**1. Rewards/Loyalty Center**

**a) Customer Points Records**

Customer View/Functions:

|  |  |
| --- | --- |
| **Ideal** | **How well does current abm website do this?** |
| Customer should be able to log-in to their abm account and see how many points they have and how many rewards they currently qualify to get | Function works well |
| Customer should be able to see a list/record of all their points-related transactions:   * orders where they earned points * reward redemptions where points were deducted * points deductions due to cancelled orders or refunded orders * Custom points additions due to customer service team manually adding the points for various reasons (e.g. special promotion) | Function works well |
| Points-related transaction records should include date of transaction, type of transaction (addition/earn or deduction/spent), description of transaction (include order number and link to the order, if applicable), and number of points awarded/deducted | Function works well |
| Customers who order via institution purchasing offices should be able to claim points for their order. This can be done by having form available on the customer’s account where they can report:   * PO#/Order# * SKU * Quantity   Our system should be able to validate the claim by automatically looking up the PO#/Order# and matching the SKU in that PO/Order. The system should then be able to assign the appropriate number of points based on the quantity of that SKU that was claimed. Once claimed, it should not be claimable by others. The system should be able to enable multiple customers to claim from the same PO#/Order#, as long as there remain unclaimed items or quantities of items left. | Function not available |

Admin View/Functions:

|  |  |
| --- | --- |
| **Ideal** | **How well does current abm website do this?** |
| Ability for admin to add/delete entire records and/or edit any part of the points-related transaction records (date of transaction, type of transaction (addition or deduction), description of transaction, and number of points awarded/deducted. They should also be able to create custom records for special cases | Function to add records works but function to delete or edit records updates the back-end information but the customer view/front-end doesn’t update. |
| Ability for admin to mass add/subtract points for all customers or a group of customers | I don’t think the function is available |

**b) Reward Items**

Customer View/ Functions:

|  |  |
| --- | --- |
| **Ideal** | **How well does current abm website do this?** |
| Customer should be able to click on reward items to see information about the item | Function works well |
| Customer should be able to redeem reward items themselves by the click of a button and see the new record appear and their total points adjusted accordingly | Function works well |
| Customer should not be able to redeem an item if they do not have enough points | Function works well |

Admin View/ Functions:

|  |  |
| --- | --- |
| **Ideal** | **How well does current abm website do this?** |
| Ability for admin to add/delete/activate/inactivate reward items and information, including reward item name, reward item description, reward item points value, reward image, and set reward item availability based on customer groups (for e.g. customers outside of North America don’t qualify for some of the rewards) | Function is available on magento but not connected to live site - still have to go through IT. Also, the function to toggle availability based on customer groups is not available. |
| Ability to toggle the order in which reward items will appear on the customer back-end. | Currently, seems like you have to add the reward items in the correct order that you want it displayed on the customer back-end. This is not convenient as we may decide to add items in the future that we want displayed in a specific position. Currently, we’d have to re-enter all the reward items, again. |

**c) Points Rules Management & Reward Redemption Rules Management**

|  |  |
| --- | --- |
| **Ideal** | **How well does current abm website do this?** |
| Ability for admin to easily edit how many points for every $1 for the global rule | There is a function that seems to be available but not connected to the live site (also, it’s not clear how to use this function). Still have to go through IT. |
| Ability for admin to add/delete/activate/inactivate special points earning rules based on: creation of new account, first >$0 order placement, log-in activity (e.g. log-in once every week and collect 5 points per week), account creation anniversary, length of time customer has been an abm customer, and when a customer subscribes to email list. These rules would be in addition to the global rule. | Only the first order placement bonus rule is available but IT was needed to implement the rules for us. |
| Ability for admin to add/delete/activate/inactivate special points rules for a list of specific items or all items in a particular group (e.g. if we want all PCR enzymes to be worth 2 points for every $1) that will overwrite the global rule for those specific products/groups of products | Function works well but IT was needed to implement the rules for us. |
| Ability for admin to add/delete/activate/inactivate special rules for products or services that do not qualify to earn points | Function not available |
| Ability to add/edit/activate/inactivate points expiry rule if no account activity is recorded after an X period of time. | Function not available |
| Ability for admin to create special groups of customers where special points earning rules can be applied   * a group for distributors/OEMs: they will not qualify to earn points from their orders * grouping(s) customers based on how long they have had an abm account: so we can create rules to reward customers based on the length of time they’ve been an abm customer | Function not available |
| Ability for admin to create special groups of customers where special reward redemption rules can be applied:   * a group for customers outside of North America: they will not qualify to redeem certain rewards | Function not available |
| Ability for admin to track who has made new points rules or made edits to existing rules (log-in name, date, and what has been edited/added/deleted) and ability to revert to an earlier version, if necessary | Function not available |

