

COST CENTRE PROCESSES

As a corporate customer, you can add members to the cost center by following these steps

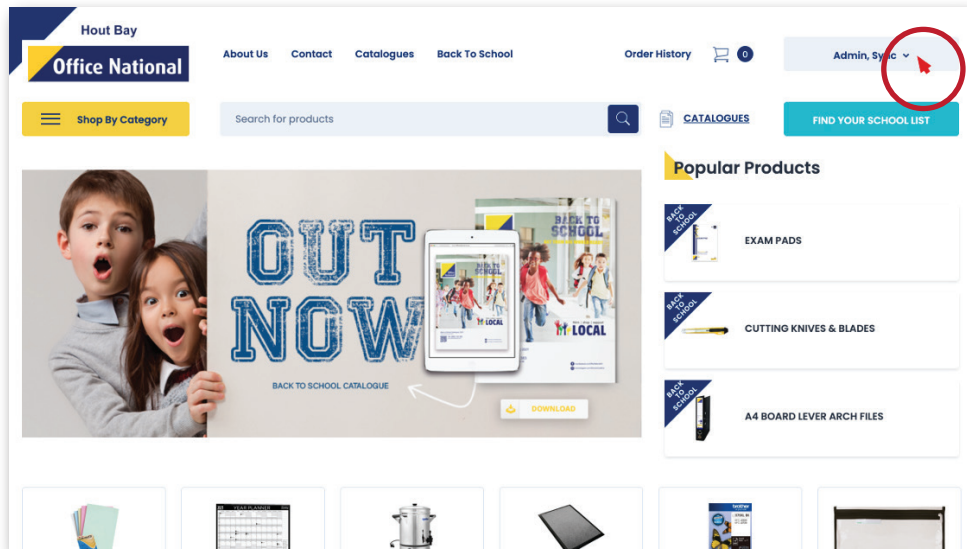


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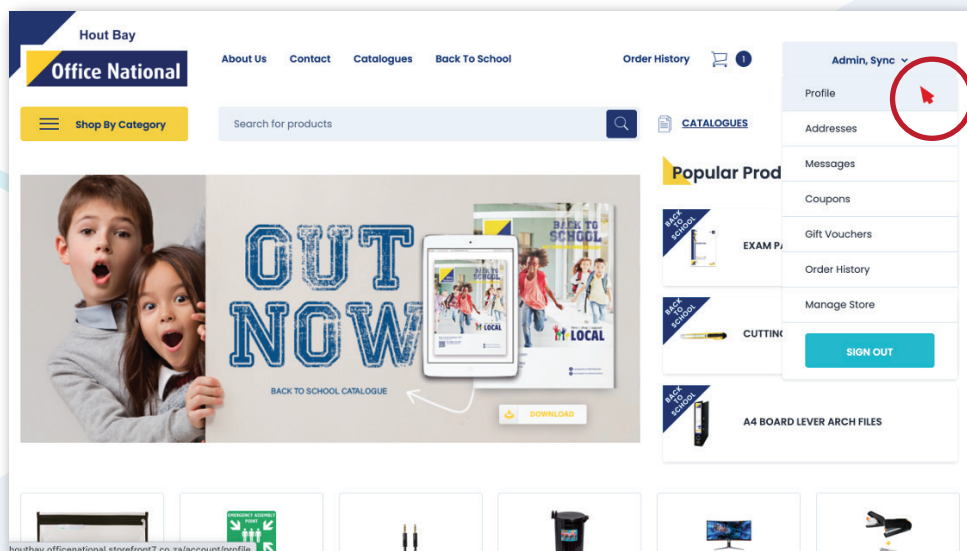
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- Adding new delivery address.....Page 12 – 14
- Approving Orders.....Page 15 – 18

Step-by-step guide to viewing and inviting members, and accepting or declining member invitations

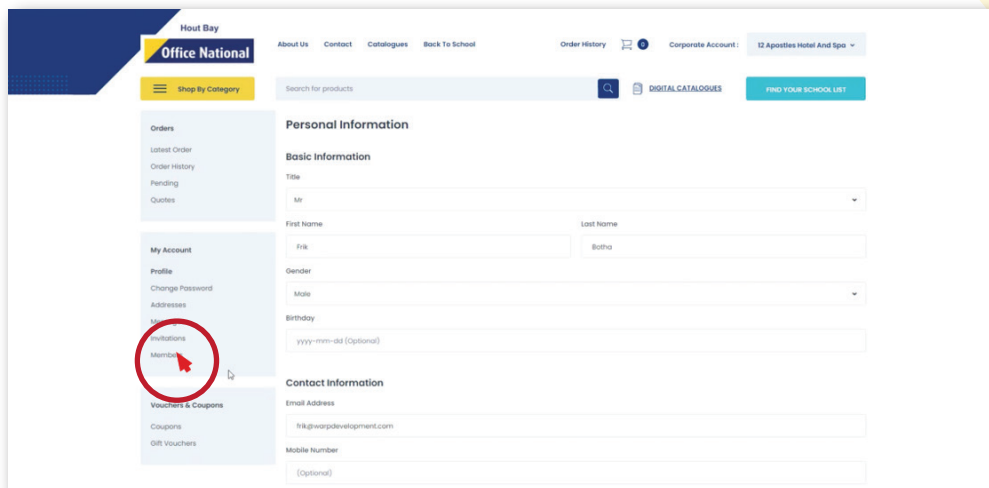
Step 1: To start the process, scroll to your user profile button in the top-right hand corner of the homepage.



Step 2: Once the drop-down menu opens, click on the ***“Profile”*** button.



Step 3: Once the page loads, move your mouse to the “**My account**” column on the left-hand side of the page, scroll down and click on the “**Members**” button.



