



RI Advice
Online User Manual for Staff & Practices
2013

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1. Introduction

Welcome to RI Advice's online ordering site. This site is provided by GEON Group, RI Advice's print management provider.

The system is entirely web-based and requires no loading of special programmes on your computer. The system will allow you to:

- Place orders online easily
- See a thumbnail of your documents
- Print and download PDFs of the document
- Track your orders
- Create favourite order templates

Like anything new, there is an initial familiarisation period as you get to know the software and explore its features. We appreciate this and have provided a range of support functions outside this manual.

Accompanying this User Manual is a comprehensive Frequently Asked Questions (FAQs). If you have questions about using the system, please check the FAQs first to see whether your question is answered here.

If you have further enquiries please call the Helpdesk on 1300 556 770 where a GEON Group consultant will assist you.

The system also has a help facility on each page accessed by clicking on the 'Help' icon.

Minimum requirements

GEONline can be used with most W3C compliant browsers, however for commercial reasons; PCs and laptops with the following specifications only are supported:

Hardware

- Configuration (including network connectivity), which will support internet access, and speeds commensurate with acceptable organisational levels. A minimum connection speed of 1mbps per user is recommended.
- Minimum Screen resolution - 1024x768

Software

- Internet Explorer 7 / 8
- Firefox 3.6.x

*Cookies must be enabled

*Java-script must be enabled

About this manual

This manual is as much a tutorial as a reference guide. While GEONline functions are built to be intuitive, this guide has been designed as a step-by-step guide on how to login and place orders.

2. How to Sign In

Step 1

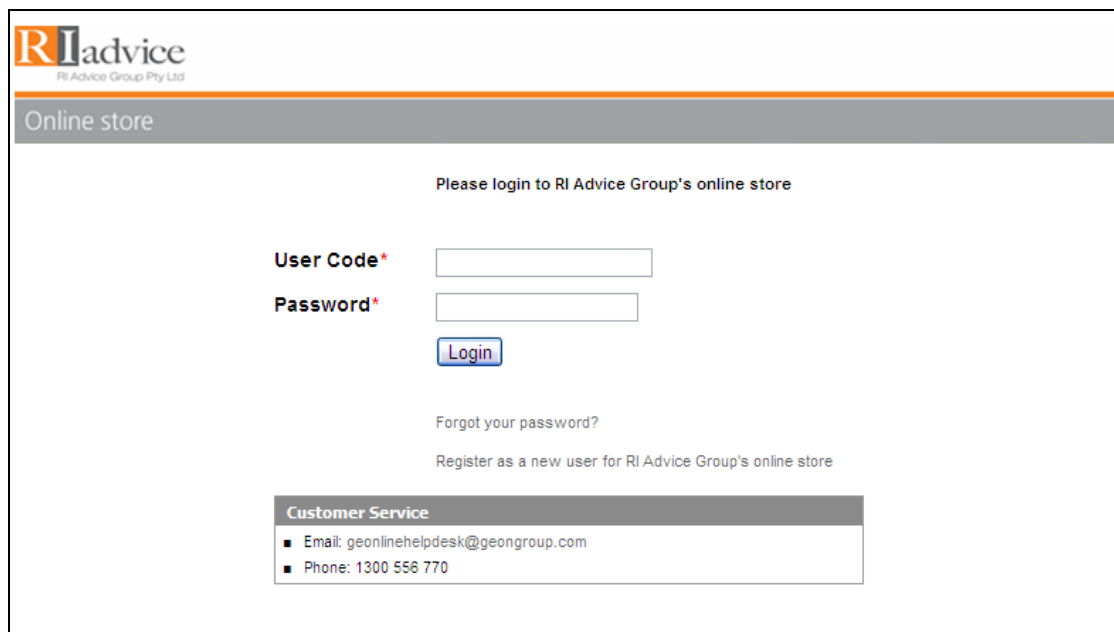
Start your internet browser and go to <https://riadvice.geononline.com>