**d) Front-End Website Elements**

|  |  |
| --- | --- |
| **Ideal** | **How well does current abm website do this?** |
| Customers should be able to see how many points they can earn with each product. This information should be displayed on the product page, search results listing pages, and in the shopping cart, checkout process (order summary), and order confirmation email(s) | Points are only displayed in shopping cart/checkout process |
| Cart preview / shopping cart page should display total points that could be earned (just like how price totals are calculated) | Function works well |

**e) Analytics**

|  |  |
| --- | --- |
| **Ideal** | **How well does current abm website do this?** |
| Ability for admin to sort and export tables of customer information based on email address, first name, last name, country, and number of points they have | Function works well |
| Ability for admin to create tiers/groupings of customers and export customer information based on the number of points they have. For example, to set a tier called “tier 1” to be customers who have 0-100 points and another tier called “tier 2” to be customers who have 101-200 points etc. | Function not available |
| Ability for admin to sort and export customer lists based on the special customer groupings mentioned in c) | Function not available |
| Ability for admin to sort and export customer lists based on number of reward items redeemed, number of all and/or each type of earning account transactions (# of orders, # of custom record additions, # of deductions) based on a date range. This is so that admin can assess how active/engaged a customer is with the rewards program. If there is a way to view the stats under each reward item that would also be helpful (e.g. how many and who has asked to redeem reward A during period 1). | There is something available under Loyalty System > Redeem Order but the export function doesn’t seem to work. Also, you have to click into each redemption order to see what reward was redeemed, and this information is not easily exportable. |
| Admin to be able to see how many new customers have earned their +500 bonus points for first >$0 order in a given date range | Function not available |

**f) Transactional Program Emails**

|  |  |
| --- | --- |
| **Ideal** | **How well does current abm website do this?** |
| Admin should be able to create and edit emails using reward program variables (number of points customers have, reward items they qualify for, the next reward item they can aim to unlock) | Email functions work well but IT creates most of the emails for us. |
| Admin should be able to activate/inactivate and configure triggers for when the emails should be sent out:   * When customers create their account * When customers place their first >$0 order * When customers place orders * When customers have unlocked a new reward * When points are about to expire * When it is a customer’s account creation anniversary * When a customer has been an abm customer for X period of time * Once every month a summary of how many points the customer has, what rewards they can qualify fo, and what rewards they can aim to unlock next | Currently, some of the emails are created by IT (account creation email, “you’ve unlocked a new reward” email) and some of them are manually done on a separate emailing platform (monthly summary email). It would be best to have the emails all in one place so the data/variables that are pulled into the emails are up to date. |
| Admin should be able to configure who will receive the emails:   * notification emails to be sent to sales team * confirmation emails to be sent to the customer | Currently works well but IT configures everything for us. |

**2. abmXchange Program**

**a) Front-End Website Elements**

Customer View/Functions:

|  |  |
| --- | --- |
| **Ideal** | **How well does current abm website do this?** |
| Customer should be able to see the abmXchange icon appear on items that qualify for the abmXchange program | Function not available |

Admin View/Functions:

|  |  |
| --- | --- |
| **Ideal** | **How well does current abm website do this?** |
| Admin should be able to select or unselect specific items or groups of products as items that qualify for the abmXchange program | Function not available |

**3. Custom Website Pages (not including product pages)**

|  |  |
| --- | --- |
| **Ideal** | **How well does current abm website do this?** |
| Ability to add, delete or activate/inactivate pages (including on our subdomain, info.abmgood.com where our learning resources and blog are currently hosted) | Function exists and works well for main website, but does not exist for subdomain. Still need to go through IT to upload for subdomain pages. |
| Ability to edit page contents using a rich text editor that can also allow access to source code (for inline css, if necessary) but not affect the website header/footer | The current rich text editor is quite comprehensive and works well, but many custom pages are not editable directly (e.g. Promotions Page, Homepage). For such pages, we still need IT’s help. |
| Ability to upload/insert/embed images, videos, and other documents/files to the page and add alt text for the files | Function works well |
| Ability to insert javascript where necessary (in order to embed forms, make pop-up windows, add social share functions, for example) | You can embed forms but sometimes there are javascript conflicts (e.g. Jotform initially didn’t display properly due to a js conflict) |
| Ability to edit Page Title, Meta Keywords, Meta Description, URLs (and create re-directs automatically, if necessary) Social Media preview images and content (e.g. Open Graph/OG tags and Twitter card tags). | Most functions are available and work well, but no option to upload social media preview image and content. |
| Ability to assign keyword tags that will enable the page to be discoverable when people search on our website |  |
| Ability to add custom code to the page’s <head> tag, if necessary | Function not available |
| Ability to assign the page to a certain category or sub-category and for the breadcrumbs to update accordingly. Also, ability for pages to be added to the menu in the appropriate category, if necessary. | Function works well |
| Ability to change URL but create an automatic URL re-direct for the old URL | Function works well for product pages and pages under “Catalog > Categories” but not for “Content > Pages”. |
| Ability to create page templates and modules that can be used to create pages. These templates should allow admin to design layouts for the body only and not affect the website header/footer. | Function to select page template is there but IT creates the page templates |
| Pages to be made mobile friendly automatically or have way for admin to inject code to adjust mobile version of the page, if necessary. | Pages mostly appear to be automatically made mobile friendly – sometimes some additional adjustments were needed, though |
| Pages can be saved as drafts and previewed first before being published/made live | Function works well |
| Ability to activate/inactivate, edit and preview global website strip/banner’s message (the one that currently says “abm is a leading provider of COVID-19 diagnostics, including qPCR and IgG/IgM detection. View products >”) | Function works well |
| Ability to create/delete/activate/inactivate vanity URLs. For example, when we were on HubSpot, we were able to create vanity URLs for marketing campaigns that redirected to a product page. | IT is needed to create these redirect rules for us |

**4. Transactional Emails**

**a) Email set-up and editing features:**

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| --- | --- |
| **Ideal** | **How well does current abm website do this?** |
| Ability to create/edit/activate/inactivate transactional emails | Currently done through IT |
| Ability to edit email contents using a rich text editor that can also allow access to source code (for inline css, if necessary) | Currently done through IT |
| Ability to upload/insert/embed images, videos, and other documents/files to the email and add alt text for the files | Currently done through IT |
| Ability to insert any customer variable that is recorded in the back-end (e.g. first name, last name, # of reward points) into email body, subject line, or preview text | Currently done through IT |
| Ability to edit name of sender, select sender email from an approved list, edit subject lines and the email’s preview text | Currently done through IT |
| Ability to send a copy of the email to an abm representative (notification emails) | Currently done through IT |
| Ability to create a list of approved sender emails | Currently done through IT |
| Ability to set which trigger should cause the email to be delivered (see list of triggers in 4b) | Currently done through IT |
| To have emails made mobile friendly automatically | Currently done through IT |
| Ability to save draft and send test email to email address of choice before the email is activated | Currently done through IT |

**b) Email triggers**

|  |  |
| --- | --- |
| **Ideal** | **How well does current abm website do this?** |
| When an account has been created | Function exists but need to go through IT.. |
| When a password needs to be reset | Function exists but need to go through IT.. |
| When an order has been placed | Function exists but need to go through IT.. |
| When an order has been shipped | Function exists but need to go through IT.. |
| X number of days after an order to solicit product feedback/product review | Function not available. |
| When a shopping cart with items in it has not been checked out after X period of time (abandoned shopping cart) | Function not available. |
| When a form has been filled in (e.g. quote, contact us etc.) | Currently works well with Jotform |
| See also list of transactional emails for the Reward program (1f) |  |

