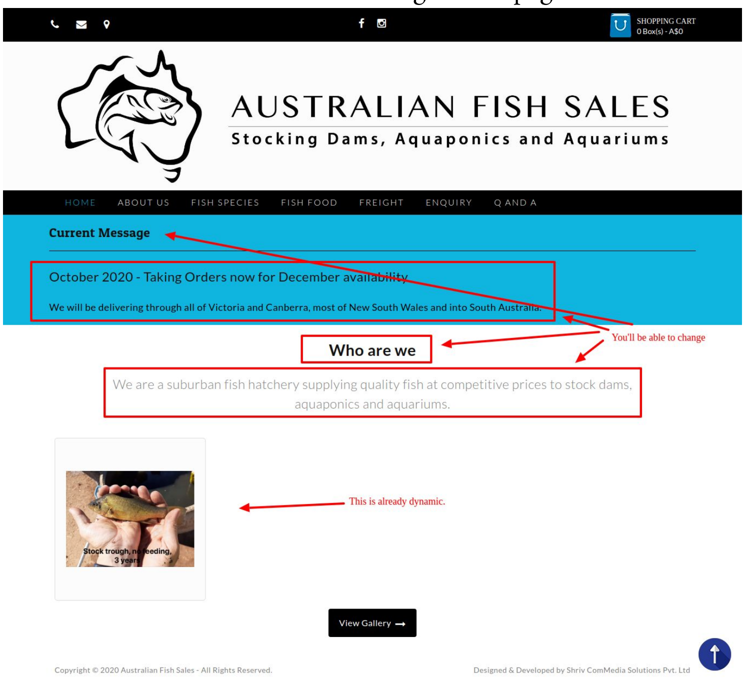
Australian Fish Sales - Changes and Improvements

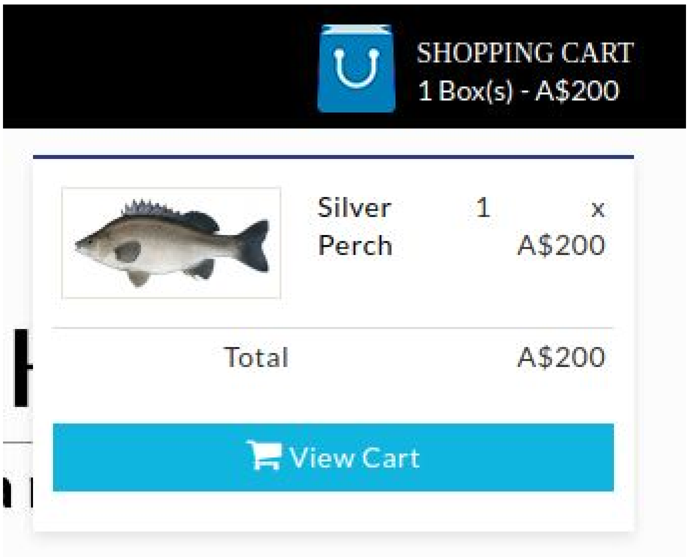
1	I need to be able to make changes to all my website screens. Home, about us, freight, enquiry and Q&A pages. How do I do this?	There is still stuff on the homepage that I can not update like the current message and who are we.

We'll add a section in Admin to change home page content.



4	Pricing on the website needs to reflect the box price. The same needs to be reflected in the shopping cart.	That's better. Still a couple of things when you view the cart at the top of the page it needs to say 1 box not 1 item and when you click on that before viewing cart it needs to say 1 x $200, not 1 x $2.

This is how it looks on our side (following image):



If you see something different, you need to clear your browser cache.

6	There is an online order there but customer doesn't appear on the customer list and is not able to be selected to include in a trip	Still can't include her in a trip. It works when I add them as a lead but this is a duplication of effort. Why cant the order appear in the 'Lead list' with a status of ordered?

Like I've already told you, if we add an existing order with the customer with the status of "ordered", and then you want to find out the Invoice against this customer, you won't find it. Invoices are generated manually by Admin. Ordered on the website show in the Order table in Admin. These two are separate modules.

7	When I generate the job card I would like my logo at the top. The same logo that is on the homepage.	Still doesn't look any good. Can we separate it from the table of customer information and present it across the width of the page. I want this to look the same for the job card, tank invoice and order form.

We'll do it.

8	When clicking on an order. The item details look untidy. Can this	Just add the logo as per above.

	also be similar to the job card.	

