

# Immij*online* Ordering User Manual



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## Login page

Immijonline web address is <a href="http://ioof.immij.com">http://ioof.immij.com</a> (please note there is no www)

Your office will have one login that is linked to your office's generic email. All order confirmation emails will be sent to this email.

IFAs will have direct access through POL and will not need to login through the web address.

If you need assistance with your login information please contact IOOF Marketing Services on IOOFMarketingServices@ioof.com.au

| Register 🐯 Log in 🛈 |   | Search store  | Q             | Î |
|---------------------|---|---|---------------|---|
|                     | Home page My account 1  | News Help   |               |   |
|                     | Welcome, Please Sig   | gn In!<br>RETURNING CUSTOMER  |               |   |
|                     | Contact Details<br>Registration / Login Details<br>For all new registrations or to change | your registration details please contact IOOF Market  | Ing Services. |   |
| Contacts            | Information   | News  |               |   |
| Marketing Services  | Shipping Timings Frequently Asked Questions Sitemap                                       | Warehouse closure over<br>Christmas 2014<br>- Thurday, November 27, 2014<br>All orders are to be placed by COB<br>Wednesday 17 Docember 2014. This will |               |   |



### Welcome page

The first page you will see is the Welcome page.

This page will display shortcuts to the main pages and also a banner that may contain important information for users.

To access your folders

- 1. Hover over Products and a drop down menu will appear.
- 2. Move the mouse down to select your folder.
- 3. Click on the sub folder to be accessed

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|--|---|--------------|------|---|
| H  | ome page Products My account  | News Help    |      |   |
| , Creating f                                     | inancial independence si  | nce 1846     | (IOF |   |
| Welcome to ImmijOnline                           |   |              |      |   |
| Welcome to the IOOF Online Portal, powered by Im | nmijOnline suite.   |              |      |   |
| Technical and Web Site Enquiries                 |   |              |      |   |
| If you have any questions regarding the orderin  | g web site please <u>contact</u> IOOF Marketing Services                  |              |      |   |
|  |   |              |      |   |



#### Home page overview



Product folders: The folders you see will depend on your access.

These are the folders to click on to access the products. When you click on a heading the folder will expand and the products will be displayed on the right hand side.

**Favourites**: Items that are regularly ordered can be added as favourites to be able to add them to your cart easily.

NB: this feature is not available for IFA's

**My Account:** This lists your office name and cost centre. This area can't be edited.

This also includes a listing of all orders placed and all of the shipping addresses you have used. For more info on this section refer to page 10.

NB: this feature is not available for IFA's

Help: This will store the general user guide for all users of immijonline, the training videos and a contact immij page.

Shopping cart display: This is the button to select after placing an order to check out.

**News:** From time-to-time news items may appear at the bottom of the screen with information about product changes.



#### Stock item overview



Name of item and warehouse code: The code and name can be used to search for the item using the search function.

**Stock on hand:** This shows the current stock held in the warehouse. This is live data. If an order is placed for more than is in stock the item will be placed on backorder. The back order will be filled when new stock is reprinted.

Pack unit: This describes how the item is packed.

It can say

- each means comes as a single item
- Pkt10, Pkt20, Pkt50, Pkt100 when an order is placed for one, you will receive the qty in the pack ie the above brochure sample means if you order one you are ordering one packet of 50 brochures. You will receive 50 brochures.
- RM500 this means ream of 500. This is used for letterhead. It means if order one ream you will receive 500 sheets of paper.

Price: This is the current price for the item.

Add quantity: this is to type in how many individual items or packs to be ordered

Select thumbnail: this opens the larger view for you to double check you are ordering the correct item.



### Order process

1. Find the product and type in the quantity (make sure to check the pack unit first). Then select 'ADD TO CART". Repeat this process for all of the items to be ordered.