**5. Forms**

|  |  |
| --- | --- |
| **Ideal** | **How well does current abm website do this?** |
| Ability to generate an exportable list of all customers who have subscribed to receive bulk marketing emails from abm that includes subscription date, which type of email they subscribed to, and if they have unsubscribed. If customer has re-subscribed, it would simply update their information to “subscribed” status again. This list can then be exported and regularly uploaded to our bulk email sending platform for marketing email campaigns. | Currently, the form is on Jotform, however it should be recorded on our website database if we want to, for example, automatically give reward points for email subscriptions in the future. |
| Ability to create forms that collect customer information into a database | Currently most forms are made on Jotform and this data is collected there. Works well. |
| Ability to edit “Thank You” message that appears after form has been submitted. | Currently most forms are made on Jotform and this can be configured there. Works well. |
| Ability to send form confirmation emails to customer and notification emails to abm rep. | Currently most forms are made on Jotform and the function is available there. Works well. |

**6. Data Analysis:**

|  |  |
| --- | --- |
| **Ideal** | **How well does current abm website do this?** |
| Connect google tag manager to our website (this will enable admin to easily add marketing tags to automatically connect other google and non-google platforms such as, for example, google analytics, google search console, etc.) | Current website has separate tags for the different google tools so we have to go through IT each time we want to add a new marketing tracking tag |
| Ability to search/sort/export customer data within a date range or lifetime based on:   * total number of quotes * total quote value * total number of orders * total order value * average order value * last log-in date * last order date * customer group * customer first name * customer last name * email address * country * account creation date * shipping address * company/institution * phone * zip code * state/province   Ideally all the above data would be columns that can be added to a tabled report and then easily exported. Currently, some of the data (e.g. total number of orders and average orders) is hidden within individual customer records so I need to click through many layers to get the information. Or, the information is located in a different report module and not associated with the customer email address. This is not ideal if I want to collect mass information for marketing email campaigns. All information in our customer database should be based around the email address. | Most functions are available and work well but as explained, some information is buried/difficult to easily mass collect |
| Ability to search/sort/export quotes/order data within a date range or lifetime based on:   * Date * SKU * product name * product group * customer group * country * state/province * shipping address * email address * customer first name * Customer last name   Ideally all the above data would be columns that can be added to a tabled report and then easily exported. | There is a magento function to look at orders under Sales > Orders and it works well but is just missing the feature to filter/sort by product group. There is also a magento function to look at quotes under Sales > Quotations but it is also missing feature to filter/sort by product group and address/country etc. |
| Ability to search/sort/export abandoned cart data within a date range or lifetime based on:   * Date * SKU * Product name * Product group * Customer group * Country * State/province * Shipping address * Email address * Customer first name * Customer last name * Total value of abandoned cart items * Total items in abandoned cart | There is a magento function to look at abandoned carts under Reports > abandoned carts, but the information as to what items were abandoned is not available |
| Ability to see what people have typed into our search boxes and be able to filter by date range or lifetime. It would also be useful to be able to see which search results returned a “No results available” page so we can see if we need to improve keywords or add new products to our catalog. | This general function works well but filter by date is not available currently. There is currently no way to see which results returned a “No results available” page without going through IT. |
| Ability to see number of new customer accounts that were created and be able to filter by date range or lifetime | Function works well. |
| Ability to see number of views per product that were viewed within a date range or lifetime | There seems to be a magento function under Reports > Views, however it doesn’t show any data. |
| Ability to see bestselling products within a date range or lifetime | Function works well. |
| Ability to see how many times a product has been added to a wish list and which customers have added it to their wishlist | Function not available |
| Ability to create customer groups either by manually selecting customer and assigning them into a group or by uploading an excel sheet of customer emails and assigning the list to a group. | There is a function to create customer groups, but it is restricted to two options (Tax exempt BC, retail customer). |
| See also data analysis for the Reward program (1e) |  |

**7. Customer Account View**

Customer Functions/View:

