

Web Platform Functional Specification

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Table of Contents

[Introduction](#)

[1.1. Definitions](#)

[1.2. Executive Summary](#)

[Front-end](#)

[2.1. Navigation/Search](#)

[2.2. Site-wide search](#)

[2.3. Navigation](#)

[3.1 Checkout & Cart](#)

[3.2 Mini-cart](#)

[3.3 Cart](#)

[3.4 Checkout](#)

[4. Product listings and details](#)

[4.1. Product detail page](#)

[4.2. Product category landing pages](#)

[4.3. Product listing pages/product categorisation](#)

[4.4. Combined product up-sale/product bundles \(also known as “Collections”\)](#)

[4.5. Quick-look](#)

[5. Up-sale/Cross-sale](#)

[6. Customer accounts](#)

[6.1. Account Management](#)

[6.2. Communications options](#)

[6.3. Wish-list](#)

[7. Auxiliary content/content manageable areas](#)

[7.1. User generated content](#)

[7.2. Embedded content](#)

[7.3. Catalogue download](#)

[7.4. Source driven content](#)

[8. Mobile commerce \(mCommerce\)](#)

[9. Customer data capture/communication](#)

[9.1. Contact forms](#)

[9.2. Newsletter sign-up](#)

[11. Overview/admin-wide functionality](#)

[11.1. Technology/The admin](#)

[11.2. Preview mode](#)

[11.3. Access restrictions](#)

[11.4. Audit log](#)

[11.5. Scheduled publication](#)

[11.6. Product bundles](#)

[11.7. Category management](#)

[11.8. Stock Control](#)

[11.9. Catalogue](#)

[12. Content Management System](#)

[12.1. Site Content “Box” system](#)

[12.2. Article system](#)

[12.3. Email templates](#)

[13. Reporting.](#)

[13.1. Sales Revenue](#)

[13.2. Customer Revenue](#)

- [13.3. Product Revenue](#)
- [14. Orders](#)
 - [14.1. Order admin overview](#)
 - [14.2. Order detail view](#)
- [15. Fraud control](#)
- [16. Customer/CSR](#)
- [17. Shipping/Delivery](#)
 - [17.1. Shipping Rules](#)
 - [17.2. Fulfilment Providers](#)
 - [17.3. Shipping Rules](#)
- [18. Customer interaction functionality](#)
 - [18.1. Customer reviews](#)
 - [18.2. Stock notifications/availability](#)
 - [18.3. Customer Contact Management - \(Ticketing>Returns\)](#)
- [19. Security](#)
- [20. Search Engine Optimisation \(SEO\)](#)
 - [20.1. SEO considerations](#)
 - [20.2. Sitemaps](#)
- [21. Backups/data retention](#)
- [22. Promotions and discounts](#)
- [23. Integrations](#)
 - [23.1. Payment Service Provider\(s\) \(PSP\)](#)
 - [23.2. Postcode Address Finder \(PAF\)](#)
 - [23.3. Reviews](#)
 - [23.5. Email marketing providers \(MSP\)](#)
 - [23.6. Google Merchant Center integration](#)
 - [23.7. Google analytics](#)
 - [23.8. Futura](#)
- [24. Front-end bespoke interfaces](#)
 - [24.1. Net curtains](#)
- [25. Confirmation of receipt](#)

Introduction

1.1. Definitions

Term	Definition
Anonymised	Removing personal information from data, creating anonymity.
E Marketing Support	E Marketing Support Ltd proprietary web platform that specialises in providing E Marketing Support functionality.
Internationalisable	The process/ability of making a website usable and accessible for an international audience

PCI	Payment Card Industry Data Security Standard (PCI DSS) is a set of requirements designed to ensure that ALL companies that process, store or transmit credit card information maintain a secure environment.
PSP	Payment Service Provider, a service that conducts payments through an API integration
Q&A	Questions and answers, this allows customers to ask questions about products and receive responses.
SEO	Search engine optimisation, functionality that compliments search engine services.
The Company	'The Company' shall be taken to mean the 'Client Name' as specified in the development and maintenance contract, at the address given.
UX	User experience, the interactive mechanism of how an end user responds to a web interface.
3D Secure	An extra layer of security whereby the checkout redirects to the issuer of funds (e.g. bank) to validate the authenticity of a card and it's owner. Real time verification of the acquirer domain, issuer domain and the interoperability domain (i..e 3 D's of security)
PAF	Postcode address finder, automated address lookup using postcodes within the United Kingdom
CVV	Card verification value, a layer of payment security that validates a physical card
AVS	Address verification system, real time verification of the address associated to a payment card
CSR	Customer Service Representative, a member of staff that is a point of contact for users of the E Marketing Support website.
RMA	Return Merchandise Authorisation, step within the refunds process that authorises a customer return. Functionality is dependant on business rules.

1.2. Executive Summary

The purpose of this document is to define the functionality available to the client on the E Marketing Support web platform. Within all functionality required explicitly by the Company is documented for the purpose of both technical development, and to ensure and illustrate collective understanding of underlying business processes required for the proper functioning of the E Marketing Support solution.

