

SERVICES

TRAINING

Lubrigard Using the Lubrigard Web Site

Clients are welcome to browse product and service offerings on the Lubrigard Web site, however, they are required to register in order to view pricing and to place orders.

There are many links to the registration page, some of which are illustrated by the high-lited areas in Figure 1.

After clicking on the <u>register</u> link the client will be taken to the Registration page.

Next Registering a User Account



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Registering a User Account

The <u>register</u> link takes the client to the Registration page (illustrated in figure 2).

The client must enter their e-mail address which will become their username for signing on to the Lubrigard site in the future. The client must enter a password (between 5 - 25 characters) and re-enter the password to verify.

The customer then enters billing information. All fields marked with an asterick (*) are required to be filled in. This information is straightforward.

The customer can, at this point, enter a *Distributor Code*. The Distributor Code is the Key Code number from your business card. This number will provide the customer with a 5% discount on all products, and will ensure that you, the sales representative receives commission on all sales from this customer.

When the client is satisfied with this information, they click on the **submit** button. The account is created, and the Validation page is shown on the Web site. The user is immediately sent an e-mail with a *validation code* to the e-mail address they entered for the account.

Next Validating your User Account

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Fig. 2 – The Lubrigard Registration Page.

Lubrigard Using the Lubrigard Web Site

Validating your User Account

Upon registering the client immediately receives a "Welcome to Lubrigard" e-mail message that includes a Validation Code. This process is necessary to ensure that the e-mail address entered in the account information is valid for the user.

The Validation page is immediately loaded on the Lubrigard site upon registering. The Client should check their e-mail, then determine their Validation Code from the e-mail (in this case the Validation Code is 1234).

The Client then enters this Validation Code into the Validation Code field of the Web site and clicks on the **submit** button.

If the Client closes the browser before validating the account, then any subsequent Sign in to the Lubrigard Web site, will immediately take them to the Validation page. They must enter this validation code before being able to view pricing or shop on-line.

There is a link to re-send the validation e-mail. If the Client did not receive, or has lost this e-mail, simply clicking on this link will re-send the e-mail.

Next Completing your User Registration

If the e-mail is not received, chances are that the e-mail address that was entered during registration is incorrect. The Client should verify their e-mail address, and then re-register.

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Completing your User Registration

Upon entering the validation code and clicking the **submit** button, the Client will be logged into the Lubrigard Web site, and the page from which the Client clicked the register link will be re-loaded.

The Client will receive an automated e-mail welcoming them to Lubrigard, and showing them the URL (login address for the Web site), and their User ID and Password, as well as phone and e-mails for contacting Lubrigard direct.

Next Signing In

You will know when you are logged into the Lubrigard site when you see "Welcome, your name" at the top right of any page on the Lubrigard Web site (as illustrated in figure 4).



Fig. 4 – The Lubrigard Welcome e-mail message and Home page once the user has Signed In or completed their registration.

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Signing In

After completing registering the Client will automatically be logged in to the Lubrigard Web site. On subsequent visits to the Lubrigard Web site, the client will have to Sign In.

There is a Sign In area on the Home Page (hi-lited in figure 5) where the user can Sign In. There are also numerous links to the Sign In page (The Sign In page is shown at bottom right in figure 5).

To Sign In (from either the Home page or the Sign In page), the user enters their e-mail address, and password and then clicks on the SIGN IN link. If the sign in is successful the Client will see the "Welcome, *your name*" text at the top of the page (see the previous page).

If the login is unsuccessful the Client will see an error message telling them what happened. At this point a link will be available to have the Lubrigard "Welcome" e-mail re-sent with this information.

Next Viewing Lubrigard Products

When a Client navigates to the Lubrigard Web site, the site attempts to recognize their IP address (unique address on the Internet). If it recognizes the IP then the Clients e-mail address will already be filled in to this field when the user is required to Sign In.



Fig. 5 – The Lubigard Home page high-liting the Sign-In areas, and the Sign In page.

Lubrigard Using the Lubrigard Web Site

Viewing Lubrigard Products

After registering or Signing In, the Client is free to place products into their shopping cart, and to make purchases.

To shop the Client clicks on the **PRODUCTS** link and then selects a *product group* from the *products category* list (the list on the page illustrated in figure 6 starting with **:: Filtration**).