Office National

Shop By Category

Orders

- Latest Order
- Order History
- Pending
- Quotes

My Account

- Profile
- Change Password
- Addresses
- Messages
- Members**
- Vouchers & Coupons
- Coupons
- Gift Vouchers

Personal Information

Basic Information

Title

Mr

First Name

Frik

Last Name

Botha

Gender

Male

Birthday

yyyy-mm-dd (Optional)

Contact Information

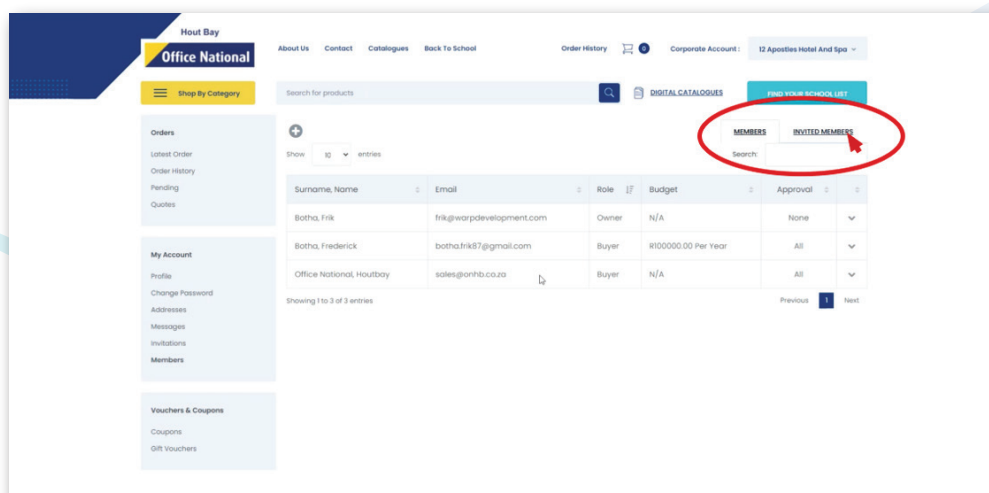
Email Address

frik@warpeddevelopment.com

Mobile Number

(Optional)

Step 4: As seen in the red circle below, the user is then given the option to view the member list, as well as the invited members list. Click on the “**invited members**” text to open up the list.



Office National

Shop By Category

Members

MEMBERS

INVITED MEMBERS

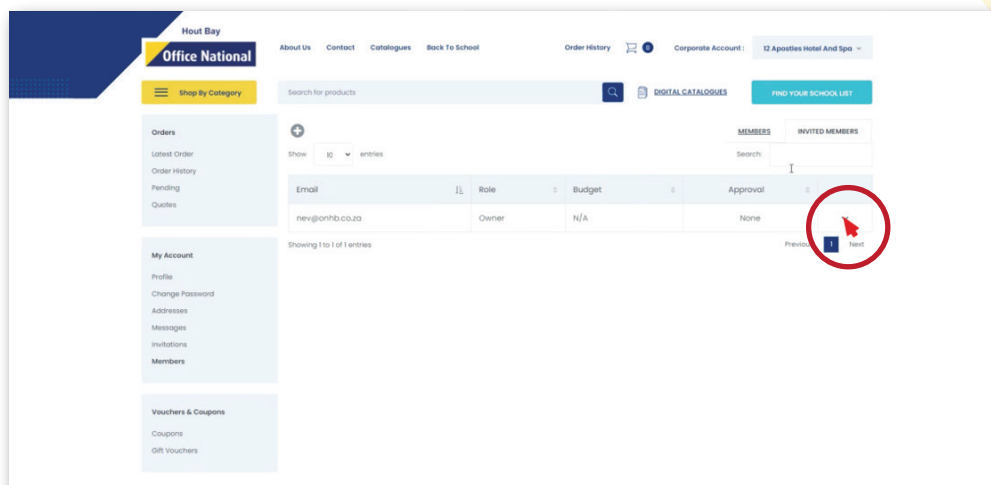
Search

Surname, Name	Email	Role	Budget	Approval
Botha, Frik	frik@warpeddevelopment.com	Owner	N/A	None
Botha, Frederick	botha.frik87@gmail.com	Buyer	R100000.00 Per Year	All
Office National, Houtbay	sales@onhb.co.za	Buyer	N/A	All

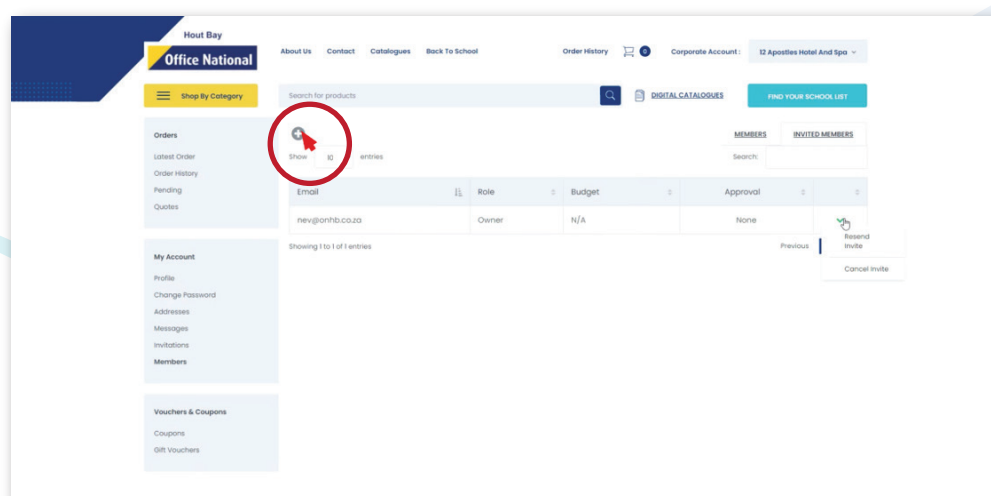
Showing 1 to 3 of 3 entries

Previous 1 Next

Step 5: Should you wish to view the actionable options for the invited members, click on the drop-down arrow on the right-hand side of the row table.