We'll do it.

9	When adding a customer I need a 'Contact Method' field. This doesn't need to be visible to the customer

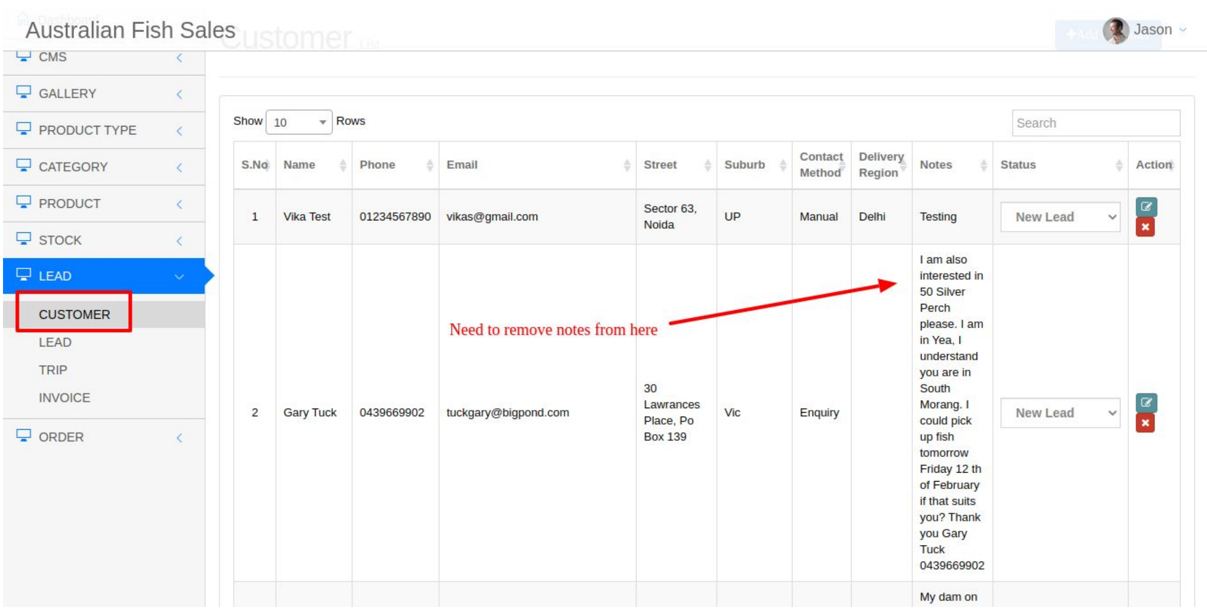
What will be the available values for the "Contact Method" field?

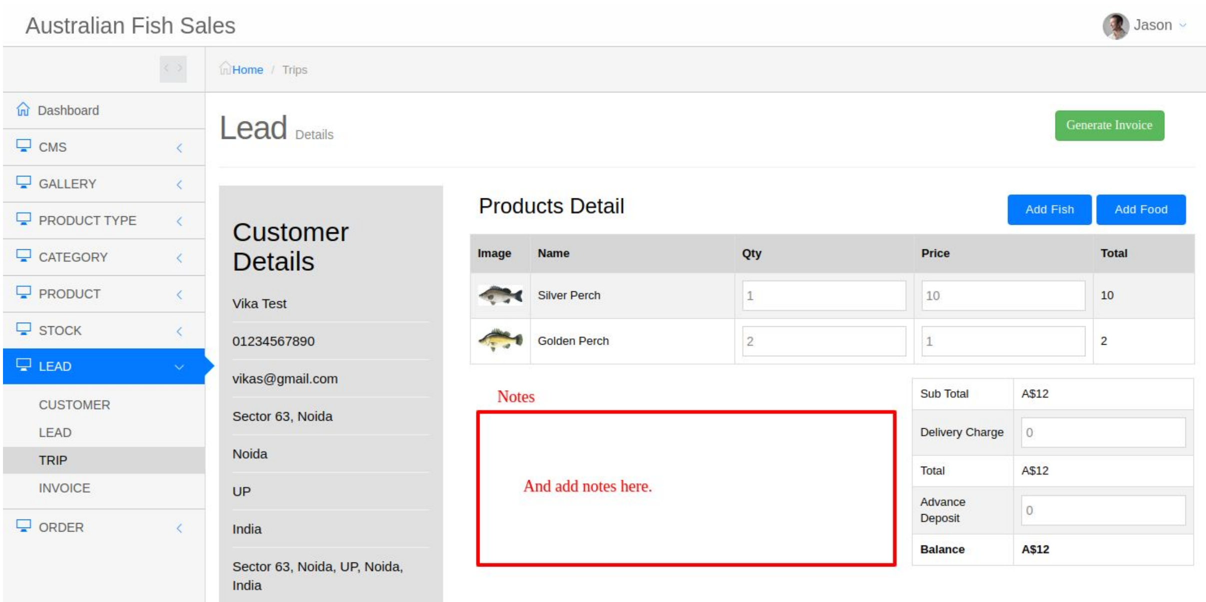
For the second part, "not visible to the customer". Can you explain more on this point?

10	Notes on the customer screen are for me to put in. Any notes that come through in the enquiry form are part of the lead information. Lead notes don't need to be displayed in the summary, they can just be in the 'Lead details'

You mean to say we need to remove notes column from customer table and show notes on lead detail page (see image below):

We'll do it.





11	None of the food sales are presenting properly on the front end. Price is incorrect and description not showing.

We'll fix it.

12	When you go to checkout it still has VAT included, it should be GST.

We'll do it.

13	At the checkout the header should read box price not unit price and the price should be $200.

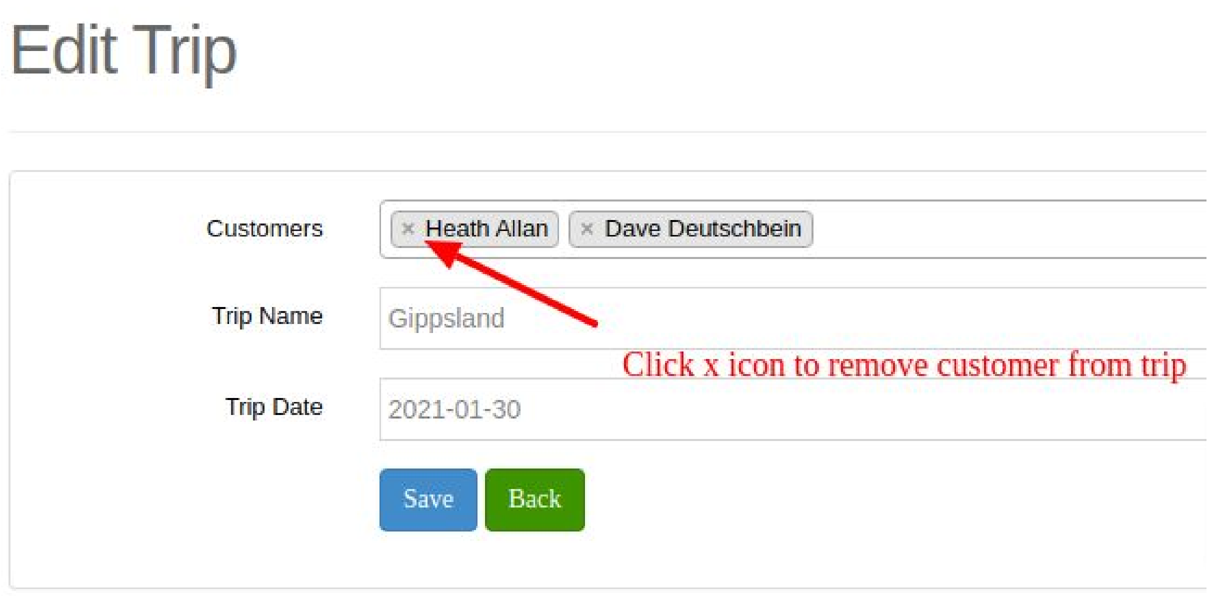
We'll do it.

14	Once I have contacted a lead and added it to a trip I want to be able to remove the lead and have it archived or deleted. Obviously I still want to retain the customer information in the customer list and trip.

Can you explain more on this point?

15	I need to be able to remove a customer from a trip and add them to another trip. There is no functionality to remove someone from a trip.

To remove a customer from a trip, you need to navigate to the trip, click edit against the trip, and then click the cross icon next to the customer name to remove it (screen below).



16	From the cart, when you click on continue shopping I want it to direct them back to the fish species page, not the homepage.

We'll do it.

17	If I delete a lead will it delete the customer from the customer list and trip?

No. Deleting leads don't delete customer from trip and customer table.

18	I have a spreadsheet with all my customer details. Can you do a bulk upload of this information?

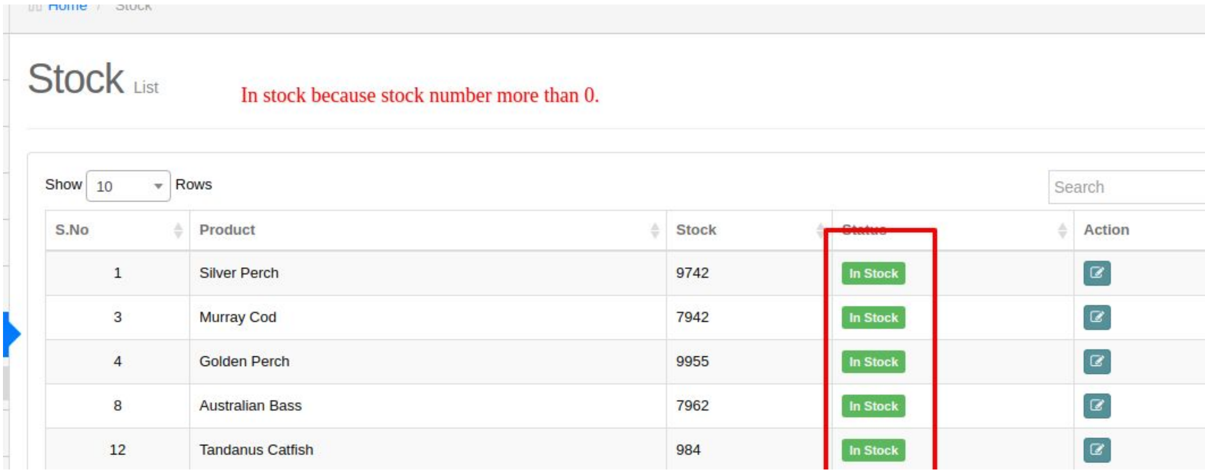
Yes, we can do it.

19	How do I get my details onto the 'From' section on the invoice?

That is fixed. Do you want a section in Admin where you can update this information anytime?

20	On the stock list I want the options to be 'in stock' and 'taking orders'.

Following is how the stock list page looks like as of now:



Can you elaborate what exactly you mean to say "taking orders"?

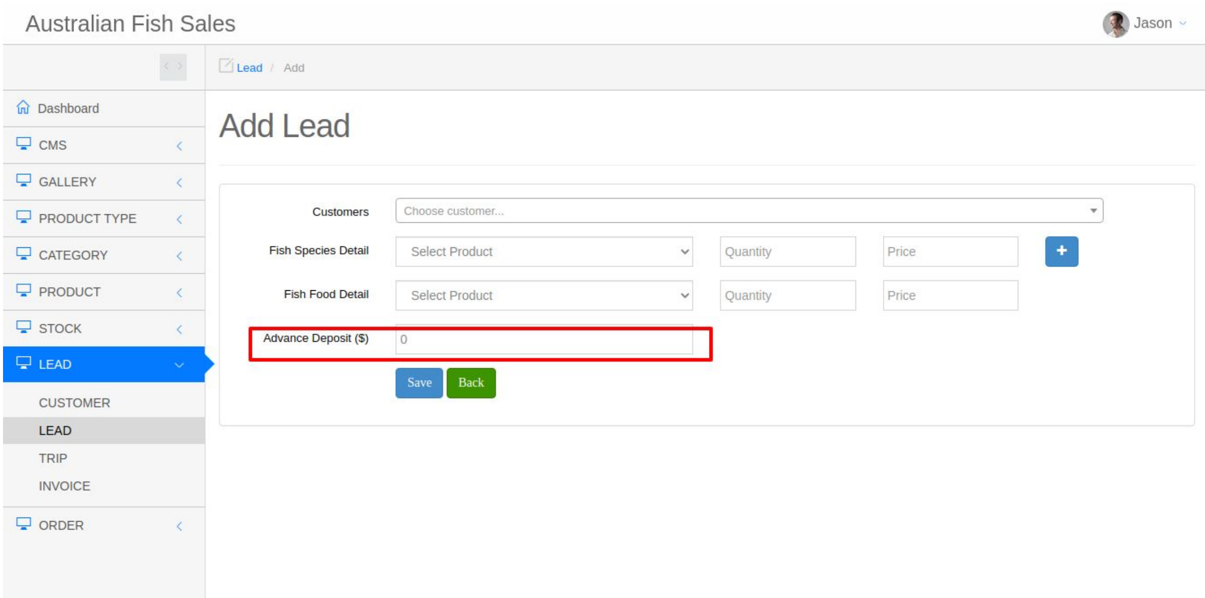
21	When I manually create a customer can it take me to the Lead screen so I can record their order rather than manually navigate? As an extension of that it would also be good to be able to add them to a trip in that same process.