Step 2

Enter your User Code and Password in the fields provided and click Login. Please remember that your Password is case-sensitive. If you have forgotten your password or would like to change it, please contact the Help Desk:

Ph: 1300 556 770

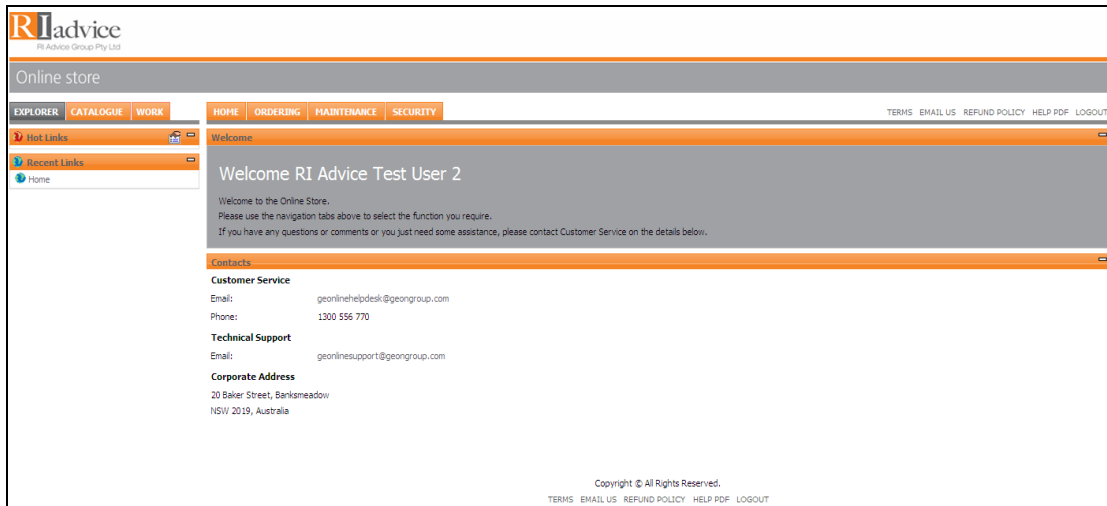
Email: geonlinehelpdesk@geongroup.com



The screenshot shows the login page for the RI Advice Group online store. At the top left is the RI Advice logo with the text 'RI Advice Group Pty Ltd' below it. A grey bar with the text 'Online store' is positioned below the logo. The main content area has the heading 'Please login to RI Advice Group's online store'. Below this heading are two input fields: 'User Code*' and 'Password*', each followed by a text box. A blue 'Login' button is located below the password field. Below the login button are two links: 'Forgot your password?' and 'Register as a new user for RI Advice Group's online store'. At the bottom of the page is a grey bar with the heading 'Customer Service' and a white box containing two bullet points: 'Email: geonlinehelpdesk@geongroup.com' and 'Phone: 1300 556 770'.

3. Home Page

Once logged in, you will be presented with a Welcome HOME page similar to the following:



Explorer Bar Overview

- *Explorer* tab – Enables you to set up *Hot Links* for your most frequently used screens
- *Catalogue* tab has the following work areas:
 1. *Cart* - Shows items waiting for checkout in your shopping cart
 2. *Search* - Simple and Advanced search facility for all catalogued items
 3. *Favourites* - Set up and manage favourites for items that are frequently ordered
 4. *Browse* – Enables browsing through product groups within the catalogue
- *Work* tab – Snapshot of orders in cart pending request

