Website Wishlist

Backend

Magento

Workflow 1: Creating a New Customer

- Add a new Customer Profile. Each profile should contain entry fields for:
  - Customer Full Name
  - Position
  - Company/Institution
  - Shipping Address (Address, City, Province/State, Country, ZIP/Postal Code, Phone, Fax, Email)
  - Billing Address (Address, City, Province/State, Country, ZIP/Postal Code, Bill Phone, Bill Fax, Billing Email)
  - FedEx #
  - Tax/VAT#
  - Notes
  - Alert Notes
  - Acct Rep
  - Customer Group* (this distinguishes end user from distributors). This is important for applying discounts on quotes & orders etc.

- Once all information are entered, the customer is automatically assigned a customer ID and are in the customer database.

Workflow 1: Creating a New Customer - Sufficient

- Current Magento site works well for this workflow.

- Nothing on the wishlist for this workflow.

Workflow 2: Viewing Customer Profiles

- Search Customer Profile in the database using any of the following terms:
  - Customer Name
  - Company Name
  - Customer ID
  - Email
  - Phone #

- Click into the Customer to view Profile. Profile should contain the following information:
  - Account information (+ and ability to edit information)
  - Address information (ability to store multiple addresses)
  - Past Order History
  - Rewards Points History
  - Ability to create a new order from the Customer Profile
  - Ability to reorder from Order History
  - Ability to re-set customer password (system sends them an email)
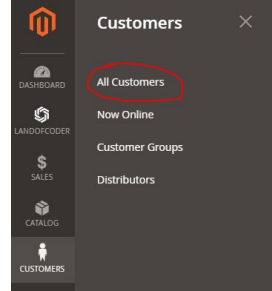
Workflow 2: Viewing Customers - Improvements Req'd

- When searching customer profiles, the current **Top Filter/Keyword Search** does not filter well

  i.e. Searching "Applied Biological Materials" provided multiple customer profiles that are irrelevant

Workflow 2: Viewing Customers - <mark>Wish List</mark>

- After clicking into the Profile:
  - have the ability to view **All Quotes** issued to this customer
  - have the ability to **Create Quotes** from this interface

Reiko Sase   🔍 🔔 👤 Heidi ▾

| ← Back | Delete Customer | Reset | Create Order | Reset Password | Force Sign-In | Save and Continue Edit | **Save Customer** |

- Under current Order History, you view orders if you click into it. It would be more convenient if it you can open a new tab from here. This way you don't have to click into order 1, hit back, and go into order 2.

Order	Purchased ↑	Bill-to Name	Ship-to Name	Order Total	
	From 🗓			From	
	To 🗓			To	
000006293	Mar 5, 2021, 9:13:16 AM	Accounts Payable	Accounts Payable	$0.00	Reorder
000006292	Mar 5, 2021, 9:11:37 AM	Accounts Payable	Accounts Payable	$1,115.00	Reorder
000006291	Mar 5, 2021, 9:09:13 AM	Accounts Payable	Accounts Payable	$1,015.00	Reorder

Workflow 2: Viewing Customers - Wish List

- Under current Order History, have the following columns:
    - Payment Status (show as **Paid** or **Pending**)
    - Ship Date (**actual date** or show the **Tracking number**)

Preferably color coded so we can easily identify which order has been (shipped + paid) vs (shipped + not paid), or (not shipped at all).
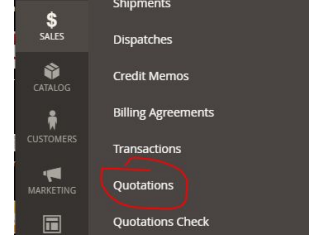
Workflow 3: Viewing Customer Groups

- Can add New Customer Group based on Tax Class (Retail customer/Tax Exempt BC)
- Can view a list of current Customer Groups
- Current Magento site works well for this workflow - Sufficient
- Wish List:
    - Ability to see a list of customers under each group ("view Group Members")
    - Ability to Add Customer (by ID) and Delete existing Members under each Group

All Members for Distributor Group V1.1

Add New Member for Group V1.1

[   ] [Add]

Account ID	Company	Delete
25563	ABM	✗
C90020	Cosmo Bio Co Ltd	✗
96142	Microtech S.r.l.	✗
C04164	Interlab Co Ltd	✗
C91331	BioCat GmbH	✗

Customers ✕

- **All Customers**
- Now Online
- Customer Groups
- Distributors

DASHBOARD
LANDOFCODER
SALES
CATALOG
CUSTOMERS

Shipments
Dispatches
Credit Memos
Billing Agreements
Transactions
Quotations
Quotations Check
SALES
CATALOG
CUSTOMERS
MARKETING

Workflow 4: Creating a New Quote

- Select "Add New Quote"
- Select a customer based on filter (Customer ID, Name, Email, Phone, ZIP, Country, Province)
- Select "Add Products" and filter by product ID, Product Name, SKU
- Checkmark the product to add, then enter Quantity required
- Select "Add to Quote". If the customer is part of a special customer group, discounts will automatically apply. **[Customer Group Discounts is broken currently]**
- Adjust "Custom Price", Discount, or Quantity as required
- Select "Submit Quote" -> the system gives you a Quote #
- Submitted quote can be further edited (Add item, Delete, or change price/quantity, add as "recommended" products, enter quote expiry date, edit "Aim", "Deliverable", "Lead time", "Notes", "Internal Notes")
- Quote can then be printed into a PDF, or made into an order by "Create Order"

Workflow 4: Creating a New Quote - Improvements Req'd

- When selecting a customer,
  - have the ability to filter by **Company Name**
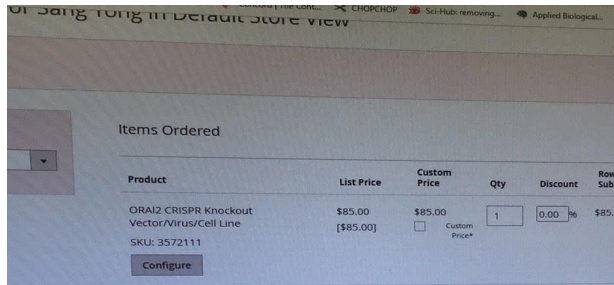
Workflow 4: Creating a New Quote - Improvements Req'd

- Must have **STABILITY** and **RELIABILITY**. Quote items, prices, once made, should not change on its own.

i.e. sometimes when adding configurable products, even after all the selection, it does not appear on quotes.

i.e. quotes prices change (was discounted when made), but reverted to original, or geoprice (1.5x) when visited later. Search "Quotes system - Old quotes changed on its own?" as subject line in the IT@abmgood.com inbox for more details.