This will be a little challenging as it's not actually a series of steps of the same form. Another thing is what would be the steps on the trip page as you add customers to the existing trips, too.

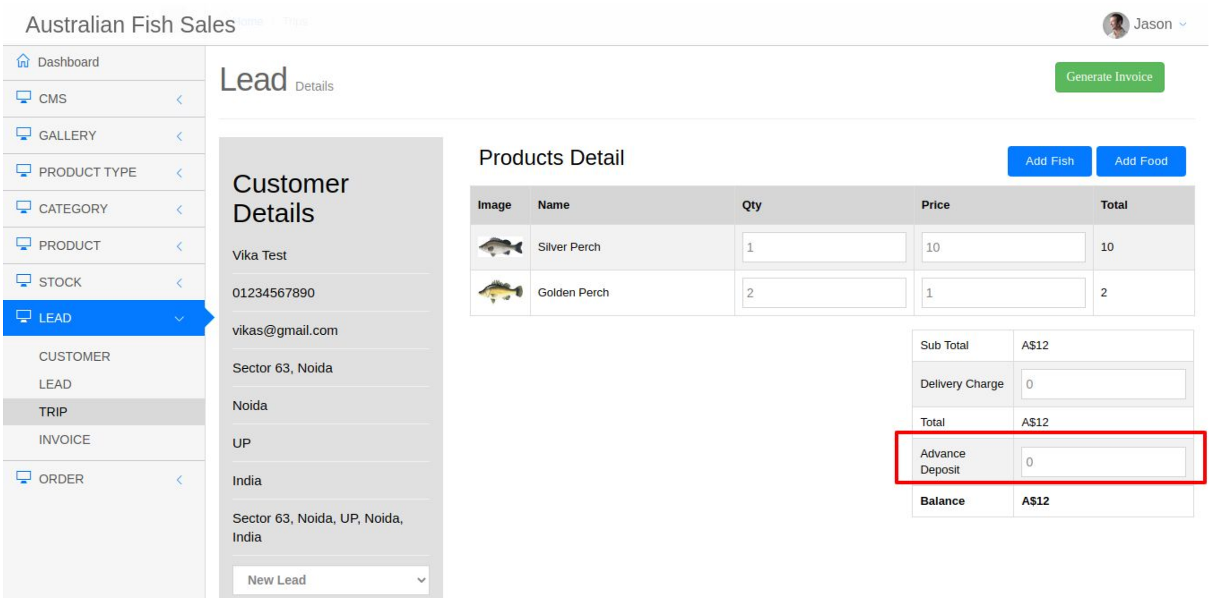
22	On the 'add lead' screen we don't need 'advance deposit'

Advance Deposit is visible in two places in Admin.

#1. One on "Add Lead" page



#2. On the “Lead Detail” page



Do you want this to be removed from both the pages?

23	I need the trips to appear in date order.

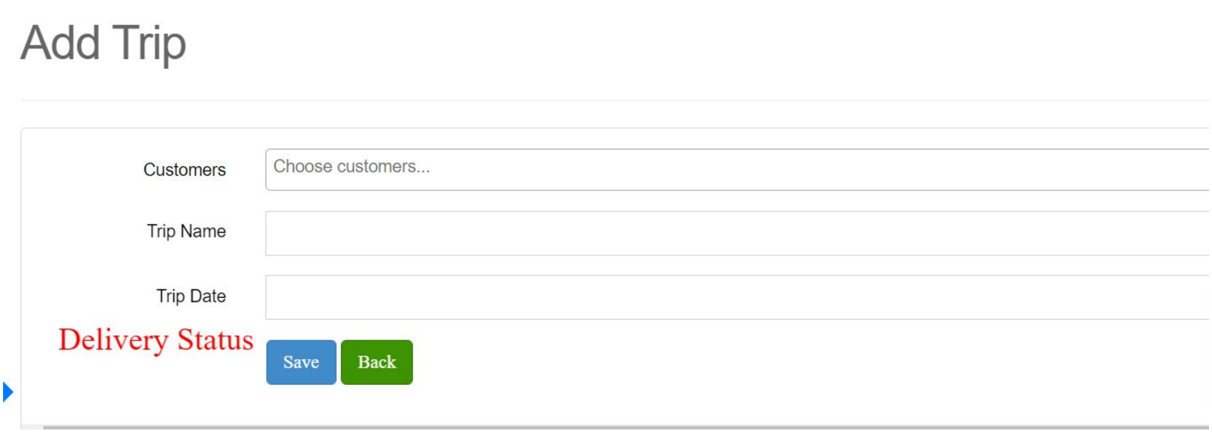
Does this mean, latest trip appears on top? For example, trip with date 12 Feb 2021 will appear before 9 Feb 2021.

24	Within each trip I need to be able to move the customers around according to my delivery route. Can the 'S.No' be editable or another way to make that happen.

Within each trip, you can drag and drop rows up-down.

25	I need a column in the trip called Delivery status. The options in this field will be invited, thinking, accepted, declined, delivered, picked up

It means we need to add a new field in the Add Trip form that has a drop-down to select with the values you gave above (image below).



We'll do it.

26	I don't want adding a customer to be a mandatory field when adding a trip.

So, does it mean you want to create a blank trip? Just give the Trip Name, Trip Date and save the form without adding any customer?

If so, we'll do it.

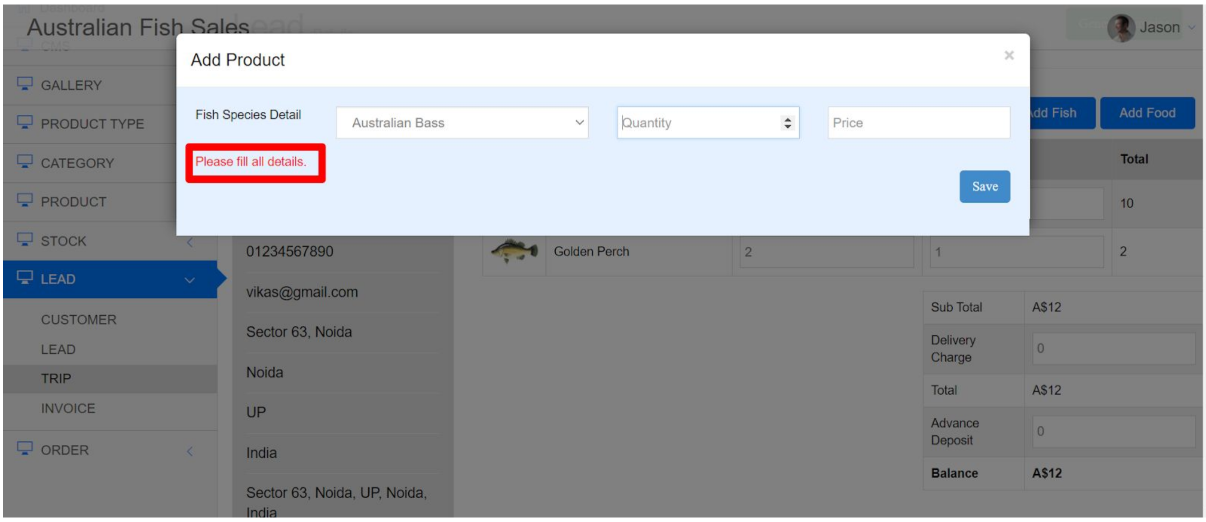
27	I like consistency in format throughout the site. Ie: lead and job card should look identical. In the lead details I like the image, name, quantity etc, but I like the job card format with the customer information at the top.

Can you elaborate more on this point? Where exactly do you want us to change in the design?