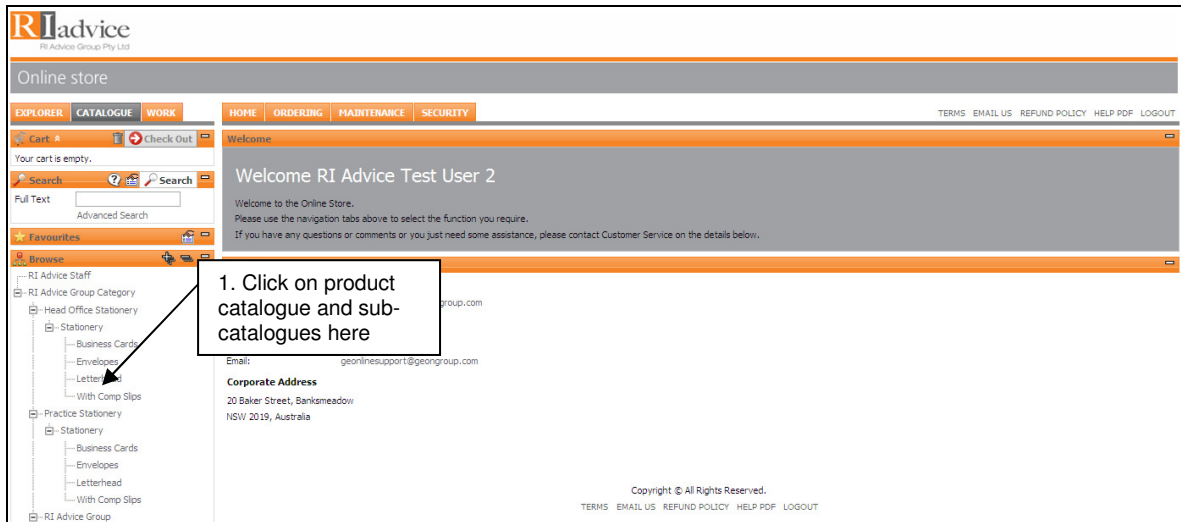
Navigation Bar Overview

- *Home* tab – Takes you back to the Home page
- *Ordering* tab – A drop-down menu enabling you to manage product orders
- *Maintenance* tab – Enables you to administer personal functions
- *Security* tab - User administration

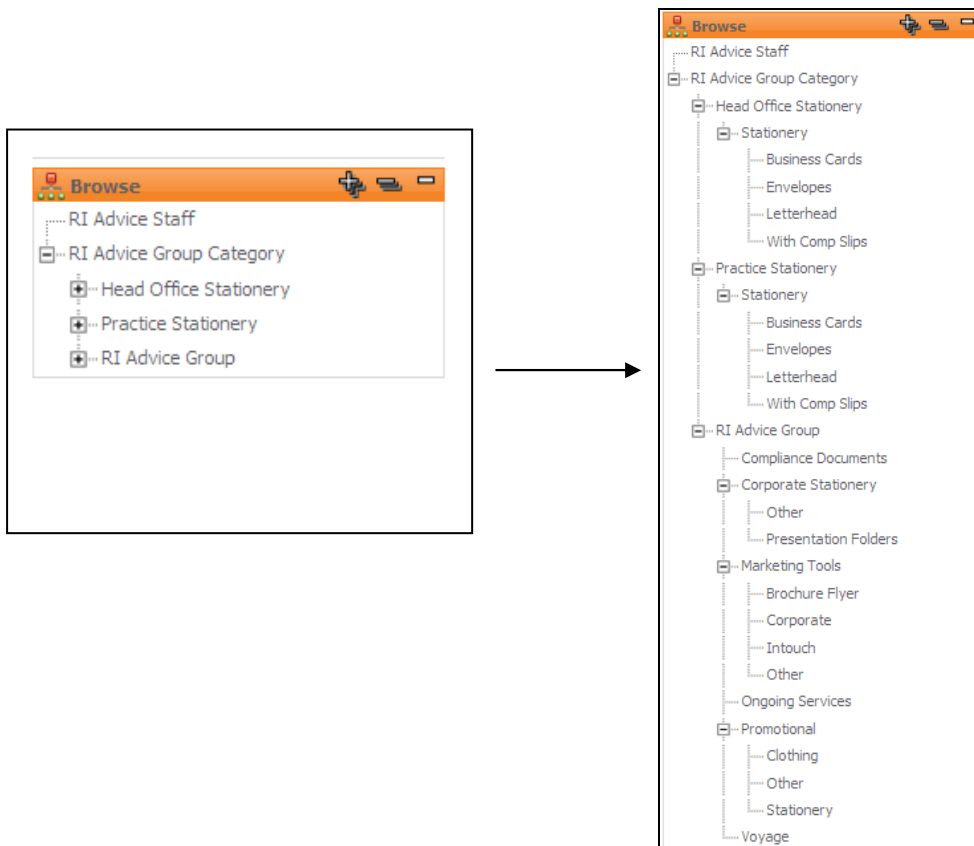
4. How to Create and Submit an Order

Step 1

Click the Staff catalogue on the left hand side of the screen under the Browse section. This will open the catalogue listing as illustrated in the screen preview below