2. As new items are added to the cart a pop up box will appear – this is to inform you the item has been added.

You will have the option to CONTINUE SHOPPING to add more items or GO TO CART

Your shopping cart information will appear in the top bar in the shopping cart drop down option.

| adviserservices@icol.com.au 🛞 Log out 🧃  | Favourites $\mathcal{A}^{(0)}$ Shopping cart $\mathcal{Y}^{(1)}$ | )  | Search store                                 | Q   | ^ |
|--|--|--|--|-----|---|
|  | Home page Products   | My account News He   | lp   |     |   |
| CATEGORIES<br>LOOF Holdings (110)<br>PDS / SPOS / COMPONENTS<br>(0)<br>Marketing Material (8)<br>Promotional (63)<br>Stationery (31) | JUST ADDED TO YOUR B   | ASKET PURSUIT FOCUS ALLOCATED<br>PERSION POS AND FORMS<br>BOOKLET - JULY 2014<br>Countity : 1<br>NUE SHOPPING<br>D TO CART | ated Pension PDS and Fo                      | rms |   |
|  |  | Pursuit Focus Pe<br>and Forms Booki  | ersonal Superannuation PDS<br>let- July 2014 |     | ~ |



3. Select "Go to cart" to check your order. Changes to items ordered or quantity can be made at this stage. If you make changes, ensure to click Update shopping cart. A reference can also be added for the order

When you have confirmed the order is correct, press the green "checkout' button.

|       | sharon commodore@koof.com.av 🛞 Log | out (1) Favourites 📩 (0) Shopping cart 🛒            | r(1)   | Search store      | Q                          |                                     |
|-------|------------------------------------|---|--|-------------------|----------------------------|-------------------------------------|
|       |                                    | Home page Products                                  | My account News  | Help              |                            |                                     |
|       | Shopping cart                      | Cart Address Shipping                               | g PO Number Confirm  | Complete          |                            | Update shopping<br>/ cart button    |
|       | Remove SKU     IOOFPDS011          | Product(s) Pursuit Focus Allocated F (IOOFPDS011)   | Pension PDS and Forms Bo   | oklet - July 2014 | Price Cty. Total           |                                     |
| field | Reference / Special Instructions   |   |  | Update shopping o | Calculated during checkout |                                     |
|       |                                    |   |  | Checkout          | ←                          | <ul> <li>Checkout button</li> </ul> |
|       | Contacts                           | Information   | News   |                   |                            |                                     |
|       | Marketing Services                 | Shipping Timings Frequently Asked Questions Sitemap | Warehouse closure<br>Christmas 2014<br>• Thursday, November 27, 3<br>All orders are to be placed | over              |                            |                                     |

4. The Shipping page is to confirm the delivery address.

|   | traissorgeridges.com  | Shopping cart 55 <sup>(1)</sup>  | Search store Q              |  |
|---|---|--|-----------------------------|--|
|   | Home p  | age Products My account News   | Help                        |  |
|   | <b>✓</b><br>Cat   | Address Shipping PO Number Confir  | m Complete                  |  |
|   | Shipping address  |  |                             |  |
|   | Please note only street   | SELECT SHIPPING ADDRESS<br>addresses can be used - deliveries cannot be made to PC | ) Box addresses. Thank you. |  |
| Click on green<br>button to select<br>this shipping<br>address. This will<br>be your office | Ship to the address<br>John John Bridges<br>Ernst tribilisergiontges con au<br>Facultation<br>Resources<br>Resources<br>Resources<br>Resources<br>Address, Guid Australia 3111<br>Australia |  |                             |  |
| address.  | Please note only street   | OR ENTER NEW ADDRESS   | ) Box addressos. Thank you. |  |
|   | First Name:   |  | •                           |  |
|   | Sumame:   |  |                             |  |
|   | Emait   |  |                             |  |

You can also add in one off delivery addresses if required (please ensure they are street addresses not PO Boxes).

IAF advisers will be required to add your shipping address for every order.



- - 5. After the address is selected or added, this will bring you to the PO Number confirmation. If you may wish to add an additional reference or click on NEXT to continue.
  - 6. The final screen is the last confirmation of your order. Please check items and quantities are correct and also the delivery address.

To place your order, press the green 'CONFIRM' button.