Front-end

2.1. Navigation/Search

2.2. Site-wide search

Search encompasses not just product and category search, but all site content, including:

- Products
- Meta-values (categories & filters)
- Certain “boxed” content, where applicable
- Articles

Product search functionality provides:

- Search results are filtered to show only products available to the customer type currently viewing.
- Fuzzy matching on user inputted strings, including approximate-string matching and stemming.
- The appropriate product fields are searched, and fields are weighted appropriately according to their content type.
- Filtering within search results
- Product categories within search results

2.3. Navigation

Site navigation follows standard usability guidelines, and encompasses:

- Top navigation drop-down menus, including a delay for show/hide on hover (hover delay time is hard coded)
- Left navigation on listing pages, including categories and filters
- Appropriately employed breadcrumb trails throughout
- Benefits bar - A strip of dynamic text on the website header template displaying promotions text such as “Free delivery on orders over £X or similar.

3.1 Checkout & Cart

The cart and checkout process follows best practices for E Marketing Support development.

3.2 Mini-cart

The mini-cart is universally available across the site, and automatically appears whenever a customer adds a product to their basket. Additionally, the cart is available for viewing at any point at which the customer desires, and allows the incrementing and decrementing of product quantities, as well as the complete removal of a product from the cart. Additionally, the mini-cart includes clear call-to-actions for both “Continue shopping” and “Proceed to checkout”.

3.3 Cart

The cart page's primary function is to allow customers to review their prospective purchase and amend individual products as needed. It also incorporates:

- The ability to enter a coupon code for promotional purposes
- Proximity promotion recommendations based on cart contents, user variables (e.g. user location, user type), total basket spend and promotion availability
- Ability to preview shipping charges for different destinations and methods
- Ability to increase/decrease product quantities, remove products, and amend product options or customisations
- "Save my cart for later", which will email the customer a link which will reconstruct their cart on any computer for later purchase, as well as optionally capturing the customer's email address for re-marketing purposes
- "Comfort content", which will pertain to the security and reliability of the companies E Marketing Support presence, increasing cart to checkout convertibility
- Recently viewed products to be displayed in order to give the customer the ability to quickly return to a previously viewed item
- Items are to stay within a customer basket for 24 hours.

Each product displayed will show:

- Name
- SKU (Stock Keeping Unit)
- Price (Gross)
- Applicable discounts and resulting price
- Quantity (editable)
- Selected variants (editable)
- Despatch time estimate
- Image
- Update/Remove links
- Personalisation options (text and positioning)
- Product options

3.4 Checkout

The purpose of the checkout is capture a sale in the most efficient manner possible. With this in mind, the checkout has been designed and developed to provide an optimal user experience (UX).

The checkout process consists of five "steps", although in reality this number varies depending on the degree of customisation the customer decides to employ, such as whether they wish to have their order shipped to multiple addresses (an address comprises a name and address, rather than a mere location), or wish to pay with multiple distinct payment methods.

The checkout includes:

- Log-in for pre-existing customers on first step
- Integrated payments utilising PSP(s) of choice (see [section 24.1.](#))
- Payer Authentication (3D-secure)
- Rapid progression through checkout for returning customers, utilising saved details, including credit card details (stored with strong crypto) or instead token from PSP if available
- No requirement for the customer to create an account in order to check out
- Ability to save, store and re-use stored addresses for both delivery and billing purposes
- Postcode Address Finder (PAF) integration (see [section 24.2](#))
- Ability to pay with multiple payment methods (e.g. credit card, gift voucher for a single order)

- Post-checkout thank-you page will have “would you like to create an account by entering a password” functionality for guest checkouts or “you already have an account” for people who checkout as guests yet already have an account.
- Ability to provide customer with an option to not show prices on the despatch note (e.g. if customer sending as gift)
- Include PayPal express, gift voucher redemption, loyalty scheme as alternative payment methods

4. Product listings and details

4.1. Product detail page

The product detail page is intended to both entice and inform, and contains a number of rich marketing features such as:

- Imagery enhancement
 - Image zoom, allowing zooming on image up to the maximum size allowed by the originally provided image. The zoom effect can either be a roll-over effect, or a click and zoom effect.
 - Unlimited number of images per product
 - Ability to add plain text captions
 - Images change to be relevant to the selected variants automatically
 - Product title on hover state
 - Ability to add watermarks to images and set the image size to apply them too
- Product badges
 - Promotional or category driven badges are shown appropriately. These badges will appear upon product images, and will indicate promotions or other highlighted information about a product, such as "Best Seller" or "New". These are driven through a meta-assignment or attribute assignment through the categories section within The admin.
- Tabbed product information
 - Product description (default tab)
 - Delivery costs and options - standardised content
 - E Marketing Support Product reviews
- Recommended products
- Facebook like button/Pinterest share/Google plus share/ShareThis/Twitter - using addthis (<http://www.addthis.com/>) which is a standard gamut of off-site sharing functionality
- Email this to a friend - allows capture of friend and customer's email addresses. NB: emails are not captured unless an order is placed on the website.
- Product videos - hosted off-site (Youtube/Vimeo/etc.), and can be embedded in an orderly fashion on product pages, likely within the same area as product images.
- Variant display
 - Text label buttons for the selection of size options, and image swatches for the selection of colourways, along with appropriate messaging to indicate colour names. Display of variants may differ from that described as a result of the design process, but will always encompass the requirement to allow customers to easily select variants and see what each variant's stock availability.
 - Where variant swatches are utilised, identical variants as managed in the admin and mapped to the same filter values will display with swatches relevant to the product upon which they are shown.