In this example we will click on the "oil dispensing containers" product group.

Next Viewing Products and Product Details

At any point a client is free to contact Lubrigard using the Toll-free Order Line. This number is displayed at the bottom right of all Lubrigard Web site pages. Clients ordering through the Order Line will still earn the sales representative the standard commissions.





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Viewing Products and Product Details

Upon clicking on the "oil dispensing containers" product group, a list of all oil dispensing products is listed (as illustrated at top left in figure 7). The list shows a small image of the product, and a short detail, including (in order); *product name, part number, product description, price*, and the *add to cart* button, and the *quantity* to be added to your shopping cart.

To see more detail on a product, simply click on the image, product name, or part number. This will call up the Product Detail page (illustrated at lower right in figure 7).

The product detail page will list any brochures available for the product, give a product *overview, specifiactions* and *features*. In addition to this information product **ACCESSORIES** and below that, **RELATED ITEMS** are listed.

The accessory and related products can be added to the shopping cart right from this page, or you can view a product detail on any of these products by clicking on the image or, product name, part number, or the "view this product" link.

Next Adding items to your Shopping Cart

Some products contain a pull down list for certain specifications (such as color). When you select a particular specification in the product list page, then click for the product detail, you will typically notice that the product image shows that specification (i.e. an oil safe lid will be red when red is selected).



Fig. 7 – The "oil dispensing containers" product listing page and the 10 Litre Drum product detail page.

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Adding Items to your Shopping Cart

To add an item to your shopping cart, simply select a quantity, and click on the *add to cart* button. That quantity of items will be added to your shopping cart. To view your shopping cart simply click on the **view cart** link at any time.

₩ view cart **7**

When you click on the View Cart link the Shopping Cart detail page is displayed (as illustrated in figure 8). The cart detail lists the products in your cart, the quantity of each and the price as well as totals.

You can remove an item from your shopping cart by clicking the **remove** button next to the item. You can change the quantity of a product in your shopping cart by changing the number in the quantity box and clicking on the **update** button for that product.

To return to the previous product page click on the **continue shopping** button, where you can continue to browse products and add products to your shopping cart.

Next Key Codes, and Tax Exemptions

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Key Codes, and Tax Exemptions

Most Clients will be purchasing products for company usage. As such they may have tax exemptions. In order to receive a tax exemption from Lubrigard, the Client must enter this tax exemption codes into their account information.

To enter a PST tax exemption code, for instance, the Client would enter the PST tax exemption code (i.e. P123456789) into the PST exempt No. field, then click the **submit** button. The submit button saves tax exempt numbers and key code information to the Clients account. Once entered these numbers will always appear on the shopping cart detail and will not have to be re-entered, unless they need to be changed.

Similarly, if the Client did not enter your Key Code during registration, they have an opportunity to enter it now and save (**submit**) this information to their permanent account record.

Next Checking Out

GST, PST and HST are automatically calculated against the province listed in the Client's billing address information. Any tax exemptions are applied to the invoices that appear both on the Web site, and by e-mail confirmation.

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Lubrigard Using the Lubrigard Web Site

Checking Out

When the Client is ready to make a purchase, they can either click on the check out icon (**check out**) on the shopping cart toolbar, or click on the **check out** button from the shopping cart detail page.

Check out will take the customer through a series of steps:

- 1. shipping / billing address
- 2. payment information
- 3. confirm your order

Even after clicking on the check out button the Client can still back out at any point from making the purchase. In fact, the client can continue to shop, or visit another page, then click on the check out icon to immediately return to the last completed check out step.

Next shipping / billing address



The shopping cart toolbar (pictured above) appears on all Lubrigard Web pages. Once you place an item in your shopping cart you will see the check out icon appear. At any time a Client can quickly see how many items and the subtotal of those items in their shopping cart.

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Fig. 10 – The shopping cart detail page. To checkout click on the check out button.

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Lubrigard Using the Lubrigard Web Site

Shipping/Billing Address

During check out the Client must confirm their billing address and enter a shipping address.