|  |  |
| --- | --- |
| **Ideal** | **How well does current abm website do this?** |
| Ability for customer to see/edit their account information:   * First Name * Last Name * Company/Institution * Email address * Phone number * Account password   And edit their contact information for billing vs. shipping:   * Billing name * Billing email * Billing Address * Billing phone number * Shipping name * Shipping email * Shipping Address * Shipping Phone number   Customer should be able to add other “saved addresses” | Function works well |
| Ability for customer to see a record of all their orders. Each record should contain the following information:   * Order # * Date order was placed * Ship to name * Order total * Status (paid, shipped, cancelled etc.) * Action (a link to view the order details) | Function works well |
| Ability for customer to see a record of all their quote requests. Each record should contain the following information:   * Quote # * Date * Status (active, expired) * Actions (a link to view quote details)   After quote expires, the quote details should no longer be viewable. | Function works well. |
| Ability for customer to see a newsfeed | Function works well. |
| Ability for customer to submit product reviews that include:   * SKU of product they are reviewing * Order # associated with the order * Overall rating (star rating) * Review Headline * Review Body/Text * Attach image + add caption for image   There should be a status indicating whether review has been “Verified” or is still “Under Review” | Function not available |
| Customers should be able to see a list of their recently purchased items and their most purchased items with the option to quickly re-add to their shopping cart. | Recently purchased items is available but not most purchased items. |
| Ability for Customer to add items to a wishlist | Function not available |
| Ability for Customer to see their email subscription status and toggle whether it says “subscribe” or “unsubscribe” for each type of email. There are 3 categories of emails:   * News & Announcements * Product Updates * Resources and Tools | Function not available. |

Admin Functions/View:

|  |  |
| --- | --- |
| **Ideal** | **How well does current abm website do this?** |
| Ability for admin to edit the contents of the customer’s news feed - thumbnail image (+ alt text), text and date. A rich text editor with access to source code would be useful here. | Function works well. |
| Ability for admin to approve/publish or disapprove/hide customer submitted reviews from the public website. If approved, the review status should appear as “Verified” under customer’s review records and published automatically under the product. Review should include customer’s name and submission date. | Function not available |

**8. Product Page**

Customer Functions/View:

|  |  |
| --- | --- |
| **Ideal** | **How well does current abm website do this?** |
| Customer should be able to see a list of customer reviews under the product | Function not available |
| There should be a button on the product page to enable customer to add the product to their wishlist | Function not available |
| Customer should be able to request a free sample (if available) from a button on the page | Function works well but had to be implemented manually (see Admin Functions/View, below, for more details) |
| Customer should be able to see a list of related products | Function works well |
| Customer should be able to go through basic e-commerce activities such as select quantity of item and select options for configurable products. Selected options must be listed in the cart preview, shopping cart checkout/order summary and subsequent email notifications. | Function works well |

Admin Functions/View:

|  |  |
| --- | --- |
| **Ideal** | **How well does current abm website do this?** |
| Admin should be able to add/delete/edit/activate/inactivate promotions that would appear on the product page. It would be ideal if admin could add promotion information (image + text) individually or en masse for a group or category of products and activate/inactive the promotion, if needed. | Currently this is manually done by opening up description pages of each product. This is fine but would be difficult to apply en masse. |
| Admin should be able to toggle a free sample button “on” or “off” for a specific product or groups/category of products. Free sample button would generate a pop-up with a standard free sample request form (with Cat. No. pre-filled). | Currently this is done manually (with some help from IT to embed our jotforms in an associated pop-up) by opening up the description pages of each product and adding the code for the free sample button.This is fine but would be difficult to apply en masse. |
| Admin should be able to add/delete/edit/activate/inactivate documents to individual products or groups/category of products. Admin should be able to configure the document’s:   * Document Type (Protocol/Manual, MSDS, QC, Other) * File Type (PDF, Excel, Word Doc, ZIP file) * Internal (YES, NO) * Display Name * If there are any SKUs that should not be included | Function works well |
| Admin should be able to add/edit/activate/inactivate FAQs to individual products or groups/category of products. | Function works well |

**9. Promotions**

|  |  |
| --- | --- |
| **Ideal** | **How well does current abm website do this?** |
| Ability for admin to add/delete/edit/activate/inactivate promo codes with promotion rules that the customer can add before checking out. Promotion rules should be able to be applied to individual products or a category of products based on:   * % discount from list price * Waived shipping fees * Buy # of the same product(s) or same category and get # product(s) or product(s) from a category, free * Based on Buy # of product(s) and get [CUSTOM ITEM] free (where you can write what will go in place of “custom item”)   Only one promotion should be allowed to be applied per order. | I think this function does exist on the magento backend but I don’t have access to it anymore so I can’t verify this. |
| Ability to activate promotion for all customers or certain groups of customers. | Function not available. |
| Ability to pull up statistics for how many times promocode was used within a date range or lifetime as well as which customer or orders the promocode was applied to. | Function exists under “Advanced Reporting” but can’t see what promocodes were used and can’t export the information. |