

# High Level Experience Flows

Solace – Supplier Portal

# 1 - Experience Flow: Horse ride tour operator fulfills a reservation from Sunshine Holidays

Nev McDonald is the owner/operator of Sunshine Horse Rides south of Noosa, QLD. He has 20 horses and 5 staff and offers beach horse rides year round for novice to more experienced riders. Almost all of Nev's customers are tourists enjoying a sunshine coast holiday.

1

Nev was heading to the office for his morning coffee after tending to the horses.

He sits at his desk to check his email and sees he has received a booking notification from Sunshine Holidays, a travel agent in Noosa using Solace.

2

Nev clicks on the link in the email and is directed to his Solace Supplier Portal and prompted to log in.

Once logged in, the reservation details are displayed .

Nev sees the reservation was made by Val Johnson who has booked 2 children for an afternoon beach horse ride on the 29<sup>th</sup> October.

3

As Nev does not have live product inventory on Sunshine Holiday's website, the booking has come through in "Request Only" mode.

Nev checks the reservation against his 'Red Book' and notes that he can fulfill the horse ride at the requested time.

He updates his 'Red Book' and clicks 'Confirm' in his Supplier Portal to indicated he is willing to accept the reservation.

4

Presently, Val is doing the grocery shopping and hears an email come in on her iPhone.

The email is from Sunshine Holidays notifying her that the status of an item in her itinerary has changed.

It prompts her to log in to her supplier portal to view the details.

When she gets home, she clicks on the link, logs in and sees that her horse ride request has been accepted.

5

The Johnsons are now on holiday and the day of the horse ride has arrived.

The kids are very excited as they pull up at Sunshine Horse Rides.

Val and the kids walk into the office and display their voucher at the front desk on Val's iPhone.

The kids go off with Beth, one of Nev's tour guides and have a brilliant time horse riding.

6

A few days go by. Nev is out on a horse ride when he receives an email from Sunshine Holidays on his phone.

As Nev is set up to receive payment after product fulfillment, the email was to advise Nev that payment for the Johnson's horse rides had been remitted to his account.

7

Nev is excited and forwards the email to Alicia who does Nev's bookwork for him.

She opens and prints the remittance and after using it to complete her daily bank reconciliation, files it away.

8

The next day, Nev comes in for his afternoon coffee sees he has received another notification from Sunshine Holidays, this time for a pending customer review.

Nev clicks on the link in the email which takes him to his Supplier Portal. He has already logged into Supplier Portal that morning, so the link takes him immediately to the review.

9

The review is from Val giving Nev and his team glowing praise. She has also posted a lovely photo of her 2 kids on the horses with big smiles on their faces.

Nev is really happy with the review, so clicks 'Accept' within Supplier Portal. Once Sunshine Holidays approve the review, it will be listed on Sunshine Holiday's website.

## 2.A - Experience Flow: Sunshine Holidays accepts a new Supplier – Initial Contact

Sunshine Holidays has just run an email campaign to scout for new potential suppliers. The email boasts of Sunshine Holidays fantastic website with its online reservation system and integrated Supplier Portal, and how it is an affordable and easy way for suppliers to gain access to new customers.

1

Alf Fitzgerald owns Sunshine Fishing Charters in Noosa.

He has a commercial fishing boats and takes groups of up to 5 at a time to all the best fishing spots around Noosa.

2

Alf checks his email one morning and is intrigued by one from Sunshine Holidays.

Alf has heard of Sunshine Holidays but had no idea what they could offer him so spends some time viewing the attached promotional video and researching the Sunshine Holiday's website.

3

Alf is really interested in finding out more and potentially signing up as a Supplier to Sunshine Holidays.

He completes the short, online application form on Sunshine Holiday's website.

4

Heidi, a consultant at Sunshine Holidays, immediately receives Alf application via email and gives Alf a call.

Alf is impressed by the fast response and spends 10 minutes chatting to Heidi about how their business relationship would work.

By the end of the conversation, Heidi has Alf agreeing to trial Sunshine Holiday's as their agent.

5

After getting off the phone with Alf, Heidi returns to her Solace Admin Console and sets Sunshine Fishing Charters up as a new Supplier.

6

Heidi and Alf have agreed on initial trading terms including:

- ✓ Commission rate
- ✓ Payment terms
- ✓ Joining fees, etc

These are all entered into Solace as part of the Supplier new supplier setup.

Heidi must also choose if the supplier is a Product or Property supplier.

7

When Heidi has completed the new supplier setup form, she clicks 'General Supplier Contract'.

A PDF of the supplier contract is emailed to Alf via email and includes the agreed terms as well as Sunshine Holiday's standard trading terms.