The billing address will be pre-loaded with the billing address information that the client entered during the account registration process. If the Client wishes to add a different billing address, then they have the option of updating the existing information which is done by simply changing the supplied information and clicking the **submit** button, or to add a new address by selecting "<add a new billing address>" from the billing address pull-down list, typing in the new information and clicking on the **submit** button. This new billing address will be kept in the Client's records and available from the billing address.

The first time a Client makes a purchase the shipping address information will be blank. If so a "use billing address" checkbox will be available. When this box is checked the billing address information currently displayed will be automatically copied to the shipping address fields. Again this information can be edited, and will be saved to the Client's shipping address record when the **submit** button is clicked.

Subsequent puchases will allow the Client to add new shipping addresses, or similarly to edit the existing shipping address just as for the billing address information.

When the proper billing and shipping address information is entered, the Client clicks on the **submit** button to proceed to step 2.

Next Payment Information

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Fig. 11 – Checkout Step 1 of 3 – Shipping and Billing Information.

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Lubrigard Using the Lubrigard Web Site

Payment Information

The second step in Checking Out is providing payment information. Client's on the Lubrigard site have two main payment options;

Pay by Credit Card

To pay by credit cart, ensure that the radio button next to "pay by credit card" is checked. Enter the name holder of the card, the card type (Mastercard, Visa, or American Express), the card number (with no spaces), the card identification number (found on the back of your credit card, generally near the signature area), and the expiry month and date. This page will validate the card number, but will not actually make the purchase to the credit card at this point.

Pay using a purchase order number

To pay using a purchase order number, ensure that the radio button next to "pay using a purchase order number" is checked. The first time a Client places an order, a full credit application form will be displayed. All the credit application information must be filled out in order to proceed. Subsequent purchases will simply require that a purchase order number be entered. The illustration in figure 12, demonstrates an approved credit application. Next to the purchase order number field the Client can see their current credit limit (\$10,000 in this case).

Once the payment info has been entered, click the submit button.

Next Confirming your Order

It is possible for a Client to exceed their credit limit. The Web site will allow the client to place the order. The Client's records will be consulted before the order is actually shipped, so if accounting has a problem with the order, they will contact the customer to resolve.



Fig. 12 – Checkout Step 2 of 3 – Payment Information.

LG-TRAIN-WEBSITE-09-2003

Lubrigard Using the Lubrigard Web Site

Confirming your Order

The final step in placing an order simply involves confirming the order information. At this point the Client can review the Bill To, Ship To, and Payment Information, as well as view the purchase detail. The Client can update the Bill To, Ship To and Payment Information by clicking on the **update** button next to each area.

When the **update** button is clicked, the Client is taken back to that step in the check out process and can edit this information and proceed back to the confirmation page.

The purchase detail section details all the products and quantities to be purchased, shows sub-totals, and applicable taxes and any discount (a 5% discount is given to all clients with a valid Sales Rep Key Code).

To place the order the client clicks on the submit order button.

Next Order Verification

At this point, if the user wishes to update any tax exemption codes or the Key Code they must click on the view cart icon in the shopping cart toolbar. This link will take them back to the shopping cart detail page.

They can update this information on the shopping cart detail page and then click on the *check out* button to return directly to the purchase confirmation page.



Fig. 13 – Checkout Step 3 of 3 – Order confirmation.

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Lubrigard Using the Lubrigard Web Site

Order Verification

Once the Client clicks on the **submit order** button the order is placed with Lubrigard. The User will be taken to the Order Verification page on the Web site, their current shopping cart will be emptied, and they will receive a message thanking them for their order, and instructing them that a purchase verification e-mail has been sent.

The purchase verification e-mail is illustrated in figure 14. This e-mail lists the bill to, ship to, and payment information as well as itemizing the products and quantities purchased with sub-totals and a total.

The e-mail contains important contact information for getting in touch with Lubrigard to track the order.

Shipping costs will be determined once the order is actually put together and weighed. The Client will be contacted to confirm the shipping method and costs.

Next Lubrigard Sales Representatives placing Orders.

The Lubrigard purchase verification e-mail is for the Client's use only. An official Lubrigard invoice will be sent at the time that the product is shipped. The Invoice will be sent to the billing address given in the Billing Address information during the check out process.



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Fig. 14 – The Lubrigard – Purchase Details e-mail.