Step 6: The actionable options will display in a drop-down format. One has the option to resend or cancel the invite. To invite a new member to the corporate account, click on the plus button as indicated below.



Step 7: A pop-up box titled “*Invite Member*” will open. Populate all the fields and proceed by clicking on the blue “*Invite member*” button.

Invite Member

If you would like to invite member(s) to join your account, please fill out the details below. Some fields are not required and can be left blank.

PLEASE NOTE: The email(s) you enter will receive the invitation to join your Corporate Account.

Role*

Email(s)*

Budget

Budget Period

Order Approval

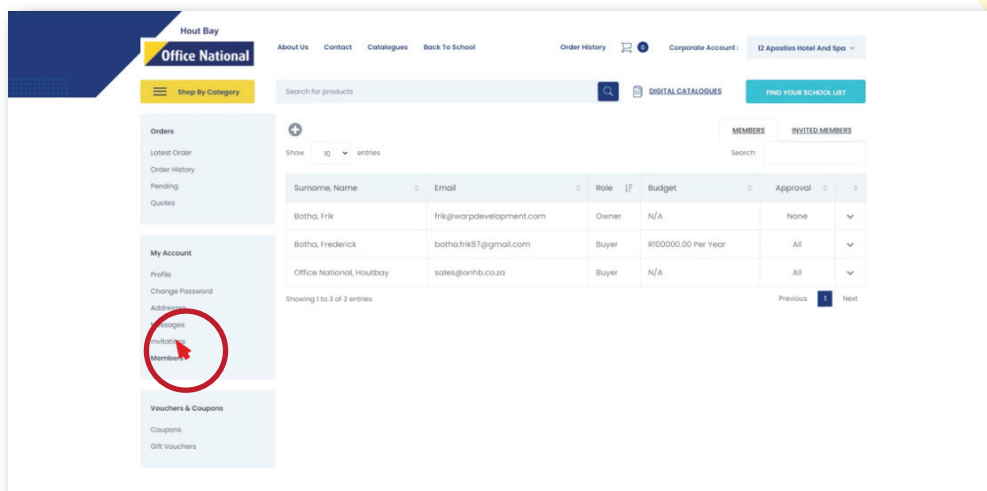
Step 8: The successful completion of the action will be confirmed with a green header bar, as pictured below.

Invitations have been sent.

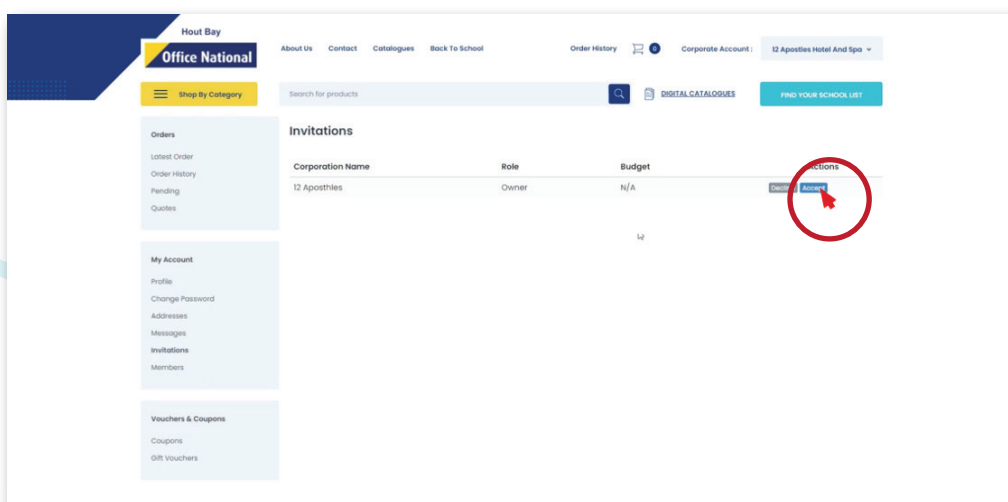
Surname, Name	Email	Role	Budget	Approval
Botha, Erik	erik@warpdevelopment.com	Owner	N/A	None
Botha, Frederick	botha.erik87@gmail.com	Buyer	R100000.00 Per Year	All
Office National, Houtbay	sales@onhb.co.za	Buyer	N/A	All

Showing 1 to 3 of 3 entries

Step 9: The user also has the option of viewing all pending invitations for them, by clicking on the “**Invitations**” button in the “**My Account**” section on the left-hand side of the page.

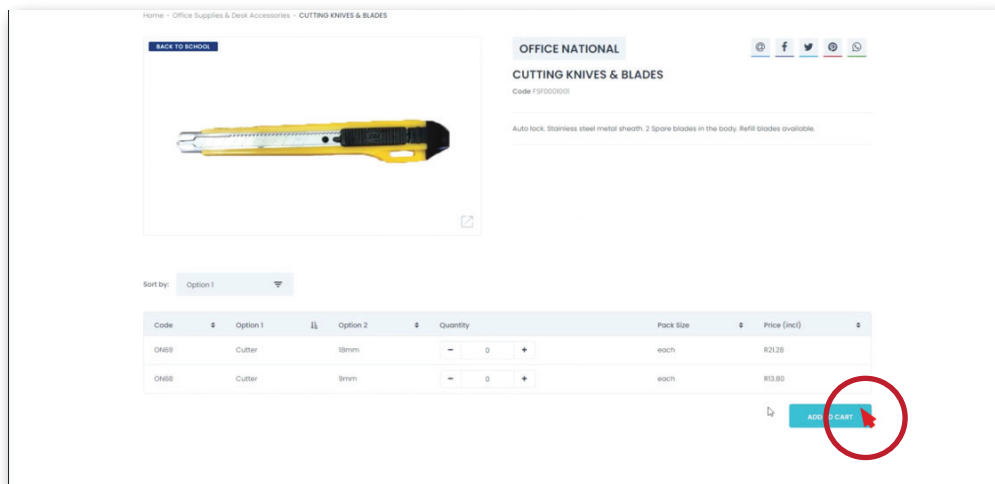


Step 10: Once the page loads, the user can “**Decline**” or “**Accept**” the invitation by clicking on their preferred action.

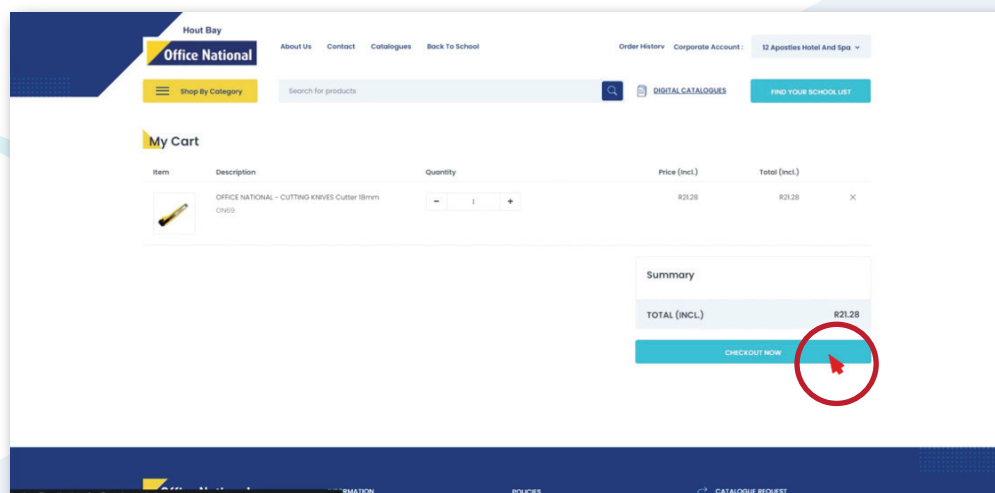


Step-by-step guide to placing orders for delivery on a corporate account

Step 1: Once you have identified the product that you want to purchase and specified the quantity that you want, proceed by clicking on the blue **“Add to cart”** button.



Step 2: Once you are ready to complete your purchase, go to your cart, where you click on the **“Checkout Now”** button.



Step 3: The “*Payment Details*” page will load, where you will be prompted to specify the manner in which you want to receive and pay for the products. Should you wish to have them delivered, click on the “*Delivery*” rectangle.

How would you like to ship this order?

Collection **Delivery**

Do you have a purchase order number?

Purchase Order Number
(Optional)

How would you like to pay?

☐ ACCOUNT TERMS

☐ EFT PAYMENT BY SWITCHPORT

☐ CREDIT CARD BY PAYFAST

Summary [Edit Cart](#)

TOTAL (INCL.) R21.28

By clicking place order you agree to the [T & Cs](#)

[PLACE ORDER](#)

Step 4: Click on the address where you want the products to be delivered.

How would you like to ship this order?

Collection **Delivery**

Order will be delivered to

Frik Botha, Test street 1, Devon Park, 0987654321 (Corporate) [Change](#)

Where would you like this order delivered to?

☐ Wesley 1, Victoria Road, Cape Town, 7700 (Corporate)

☒ Frik Botha, Test street 1, Devon Park, 0987654321 (Corporate)

How would you like to ship this order?

☒ Ship by Courier R 20.00

Do you have a purchase order number?

Purchase Order Number
(Optional)

How would you like to pay?

Summary [Edit Cart](#)

TOTAL (INCL.) R17.02

By clicking place order you agree to the [T & Cs](#)

[PLACE ORDER](#)

Step 5: You are then given the optional step of entering a purchase order number, as seen in the red circle below.

The screenshot shows a checkout page with the following sections:

- Where would you like this order delivered to?**
 - ☐ Wesley L, Victoria Road, Cape Town, 0214379298 (Corporate)
 - ☒ Frikk Botha, Test street 1, Devon Park, 0987654321 (Corporate)
- Order will be shipped by**
 - Ship by Courier [Change?](#)
- Do you have a purchase order number?** (This section is circled in red)
 - Purchase Order Number:
- How would you like to pay?**
 - ☒ ACCOUNT TERMS
 - ☐ EFT PAYMENT BY SWITCH/PORT
 - ☐ CREDIT CARD BY PAYFAST

On the right side, there is a **PLACE ORDER** button and a link to [By clicking place order you agree to the T&Cs](#).

Step 6: You are also given the option to change the means of getting the products. Should you wish to update the delivery or collection specifications, click on the “**Change**” button as seen in the circle below.

The screenshot shows a checkout page with the following sections:

- Payment Details**
- How would you like to ship this order?**
 - ☒ Collection
 - ☐ Delivery
- Order will be delivered to**
 - Frikk Botha, Test street 1, Devon Park, 0987654321 (Corporate) [Change?](#)
- Where would you like this order delivered to?**
 - ☐ Wesley L, Victoria Road, Cape Town, 0214379298 (Corporate)
 - ☒ Frikk Botha, Test street 1, Devon Park, 0987654321 (Corporate)
- Order will be shipped by**
 - Ship by Courier [Change?](#) (This link is circled in red)
- Do you have a purchase order number?**
 - Purchase Order Number:
- How would you like to pay?**

On the right side, there is a **Summary** section with the following details:

Summary	
Subtotal (Incl.)	R67.02
Shipping (Incl.)	R20.00
TOTAL (INCL.)	R40.02

Below the summary, there is a **PLACE ORDER** button and a link to [By clicking place order you agree to the T&Cs](#).

Step 7: The next step is selecting the payment method. If you are shopping on behalf of a corporate account, the “**account terms**” option will be made available to you.

The screenshot shows a checkout page with the following sections:

- Collection / Delivery:** Delivery is selected.
- Order will be delivered to:** Frikk Botha, Test street 1, Devon Park, 0987654321 (Corporate) [Change?](#)
- Where would you like this order delivered to?**
 - ☐ Wesley L, Victoria Road, Cape Town, 0214379298 (Corporate)
 - ☒ Frikk Botha, Test street 1, Devon Park, 0987654321 (Corporate)
- Order will be shipped by:** Ship by Courier [Change?](#)
- Do you have a purchase order number?**
Purchase Order Number:
- How would you like to pay?**
 - ☒ ACCOUNT TERMS (highlighted with a red circle and arrow)
 - ☐ EFT PAYMENT BY SWITCH/STANDARD
 - ☐ CREDIT CARD BY PAYFAST

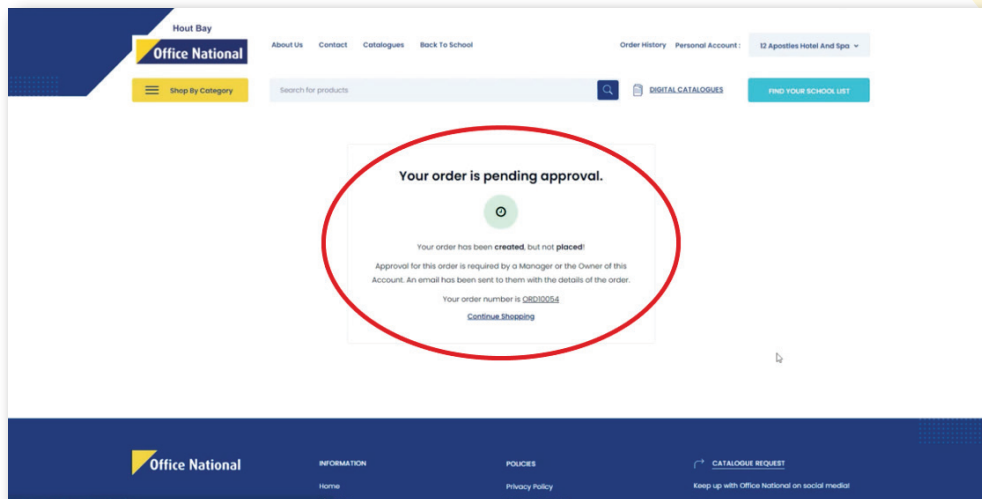
On the right side, there is a summary box:

- Shipping (incl.) R20.00
- TOTAL (INCL.) R40.02**
- By clicking place order you agree to the [T.S.&C.s](#).
- PLACE ORDER** button

Step 8: Once you have selected your payment method, scroll back up and click on the blue “**Place Order**” button.

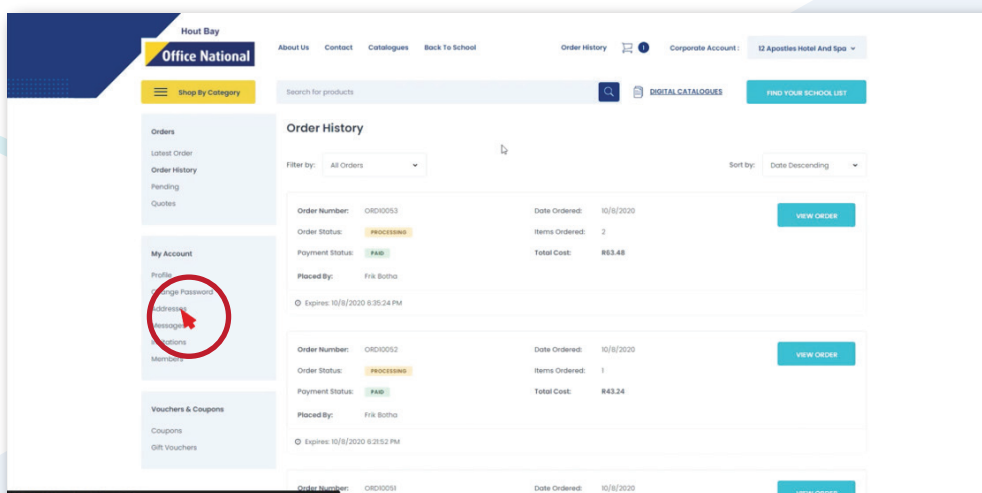
The screenshot shows the same checkout page as in Step 7, but with the 'PLACE ORDER' button highlighted with a red circle and a red arrow. The 'ACCOUNT TERMS' option is still selected. The page layout is identical to the previous screenshot, showing the delivery address, shipping method, and payment options on the left, and the order summary and 'PLACE ORDER' button on the right.

Step 9: Buyers and certain managers do not have the permission to place orders without permission, which is why this process is completed with a confirmation screen, stating that the order is pending approval. Please see below.

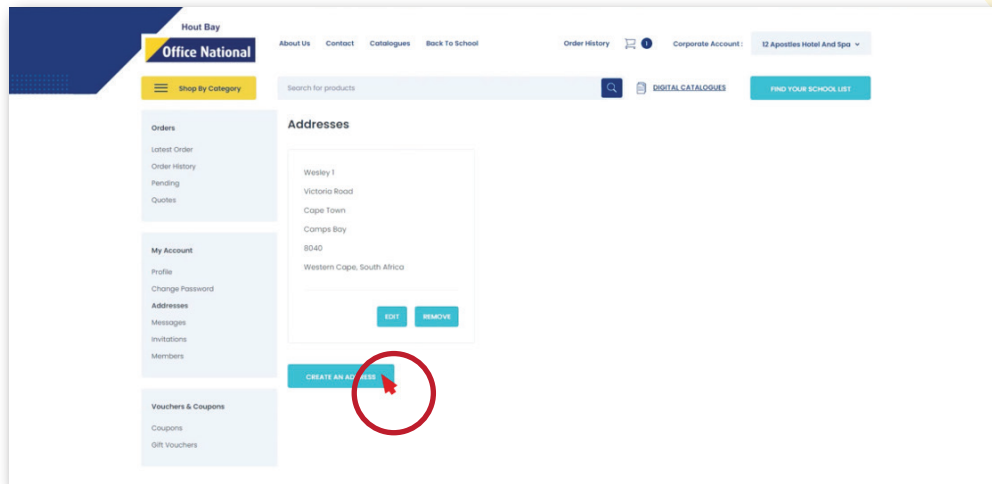


Step-by-step guide to creating a new delivery address for a corporate account

Step 1: On the left-hand side of the page, in the “*My Account*” tab, click on “*Addresses*”.



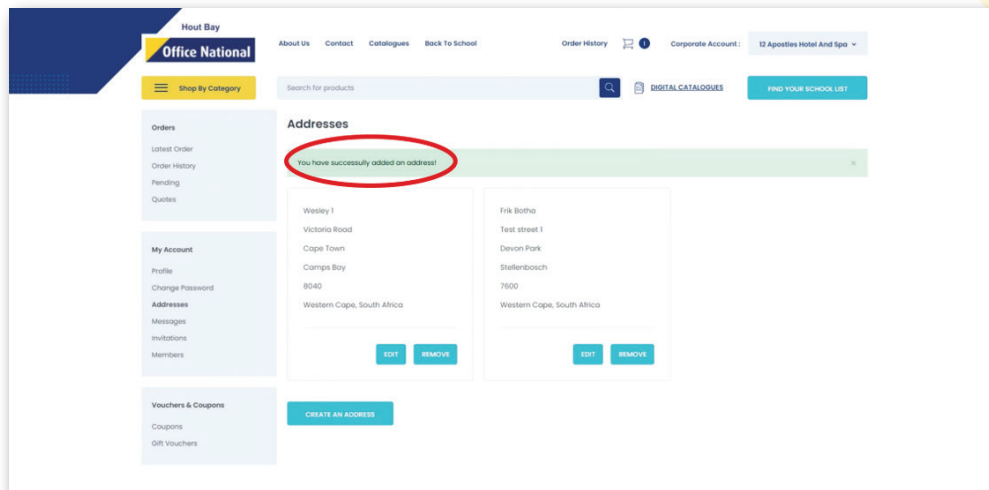
Step 2: Once the “**Addresses**” page loads, scroll down and click on the blue “**Create an Address**” button.



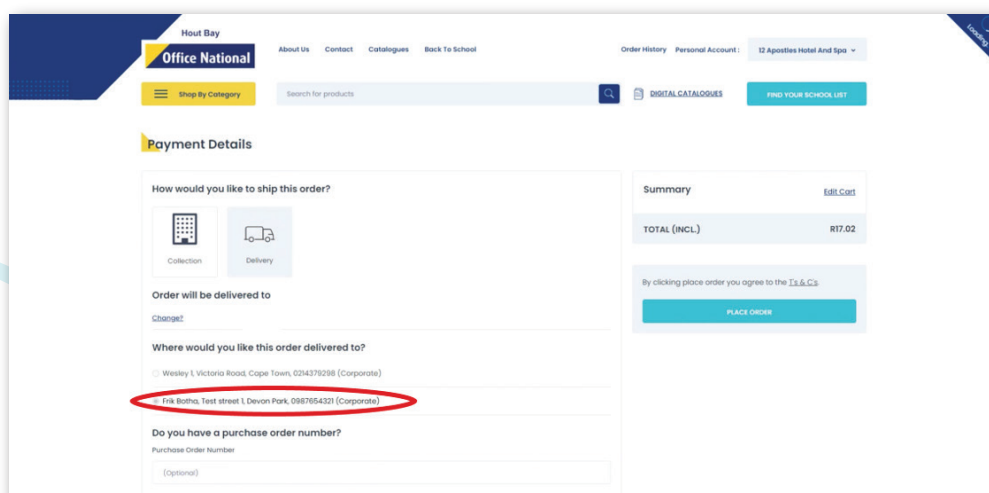
Step 3: Populate all the necessary fields and proceed by clicking on the blue “**Create**” button.

The screenshot shows the 'Create an Address' form. The form is divided into two main sections: 'Contact' and 'Address'. The 'Contact' section includes fields for 'Name *', 'Surname *', 'Email *', and 'Contact no *'. The 'Address' section includes fields for 'Address Line 1 *', 'Address Line 2', 'Suburb *', 'City / Town *', 'Country', 'Province / State *', and 'Postal / Zip Code *'. A red circle highlights the 'CREATE' button at the bottom of the form.

Step 4: Once the address has been added, the process will be completed with a green confirmation message as seen in the red circle below.



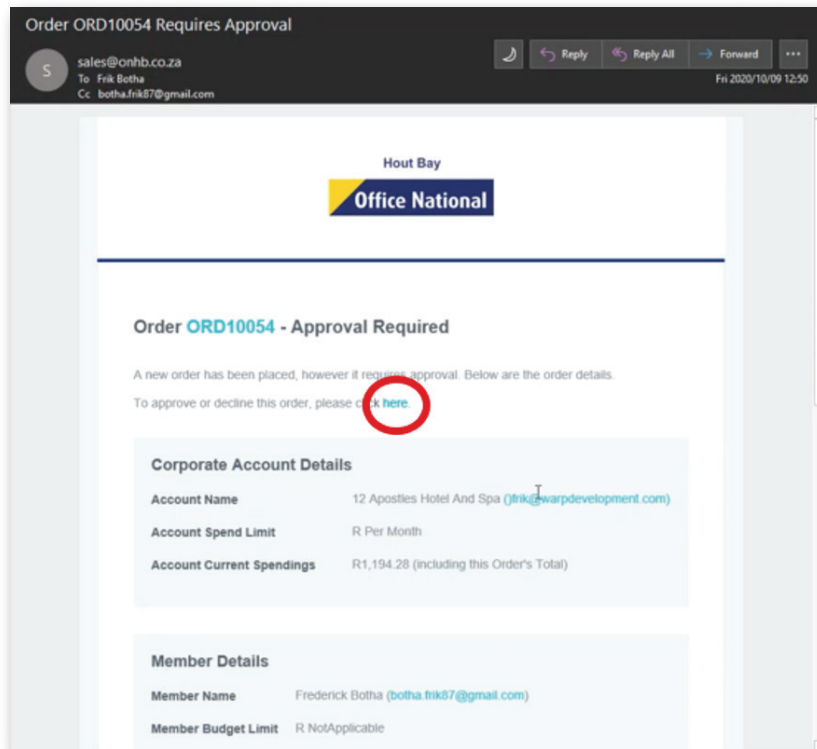
Step 5: The new address will now be loaded on the “*Payment Details*” page, thereby providing you with the option to have it delivered at the specified location.



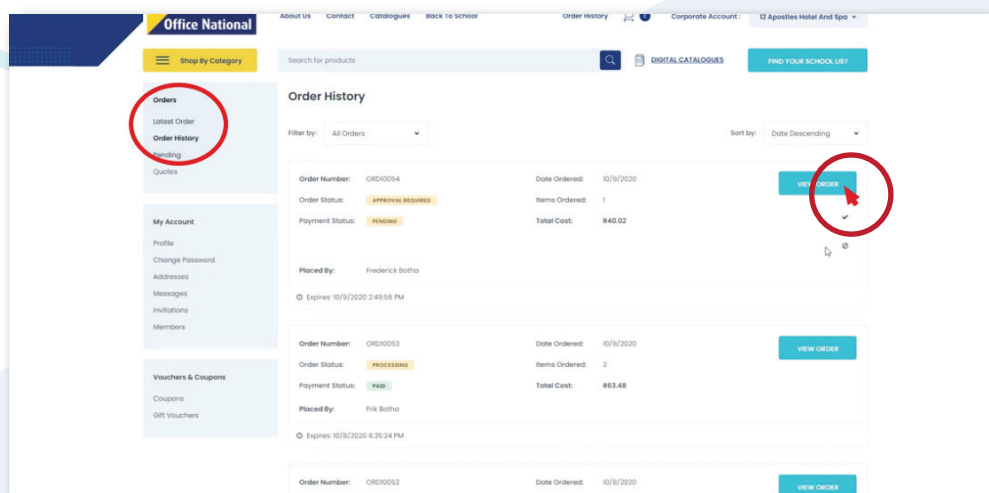
Step-by-step guide to approving orders.

Below is a simple guide for eligible individuals to approve orders

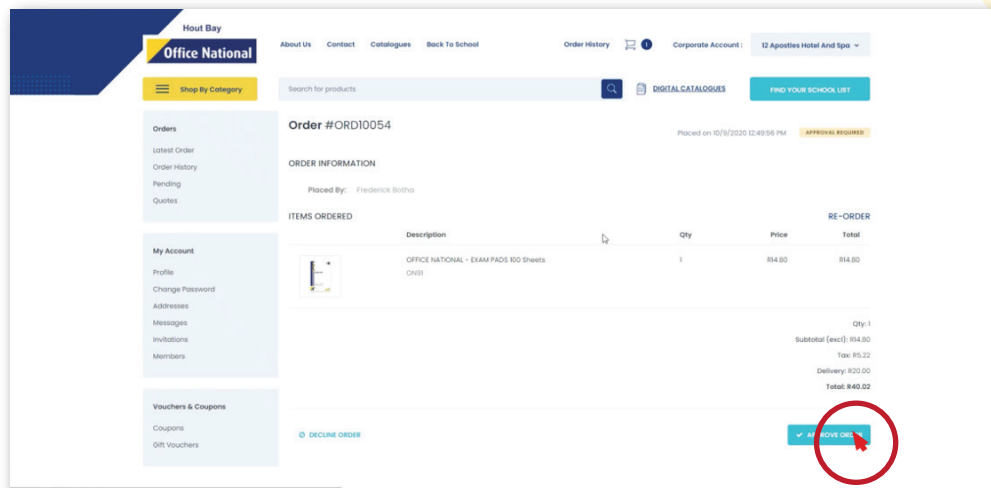
Step 1.1: The process can commence in one of two ways. When orders are placed, managers or owners will receive an automated email, where the order can be viewed. Click on the blue “*here*” button to start the approval process.



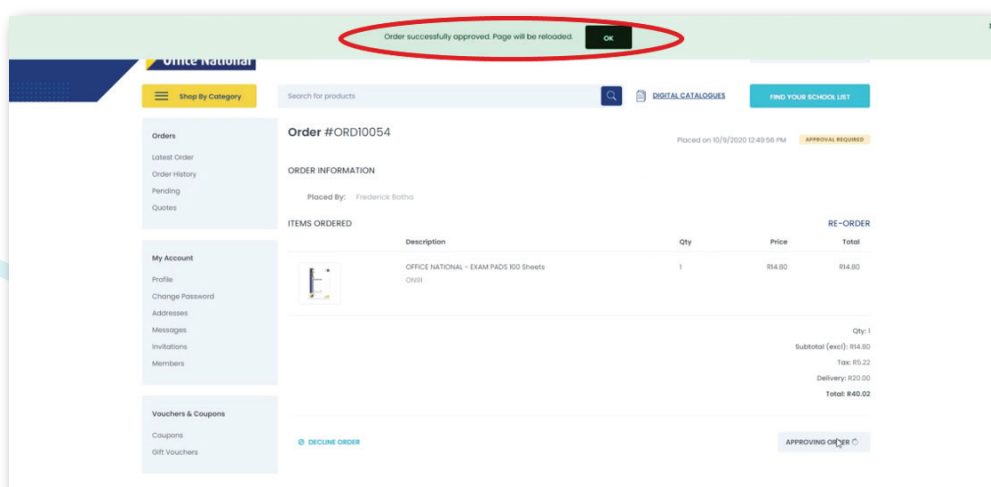
Step 1.2: Alternatively, the user can go to the “*Orders*” tab on the left-hand side of the page, and click on the “*Order History*” option. After clicking on the “*order history*” button, locate the order and click on the blue “*View order*” button.