8

Alf agrees with the terms in the contract, prints it, signs it and faxes it back to Heidi.

9

Heidi receives Alf's contract. She checks off the agreement as 'Accepted' in the Solace new supplier setup section.

Solace then prompts Heidi to create a username and password for Alf's Supplier Portal. She does this, then files the agreement away with the other hard copy Supplier contracts.

## 2.B - Experience Flow: Sunshine Holidays accepts a new Supplier – Activating Supplier Portal

Alf is optimistic about his new relationship with Sunshine Holidays. He has signed a contract with Sunshine Holidays agreeing to a range of trading terms and conditions and is waiting for advice regarding the setup of his Supplier Portal.

1

Alf received the much anticipated email from Sunshine Holidays with a link to Supplier Portal and his initial username and password.

There are also links to some video tutorials and online support files which he ignores for the time being.

2

Alf logs into Supplier Portal and is immediately prompted to set up a new password.

3

Once into Supplier Portal, Alf can see the site is user friendly, easy to navigate and intuitive.

He updates a few business details such as his ABN, contact information and bank details and then decides to set up his products using the 'Set-up Wizard'.

4

The wizard tool prompts Alf to enter his products one at a time and requests information such as product description, pricing and photographs.

5

Once all the information is entered, the wizard prompts Alf to choose if he wants to run a live inventory of the product or run on a 'Request Only' basis.

Alf initially chooses 'Run Live Inventory'. He is presented with a Calendar view and is asked to upload his product availability. He also notes that this option will result in the immediate confirmation of bookings once paid for by the customer.

6

Alf hits the 'Back' button as he decides he is not ready to upload all his inventory yet or run all of his reservations out of his Supplier Portal.

He is anxious about causing a double booking as he can't keep his inventory up to date, or he decides he is better off listing his products as 'Request Only', at least in the short term.

7

Alf finishes the wizard by reviewing the content as it will appear on Sunshine Holiday's website.

He clicks 'Finish my setup' as he thinks the content is good to go.

8

Heidi from Sunshine Holidays receives a notification that there is web content waiting for approval.

She clicks on the link which takes her to the content for review in Solace.

She finds a spelling mistake, makes the correction the 'Approves the Listing'.

9

Alf receives a 'Welcome to Sunshine Holidays' email with an invitation to view his listing online.

Alf is very satisfied with how his business is presented on the website. He can't wait to receive his first booking! To celebrate he heads out for an afternoon fish.

### 3 - Experience Flow: Property Owner prepares for tax time

Fiona Sims lives in Sydney and owns a holiday rental property in Adaminaby, NSW. The property is managed by Snowy Mountains Holiday Centre, a travel agent in Adaminaby. Fiona has a tax planning meeting with her accountants tomorrow and needs to gather some information pertaining to her holiday rental.

1

The information Fiona needs for her accountant includes:

- Income received
- Estimated June income
- Expenses
- Estimated June expenses

2

Fiona jumps on her computer and logs into her Supplier Portal.

She navigates to the 'Accounts' and views remittance advices. She can either download one at a time in PDF format, or she can click a check box for the ones she'd like to download and do it in one go.

She clicks on all the remittances from July 2014 to May 2015 and clicks 'Download'. She prints and saves them.

3

She next goes into Reports and selects 'Forward Bookings' report. She enters 01/06/2015 to 30/06/2015 in the parameter fields and clicks 'Generate Report.'

She can now print this to PDF. She prints and saves this file also.

4

Next, Fiona wants to view what expenses have been incurred since July 2014.

She is able to generate this report, print and save it also.

5

Finally, Fiona wants to see if there are any 'Jobs' pending for June 2015.

'Jobs' are property management activities that can be logged by the property owner or the Business which describe maintenance activities that need to occur at the property.

She goes to the 'Property Management' area and is able to view scheduled jobs. There are none for June so nothing to print or save.

6

Having finished gathering all the information for her accountant, Fiona has a few administration jobs to attend to in Supplier Portal.

7

Firstly, she has decided that her rates need to go up for the next financial year.

She does this using Supplier Portal's 'Bulk Update Pricing' tool.

This allows her to apply a 3% pricing increase with rounding to her pricing matrix.

8

Next, she wants to update her property photographs with some professional photos she had taken recently.

She inserts her SIM card into her PC and uses Supplier Portal's 'Bulk Image Update' tool to upload all her new photos with just a few clicks of the mouse.

9

She clicks 'Approve Content Change' to get approval from SMHC so the new images can update across SMHC's website and participating Channel websites.

10

She logs out of Supplier Portal and is about to go and get a coffee when she sees a SMHC booking notification email come in to her inbox.

She notices the booking has come from Stayz.

She gets her coffee and thinks how easy Supplier Portal makes tax time!