Any catalogues that have a plus (+) sign beside them, can be expanded further to view the contents within this category as illustrated.



Step 2

1. When you click on the product sub-group that you wish to browse, the products in this group will appear in the main body of the screen. This will include:
 - RI Advice product code
 - Image of the product that can be downloaded as a low resolution PDF
 - Unit of measure
 - Stock availability
 - Order button
2. Once you have located the item you wish to select, enter the quantity in the box provided.
3. You then click on the Order link at the far right side of the product you wish to order. This will add the item to your Shopping Cart.

To add more products to your Shopping Cart, you simply follow the above steps again.

4. When your Shopping Cart is complete, click on the Check Out button. The 'Check Out' option navigates you to the checkout area of the online solution where you can preview your cart before completing the necessary delivery details.
 - a. To empty the contents of the cart if you have added incorrect products/quantities to your shopping cart click on the rubbish bin icon.

The screenshot shows an online shopping interface with several callout boxes pointing to specific elements:

- 1. Select product group you wish to browse:** Points to the 'Browse' menu in the left sidebar.
- 2. Enter quantity of the product you need:** Points to the quantity input box for the product 'RI279M - RI Mens TShirts (30)'. The quantity '24' is entered.
- 3. Click on 'Order' button:** Points to the 'Order' button in the 'Action' column of the product row.
- 4. Click on 'Check Out' to complete order:** Points to the 'Check Out' button in the top navigation bar.
- 4a. Click on bin to clear cart:** Points to the trash bin icon in the top navigation bar.

Description	Packs Per Outer	Stock Level	Price	Pack Unit	Quantity	Action
RI279M - RI Mens TShirts (30) - Order RI279M/36892	0	In Stock 653	\$0.00	EACH	<input type="text" value="24"/>	Order Details Favourite
RI279M - RI Mens TShirts (30) - Order RI279M/36892		In Stock 641	\$0.00	EACH	<input type="text" value="24"/>	Order Details Favourite

Step 3

If you have access to more than one (1) Cost Centre, 'Select' the appropriate cost centre the product/s will be charged against; otherwise go to next step.

Account Number	Cost Centre Name	City	Country	Account Status	Action
21RIADVICE	RI Advice		India	Active	Select
21RI10375	10375 - RetireInvest Newcastle		India	Active	Select
21RI10376	10376 - RetireInvest Parramatta	Parramatta	Australia	Active	Select
21RI10379	10379 - RetireInvest Nowra	Nowra	Australia	Active	Select
21RI10382	10382 - RetireInvest Woden	Phillip	Australia	Active	Select
21RI10385	10385 - RetireInvest Castle Hill	Castle Hill	Australia	Active	Select
21RI10386	10386 - RetireInvest Bondi	Bondi Junction	Australia	Active	Select
21RI10389	10389 - RetireInvest Hurstville	Hurstville	Australia	Active	Select
21RI10390	10390 - RetireInvest Hornsby	Hornsby	Australia	Active	Select
21RI10396	10396 - RetireInvest Mona Vale	Mona Vale	Australia	Active	Select
21RI10397	10397 - RetireInvest Werrimbee	Werrimbee	Australia	Active	Select
21RI10405	10405 - RetireInvest Moonee Ponds	Moonee Ponds	Australia	Active	Select

Minimum and Maximum Limits

When ordering a product that is over/under the minimum and maximum quantities, the online solution will automatically round up/down your order quantity to fall within the defined thresholds; a message will notify you when clicking the 'Check Out' button.