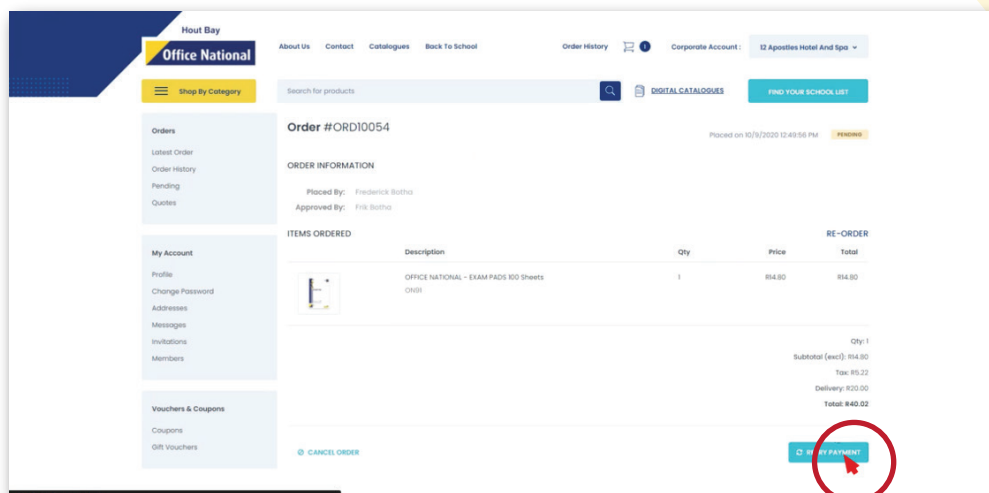
Step 2: Both of these starting points will direct the user to the order's page, where they proceed by clicking on the blue **“Approve Order”** button at the bottom of the page.



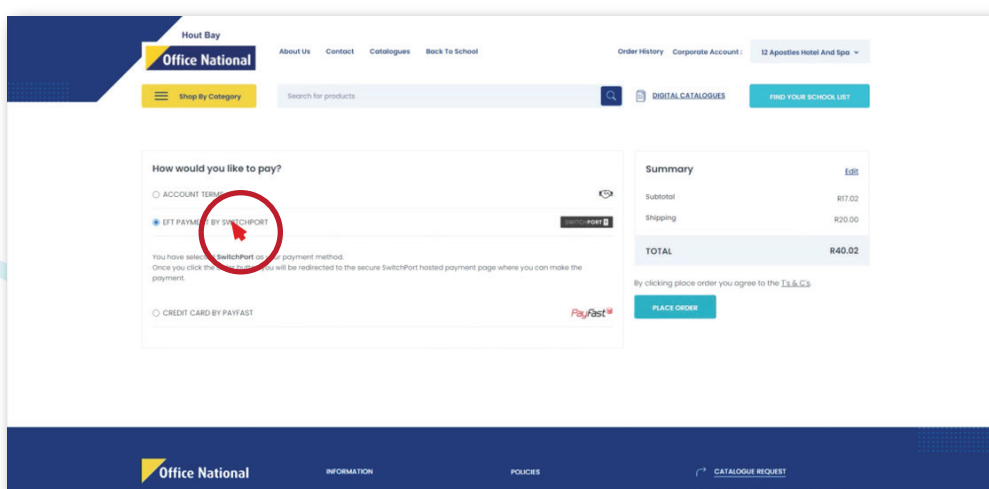
Step 3: Once clicked, an order approval message will pop-up at the top of the screen in the form of a green banner.



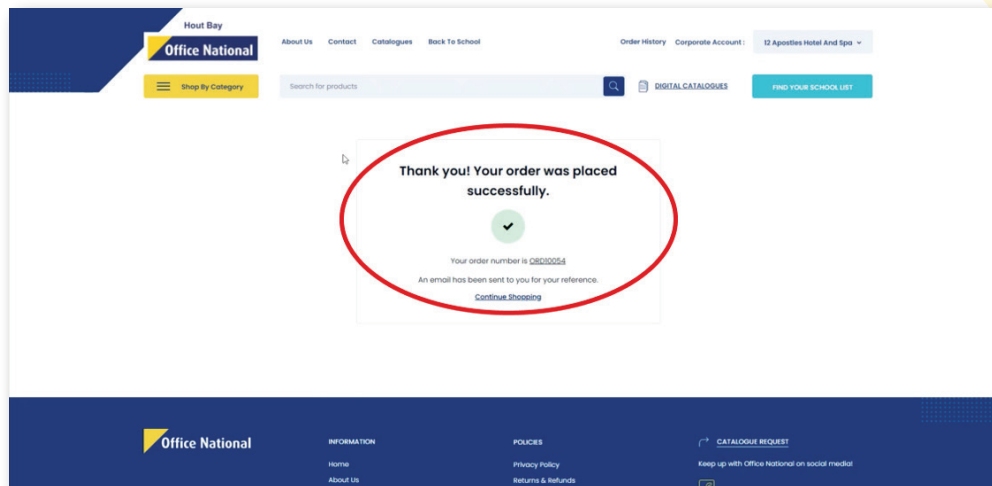
Step 4: The green banner will automatically disappear, directing the user to a crucial next step. The order payment then needs to be retried, thereby acting as a two-factor authentication method for payments. To do so, click on the blue **“Retry Payment”** button.



Step 5: Once clicked, the user is directed to the payment options page, where they are prompted to select their payment method. Once you have selected their payment method, proceed by clicking on the blue **“Place order”** button.



Step 6: Once the order is completed, a pop-up message providing you with confirmation will appear.



Step 7: For the sake of ensuring that the order was successfully approved, return to the “**Order History**” page, and check whether the status has changed to “**Approved by**”.