Your order is not placed unless you click on the CONFIRM button.

| trialuser@bridges.com 🛞 Log.out 🚺   | Favourites 📈 (            | Shopping carl Ç     | J <sup>(1)</sup> |            | S       | earch store             |                 | 0          | ۹               |
|---|---------------------------|---------------------|------------------|------------|---------|-------------------------|-----------------|------------|-----------------|
|   | Home p                    | age Pro             | ducts N          | ly account | News 1  | Help                    |                 |            |                 |
|   | <b>✓</b><br>Cart          | <b>√</b><br>Address | Shipping         | PO Number  | Confirm | ><br>Complete           |                 |            |                 |
| Confirm your order  |                           |                     | Co               | nfirm 🧲    |         | Press 'Co<br>finalise t | onfir<br>he c   | ·m'<br>ord | to<br>er        |
| Shipping Address<br>John John Bridges<br>Email trabuorgibridges com au<br>Para:<br>Para:<br>Bridges Adeburn<br>Teit Road<br>Adeburn, Sorb Australia 3111<br>Australia<br>Shipping |                           |                     |                  |            |         |                         |                 |            |                 |
| Shipping Method: Standard           #         SKU         Proc           1         BEBROOS         Ac   | iuci(s)<br>countants Refe | rral DL broch       | ure (BBBR00      | 5)         |         |                         | Price<br>523.25 | Qty.       | Total<br>523.25 |
|   |                           |                     |                  |            |         |                         |                 |            |                 |

7. After the order is placed a Thank you page will be displayed with the order number and a link to view the details.

| trialuser@bridges.com                                 | avourites ${\not\!$ | Search sto  | xe Q  |  |
|---|---|---|---|--|
|   | Home page Products  | My account News Help  |   |  |
|   | Cart Address Shipping   | PO Number Confirm Comple  | lete  |  |
| Thank you   | YOUR ORDER HAS BEEN   | SUCCESSFULLY PROCESSED!   |   |  |
| Order number: 503192<br>Click here for order details. |   |   |   |  |
|   | Co  | ntinue  |   |  |
| Contacts  | INFORMATION   | New PRODUCTS  | NEWS  |  |
| E Marketing Services                                  | Shipping Timings Frequently Asked Questions Sitemap                                     | AustChoice Employer & Personal<br>Super PDS and ferms CD     AustChoice Employer & Personal<br>Super PDS and ferms CD     WealthBuilder SPDS - 11     December 2014     Apd care - making an informed     decision (A5 booklet) | Warehouse closure over<br>Christmas 2014<br>- Trustay, November 27, 2014<br>Al oders are be bejaced by COB<br>Wednesday 17 December 2014. This will |  |

8. A confirmation email will also be sent to the email used to login or to the email supplied in the shipping address detailing what has been ordered.



## My Account section

This feature is not available to IFAs.

|                                      | sharon.commodore@ioof.com.au 😥 Log out 🚺 | Favourites ${\bf A}^{(0)}$ Shopping cart ${\bf a}^{(1)}$  | Search store | Q       |  |
|--------------------------------------|--|---|--------------|---------|--|
|                                      | HODE H                                   | ome page Products My account Nev  | vs Help      |         |  |
| Click to access<br>and edit shipping | MY ACCOUNT<br>Customer Info              | My account - Orders   | MBER: 503190 |         |  |
| addresses                            | Addresses<br>Orders                      | Order Jahns: Processing<br>Order Date: 4222015 11:47:28 AM<br>Order Total:                        |              | Details |  |
|                                      |  | ORDER NU<br>Order status: Processing<br>Order Date: 4762015 11:33:43 AM<br>Order Total:           | MBER: 503178 | Details |  |
|                                      | Click to access a                        | ORDER NU  | MBER: 503158 |         |  |
|                                      | previous orders                          | Order status: Processing<br>Order Date: 12/17/2014 3.04:49 PM<br>Order Total:                     |              | Details |  |
|                                      |  | ORDER NU<br>Order status: Processing<br>Order Date: 12/17/2014 3.02:55 PM<br>Oxder Total: 5448.28 | MBER: 503157 | Details |  |
|                                      |  | ORDER NU<br>Order status: Processing  | MBER: 503150 | Datala  |  |

#### Addresses

This section will list all address that the user has added in. Delivery addresses can be added either through the checkout stage or within this section.

Addresses can also be edited or deleted within this section

#### Orders

This will list all orders placed by the user.

To view the information about an order, click on the details button. You can choose to re-order the entire order. It will be added to your shopping cart.