Order Details

Order Number: 222832
Status: Draft
Created by: Michael Sutjadi - RI Practice
Cost Centre Name: 10379 - RetireInvest Nowra

Date Raised: 16/02/2013 6:43 AM
Date Submitted: [C]
Date Approved: [C]
Date Last Modified: 16/02/2013 6:43 AM
Reference: [C]
Operator Comments: [C]

Delivery

Company Name: 10379 - RetireInvest Nowra
Contact: Michael Sutjadi - RI Practice
Originator's Email: michael.sutjadi@geongroup
Delivery Comments: [C]

Address Line 1: 1st Floor Hot Centre
Address Line 2: 31 Kinghorne St
City: Nowra
State: NSW
Post Code: 2541
Country Name: Australia

Order Items

Product Code	Description	Quantity	Pack Unit	Action
RI276M/0101	RI Mens TShirts (5XL) - Unit of 1	5	EACH	Edit Delete

The maximum order quantity for [RI Mens TShirts (5XL) - Unit of 1] is 5. This line has been decreased from 7 to 5.

You can quickly identify the minimum and maximum quantities assigned to a stock item by clicking on the 'Product Description' of any product and then clicking on the 'Stock' tab which will bring up the stock metrics as identified below.

The screenshot shows a web application interface with a navigation menu at the top (EXPLORER, CATALOGUE, WORK, HOME, ORDERING, MAINTENANCE, SECURITY) and a search bar. The main content area displays a table of products. A callout box with the text "Click on 'Product Description'" points to the first row of the table.

Description	Packs Per Outer	Stock Level	Price	Pack Unit	Quantity	Action
RI276M - RI Mens TShirts (5XL) - Unit of 1 Customer Stock Code: RI276M/36892	0	In Stock 653	\$0.00	EACH	<input type="text"/>	Order Details Favourite
RI275M - RI Mens TShirts (3XL) - Unit of 1 Customer Stock Code: RI275M/36892		In Stock 641	\$0.00	EACH	<input type="text"/>	Order Details Favourite

The screenshot shows the 'Product Details' - 'Stock' tab for product RI276M. The 'Min Qty' and 'Max Qty' fields are highlighted in yellow.

Product Details	Price	Stock	Groups
Code		RI276M	
Description		RI Mens TShirts (5XL) - Unit of 1	
Stock Level		<input type="text" value="653"/>	Quantity On Hand <input type="text" value="653"/>
Pack Unit		<input type="text" value="Single item"/>	Quantity On Order <input type="text" value="0"/>
Pack Size		<input type="text" value="1"/>	Quantity Quarantined <input type="text" value="0"/>
Packs Per Outer		<input type="text" value="0"/>	Quantity in Production <input type="text" value="0"/>
Min Qty		<input type="text" value="1"/>	
Max Qty		<input type="text" value="5"/>	
Quantum Order Quantity		<input type="text" value="1"/>	

Step 4

- 'After selecting the 'Check Out' button you will be taken to the Order Details screen. Add a 'Reference' if required. The Reference is a free text field that can be used to type in purchase order numbers, contact names, reference numbers etc., as a way of differentiating orders.

Step 5

- The delivery address provided on the registration page will automatically populate the required fields.
- If you wish to modify the pre-populated address, simply write over the existing address. You can also save this as your default address by selecting the 'Save as Default Address' option below the address fields.
- To complete the order, click on the Submit Order button and your order will be processed.

The screenshot shows the 'Order Details' screen in a web application. The interface includes a navigation bar at the top with 'HOME', 'ORDERING', 'MAINTENANCE', and 'SECURITY'. The main content area is divided into sections: 'Order Details', 'Delivery', and 'Order Items'. The 'Order Details' section contains fields for Order Number (222632), Status (Draft), Created by (Michael Sutjadi - RI Practice), and Cost Centre Name (10379 - Retireinvest Nowra). The 'Delivery' section contains fields for Company Name, Contact, Originator's Email, and Delivery Comments, along with address fields (Address Line 1, Address Line 2, City, State, Post Code, