enters an email address that has already been used to register an account on the website, the website will display a password field and login button when they tab or click out of the email address field. The page will refresh and the customer will be logged in.

If the customer continues with an email address already associated with an account, without logging into that account, their order will be recorded as a guest order and will not be associated with their account.

Guest checkout will be disabled for Gardiner Pole Systems.

10.2.2. Delivery Address - New Customers

Customers checking out without having logged into an account will be asked to enter the delivery address for their order.

New customers will be required to deliver their address to their billing address if their first order is over the value of £250. A CMS static block called "Checkout_Address_FirstOrder" will be displayed at the top of the delivery address section of the checkout informing the customers that they will need to deliver to their billing address on their first order.

The customer will need to enter the following information:

- Customer title
- Customer first name *
- Customer last name *
- Company name
- Address Line 1 *
- Address Line 2
- City *
- County
- Post code *
- Country *
- Mobile Number*
- VAT Number

The fields marked with an asterisk above are mandatory and must be completed before moving onto the next step if the checkout process.

The above set of form fields will also be shown to customers who have logged into a returning account but who have not yet added an address to their account.

Loqate Postcode lookup functionality will also be used to help the customers auto-populate their addresses. The fields for that will be used for postcode lookup will be set by the Gardiner Pole Systems.

This element will be present in both mobile and desktop layouts.

10.2.3. Delivery Address - Returning Customers

Customers checking out who have added an address to their order will be asked to select the delivery address from those stored in their address book. Customers will also be given the option to enter a new address and if clicked, will be asked to enter the delivery address details as above and will also be given the option to save this address against their account for future use.

The "Checkout_Address_FirstOrder" static block will not be shown to customers who've logged into an existing account and if the customer logs into their account successfully, this content block will be hidden.

<div style="float: right; color: grey;">

Commented [AG20]: This only needs to be true for new client accounts order where the value is over £250

Commented [RP21R20]: I have updated the specification.

Commented [AG22]: Ideally this should be specified as a Mobile Number

Commented [RP23R22]: Updated

</div>

This element will be present in both mobile and desktop layouts.

10.2.4. Loquate Address Lookup

As the customer types into any of the address fields, the entered data will be sent to the PCA Predict address lookup service and the matching addresses presented in a drop-down below the field the customer is typing into. Selecting these address results will populate the form with the selected address.

This element will be present in both mobile and desktop layouts.

10.2.5. Delivery Method

The customer is asked to choose between the shipping methods available for their selected delivery address.

This element will be present in both mobile and desktop layouts.

Once the identification, delivery address and delivery method choices have been made by the customer they can click the "Next" button at the bottom of the page to continue to the payment page.

10.2.6. Delivery Instructions

A text area will be displayed at the bottom of the page that will allow the customer to add any notes. This information will then populate an order attribute called "order_notes" that will pass through to the order information and invoice.

The order notes text area will only display if the user selects an appropriate shipping method. Shipping method functionality will be expanded to have an option in the backend to allow order notes.

10.3. Review & Payment

10.3.1. Payment

SagePay

If the customer chooses credit/debit card, they will not enter any card details at this stage the site but will be shown the SagePay payment page embedded iframe on the order view stage once they press the confirm order. They will be informed on screen that this is how payment will be captured.

This element will be present in both mobile and desktop layouts.

PayPal

If the PayPal option is selected, the customer is then given a "Continue to PayPal" button that, when clicked displays the PayPal In Context checkout in a pop-up over the checkout page, whereupon the customer can (after logging in) confirm payment and delivery information.

After confirmation, the customer is returned to the website's main order confirmation page. The customer proceeds as set out elsewhere thereafter.

Commented [AG24]: Is this different to the Loquate functionality mentioned in the previous point?

Commented [RP25R24]: This is the Loquate functionality. The company has changed its name from PCA to Loquate but some references still exist in various places. To eliminate confusion I have updated the specification.

Commented [AG26]: This should only be available if the client has selected Fedex delivery – it should not be available if selecting Royal Mail. This needs to be on the packing slips paperwork more importantly than the invoice.

Commented [RP27R26]: Is there a reason that you do not want this to appear on other delivery methods? Hard coding functionality for single shipping methods is not advised as would likely increase the effort required to make changes to shipping methods in the future.

Commented [RP28R26]: A Gee
The reason is that we are unable to instruct Royal Mail with any instruction. Therefore clients would input instructions and then are not happy when we tell them that we cannot action specific delivery instructions for Royal Mail. Also this takes some time to communicate this to the client and this results in delays in order processing and delivery. It is better if the delivery box only shows for FedEx.

Commented [RP29R26]: That is fine, I have expanded the functionality for this.

This element will be present in both mobile and desktop layouts.

Internal Credit

If the customer chooses Internal Credit, they will be shown the amount of internal credit they have set against their account and will be able to state the amount that they would like to be redeemed on this order. This value will then be deducted from the total price. If any remaining balance remains another payment type will have to be used.

This functionality will be implemented via the Magestore – Magento 2 Store Credit extension.

If a customer account has internal credit this should be selected by default and the internal credit must be used before other payment methods can be selected.

This element will be present in both mobile and desktop layouts.

10.3.2. B2B Credit Limit Handling

Screen Pages will implement functionality that Gardiner Pole Systems can use too set a limit on the order value per customer for "non fund obtaining" payment methods such as purchase order. The customer will still be able to purchase their order with other email payment methods such as PayPal & SagePay.

If a customer attempts to exceed the credit limit a message will appear such as:

"This value exceeds your credit limit, please contact us or select a different payment method."

The message will be set in a content block called "credit_limit_exceeded" and will be controlled and editable by Gardiner Pole Systems.

10.3.3. Checkout Basket Summary

The right hand section of the page will continue to show a summary of the customer's basket contents and will be expanded to display details of the delivery address and method selected.

Customers will be able to click back to edit either of these sections and will be taken back to the first page of the checkout process.

This element will be present in both mobile and desktop layouts.

10.3.4. Restrict Payment on First Purchase

New customers will be required to deliver their address to their billing address if their first order is over the value of £250. A CMS static block called "Checkout_Billing_FirstOrder" will be displayed above the payment method "My billing and shipping address are the same" section of the checkout, informing the customers that they will need to deliver to their billing address on their first order.

In addition, the checkbox that allows a customer to set a different billing address to their delivery address will be disabled so that it cannot be un-selected by the customer.

If a customer has previously logged into their account, created a separate billing and delivery address but not ordered before, a check will be written into this section of the checkout process that verifies that they're using the same address for delivery and billing and if not, it will disable the "Place Order" button and display a message above it. This message will be pulled from a CMS static block called "Checkout_PlaceOrder_FirstOrder".

The customer will need to adjust their delivery address to match their billing address by going back to the first step of the checkout process before proceeding again to the second step (payment stage).

10.4. Thank You Page

Upon successful submission of the order, the customer is directed to the Thank You page.

The page will be displayed within the "main content area" as explained in the Site Layout section. The following information will be displayed on this page:

The page will display:

- A sequential order number generated by the database which links to the customer's order history section
- A "Continue Shopping" button which takes the customer back to the site homepage.

This element will be present in both mobile and desktop layouts.

10.4.1. Thank You Page Content Managed Area

Screen Pages will create a content managed area called **"Thank_You_Lower_Content"** that will be displayed below the page content.

This element will be present in both mobile and desktop layouts.

10.5. Email Confirmation/Print Order Confirmation

An email containing an order summary will be sent to both the customer's registered email address and to an email address designated by Gardiner Pole Systems. The customer will also be able to access this information from the "print" link available on the thank you page. This will include the order number and the information outlined below:

- Delivery & billing address
- Selected shipping method
- Payment method
- Line item summary of the basket
- The sub-total of all the line items in the basket.
- The delivery charge for the order

Please Note: This generated email is not specific per product or delivery option. The same email is sent for all orders placed on the site.

sp.

11. My Account Pages

Customers can access the My Account area of the site at any time using the "Your Account" link from the page header

11.1. Account Dashboard

If a customer has already logged in, the My Account menu will display links to the forms to allow customers to add / update their delivery and account information. If a customer hasn't logged in they are offered the opportunity to do so using their account details or are invited to register an account.

When registering for an account they are asked for the following information:

- Title
- First name
- Last name
- Email address
- Password
- Password confirmation

Once the customer clicks the "Your Account" link they are presented with the account dashboard

The following summary information is displayed:

Summary Option	Description
Recent Order	Links to the details or any orders placed on the website with links to view the order details or to re-add the entire order to the basket.
Contact information	The primary contact details stored against the account including a link to the change password page.
Email subscription	Details of the current subscription details of the account with a link to edit this information
Primary Billing Address	Displays the primary billing address with the option to edit.
Primary Delivery Address	Displays the primary shipping address with the option to edit or add more addresses.

A left hand navigation menu also provides access to the following pages:

Navigation Option	Description
Account Dashboard	Links to the main account dashboard page.
Account Information	Links to a page where the customer can update the primary contact details stored against the account and change their password.
Address Book	Gives details of the default billing & delivery addresses for the customer account with links to edit or add additional addresses.
My Orders	Links to a page that gives summary information about orders placed on the site with links to view the order details or to re-add the entire order to the basket.
My Product Reviews	Links to a page showing summary information about the product reviews a customer has submitted to the site.
My Tags	Links to a page showing summary information about the product tags a customer has submitted to the site.
My Downloadable Products	Links to a page that shows a list of any purchased downloadable products.

Navigation Option	Description
My Credit	Links to a page allowing the customer to view their credit balance.

Please Note: All pages linked to from the "Your Account" menu will display in the main content managed area.

This element will be present in both mobile and desktop layouts.

11.2. Recently Viewed Products

On the left-hand side under the Account Dashboard menu recently viewed products will display in a list format showing:
- Thumbnail image
- Product name

These will act as links to the associated product page.

12. Other Pages

12.1. 404 Error Page

The site will contain a stand alone page used when a customer has clicked through an out of date link (i.e. to a product or category that no longer exists) or mistypes a URL that cannot be resolved to a page within the website.

This page will automatically return a "404" status code to the browser or search engine informing it that the link is no longer valid and needs to be removed.

The page content displayed to the customer will be a content managed area that can be used to contain links to popular categories/products/search terms and so seek to retain visitors where possible.

This element will be present in both mobile and desktop layouts.

12.2. Contact Us

The site will contain a HTML form titled "Contact Us" to allow customers to submit questions and feedback to Gardiner Pole Systems. This will be displayed in the main content area when selected from a static link in the page layout.

The page will also consist of a single form which will have the following input fields:

Field	O/M	Field Format	Description
Name	M	Text	Name of the customer
Email Address	M	Text – Email	The email address of the customer. Validation will be carried out to ensure that this is in the correct format.
Telephone	O	Text	The phone number of the customer.
Comment	M	Text	A free text message field for the customer to enter their enquiry / feedback.

Screen Pages will create a content managed area called **"Contact_Us_Top"** that will be displayed above the page content.

On submission, a single email, containing the details entered on the form, is automatically generated and sent to a pre-determined email address supplied by Gardiner Pole Systems. The page refreshes and a status message is displayed informing the customer that the email has been sent successfully.

This element will be present in both mobile and desktop layouts.

12.3. Email a friend

A facility will be created whereby the user of the site can email details of the product page they are viewing to a friend. A text link will appear on the product page and within the site layout areas. When the user selects this link, the customer will be redirected to the "Email a friend" page.

The user will be presented with a small HTML form containing the following:

Field / Prompt	Field Format	Description
Sender name	Text	Name of the customer
Sender email	Text	Email address of the customer
Message	Text Area	Text message to send to recipient
Recipient name	Text	Name of the recipient
Recipient email	Text	Email address of the recipient

Please Note: The user is required to enter all fields.

An option is available to allow the customer to send the same email to 5 friends simultaneously.

A "Submit" button will be displayed beneath the input fields. The following rules apply:
- If the user is a registered user who has logged in, the "Sender Name" & "Sender Email" fields will be pre-populated with their registered details.
- The format of the email addresses must be valid

When a valid submission is made by the user an email will be generated and sent to the friend's email address.

The link that is sent will be the URL of the page that the user was on when the "Email a friend" link was clicked.

This element will be present in both mobile and desktop layouts.

12.4. Google Maps Store Locator

The site will contain a content page that provides an index of all stores/stockists/locations using a Google Maps system to allow the customer to search for their nearest store, display information about that store and if required be redirected to Google Maps for directions to that store.

The functionality will be achieved by Amasty Store Locator extension.

This element will be present in both mobile and desktop layouts.

12.5. Weblog

A weblog (or blog for short) will be created alongside the ecommerce website.
This functionality will be achieved via the Aheadworks blog extension.
The Aheadworks Blog extension will be configured and styled to match the overall site design.

This element will be present in both mobile and desktop layouts.

12.6. Wish List

The wish list page shows a summary of all the products that the customer has added to their "wish list" while browsing the site:-

- The "wish list" is separate from the standard shopping basket

Commented [RP37]: @Alex – please can you confirm how you would like customers to add products to their wishlist.

Commented [AG38R37]: Previously we had this as a simple add to wishlist button that appeared on the quick view facility. Or it could be on a button on the product page next to email a friend etc.

Commented [RP39R37]: I would suggest adding it to the product page, you already have the add to compare functionality on the hoover pop up.

- The products are listed as line items in a table. Customers are presented with several options for each of the items in the Wish List as well as buttons that affect the overall list
- The wish list page is accessed via a link in the page footer / header

Customers will be able to items to their wishlist from a link on the product page.

12.6.1. Wish List Line Items

Each product / variant that the customer has added to the wish list is displayed as a single line item on the wish list page.

The following will be displayed against each line item:
- Product thumbnail image
- Product name
- Product price
- Comments field
- "Added on" date
- A button to add the line item to the shopping basket
- A button to remove the line item from the wish list

12.6.2. Wish List Line Item Actions

The following actions are available against each line item:

Remove
When the customer clicks the remove line item button, the product is removed from the customers Wish List. The Wish List page refreshes to display the current contents.

Add to basket
When the customer clicks the "add to basket" button, the product is added to the customers normal shopping basket. The customer remains on the Wish List page.

12.7. File Download Block

Screen Pages will create a file download widget that Gardiner Pole Systems can embed into the CMS pages and blocks displayed across the site.

The will have the following definable elements:

- Download file type
  - e.g. PDF, DOCX
- Download title
- Download description
- Download file name

This information above will be used to create a 50% page width element showing the following information:

- File type icon
  - This will also be used to lookup an image of the file extension icon
- Download title
- Download description
- Download button
- Download file size
  - This will be determined when the widget is loaded.

Clicking any of these elements will start the file downloading in the customer's browser.

Gardiner Pole Systems will be able to arrange these blocks in a set of content pages to form a manuals and guides download section.

These elements will be present in both mobile and desktop layouts.

12.8. Videos Page

Screen Pages will create a content page that will be used to display the videos specified by Gardiner Pole Systems. The page will display videos in a 3 column format and the videos will include embedded YouTube links. There will also be functionality to add H1 & H2 text above each row of the videos. Please refer to designs.

12.9. Testimonials Page

Screen Pages will create a content page that will display testimonials for Gardiner Pole Systems. These will include widgets that sit in the content area in rows made up of 2 columns.
The widget will include:
- Title
- Text

Please refer to designs.

12.10. Quick Order

Screen Pages will implement Quick Order / Order by SKU functionality.
This page will display on the account pages for customers that are part of the Distributor Customer group.
It will allow the customer to add the specific SKU and the quantity into a frontend form.
The user can then press the "Add To Cart" which will add all items and set quantities to their cart.

Commented [RP40]: @Alex - Would you like a separate page for this or for this to be implemented in the customers account pages as standard?

Commented [AG41R40]: This facility would only be wanted for our Distributor Customer Groups. This could be integrated into their account pages.

sp.

Appendix A: Search Engine Optimisation

Site Indexing

The site will be built in a manner which will optimise indexing capabilities for automated search engine robots. URLs are 'flattened' which means they will not include query strings and the site will appear to search engines as non-database driven. For instance:

www.screenpages.com/womens/dresses.htm

The website operates from two principles:

- Pages are built and generated with the Magento default setting
- Individual pages can be altered in the Magento Admin Panel.

Default Site Arming

The generic strategy for site arming is as follows:

The HTML page title and certain meta tags (i.e. page description and keywords) will change depending on the page.

- Catalogue pages (for categories and products) will utilise database assets such as product name or code.
- Product image 'alt' tags (the alternative text that is displayed for broken images or when the mouse moves over an image in certain browsers) will reflect the product name or code (whichever is most appropriate).

In summary, the implementation will be:

- On the Home Page, the brand and a generic keyword-based description of Gardiner Pole Systems's products will be displayed.
- On the Category Page, the Page Title will be populated with the CATEGORY_NAME and the Meta Description will be populated with the DESCRIPTION
- On the Product Page, the Page Title will be populated with the PRODUCT_NAME and the Meta Description will be populated with the DESCRIPTION

The Magento Admin Panel provides an over-ride facility for customising these parameters.

Please Note: As part of the site launch Gardiner Pole Systems should develop a full strategy for search engine performance. This may include things such as:

- Submitting the site to search engines
- Submitting news stories
- Promoting the site online through blogs, social networking and online advertising
- Supplying product feeds to product aggregators such as Google Base etc

It is worth noting that link backs (the number of sites linking to the site) can help with page ranking, the mechanism by which pages are positioned in search results.

SEO Management

The Administration Panel provides Gardiner Pole Systems with facilities to customise all the SEO elements at home, category and product level. The key SEO elements are:

- Page title

- Meta description
- Meta keywords
- URLs

The Footer site map will contain links to all the main product categories. The Footer Text can contain HTML to facilitate links to other areas of the site.

System settings

In the System/Configuration menu, it is possible to edit the following elements on a site-wide basis:

Field name	Format	Description
Page Title PREFIX: <TITLE> HTML tag	Text – remember that total display length incl. prefix is 65 chars	The text that appears BEFORE any dynamic elements in the title of the page. The TITLE is viewed within the customer's browser and on the first line of search listings.
Page Title SUFFIX: <TITLE> HTML tag	Text – remember that total display length incl. suffix is 65 chars	The text that appears AFTER any dynamic elements in the title of the page.
Meta Description: <meta name="Description"	text string app. 145 chars.	The meta tag description. This will appear on lines 2&3 of search listings
Meta Keywords: <meta name="keywords"	4-5 keywords or phrases	The meta tag keywords. Generally, these are not regarded as significant by search engines any more.

Once the site is live, Gardiner Pole Systems is responsible for making changes / managing the data stored in these fields using the Content Management tools.

Home page settings

The Home Page SEO elements are edited in the content management area for the home page and it is possible to edit the following elements:

Field name	Format	Description
Page Title: <TITLE> HTML tag	Text – remember that total display length is 65 chars	The text that appears in the title of the page. The TITLE is viewed within the customer's browser and on the first line of search listings.
Meta Description: <meta name="Description"	text string app. 145 chars.	The meta tag description. This will appear on lines 2&3 of search listings
Meta Keywords: <meta name="keywords"	4-5 keywords or phrases	The meta tag keywords. Generally, these are not regarded as significant by search engines any more.

Once the site is live, Gardiner Pole Systems is responsible for making changes / managing the data stored in these fields using the Content Management tools.

Category and Product settings

In the catalogue/product menu, it is possible to edit the following elements basis:

Field name	Format	Description

Page Title: <TITLE> HTML tag	Text – remember that total display length is 65 chars	The text that appears in the title of the page. This is viewed within the customer's browser and on the first line of search listings.
Meta Description: <meta name="Description"	text string app. 145 chars.	The meta tag description. This will appear on lines 2&3 of search listings
Meta Keywords: <meta name="keywords"	4-5 keywords or phrases	The meta tag keywords. Generally, these are not regarded as significant by search engines any more.

Important:
Please note that changes to SEO elements for category and product pages will OVER-RIDE the default system settings above.

Google Sitemap

The Administration System also contains a tool to generate a Google Sitemap (sitemap.xml).

A Google Webmaster Tools account will be created and verified to read the sitemap.xml.

sp.

Appendix B: Discounts

The Magento ecommerce platform supports a wide range of customer discounts and promotions through a configurable promotions engine. The basic promotion types are specified below are all well supported by Magento. Other promotions types should be discussed with Screen Pages as soon as possible to ascertain how they may be made compatible with Magento or visa-versa.

A more detailed description of these promotions types and how they are configured within the Magento Admin Panel can be found on the Magento website, here.

Below is a list of underlined typical promotions. *Please advise your project manager of any promotions you have currently or plan which do not fit these rules*.

Percentage Off Promotions

The following percentage off promotions can set up within Magento:

- X% off everything
  - e.g. 10% off everything as a launch offer
- X% off one category
  - e.g. 50% off everything in the sale category
- X% off specific products
  - e.g. 10% off product A
- X% off specific products when you order £Y or more
  - e.g. 20% off your order when you spend over £50

Fixed Amount Promotions

The following fixed amount promotions can set up within Magento:

- £X off your order
  - e.g. £10 off every order
- £X off when you spend £Y or more
  - e.g. £10 off every order
- £X off a specific product when you buy Y
  - e.g. Buy product A and get £5 off product B

Buy X & Get Y Promotions

The following buy X and get Y promotions can set up within Magento:

- Buy 1 Get 1 Free
  - e.g. Buy 1 of product A, get another product A completely free
- Buy X Get Y Free
  - e.g. 3 for 2 on product A

Free Shipping Promotions

The following free shipping promotions can set up within Magento:

- Free shipping on all orders
  - e.g. Free shipping this week
- Free shipping on orders over £X
  - e.g. Free shipping on orders over £50

sp.

Appendix C: Reporting

The primary website analysis tool in use on Screen Pages websites is Google Analytics, a powerful analytics tool for tracking site and ecommerce activity.

Google Analytics

The site will be enabled for Google Analytics which will allow Gardiner Pole Systems to analyse site visitors and how they interact with the site by tracking customer activity, including journey path analysis.

It provides all site owners with powerful reporting that allows them to highlight successful and unsuccessful areas of the site and ultimately increase the conversion ratio of a site.

There are two types of tracking:
• Page Tracking - Where access to each page is recorded
• Revenue Tracking - Where the volume of successful orders is recorded

Further reporting capability is provided in the form of goals. A goal is a website page which a visitor reaches once they have made a purchase or completed another desired action, such as a registration or download.

Screen Pages will:

• Set up Google Analytics for Gardiner Pole Systems
• Set up a single goal for tracking basket – to order activity
• Site search (ie what the visitor types into search box)

Gardiner Pole Systems can add additional goals over time.

The Google Analytics application is hosted and maintained by Google and as such Screen Pages cannot control or guarantee availability for the application or its operations.

sp.

Appendix D: Media Tracking Codes

The site will support certain alphanumeric Media / Tracking codes that will enable Gardiner Pole Systems to track the source of all visitors to the site.

This will offer:

- A flexible system of media / tracking codes which can be appended to an incoming URL (i.e., link from another website)
- The measurement of site marketing activity such as what campaigns generated sales, cost-effectiveness of particular marketing activities etc.

By appending media / tracking codes to incoming URLs, Gardiner Pole Systems can gain a rich source of Customer information and trends.

Please Note: As most of this URL based information is implicit by the time a visitor arrives at the site, it is important that Gardiner Pole Systems define the tracking regime that is appropriate to their marketing analysis needs.

Google Tracking Codes

Once added to an incoming URL (i.e. the URL or a link to your site), Google tracking codes will be picked up by Google Analytics and can be reported on using the standard Google Analytics reporting tools.

Please Note: The Screen Pages website will **not automatically** record this data against customer orders. These codes/values will only be detected / stored by the Google Analytics application on pages that are enabled with the Google Analytics tracking code.

The standard Google tracking codes are:

Code	Name	Description
utm_source	Source	This parameter is used to track the site / domain that the link came from. (Google, Yahoo!, Email, Affiliate, Portal etc).
utm_medium	Medium	This parameter is used to track the format of the marketing activity (PPC, email, Banner).
utm_term	Term	Term contains the keyword associated with the visitor if applicable (such as the word or phrase they entered in a google search) or other coding associated with the visitor (such as an affiliate code).
utm_content	Content	The content parameter is used to describe which version of your advertisement has been used or to highlight individual keywords. E.g., if you ran two adverts on the same page, as part of the same campaign, the content element would be used to differentiate between the two.
utm_campaign	Campaign	This is used to identify the particular campaign that is being run such as a sales campaign for a particular product or newsletter etc. This is used to help breakdown marketing activity into specific promotions.

Using Tracking Codes – How to

Incoming URLs (i.e., from other sites)

Applying tracking codes to your incoming URLs is straightforward. The codes are appended to incoming links (i.e., links on other sites that link to your site) but can

also be used on internal links if you organise specific campaigns (like banner adverts etc).

Each link to your site should consist of:

- A URL to link to your site, e.g. http://www.myshop.com/
- A question mark character, to denote that "parameters" are going to be attached to the URL, e.g. http://www.myshop.com/**?**
- The tracking codes, e.g. http://www.myshop.com/**?utm_source=12345**

Each tracking code consists of two elements which make up a "name and value" pair:

- The tracking code name
- The tracking code value, which can be any alphanumeric string
- The format is always the "**name**" followed by an "**equals**" sign followed by the "**value"**, e.g. "utm_source=12345"

An example of adding a code of the name "**utm_source**" to a URL:

Before: http://www.myshop.com/
After: http://www.myshop.com/?utm_source=12345

In the example above, if a customer linked to the site using the above URL, Google Analytics would record the value **"12345"**

Multiple tracking codes **can be sent on a single link**. To send more than one tracking code on a single URL, each set of name / values must be separated using an ampersand (&). An example of adding the codes "**utm_source**" and "**utm_medium**" to a URL

Before: http://www.myshop.com/
After: http://www.myshop.com/?utm_source=12345**&**utm_medium =abcd1

Please Note: There are no spaces in the URL

Internal URLs (i.e., on your own site)

You can tag content links on your own site so that they are recorded in Google. This information is very useful in identifying which content is most effective (for example, if you have multiple content managed areas on the homepage etc). The tagging works in exactly the same format as for incoming URLs however the Google Tags must be added AFTER the required screen pages information

Links to the product pages

When tagging a link to the product page, the information should be added to the URL after the URL identifier for the product page:

www.clientname.com/category/product.html?utm_source=

Links to the Category pages

When tagging a link to the product page, the information should be added to the URL after the URL identifier for the category page:

www.clientname.com/category.html?utm_source=

Links to Content Managed Pages

sp.

When tagging a link to the product page, the information should be added to the URL after the URL identifier for the content page:

www.clientname.com/content.html?utm_source=

sp.

Appendix E: Training Agenda

The following table shows the topics covered during the standard Screen Pages training:

Overview ▪ Admin Panel overview & main menu ▪ Staging & live versions ▪ Dashboard page	10 minutes
Sales ▪ Finding, sorting & viewing orders ▪ Editing an existing order ▪ Processing a new order ▪ Introduction to shipments slips/invoices/Credit memo	60 minutes
Products ▪ Finding, sorting & updating products ▪ Introduction to Product Types ▪ Creating new products ▪ Editing, creating & re-ordering categories	60 minutes
Customers ▪ Finding, updating & creating customer records ▪ Introduction to customer Segments ▪ Now Online	10 minutes
Marketing ▪ Introduction to promotions ▪ Introduction to Newsletters ▪ Introduction to Search ▪ Reviews	30 minutes
Content ▪ Introduction to Content managed areas ▪ Create / Edit content pages ▪ Create / Edit content blocks	20 minutes
Reports ▪ Introduction to reporting	10 minutes
Stores ▪ Introduction to Taxes ▪ Introduction to Attributes ▪ Introduction to Customer Groups ▪ Introduction to the Configuration Section	60 minutes
System ▪ Managing exporting & Importing ▪ Scheduling Import / Export ▪ Managing Cache & Index Management ▪ Creating new Admin Panel roles/users	20 minutes

sp.

Appendix G: QA Test Cases

The following table shows the test cases used as a basis for Screen Pages testing:

Case	Section	Test Case Description
1.	Home Page	Check all links (catalogue and non commerce links)
2.		Check all links (catalogue and non commerce links)
3.		Check all navigation flows – left/right/top/bottom
4.		Check header and footer
5.		Check buttons & actions
6.		Check images and links
7.		Check basic search
8.	Category / Sub category page	Check links
9.		Check Category details – text and image
10.		Check sub categories and products are as expected
11.		Check sub categories and product details are as expected (image, name, price, links etc)
12.		Check commerce navigation as expected
13.		If no sub categories or products within category check error
14.		Check pagination (if applicable)
15.	Product page	Check option/variant handling (all permutations)
16.		Add to basket
17.		Cross-sells
18.		Breadcrumb trail
19.		Check images and copy for product
20.		Check price/swatches
21.		Check any other links / options
22.		Check stock options if applicable (in stock, out of stock or low stock)
23.		Check Zoomify/Zoom if applicable
24.		Check More images (if set up)
25.	Breadcrumb trial	Check on each page
26.	Account Management : User Profile Details	Register new user
27.		Check mandatory fields
28.		Check correct information in drop downs
29.		Check left navigation
30.		Log off and login to check user details
31.		Amend user details
32.		Log off and login to check user details
33.	Account Management : Account Address	Enter user address
34.		Check mandatory information
35.		Check values in drop down
36.		Check left navigation
37.		Log off and then log in to check user address
38.		Check Postcode lookup if applicable
39.	Account Management : Address Book	Enter multiple addresses
40.		Check mandatory information
41.		Check values in drop down
42.		Check left navigation
43.		Log off and then login to check user addresses
44.		Check Postcode lookup if applicable
45.	Account Management : Payment Cards	Add payment card information
46.		Check card number for validity
47.		Check mandatory information
48.		Check values in drop down

49.		Check left navigation if applicable
50.		Check Start/Expiry dates are valid ranges (new visas have 20 year lifespan)
51.		Check Start/Expiry validation (some sites in past rejected cards within their validation month)
52.	Account Management : Change Password	Update password
53.		Log off and login using new password
54.	Account Management : Password Reminder	Request update.
55.		Test that email is sent & check copy/message information.
56.	Account Management : User Login	Login and Logoff from site
57.		Check account recognition
58.		Check if saved basket for user is visible on logging in
59.		If no saved basket and customer recognised then account details page visible on logging on
60.	Account Management : Order history (if applicable)	Check all order appear in history
61.		Check order details for orders in history
62.		Check order status
63.		Multi channel order history if applicable
64.		Check reorder function
65.	Search	Check data in drop downs (autocomplete)
66.		Select different combinations
67.		Check responses – no response / multiple response
68.		Test for "null" entries
69.		Test pagination if applicable
70.		Test Sorting of search results
71.		Check response time is acceptable
72.	Basket Page	Check basket page- layout and item details
73.		Check navigation / links
74.		Check basket summary
75.		Delete from basket
76.		Add further items
77.		Change variants
78.		Test "offer codes"
79.		Update quantities – **Check handling of negative values/bad data**
80.		Check login options on basket page (when customer logs on and then comes to basket page and when customer comes to basket page without logging on)
81.	Checkout Process	Account/Invoice address -> Payment details -> Delivery details /Rapid order form -> Confirm order
82.		Check navigation
83.		Check mandatory information and validations for each section
84.		Cancel process and check status
85.		Customer purchase journey without registering (new user)
86.		Customer purchase journey for existing user
87.	Checkout Process : Email Confirmation	Check message data (to/from/title)
88.		Content managed area on email confirmation (if applicable)
89.	Checkout Process : Order Summary	Check data and options
90.		Check links
91.		Check available postage options
92.		Check correct postage methods enabled when ordering with overseas addresses.
93.	Checkout Process : Thank You Page	Check order number and other details

94.	Delivery charges	Check calculation of delivery charges based on postage rules (country, number of. items, weight, timing etc)
95.	Contact Us Page	Check links
96.		Check mandatory information
97.		Check action on submit
98.	Content Managed Pages / Static pages	Test links and text and images
99.	Currency Converter (Indicative)	Check supported currencies appear in list
100.		Check Calculations
101.	Email A Friend	Check text on pop up
102.		Test email generation and message data
103.	Catalogue request (if applicable)	Check mandatory information
104.		Check request captured and sent to client
105.	Newsletter request	Check request captured and sent to client
106.	Wish list (if applicable)	Add items to wish list
107.		Check items added to wish list appear as expected
108.		Check item details on wish list
109.		**Check add to basket functionality**
110.	Unsubscribe From Newsletter	Test links from email for unsubscribe
111.		Check data deleted and request actioned
112.	Discounts and offers	Check discounts and offers appear as set-up in Admin panel
113.		**Check order export handling of Discounts**
114.	Integration : Product	Check data upload and product details
115.	Integration : Order Export (if applicable)	Load data into spreadsheet
116.		Check off against printed order
117.	Integration : Stock	Check values in Admin panel
118.		Test product-by-product ordering with conditions (in stock, out of stock)
119.	Integration : Payment	Check payment integration working as expected
120.		**Check site handles payment provider errors gracefully (does not 500!)**
121.	Integration : Customer (if applicable)	Check customer records being exported/imported as expected if applicable
122.	Search Engine Optimisation	Test combination of dynamic + static elements
123.		Ensure page URLs are readable
124.	Stock Countdown	Check Stock figures
125.		Out of stock behaviour
126.		Check stock figures on placing order for item
127.	Admin Panel Basic checks	Catalogue data management including: Updating product data (names, descriptions, etc.) Updating data (variant options, prices, etc.) Updating category data (names, descriptions) Adding and removing products Adding and removing categories Assigning/re-assigning products to categories Assigning cross sell/up sell products to other products Uploading images to products
128.		Amending delivery charges
129.		Adding new delivery options
130.		Updating content managed page content

131.		Adding content managed pages
132.		Searching for orders
133.		Printing orders
134.		Viewing customer information
135.		Setting up discounts
136.	Others : Check if applicable	Recently viewed items
137.		Product feature comparison
138.		Weblog
139.		Store locator