28	On the lead details page when I click on 'add fish' I can select a fish species but not quantity and price. When I try as save it without those details it gives me an error

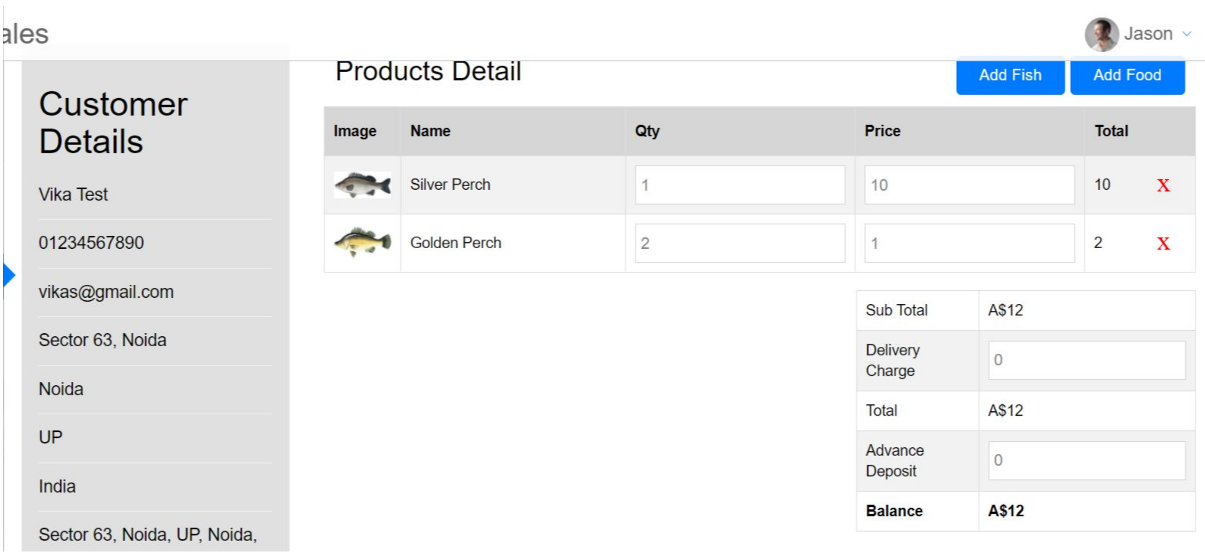
We did it and it's not giving any error. All fields in there are mandatory, so it gives you a message saying "Please fill all details."

If you want to keep "Quantity" and "Price" as an optional field, we can do it.



29	On the Lead details screen I am unable to remove a line if a customer chooses not to buy a species.

We can add a cross sign so that you'll be able to delete the product from the lead detail page (image below). We'll keep the delete signs disabled if an invoice is created against the lead.



30	When a customer submits an order or enquiry I want it to send me an email

We'll do it. Should we send an email to "jason@australianfishsales.com.au"?

31	In the action column on the lead list can I move to a function that allows me to move it to a trip?

Does it mean you want to move a lead to a trip without navigating to the trip page? We'll add a button next to the trip called "Add to a Trip". Clicking on the button will popup a list of all available trips in the system, you'll select one trip and lead will be added to that trip.

32	I need a notes field in the lead details. This can also be where the notes from the enquiry form go. The notes only need to be visible from the lead details, not the lead list.

I guess this is the same as point 10. We'll move the "Notes" field to a Lead detail page.

33	When adding a customer I want to be able to add a contact method. This field is not something that needs to be visible to the customer.

I guess this is the same as point 9.

34	When printing the job cards each customer needs to be printed on a separate page.

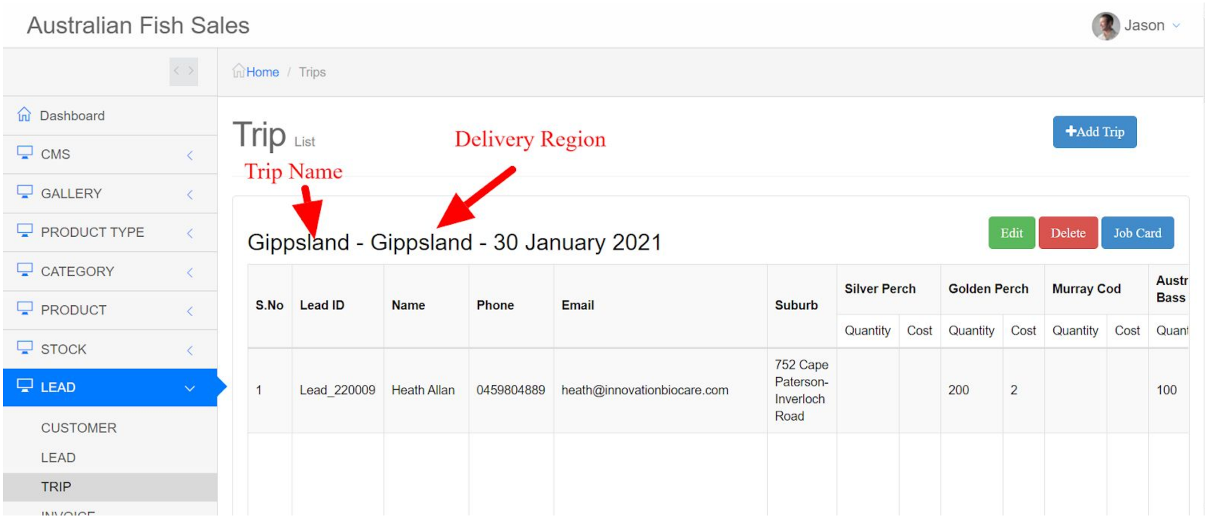
We'll do it.