Workflow 4: Creating a New Quote - Improvements Req'd

- Automated Discount based on Customer Group - **NEEDS TO WORK RELIABLY.** Currently it does not work or only partially work (some SKU work, while other SKUs do not work).
- See **"Customer Group Discounts" Workflow 6** for more details.

Workflow 4: Creating a New Quote - <mark>Improvements Req'd</mark>

- Ability to modify the List Price <u>instead </u>of Custom Price, overwise once a quote is made, the customer will see both List Price/Custom Prices on the PDF printout. It does not look professional when we quote higher than List Price.

Workflow 4: Creating a New Quote - Improvements Req'd

- Ability to calculate price using any number (not just 2 decimal places).
  i.e. when quoting C098 (Gene synthesis), it is priced at $0.18/bp
    If we provide a 10% discount, then each bp is $0.162

  For a 100 bp, price should be $0.162*100 = $16.20

Gene Synthesis	USD$0.18	USD$0.16	USD$0.16	100	10 %	$16.00
SKU: C098						

Workflow 4: Creating a New Quote - Improvements Req'd

- Ability to use special characters. Currently Magento does not take '' (e.g. 5' UTR, 3' UTR, customer' s, etc). It turns into \ and adds multiple \\\ everything a quote is updated

Product

Promoter Change Service
SKU: C126

Use pAAV-hROSA26-5\'-UCOE-CAG-Tet3G-loxP-2A-**eGFP**-loxP-polyA-hROSA26-3\' from C129

Service 1: Replace CAG promoter with UBC promoter from Order 50932. UBC promoter sequence below as a reference:

Workflow 4: Creating a New Quote - Wish List

- When adding products, streamline the process by allowing us to enter SKU directly into multiple blank fields. Currently we have to filter to find the SKU, click add, then find the next SKU, then add, etc. If we are quoting 20 different products, it takes up quite a bit of time.

Add Additional Items to Order	
Catalog Number	**Quantity**
	1
	1
	1
	1
	1
	1
	1
	1
	1
	1
Add to Order	

Workflow 4: Creating a New Quote - Wish List

- When selecting bundled product, streamline the process by eliminating the extra 'pop up step' and have the ability to enter directly the quantity needed (last column). Currently you would check mark first then enter QTY in the next window.

Workflow 4: Creating a New Quote - Wish List

- Ability to enter entire SKU for configurable product directly when adding to quote instead of searching for the first 7 digits, then go through a series of selections. It will save time, as well as reduce processing error.

Workflow 4: Creating a New Quote - Wish List

- Ability auto-populate CAD vs USD currency in quote based on the customer's address. Currently we manually multiply 1.15 to our USD list price for Canadian customers.
- Ability to display 'customer notes' on the same view. This will allow us to follow the notes if special discounts/arrangement was made with the customer. Currently we have to open multiple windows (customer tab + quotes tab).

Notes

[José] Distributor

Special Support in 2021: All inquiries from customers based in Spain should be sent to Eva Vasquez at eva.vazquez@condalab.com. Example:
We have a distributor in Spain who would be able to provide you better pricing and support. Please find their contact information below:

Condalab
ATTN: Eva Vazquez
Calle Forja, 9, Torrejón de Ardoz
Madrid, 28850
Telephone: 34 91 761 02 00
E-Mail: eva.vazquez@condalab.com
Website: www.condalab.com

Workflow 4: Creating a New Quote - Wish List

- Ability to "clear all products" in the quote. Currently each item has to be deleted individually.
- Ability to edit customer information (auto-populate what is in the customer profile, but have the ability to change customer name/address if needed). This will help when we drop ship to our customer on behalf of the distributor.
- Ability to change currency after quote is made (i.e. from USD to CAD)
- Display shipping conditions on the quote/shopping cart by category
- Ability to show current inventory when quoting

Cat. No.	In Stock	On Hold	Product Name
G464 twd	95.6	2	2X PCR Bestaq™ MasterMix Edit/Add Product Notes

Workflow 4: Creating a New Quote - Wish List

● Ability to recognize lower vs upper case SKUs (the 'Add item' system can only add G041, not g041)

Workflow 4: Creating a New Quote - <mark>Wish List</mark>

- For the printout view (PDF):

  Show List Price, Discount, Sale/Unit Price and Total Cost. If *no discount* is applied, do not show the discount or the sales price column.

Qty	Cat No	Unit	Description	List Price	Discount	Sale Price	Total Cost
Requested Item(s):							
1	mh10013	500 ng	LentimiRa-GFP-hsa-miR-101-3p Vector	$215.00	30%	$150.50	**$150.50**

Qty	Cat No	Unit	Description	List Price	Total Cost
Requested Item(s):					
1	mh10013	500 ng	LentimiRa-GFP-hsa-miR-101-3p Vector	$215.00	**$215.00**

Workflow 4: Creating a New Quote - Wish List

- For the printout view (PDF): words are cut off making it difficult to read

Qty	SKU	Unit	Product Name	List Price	Discount	Unit Price	Total Cost
Requested Item(s):							
1	C087	Single Service	Ab Production w/o Protein Production	$9,000.00	-	$9,000.00	$9,000.00

Project Overview:

- Stage 1: Immunization of 5 mice per immunogen and testing anti-serum titres by ELISA
- Stage 2: Cell fusion to make hybridomas and colony screening
- Stage 3: Collect ELISA positive supernatant for CUSTOMER to screen. ELISA results against antigen will be provided to customer on individual clones.
- Stage 4: Subcloning, Colony Expansion and freezing down 2 clones. Antibody isotyping included.
- Stage 5: Ascites production and antibody purification.