- It is possible for product variants to display their own images but this will largely depend on how the user interface has been designed
- Stock availability display
 - This is displayed according to the rules that are ultimately defined for stock messaging. Additionally, stock messaging will be override-able on a per product basis, and stock messaging will vary depending on selected variant.
 - Expected delivery times can also be shown based on restock dates defined against individual products, and are displayed as rough time brackets, rather than definite dates.
 - Out of stock items can be back-ordered if the product is set up to be back-orderable.
 - Editable stock messaging (e.g. Coming soon, pre-order now for delivery in X weeks or available in X weeks).
 - Out of season stock messaging
- Product Information/Guides which are PDF downloads
 - It is possible to specify size, colour or technical guides (dependent on the nature of the product) via the admin. These can either be fixed PDF downloads that are a link on product detail pages, or HTML content.
- Add to basket – clear, simple call to action encouraging the customer to purchase the item
- Add to wish-list
- Coming-soon facility

The ability to provide back-in-stock email notifications to customers for SKU items not yet available in stock. With complementary upsell text like “coming soon”. Products will be tagged in the admin as ‘Coming soon’ and this will then display an email sign up box on the product page. When the item comes in stock, and stock levels are adjusted for the product, this will trigger an email to the customer saying it is available.

4.2 Product category landing pages

Each major category will have a landing page to help promote specific product ranges or sections within the site. It will be possible to change text and images within a page that is assigned to a category with the inclusion of:

- Main banner space
- Featured modules - this will allow the inclusion of images via the CMS which can link through to other areas of the site (e.g. product listing pages)
- Search engine friendly text - this will be included at the bottom of the page for SEO purposes

4.3 Product listing pages/product categorisation

Product listings are a critically important element of the site, intended to allow customers to view a range of products relevant to their desires and to make an informed selection of which products to view further details or to purchase.

Product views will include the ability to view products in several different fashions:

- Grid – this is the default view for customers, and is a grid of product images, with name and price displayed below
- List – in this view, a large product image resides to the left, and a snippet of product details, the product tile, price, and variants are shown on the right
- Quick-buy – in this view, products are reduced to a tabular format allowing the rapid addition of multiple distinct products to the cart in a single click.
- A rule to display out of stock items at the bottom of pages

Product listing support infinite scroll, meaning that rather than having traditional pagination, the default view is effectively “view all”, resulting in greater product visibility and a shorter user journey.

Left navigation on product listing pages will comprise links to other categories and filters for the further windowing of the selected range of products. Any meta-value which has been set up as a filter will be filterable upon, and filters show intelligently based upon the availability of products within the currently viewed category. Additionally, available filters can be further sculpted on a per-category basis, if so desired.

Promotional badges are shown on each product as applicable, driven by the assignment of products to a promotional filter.

Upon mouse-over of any image on the product listing view, it is possible to replace the primary image with a secondary image, such as a box view or a lifestyle shot.

4.4 Combined product up-sale/product bundles (also known as “Collections”)

In order to aid the sale of certain items, ‘combined product’ suggestions and creation tools are essential in order to increase average basket spend, and in order to illustrate the possibilities individual items present to the customer.

This functionality operates as follows:

Each product will have a selection of other items (and/or meta-values) selected for ‘combined product’ up-sale purposes in the standard up-sale system. This then allows the display on each product page of proposed product combinations, automatically generated based upon the selected up-sale items. There is the facility to select any variants (if applicable) and purchase a selected range of products together. ‘Combined products’ can be discounted from the standard item prices, providing a further incentive for customers to buy an entire set.

4.5 Quick-look

Quick-look will be present throughout the site, allowing customers to pull up a window-within-a-window containing product details for the selected product. This will allow the viewing of the product description, product symbols, variants, images, pricing information, and the ability to purchase the product, without leaving the page that the customer was on at the point at which they viewed the quick-look.

Rollover product images on the product listing page - shows a different image and also a link to ‘quick buy’. The quick buy will show in a ‘light box’ without moving the customer away from the listing page they were already on.

5. Up-sale/Cross-sale

In order to effectively cross-market products to consumers, a variety of different means of doing so exist, and are applied in the following order:

- Automatic up-sale based on product similarity
- Automatic up-sale based on recently viewed products
- Manual up-sale, product <-> product

Meaning that any explicitly defined product <-> product relationships are specified, they take a higher priority than the preceding methods, and recommendations are created and ranked until the number of required recommendations is reached.

A number of cross and up-sale areas may exist, each of which may have different kinds of up-sales within it. For example, there might be a "recommended care accessories" up-sale, and a "goes well with" up-sale, each of which would contain different content.

Each manual up-sale option can be controlled via the admin.

6. Customer accounts

It should be noted that the below are 'standard' functionality requirements that may be superseded by the existing functionality for members on the Gardening Club website.

Customer accounts allow identification and understanding of individual customers, and aggregate customer data. In addition, they allow customers to be marketed to more directly and accurately, and grant the customer any number of benefits through the use of user types. Customers can be classified under specific user types to enable functionality such as discounts, pricing and a different MyAccount section.

E Marketing Support is to house a detailed Customer database, into which all customer interactions & transaction can be stored..

6.1. Account Management

The principal routes for account creation will be via the checkout, or via the "My Account" area. In either case, customers can create an account with an email address, name and a password. Additionally, gender and date of birth can be captured but are not mandatory fields.

From the login page, the customer can either log in, using their email address and their password, create an account, with whatever required data is desired, and request a password request and/or reset (sent via email service provider).

Within the account management section, the customer is able to:

View/Edit their account details, including

- Name
- Password
- Email Address
- Addresses saved against the account
- Adding or deleting credit cards
- Marketing preferences
- View order history, and the status of each order they have placed, along with its contents and any applicable tracking details
 - Includes ability to re-place a historic order
- Communicate with customer service
- View recommended products based on past purchase history
- Manage/view their wish lists

6.2. Communications options

Throughout the site, customers are encouraged to opt-in to marketing communications.

A newsletter subscription field is always visible on the site and allows customers to sign up for email communications from any point of their journey, without leaving the page they are currently viewing. The sign-up form also allows for additional data gathering and segmentation.

If only minimal data is to be gathered (email address) this can be handled entirely within the site footer. If additional data is required (Name, Address, Date of Birth, any other mutually agreed fields) a subscription form will appear as an inline popup, allowing the customer to populate their data without leaving their current page.

In addition to the standard newsletter sign-up form, customers are presented with the option to opt-in from the checkout (checked by default), account sign-up (checked by default), and account management.

Customers may opt out of email communications either through their "My Account" area, or through the Mailing Service Provider's opt-out link.

6.3. Wish-list

Wish lists are intended to allow customers to bookmark products of interest to themselves, to create their own shopping list, and to allow sharing of products with other potential customers.

The wish-list system allows registered customers to add items to their wish-list from any product view, whether or not they have an account. Logged in customers are given the option to choose which of their wish lists they wish to add the item to at the point at which they add it. Wish-lists can be either public or private.

Public wish lists can be shared with associates via selected media (email, social networking, etc.), and individuals other than the original customer can make purchases from the public list. They either allow the customer to know that they have made the purchase for them or to do it "secretly", in order to be able to gift the wish-list owner with the goods they desire. The purchase of an item from a list will result in that item's quantity decreasing by the quantity bought, until it reaches zero at which point the item is removed from the list.

Private lists operate identically to public lists, however are viewable only by the logged in wish-list owner.

7. Auxiliary content/content manageable areas

7.1. User generated content

In addition to the user generated content relevant directly to products, administrators are able to publish selected customer testimonials in order to have them display in various areas around the site, as a customer confidence boosting measure. This is done through an integration with a third party testimonials or reviews provider. This will likely be Feefo, as this has benefits beyond onsite content.

7.2. Embedded content

Mutually agreed content can be embedded as required in any content manageable area suitable for embedded content (e.g. products, pages and box based content). This includes, but is not limited to:

- Video (hosted off-site on a suitable platform, such as YouTube, Vzaar, Vimeo)
- iFrames
- PDF documents

7.3. Catalogue download

If determined that this functionality is required then the below will apply;

This is a downloadable PDF catalogue, which can include links if the PDF is correctly created by the Company, and a page-turning catalogue view. A third-party will be utilized for this purpose (<http://www.yudu.com/>), due to its low cost of ownership, ease of integration, and well-rounded feature set.

7.4 Source driven content

Source codes can be used to load specific areas within the website. This will be determined by a parameter within the url (yoursite.com?sourcecode=PROMOCODE). Area which can be attached to a source code can include:

- Prices
- Content Items
- Navigation

8. Mobile commerce (mCommerce)

The site will be constructed to be optimised for Desktop and Tablet devices. This will be achieved by building the site using 'responsive design' techniques. There will exist one 'code-base' of the website, and using CSS/HTML techniques, the website will respond to the the device/screen resolution the user is browser on. Please refer to http://en.wikipedia.org/wiki/Responsive_web_design for more information about this new practise.

For smartphone mobile devices, a responsive mobile website is to be built based on best practices and mutually approved designs. All sites will be managed by a single instance of The admin with the ability to push different CMS content. All other elements are driven globally.