35	Can the format of the mobile number be xxxx xxx xxx

We'll do it.

36	Why is the trip name appearing more than once?

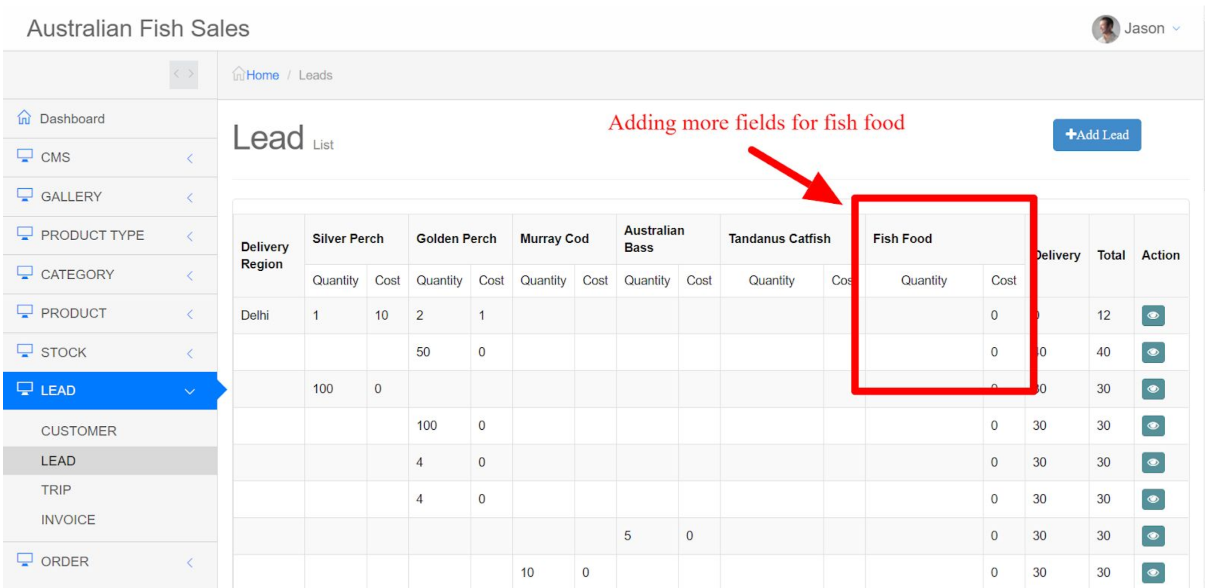
The second part is the "Delivery Region" taken from the first customer added into the trip as you've suggested in your first excel sheet.



37	On the enquiry form I need a + next to the fish food.

As per your first excel sheet, there was only one column for fish food. Adding more fish food on enquiry form means we also need to add and maintain more columns in the Lead page (Admin).

We'll do it.



38	I need a search field on the trip page identical to the customer list

We'll do it.

39	When people order food via the enquiry form it comes through as different types of fish.

We'll fix it.

40	I am getting complaints that the online shop it is timing out when they are placing an order.

If the user is inactive for a specific time of period, the session becomes out. This is the typical feature of eCommerce. If possible, can you give us more detail on this?

41	Customers are also reporting that they are not getting any confirmation that their order has been successful.

We'll do it.

42	On the lead information I would like a date of the lead.

Does it mean one more column on the lead page called "Created On" which will be auto generated when you'll add lead?

We'll do it.

43	I am getting more money into my account than the amount of orders I am seeing. One lady was tell me she has paid but there is no order for her only a lead

Can you share the details with us to look into this?