Up to 3 mg of purified antibody will be provided as the final deliverable (up to 2 clones). Large scale production will be quoted separately. Additional clone can be added at the time of screening using SKU C081.

Workflow 4: Creating a New Quote - <mark>Wish List</mark>

- For the printout view (PDF): **If "Customer Group Discounts" is working,** display List price, Discount %, Unit Price rather than the final unit price as List Price with no discount.
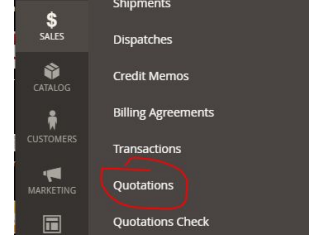
Currently it shows:

Qty	SKU	Unit	Product Name	List Price	Discount	Unit Price	Total Cost
Requested Item(s):							
1	G891	500 rxn (4 x 1.25 ml)	BlasTaq™ 2X qPCR MasterMix Alternative to "EvaGreen Express 2X qPCR MasterMix-ROX"	$62.50	-	$62.50	**$62.50**

We want:

Qty	SKU	Unit	Product Name	List Price	Discount	Unit Price	Total Cost
Requested Item(s):							
1	G891	500 rxn (4 x 1.25 ml)	BlasTaq™ 2X qPCR MasterMix	$125.00	50 %	$62.50	**$62.50**

Workflow 5: Viewing Existing Quote

- Search quotes in the database using any of the following terms:
    - Quote # ("ID") from ___ to ___
    - Created from ___ to ___
    - Customer Name
    - Customer ID
    - Email
- Click into quote to view, make edits, turn into order

Workflow 5: Viewing Existing Quote - Improvements Req'd

- When searching Quotes, the current **Top Filter/Keyword Search** does not filter well

  i.e. Searching "ryan@abmgood.com " gave no results. Filter by email using "ryan@abmgood.com" gave 9 results.

Workflow 5: Viewing Existing Quote - Wish List

- Ability to search quotes by 'Company'
- If a quote was processed into an order, the ability to show the corresponding order# when looking up quote# (this allows us to know if the customer placed an order)

Search for Quote:

Q24517 [Search]

Quote No.

See order 60335

Workflow 6: Creating Customer Group Discounts

Marketing

DASHBOARD

LANDOFCODER

SALES

Promotions

Catalog Price Rule
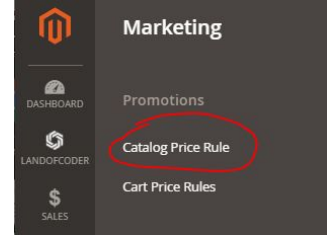
Cart Price Rules

- *Discount rules* under *Marketing ->"Catalog Price Rule"* allows us to set discount level (in %) for product groups. This is used for distributors or OEM partners. When creating quote, or order for them, the discounts will automatically apply to the List Price without manual input.
- Add "New Rule".
- Set rule name, select status (active/inactive), select Customer Group (defined in workflow 3), set date range, set priority
- Add conditions
  - Apply Discount based on "Attribute Set", "SKU", "Category", "Supplier"
  - Can exclude certain conditions (i.e. if SKU is NOT XXX), or apply two conditions
- Add action
  - Apply discount as a percentage of original
  - Apply as a fixed amount

Workflow 6: Group Discounts - Improvements Req'd

- Currently the discounts rules do not apply immediately after it is made. It requires manual indexing by Tony, and the indexing takes several hours/can be interrupted/fail etc.
- The discount should show for customer front end as well - currently it does **not** (not reliable, sometimes it does, sometimes it doesn't). If it does, it is also incorrect. See next page for details.

Workflow 6: Group Discounts - Improvements Req'd

- If the discount is displayed for the customer on the front end, it applies the discount to GeoPrice (1.5x), not List Price.

  i.e. they see this when the price should be [Regular: $30, Special: $19.50]

CAT.NO	UNIT	PRICE
G943	250 µl, 25 mM each	Special Price: $29.25
		Regular Price: $45.00

1   Add to Cart

Workflow 6: Group Discounts - Improvements Req'd

- **NOT RELIABLE.** It does not seem to be properly connected to Quotes system or Order system. Sometimes the discount will apply, sometimes not. Currently we use a rule helper to check the appropriate discount for the group, and enter discount % manually.

  https://www.abmgood.com/china/API/Helper/CheckRuleForProduct.php

Workflow 6: Group Discounts - Wish List

- **[Refer to Old Website Logic]** Have different priorities of discounts, and that upper level setting (specific to the customer ID) will overwrite the level below (same across all group members).

i.e.

Workflow 6: Group Discounts - Wish List

- Ability to have discount automatically applied to ALL PRODUCTS. Currently we cannot apply discount for configurable products (library items).
- Ability to set numeric fixed price at upper level
- Ability to set Discounts by Product Category, Sub category (child group), or SKU
- Ability to set Discounts by Vendor (esp. for Antibody Group)

Workflow 6: Group Discounts - Wish List

- Ability to set time frame for which specific discount will expire on the upper level. i.e. allowing 60% discount instead of 50% for SKU XXX only until June 30, 2021. After June 30, 2021, the discount will revert back to 50% automatically.
- Ability to automatically give additional discount (or set discount) when X Qty is ordered. i.e. if the customer purchases 100 qty, discount automatically becomes 60% instead of 40%. OR discount automatically increase by 20% from the base discount level.

Workflow 7: Converting Quotes to Orders
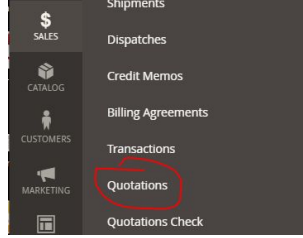
- [Refer to order team's feedback on workflow as I don't process orders]

- **Improvement Req'd / Known problem:**

1. When adding quotes to a cart for order placement, they add on top of each other instead of clearing the cart and then adding the quote to a 'fresh cart'. The cart should 'empty' and then add items from the quote.
2. The coloration of items do not always reflect the correct inventory status. When working properly,

        RED - out of stock

        Green - in stock

Workflow 8: Viewing Existing Orders

- Search orders in the database using any of the following terms:
    - Purchase Date from ___ to ___
    - Grand Total (base) /(Purchased) from ___ to ___
    - Customer Name
    - Customer ID
    - PO Number
    - Company
    - Email
    - Status
    - Products SKU
    - Shipping address
- Click into order to view, update ESD, change Order Group, edit Payment & Shipping method, cancel/hold/ship/reorder order, make invoices, make packing list, add tracking number, edit notes, view total unpaid $, view total loyalty points.
- View Printout PDF of order confirmation, invoice, packing list

Workflow 8: Viewing Existing Orders - Improvements Req'd

- Printout PDF of order confirmation
  - Margin for 'Product Name' should be adjusted. See example to the right.*
  - Font size should be adjusted/consistent
  - Final Grand Total should be aligned right. It is currently floating

*This only happens when we are pasting in sequences. One way to get around this to have the ability to auto fit the sequence to the size of the page

Workflow 8: Viewing Existing Orders -Improvements Req'd

- Printout PDF of invoices
  - Should not have product name cut off (i.e. invoice #5678)

Product Name	SKU	List Price	Qty	Unit	Discount Amount	Total
PriCoat™ T25 Flasks	G299	$40.00	2	10 Flasks	$0.00	$80.00
100bp Plus Opti-DNA Marker	G193	$24.00	9	500 µl/100 loads	$0.00	$216.00
100bp Opti-DNA Marker	G016	$24.00	18	500 µl/100 loads	$0.00	$432.00
Opti-Protein Express Marker	G494	$27.00	2	500 µl/100 loads	$0.00	$54.00

  - Should have a proper DUE DATE and TERMS (i.e. NET15, NET30..). Due date should be calculated using the Terms from the ship date.

P.O. Number	Ship Date	Due Date	Terms	Overdue Interest	Via
562	2021-03-04			18%	To Be Determined - Representative will adjust during order confirmation

Workflow 8: Viewing Existing Orders -Improvements Req'd

- Printout PDF of invoices
    - If payment term is PREPAYMENT, the Invoice should show **"PROFORMA INVOICE"** instead of "INVOICE"
    - If payment term is credit term (NET15/30/60), the invoice should show "INVOICE"
    - If this invoice has been PAID, then the printout should show **"RECEIPT"** instead of "INVOICE"
    - If the invoice is overdue (past due date), adjust to **"OVERDUE INVOICE"** instead of "INVOICE". Overdue should be in red font.

INVOICE
Date:2021-03-05
Invoice No :000005686
Order No :000005124

Workflow 8: Viewing Existing Orders - Improvements Req'd

- Printout PDF of invoices
  - Math should be correct (i.e. invoice #5686). Why is "Total" showing $0.00 when List Price is $262.50 and Grand total at the bottom is $262.50?

P.O. Number	Ship Date	Due Date	Terms	Overdue Interest	Via
4100058974	2021-03-04			18%	To Be Determined - Representative will adjust during order confirmation

Product Name	SKU	List Price	Qty	Unit	Discount Amount	Total
CRYAB Adenovirus	168740510100	$262.50	1	1.0 ml	$0.00	$0.00

To Be Determined - Representative will adjust during order confirmation#:

Subtotal: $262.50
Shipping & Handling: $0.00
Total Tax: $0.00
Grand Total: $262.50
Total Paid: $0.00

Workflow 8: Viewing Existing Orders - Improvements Req'd

- Printout PDF of packing list
  - Margin for 'Description' should be adjusted. See example to the right.
  - Alignment & presentation can be better

Workflow 8: Viewing Existing Orders - Wish List

- Ideally on the order confirmation, instead of 'Shipping and Handling' fee, break it down into 'Bank Fee' and 'Shipping Fee'.
- Have easier to interpret terms for order status. Currently it has 'Processing', 'Pending' which are the same...
  - Use "HOLD", "PROCESSING", "COMPLETE", "PAID | COMPLETE". Currently the order is only marked as "COMPLETE" when it is paid. If the order has been shipped but NOT paid, it is still "Processing". It would be good to distinguish what has been shipped + paid vs just shipped + not paid.
- Link to Custom Service Log (CSL) from the order
- Ability to view orders by category group (i.e. show me a list of PCR orders, not 'completed')

Workflow 8: Viewing Existing Orders - <mark>Wish List</mark>

- Ability to show product Qty ordered. Can make the default as one. If multiple are ordered, can show the order qty in brackets:

	ID	Purchase Date ↑	Grand Total (Base)	Grand Total (Purchased)	Status	Shipping Address	Customer Email	Customer Name	Action	PO Number	Products SKU
☐	000006253	Mar 4, 2021 10:47:57 AM	$284.76	CA$327.47	Pending	4410 Paletta Court Burlington Ontario L7L 5R2	ryan.bratkovich@cedarlanelabs.com	Ryan Bratkovich	View	313695	TM003 (3)

Workflow 9: Using Custom Order Log

- Search log items in the database using any of the following terms:
  - Est Comp Date from ___ to ___
  - Ship Date from ___ to ___
  - CSL# (not necessary)
  - Order #
  - Cat. No.
  - Qty
  - Description
  - ProdGroup
  - Current Employee
  - Special Requests
  - Complete (Yes/No)
- Click into CSL to view status of current order

Workflow 9: Using Custom Order Log

- Search log items in the database using any of the following terms:
  - Est Comp Date from ___ to ___
  - Ship Date from ___ to ___
  - CSL# (not necessary)
  - Order #
  - Cat. No.
  - Qty
  - Description
  - ProdGroup
  - Current Employee
  - Special Requests
  - Complete (Yes/No)
- Click into CSL to view status of current order

Workflow 9: Using Custom Order Log

- Current Magento site works well for this workflow - Sufficient
- Wish List:
    - Ability to search with PO#
    - Ability to have a pop up to view COMMENTS. Currently we have to click into 'View', load into another page before we can see all the comments.
    - Ability to link the **SHIP DATE** to order ship date. This way we can easily filter /see a list of orders that have been completed but not shipped yet
    - Link order to the CSL log directly from the order view.
    - Ability to tally up all pending orders for each ProdGroup so group leaders can better allocate human resources

siRNA/sgRNA/miRNA (0)	Lentivirus (130)	Cloning & DNA (58)	Adenovirus (58)	AAV (9)

Workflow 10: Looking up inventory

Catalog

Inventory   Product Document

Products   Document

Categories   Settings

Giant Table   Product Helper

Modify Products   Search Inventory

Catalog Type

DASHBOARD
LANDFORORDER
SALES
CATALOG
CUSTOMERS
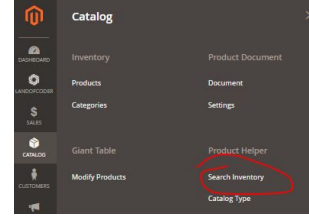
- Currently type in SKU EXACTLY the way it appears in the database to search for inventory information
- Inventory view pulls up the following information:
  - SKU
  - Product Type (Simple, Configurable, Bundle)
  - Stock
  - Name
  - Unit Size
  - Price
  - Supplier
  - Location
  - Source CatNo
  - Action (links to product page)

Current Magento site works well for this workflow - Improvements Req'd

- Ability to input both upper/lower cases for the SKU. Currently it will recognize G043, but not g043.

Workflow 10: Looking up inventory - Wish List
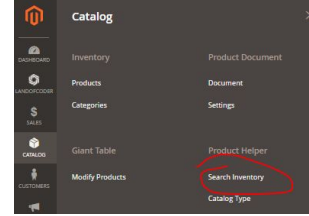
- Ability to see current **on hold** orders on the same view. Currently this is achieved by using the 'Product Ship Check' function separately.
- Ability to see a list of inventory items by Category. i.e. list out PCR products and its current inventory
- Ability to pull a list of products that have "Negative inventory number" (within a category)
- Ability to pull a list of products that have less than 100 inventory (or other threshold set by us) (within a category)
- **(Future)** Ability to store inventory by lot# i.e. if there are two lots of LV900, keep the inventory separate

Workflow 11: Looking up On Hold Products

- Search unshipped orders with specific products by searching for the SKU under "Product" Ship Check"
- A list of current orders will appear, along with the following information:
  - Order #
  - Status (Canceled, Processing, Pending)
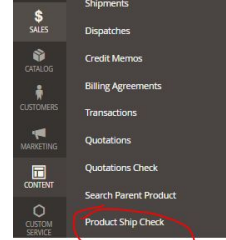 - ESD date
  - Action (click to view order details)

Current Magento site works well for this workflow - Improvements Req'd

- Ability to input both upper/lower cases for the SKU. Currently it will recognize G043, but not g043.

Wish List:

- Ability to display the number of QTY ordered in the order

Workflow 12: Adding/Viewing Product

New Product Addition:

- Choose Product Type (Simple, Configurable, Bundle)
- Choose attribute Set
- Enter the following product information:
    - Product Name
    - SKU
    - Price
    - Quantity
    - Stock Status
    - Category
    - Visibility
    - Datasheet information (Invisible search words, description, Images, SEO…. - fields specific to attribute set)
    - Source/Supplier
    - Source Cat. No

View or Editing Existing Product:

Search by SKU and click into product to make changes.

Workflow 12: Adding/Viewing Product Improvements Req'd

- Each product takes awhile to add /edit due to slowless of backend (likely due to large amount of data). Adding 20 new PCR products manually took several hours.
- Ability to search by Category (i.e. PCR)
- Ability to link Product Doc, Reference, FAQ addition as the same workflow. Currently once you added the product, you have to go to 'add product doc', select by SKU, upload.. Then repeat for reference & FAQ. [See workflow 14, 15, 17]. The whole process has many unnecessary steps = adds up time
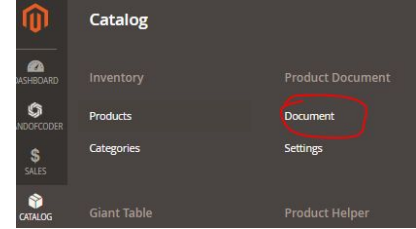
Workflow 12: Adding/Viewing Product - Wish List

- Ability to 'mass add' products using an excel file, including addition of product images, associated document and references. Currently it can only add simple excel sheets.

- **Ability to easily export product information. This is esp. important for our distributors/partners that need to use the information to add products to their own website. Best to integrate this with the distributor discount. i.e. system is able to provide excel sheet with headings SKU, Product Name, Quantity, List Price, Discount, [Attribute set headings])**

Workflow 13: Adding Product Document

New Document Addition:

- Choose Add New Document
- Enter the following information:
    - Document Name
    - Choose File
    - Document Type (Protocol/Manual, MSDS, QC, Other)
    - File Type (PDF, Word Doc, Excel, Zip)
    - Internal (Yes/No)
    - Category Group
    - Exclude SKUs
    - Active (Yes/No)
- Select product that the document will apply to

Catalog

Inventory   Product Document

Products   Document

Categories   Settings

Giant Table   Product Helper

DASHBOARD

ANDOFCODER

SALES

CATALOG

Workflow 13: Adding Product Document - Sufficient

- Current Magento site works well for this workflow.

- Nothing on the wishlist for this workflow.

Workflow 14: Editing Product Document
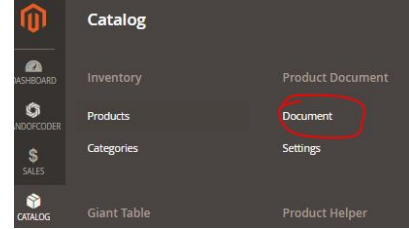
- Filter document by
  - Name
  - File Name
  - Document type
  - File Type
  - Internal
  - Status

Improvements Req'd
- Almost impossible to search for old documents. The purpose of Internal (Yes/No) used to allow us to view past versions of the document. Or internal FAQ/Notes that's being shared between order team/tech team. To solve this problem, have the ability to search/filter document based on SKU. This way, we are able to pull up a list of documents that were uploaded under a specific SKU.

Workflow 14: Editing Product Document - <mark>Wish List</mark>

- Ability to view the internal documents once logged in on the front end of the website. This enables us to quickly know what documents are available without the need to look in the backend. (Plus currently it is difficult to search internal documents on the backend if you do know what the document is called)

- Ability to mass upload (i.e. MSDS)

Workflow 14: Editing Product Document - <mark>Wish List</mark>

- Ability to see a list of product documents that are applied at category level. Currently it is difficult to know unless you click through the front end, or scroll through the category selection field.
- Ability to edit the product document on the front end (i.e. change from external to internal). This will streamline the process. Currently we have to go to the product home page to see the documents listed, THEN go the back end and filter to find the correct document before we can make changes.

- Ultra Low Temperature Lab Freezer Manual
  Notes: Updated T&C 01.29.2019
  UPDATE

ABM FAQ Editing Page

File Name to Display: Ultra Low Temperature Lab Freezer Manual

Document Category: Protocol

File Type (Note all ZIP files are automatically internal): PDF

Internal (Note all ZIP files are automatically internal): no

Document Notes: Updated T&C 01.29.2019

Update

Workflow 15: Adding FAQ

New FAQ Addition:

- Choose Add New FAQ
- Enter the following information:
  - Question
  - Answer
  - Category Group
  - Active (Yes/No)
- Select product that the document will apply to

Improvements Req'd / Wish List
- Ability to apply FAQ to entire Group and exclude specific SKUs. Currently you can only add FAQ to the entire group, or specific SKUs. If I need to add to a group of 20 but 1, the only way to do it right now is to manually select 19 SKUs.

Workflow 16: Editing Product FAQ

- Filter document by
    - Question
    - Status

Current Magento site works well for this workflow. Sufficient

- Wish List:
    - Ability to search by SKU or product category
    - Ability to edit FAQ on the front end (similar to the comment for document edits)

What is the storage capacity of the Freezer?
EDIT
The available storage space in the Freezer is 528 L, and it may hold up to approximately 40,000 vials of samples.

Workflow 17: Adding References

New References Addition:

- Choose Add New Document
- Enter the following information:
  - Article
  - Category Group
- Select product that the document will apply to

- Current Magento site works well for this workflow. Sufficient
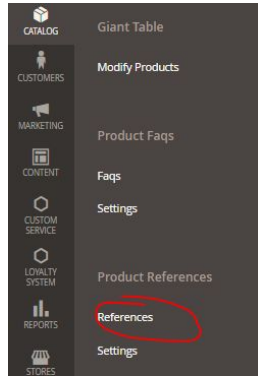
Workflow 17: Adding References - Wish List

- Ability to automatically create links to PubMed, or specific styles. Currently we have to enter in html coding. Example below:

    - Linta, L **<i>**et a**l</i>**. "Rat embryonic fibroblasts improve reprogramming of human keratinocytes into induced pluripotent stem cells" Stem Cells Dev 21(6):965-976 (2012). **DOI: 10.1089/scd.2011.0026.**

- Ability to mass upload references instead of entering one by one. We collect references at year end and it would be nice to upload with excel file (columns SKU, Reference). Each year volume is a couple hundreds of new references.

Workflow 18: Editing Reference

- Filter document by
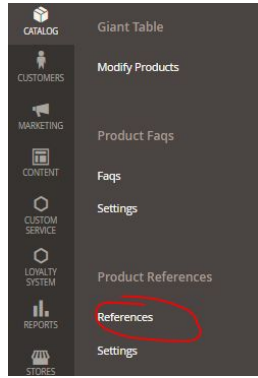 - Article
  - Status

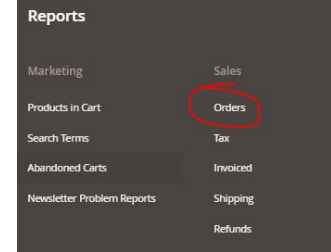Current Magento site works well for this workflow. Sufficient

- Wish List:
  - Ability to search by SKU
  - Ability to edit Reference on the front end (similar to the comment for document edits)

- Chiavari, M et al. "Pro-Inflammatory Activation of a New Immortalized Human Microglia Cell Line." Brain Sci 9(5):111 (2019). DOI: 10.3390/brainsci9050111. PubMed 31096716.

UPDATE DELETE

CATALOG
Giant Table
Modify Products

CUSTOMERS

MARKETING
Product Faqs

CONTENT
Faqs
Settings

CUSTOM SERVICE

LOYALTY SYSTEM
Product References

REPORTS
References
Settings

STORES

Workflow 19: Looking at Sales Numbers

- You can view various reports (i.e. sales - based on Orders, Tax, Invoiced, Shipping, Refunds, or customers - based on order total, order count etc, or products - views, bestsellers,...)
- Input parameters (varies by which type you choose):
  - Period desired (Day, Month, Year)
  - From _____ to _____
- Output generally shows a broad overview

Interval	Orders	Sales Items	Sales Total	Invoiced	Refunded	Sales Tax	Sales Shipping	Sales Discount	Canceled
Jan 1, 2021	1	1	$173.25	$173.25	$0.00	$8.25	$0.00	$0.00	$0.00
Jan 4, 2021	10	24	$8,610.44	$8,165.44	$0.00	$92.94	$280.00	$0.00	$0.00
Jan 5, 2021	12	42	$5,967.83	$5,529.75	$0.00	$97.18	$425.65	$0.00	$0.00
Jan 6, 2021	9	25	$3,279.82	$3,519.82	$0.00	$14.82	$80.00	$0.00	$0.00
Jan 7, 2021	16	30	$11,555.74	$11,310.24	$0.00	$27.74	$40.00	$0.00	$0.00
Jan 8, 2021	6	123	$6,091.80	$10,100.35	$0.00	$0.00	$65.00	$0.00	$0.00

- ALL REPORTS AS-IS ARE NOT USEFUL (see wishlist)

Workflow 19: Looking at Sales Numbers - Wish List

- Ability to breakdown sales numbers by:
  - Time frame (between dates YYYY-MM-DD & YYYY-MM-DD):

Coupled with one of/ or multiple input of:

  - SKU (i.e. how many COVID19 kits have been sold from Jan 01 to date?)
  - Customer ID (i.e. how much has our Korean Distributor purchased from us this month?)
  - Product Category (i.e. are we selling more cell culture products or lentivirus products?)
  - Supplier (i.e. how much have we purchased from Abcam this year?)
  - Location (i.e. how are we selling in Denmark?)
  - Shipped orders (i.e. how many shipped orders/total value have we made to Korea?)
  - Sales Rep (i.e. how are Heidi's customer's doing?)
- Ability to compare sales for two time periods

Workflow 19: Looking at Sales Numbers - Wish List

- Ability to export report into csv. or excel
- Report should contain the following information:
  - Order No
  - Order Date
  - Customer (Ordered by)
  - Ship (Yes/No)
  - Category Group
  - Cat No.
  - Product Name
  - Quantity
  - Order Total

Order No.	Order Date	Ordered By	Ship	Group	Cat. No.	Product	Quant.	Total Sales
51551	2019-01-04	DIBBIOTEK (Texas, USA)	YES	WB Reagents	G445	ELISA ABTS Substrate for HRP	1	$103.50
51607	2019-01-08	Quimiolab (, Colombia)	YES	NGS	E048	EcoRI	1	$17.50
51607	2019-01-08	Quimiolab (, Colombia)	YES	Markers	G016	100bp Opti-DNA Marker	1	$24.00
51607	2019-01-08	Quimiolab (, Colombia)	YES	PCR/qPCR	G013	2X PCR Taq MasterMix	3	$72.00

Workflow 19: Looking at Sales Numbers - <mark>Wish List</mark>

- If comparing time period, the output can be simpler

Sales for 2019-01-01 to 2019-12-31	TOTAL	----	23246	$1,266,791.85
Sales for 2018-01-01 to 2018-12-31	TOTAL	----	43562	$1,021,668.26

- Ability to do auto-reporting once a month (user set up to have the stats emailed out)

[Can this be done for Quotes made too? Provide a list of Quotes that weren't turned into orders every month, by category. This will help close the sales funnel.]

Workflow 19: Looking at Sales Numbers - *Future* Wish List

- In addition to specific inquiries, it should also be able to report...
  - all sales from YYYY-MM-DD to YYYY-MM-DD based on category group
  - Generate bar graphs
  - All sales from end users
  - All sales from OEM/Distributors
  - All sales from services

January-December		2(
Group	Items Sold	Value Sold
AAV Vectors	18	$6,017.25
AAV Viruses	29	$25,067.25
Adenoviruses	58	$27,885.25
Antibodies	727	$117,355.38
Antibodies - IHC	53	$12,064.50
Cas9 Enzymes	276	$19,317.28
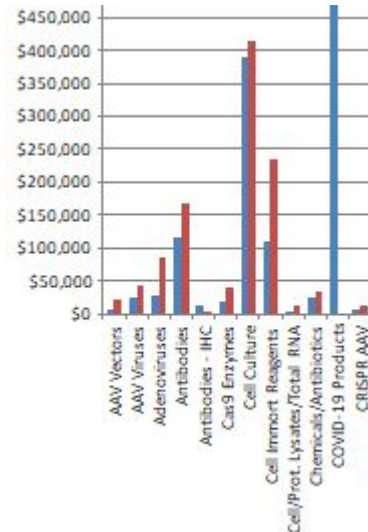
Other Wish List: Out of stock emails

- Include direct link to the Actual Order on Magento backend
- Include any notes for the product requested (i.e. One-Lot only or special notes for custom service orders)
- Include direct link to the Product Page on the Front end
- Include a link to add this entry to the CSL

Ability for user to set threshold for specific SKU/product category for when "out of stock" email will trigger.
i.e. I want to get a notification when B560 is under 5

abm abm

The following products having **quantity below 1**

Order is 000006361

Product Name	SKU	Quantity
Anti-ALDH1L2 Antibody	Y058744	-1
Anti-LRRC8A Antibody	Y158339	-1

All the best,
The **abm** Team

Applied Biological Materials Inc.
T: 604-247-2416 | F: 604-247-2414
#1-3671 Viking Way
Richmond, B.C.
V6V 2J5 Canada

Other Wish List: License Royalty Reports

- Presented to Vincent separately already
  - Ability to link sales for licensed products & generate royalty report based on user defined royalty %

Last words on the backend.