9. Customer data capture/communication

9.1. Contact forms

A general contact form will be available on the site in order to cater for different customer communication needs and types.

9.2. Newsletter sign-up

The facility to sign up to receive the company's newsletter using email address only

11. Back-end

11. Overview/admin-wide functionality

11.1. Technology/The admin

The admin should be a web based system accessible from any web enabled device through a browser. It should not require a standalone installation.

11.2. Preview mode

The admin includes a preview tab which allows administrators to review changes holistically within the context of the site, rather than in isolation. From this tab, changes can then be deployed en masse once administrative review has been completed.

11.3. Access restrictions

Admin access can be controlled by administrators with appropriate permissions to do so. Administrative users can be created and destroyed via the admin, and permissions can be assigned on a relatively fine-grained level as required. Permissions granularity currently extends to which areas of the admin are available to a user (orders, customers, products, settings, CMS, etc.) and what permissions they have (read/write). These permissions can be extended should the need arise.

11.4. Audit log

CMS administrative actions within the The admin are logged, allowing review of actions taken by individual admins, or actions made regarding a specific item of content. This enables administrators to track down problems rapidly (who changed the price of X to Y?).

11.5. Scheduled publication

There is the following means of scheduling publication of changes.

- Start & End time
 - For many elements of content (products, articles, CMS, discounts) it is possible to set both a start and end date/time, which will allow content to be published and unpublished on pre-determined schedules. This works well for single content items.

11.6. Product bundles

Product bundles are managed as though normal products, however when a product is indicated as a bundle the administrator must specify its component SKUs and the quantities thereof. All other data can be set as normal, with the exception of stock information, which is drawn from the constituent child products. These bundles are created manually in the admin, rather than via any integration option.

11.7 Category management

An unlimited number of categories and filters can be created and tied together in any hierarchical or non-hierarchical fashion, or in a mixture of the two, via the category management administrative interface.

Categories can be created at will, and may reside in multiple locations within the hierarchy (i.e. a single category called "xyz" could be assigned to both "A" and "B", meaning only one set of information is required to be populated to create two distinct views, and to allow filtering by category). In addition, a variety of information may be associated with each category, including:

- Name
- Small image for linking from category listing pages
- URL
- Description for header
- Meta keywords and information
- Document title
- Other titles for use in other areas of the site (plural/singular form etc.)
- Default sort method, from one of :
 - Price (High->Low/Low->High)
 - Name (A-Z/Z-A)
 - Review Rating (Asc/Desc)
 - Including the ability to specify the sort order either globally for that category, or for each leaf instance of that category where multiple leaf instances exist, in such a fashion that individual products can be pinned in a specific order.
- Default layout (grid/list/window/other)
- Front-end visibility
- Order of display
- Other information required to be stored against each category, such as background image.

11.8. Stock Control

This area will require further investigation, but making the assumption that stock feeds will be available from three main sources – EPOS, Axerrio, and manual entry. In instances then where E Marketing Support is integrated with an ERP, stock control is obtained principally through the feed of stock from the ERP. The ERP provides simple stock numbers which will each represent the stock available for business and consumer customers, respectively. Upon each scheduled import of fresh stock information from the ERP, orders currently held within the site but not yet sent to the ERP will be taken into account, insofar as all stock allocated to those orders is deducted from the relevant stock pool upon import.

11.9 Catalogue

The catalogue admin will allow full administration of the products within your site. This includes:

- Full product search
- Facet assignment
- Filter management
- Product editing
- Adding new product
- Bulk import/export to csv (product cloning)
- Sort order management
- Promotional stickers
- Gift vouchers

12. Content Management System

The content management system encompasses the management of all areas of the site that do not fall into the realm of product data management. There are two principle components to the CMS.

12.1 Site Content “Box” system

The “Box-out” system, thus called as it generates predefined content boxes across the sites, allows the majority of content management on the platform. All areas indicated in each of the front-end specifications as content-manageable can be managed through the content management system. This encompasses content such as marketing banners, FAQs, landing pages, events, and any other area in which it is desirable to have a content-managed area.

All CMS areas are managed through a consistent interface, which presents those fields relevant to the specific item of content being managed, such as a title, textual content area, fields for the inputting of (including auto-complete) SKUs, space for one or more images, and so-forth.

Content can be managed on a per-site and per-language basis, and can additionally be varied based on the type of the viewing user. Where desirable, content such as CSS, JS and HTML may be injected directly.

All CMS areas can have start and end dates specified against them.

12.2 Article system

Articles/blog posts will be managed via the ‘built in’ article system for which there is no limit. Articles will include:

- Our Story
- Press Reviews
- Gift Vouchers

Each article may include

- A title
- An author
- A date
- Content with WYSIWYG editor
- Meta keywords and description
- ‘Product tagging’ which allows products to be shown alongside the article detail page
- Comments handled by DISQUS, a 3rd party integration, or alternative similar product.

12.3 Email templates

All E Marketing Support email templates sent from the site are user-editable in code source view. It is possible to send test emails directly from the editor page. Multivariate testing may be performed.

13. Reporting.

Reports generated within the site are available on-demand through The admin. It will be accepted that some on-demand reports may take a significant amount of time to generate.

Reports generated in The admin will be centred on three focus areas:

- Sales
- Customer
- Products

13.1. Sales Revenue

The Sales Revenue report provides you with sales data broken down into intervals (Day, Week, Month, Year) within any given sales period. This report does not include returned or cancelled packages. The headings for this output are as follows:

Interval	Total Sales	Total Items Sold	Total Gross
Total Net	Total Tax	Total Shipping Gross	Total Shipping Net
Total Shipping Tax	Total Discount Gross	Total Discount Net	Total Discount Tax

13.2. Customer Revenue

The customer revenue report provides information on customer total revenue relative to the sales within a given period. Please note that this data does not include returned or cancelled items. The following headings for the report are as follows:

Customer ID	First Name	Last Name	Email
Address1	Address2	City	Region Code
Post Code	Gender	Joined Date	Marketing By Mail
Marketing By Email	Marketing By Third Party	Date of first sale	Date of last sale
Purchase Frequency	Purchase Recency	Total Sales	Total Items Sold
Total Gross	Total Net	Total Tax	Total Shipping Gross
Total Shipping Net	Total Shipping Tax	Total Discount Gross	Total Discount Net
Total Discount Tax			

For the sake of clarity, please note that:

- Date of first/last sale - Relative to that date period
- Purchase Frequency - The average number of days between sales within that date period
- Purchase Recency - The number of days since the last sale for that given date period

13.3 Product Revenue

The product revenue report details product data bought within a certain sales period. Please note that this report will not include returned or cancelled orders. The headings provided to you in this report are as follows:

Product ID	SKU	Name	Primary Category
Secondary Category	Total Sales	Total Items Sold	Total Gross
Total Net	Total Tax	Total Shipping Gross	Total Shipping Net
Total Shipping Tax	Total Discount Gross	Total Discount Net	Total Discount Tax

Reporting has the granularity from decade to day. In addition, the site will be fully integrated with Google Analytics.

Other reports are additionally available, however pending a detailed list of reporting requirements will be released on an as-needed basis and is subject to change control.

14. Orders

14.1. Order admin overview

The order admin overview allows viewing of orders en masse in a tabular format. These orders may be sorted by the visible columns (by default Order ID, date/time, channel, billing name/address, shipping name/address, shipping method, personalised (Y/N) order total, payment method, payment status, processing status) and filtered by any of these criteria, and others such as products ordered, customer email address, personalised and other pertinent criteria.

Orders can be searched by customer surname, email address as well as orderid.

It also possible to set custom flags to to display in the order list to highlight specific order types ie Next Day delivery

14.2 Order detail view

Within the order detail view, orders may be viewed, including package breakdowns, transaction history, notes, status, personalisation details, items, billing details, associated customer accounts, and shipping information. With each update a note may be left as to the reason, and all actions are logged against the appropriate CSR. Once orders have entered the pick/pack/despatch process (the "picking" status) they may no longer be amended by CSRs, unless returned due to a pick error or other such scenario.

15. Fraud control

Several important fraud controls exist:

- Payer Authentication (3D-secure)
 - This drastically reduces fraudulent transactions by requiring the customer to input a password on their bank's site, integrated into the checkout. It additionally reduces site conversion rate by between 5% and 15%, however this is often desirable in the face of the negated fraud risk.
- CVV & AVS
 - These further authenticate cardholder authenticity, but are less effective than 3D-secure
- Third party fraud integrations
 - As part of the integration with the chosen PSP (where possible), The Third Man (T3M) fraud statuses will be returned, and these will determine the status of inbound orders.
 - Green Light - Ready for Despatch/Other fraud-pass status (e.g. "on back-order").
 - Amber/Red Light - Hold for review

Based on fraud score (determined by the above factors) orders may be placed into various statuses for review, or rejected entirely. Orders which are rejected for fraud reasons will be placed into a cancellation status reflecting this, which will have an appropriate pre-set email message.

16. Customer/CSR

The customer section within The admin allows the following:

- Viewing and modification of customer records (according to permissions), including
 - Addresses
 - Removal of saved card details
 - Order history
 - Total value
 - Credit account history
 - Loyalty point history
 - Name
 - Email address
 - Password (non-viewable, edit and reset only)
 - Communication history
- Searching of customer records by
 - Customer #
 - Name
 - Email address
 - Address
 - Postal code, exact or distance from
- Exporting of customer records by all of the above

17. Shipping/Delivery

17.1. Shipping Rules

Multiple shipping methods and rates within each of those methods can be set up, allowing flexible shipping options for a global audience, if this is required. Integration with multiple couriers systems for the purpose of automatic label creation will be needed, and it may be that a system such as meta pack is used..

Shipping costs can vary based on the following criteria:

- Package price
- Package weight
- Shipping destination (Country/County/Postal Code)
- Products contained in the order (e.g. if the order does/does not contain an item from category X the shipping cost will be Y)

Shipping rules will be pre-populated with a supplied matrix of initial shipping data, and can then be managed by all administrator level users.

Shipping rules can additionally be set up to offer shipping free of charge over a certain threshold, and individual items can have flat rate shipping costs associated with them.

Specific methods (methods are further subdivided into bands) can be associated with a specific courier, allowing generation of tracking information for provision to the customer.

17.2. Fulfilment Providers

Each shipping method will make use of the given carrier, multiple options per method will be required, or a method of determining the carrier based on the item sku/size/dimensions, or other determining factor..

17.3 Shipping Rules

The admin is to provide the mechanism for shipping management. As in, the ability to manage shipping methods and displaying their associated delivery times, cost and applicable delivery locations.

18. Customer interaction functionality

18.1. Customer reviews

Integration with Feefo (or alternative third party) will be used for customer reviews

18.2. Stock notifications/availability

A product that is currently out of stock doesn't have to mean a lost sale. E Marketing Support will need to offer a choice of 2 options. Firstly it can cater for over-selling, i.e. customers can still purchase the product but are notified that there will be a delay in fulfilling their order.

Secondly, a 'remind me when back in stock' feature can be enabled so -with a simple addition of the customers email address – they will be automatically notified as soon as the item is back in stock.

This is displayed according to the rules that are ultimately defined for stock messaging. Additionally, stock messaging will be override-able on a per product basis, and stock messaging will vary depending on selected variant. For bulk editing stock messaging can be added to the bulk export file

Expected delivery times can also be shown based on restock dates defined against individual products, and are displayed as rough time brackets, rather than definite dates.

Out of stock items can be back-ordered if the product is set up to be back-orderable within the admin. When items are out of the stock, the administrator(s) will be notified by email. The reporting area can also be used to report on low stock items.

18.3. Customer Contact Management - (Ticketing>Returns)

The below would be the preferred method of managing customer contact, and should be aimed for if possible.

All support queries opened in the customer account area are routed into the admin ticketing system. From here, support staff can reply to queries, authorise returns, and modify the status of tickets (low, medium, high priority). The ticketing system also allows for 'canned responses' (designed to cut down time for common queries), auto-responders, and the ability to view orders related to the ticket.

This will also allow customers to create a ticket on their order to update/add personalised information after an order has been submitted. Customers will be able to log into their account select the order and send the request through to E Marketing Support. The request will be added to the ticket queue to be actioned.

19. Security

All elements of the platform will be entirely secure, allowing certification up to any required PCI DSS level. All admin communications are made via encrypted binary message streams, and all sensitive data entered by consumers on the site is exchanged via high-crypto HTTPS (SSL). All sensitive data (i.e. credit card numbers) is encrypted in such a fashion that it cannot be decrypted unless the correct key is inputted by the decrypting user (plain-text password for consumers, private GPG key and password for admins).

20. Search Engine Optimisation (SEO)

20.1. SEO considerations

The Company's entire site will be built with SEO in mind, and document structures will be semantically correct, using clean mark-up and appropriate micro-formats. All page-based manageable content (i.e. products, articles, meta-values) allow individual sculpting of keywords, document title and meta description. Additionally, site-wide default meta-tag information can be set, and canonical tags will be automatically set on product detail and product category pages in order to further improve SEO.

The features below should be included within E Marketing Support's platform to help with search:

- Search to work against product and non-product content
- Include a Google Webmaster Tools integration, including
 - Google Sitemap XML integration to optimize searching
 - Google Video Sitemap to ensure content appears in relevant Google searches
- Include a Bing Webmaster Tools integration, including
 - Bing Sitemap XML integration to optimize searching
 - Bing Video Sitemap to ensure content appears in relevant Bing searches
- Include canonical tags to ensure secondary replica data isn't penalised
- Google shopping feed
- Google Adwords implementation
- Customer 404 pages which are customizable (subject to design configuration requirements) ● Search engine friendly site structure
- SEO tag editing
 - Ability to add / edit things like page title, meta description, meta keywords. ○Ability to amend the URLs
 - Ability to amend the SEO tags for static pages
 - URLs will be generated for different colour variations of the same product
- SEO Upload tool - Upload SEO centric functions like page title, meta descriptions etc. via a CSV rather than adding this information to individual products.

20.2. Sitemaps

In addition to following SEO best practices, XML and HTML sitemaps are automatically generated for submission to multiple search engines.

21. Backups/data retention

In order to maintain the security and integrity of data, the following backup protocols will be in place:

- Continual off-site replicated database backup. This means that all database actions are replicated to a remote database slave.
- Automatic database snapshot. This takes a snapshot of your database on the hour, every hour, and stores it for 3 years in Amazon S3 (or alternative cloud based datastore).

Assets (images, PDFs, documents, other miscellaneous files stored in order to be used upon the site) are also to be backed up.