- Speed need improvement

  I.e. every step takes 5 seconds to load

- Magento in general requires a lot of extra 'clicking' to get to the information we are looking for or to make a change/edit. If we can cut down on these unnecessary clicking/loading (+ 5 secs each time!), it will save us a lot of time. Currently it is a very poor use of human resources.
- A lot of the information are under separate tabs. If we can integrate multiple pieces of information in the same 'dashboard', it will save us the time to find all the information.

Most importantly…. #StabilityandReliability

Front end

Magento

Workflow 20: Customer account log in

- Customer account dashboard allows the customer to:
  - Change contact information and password
  - Change billing & shipping address
  - Review latest news from abm ("what's new" section)
- Customer is able to view ...
  - Past orders (under "My Order")
  - My quotes
  - My reward Points
- Customer is able to add any item to shopping cart on the front end once logged in and proceed to checkout

Workflow 20: Account log in - Improvements Req'd

- Under 'Order History': Better/ more professional formatting for self-printouts. Left below is self-print, right below is what we provide to customer on our end.

Workflow 20: Account log in -

- Under Product Page View, customer groups that have discounts should see discounted price - **CURRENTLY DOES NOT WORK.** [Refer to Workflow 6]

Workflow 20: Account log in - Wish List

- Under Order History, add the following order details for customer to view:
  - Customer PO#
  - Current Est. Ship Date
  - Packing Date
  - Invoice Date
  - Shipment information (i..e DHL, Fedex, tracking #)
- Ability for customer to download 'Invoice' (links to our backend)
- Under 'My Quotes', ability to place order directly from an issued quote. You can only view or delete quote right now.
- For quote that are about to expire, auto-send email to the customer reminding them about their quote.

Workflow 20: Account log in - Wish List

- Under Shopping Cart View, add a column for <u>SKU</u>, <u>Lead time</u> and <u>Shipping Condition</u> (room temperature, ice packs, dry ice)

Other Improvement Req'd: Better Search Results

- Customers have a hard time finding products because of the search results
- Suggest to make it 'fuzzier' so it can pick up strings of words/part of product name or improve the display priority
  - When searching for "Transfection", the top search is not "Transection Reagents" even though the search Term matches an entire word
  - Priority - match SKU, then match product name, then content
  - Treat "-" as no space or as a space in searches like IL-2
    - IL-2 gives **NO** result because our product name go by IL2
  - Treat singular/plural the same. "Melanocyte" does not pull up our cell line because the product name is "Melanocyte**s**"

Showing 1-10 of 34632   Sort By Relevance

Lenti-III-CFP-C Kit Complete Kit   Out of stock
Expression Systems and Packaging Kits

Sku: LV671   The Lenti-III-CFP Fusion tag vector is a modified version of Lenti-III-HA
Price: $975.00   vector, with choices of both N- and C-terminal CFP fusion tags, and
                    Puromycin selection marker.

Calciumfectin™ Mammalian Transfection Reagent Kit   Add to Cart

Sku: G099   The Calciumfectin
Price: $125.00
Unit: Kit (100 transfections)

Lenti-III-HA Kit Complete Kit   Add to Cart
Expression Systems and Packaging Kits

Sku: G327   The Lenti-III-HA expression vector is an improved version of our orignal
Price: $975.00   Lenti-Easy HA vector, with a greater selection of subcloning sites and a
Unit: 1 Kit   different stable selection marker, Puromycin.

Other Improvement Req'd: Better Search Results

- ○ Search each word separately and not treating as a phrase.
  - ■ "Human A2LD1 recombinant Protein" gave **NO** result as our product is named "A2LD1 Recombinant Protein (Human)" i.e. different combination of the same word
  - ■ "a1bg recombinant lentivirus" gave **NO** result as our product name is named ""a1bg lentivirus"
- ○ Ability to allow user to define similar terms and apply to the entire website. Currently we use "invisible key word" under Product Addition to add search terms that will pull up the specific product. This is time consuming if we have to manually input for multiple SKUs (i.e for G2500, G073. G2100, G099. G074 to be pulled up under keyword 'transfection', you need to enter it 5 times under 5 different SKUs)
- ○ Suggest to make universal rules like…
  - ■ cell, cell line, cells, line
  - ■ lentivirus, lentiviral vector, recombinant virus, recombinant lentivirus

The old website has a pretty good search result that has been refined over the years - model that as a start.

Other Improvement Req'd: Better Datasheet Printout

- Be more consistent with text style
  - Why is *Description* and *Propagation* section bolded while other are are not?
  - Can have better spacing throughout the document to make it easier to read

Other Wish List: Searchable CoA/MSDS Database

- Ability to allow customer to search for CoA by entering SKU & Lot #
- Ability to allow customer to search for MSDS by entering SKU
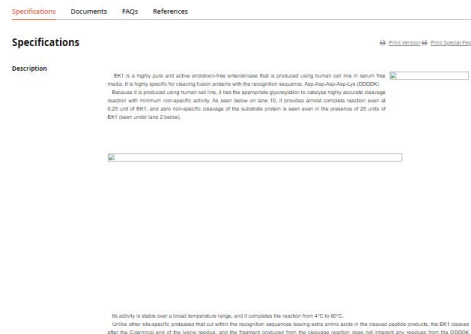
Certificates of Analysis (COA)

PRODUCT NUMBER

LOT NUMBER

Other Wish List: Website Maintenance

- Ability to notify IT for broken links, or images. Currently we do not know until customer tells us/when we come across it.

    i.e. G699 has broken images

    i.e. searching "COV00508" gives you a wrong product link: "https://www.abmgood.com/sars-cov-2-nucleocapsid-protein-n-protein-protein-vector.html#COV00508" - becomes a endless loop

Last words on the Front End.

- Speed need improvement. Similar to backend, it takes quite some time to load.
- **Search function optimization is THE MOST IMPORTANT.**
  - **Most people rely on search. If they are not able to find the product the want on their first or second try, they will assume we do not offer it. We lose customers this way.**
- Multiple customers have reported multiple occasions where they are not able to access the website (service interruption due to backup?)

#StabilityandReliability