22. Promotions and discounts

A broad variety of promotional and discount functionality is provided, including, but not limited to:

- % off first order
- Site wide Discount
- Category Specific Discount
- 2 for the Price of 1
- Buy 1 get 1 free
- Buy X get Y free
- Buy 1 get 1 half price
- 3 for the price of 2
- Fixed Price Bundles
- Fixed Price Off
- Gift with purchase
- One off gift with Purchase
- Gift Vouchers
- Member Discounts
- Quantity Price Break
- Quantity Discount
- £x off when you spend £y
- Free delivery over £x
- % discount from categories
- % discount from SKUs (including product sets)
- Select from choice of a free gift
- Subscription based promotions

In each of these cases (and in the case of any other discount), discounts can be:

- Mutually exclusive
- Be tiered
- Require any combination of:
 - A coupon
 - An email address to match a pattern
 - The order to exceed or be below a value
 - Specific products or products from a category to be in the cart
 - Specific products or products from a category to *not* be in the cart
 - A specific user-type (e.g. VIP/B2B/B2C/press)
 - A specific site ID as origin (e.g. retail/trade)
- Single-use
- Multiple use up to a limit

- On a set of products being purchased in one order, also known as product “bundles”. With the functionality to apply an apportioned discount to the bundle (e.g. buy this product bundle and receive 20% off the total order).

All promotions as described above are Admin manageable, and no limits will exist as to the number of promotions which may be run concurrently. In addition, products can be active within multiple promotions simultaneously.

Additionally, the discount system allows other rewards to be given, such as loyalty points, in the place of a product or a discount.

It is also possible to automatically apply a discount coupon via a special URL which may be useful for marketing purposes. For example a URL such as <http://www.mystore.com/landingpage> could be set up to automatically apply discount ID 123 when it is accessed.

The discount admin includes the facility to generate any number of coupons associated with a discount automatically, and to then download them in CSV format for printing, mail merging or other such activities.

Additional Functionality

23. Integrations

23.1. Payment Service Provider(s) (PSP)

Sagepay has been selected as the desired PSP. The integration will allow on-site payments, Payer Authentication, and full transactional flexibility (Authenticate, Authorize, Void, Cancel, Refund), including tokenisation storage for longer-term transaction retention.

23.2. Postcode Address Finder (PAF)

Postcode Anywhere has been selected as the desired PAF solution. The integration will allow look-up of addresses from postcode anywhere on the site where address entry is necessary.

23.3. Reviews

The site will utilize the Feefo review system.

23.5. Email marketing providers (MSP)

There will be a integration with a suitable system, or in platform functionality, to send the following emails

Email Type

Trigger Point

Recommend To A Friend / Tell A the website to someone else, i.e. usually a product Friend

Triggered when someone recommends content on page.

A Friend - Referee Email purchase).

Triggered when someone clicks 'Refer A Friend'. Refer Email to the referee (usually with a voucher or incentive to purchase).

Refer A Friend - Referrer Email	Triggered when someone clicks 'Refer A Friend'. Email thanking the referrer for doing this.
Share Wishlist Over Email	Triggered when someone shares a wishlist over email.
Newsletter confirmation	Triggered when someone signs up to a newsletter
Catalogue Request Confirmation	Triggered when someone clicks 'Request A Catalogue' on the website.
Contact Form confirmation	Triggered when someone submits a query through the 'Contact Us' form on the website.
Login Details Reminder	Triggered when someone clicks 'Forgot Password' on their website account.
Member / Registration Confirmation	Triggered when someone registers a new account on the website.
Order Confirmation / Thank You	Triggered when someone places an order on the website.
Your Shopping Bag...	Triggered when someone abandons their cart.
Refund Confirmation Order	Triggered when an order is refunded.
Your order is on its way	Triggered when an order is despatched.
Welcome	Triggered when someone signs up for our newsletter.

Email

Trigger Point

a friend (about the website)	Triggered when someone clicks 'Tell A Friend'. Tell Email is sent to the friend of the person.
Account Details Updated	Triggered when someone updates details on their account.
Email Me When Back In Stock	Triggered when a product that was out of stock comes back into stock and a customer requested to be notified of this fact.
Password Confirmation Change	Triggered when someone changes the password on their account.
Send a Link (on a product page)	Triggered when someone clicks 'Share' on the website and chooses to share content over email, i.e. usually a product page.
Write A Review / Share Your Thoughts	Triggered when someone submits a review on the website.
Thank you for your order	Triggered when someone places a telephone order with Customer Services.

23.6. Google Merchant Center integration

In order to list items on Google Merchant Center, the site will automatically generate a Google Merchant Center feed for consumption by Google Merchant Center, which will result in products appearing on Google Merchant Center. In addition, micro-formats will be employed on the site, ensuring as much content as possible will be exposed to google for marketing purposes.

23.7. Google analytics

The site will be integrated with Google Analytics E Marketing Support tracking, and will show continuity from existing data within the Company's analytics account.

25. Confirmation of receipt

Name:	
Position:	

I confirm I have received the Functional Specification document and give my authorisation to proceed to the remaining phases of the build process, Implementation Phase.

Signed: _____

Date: _____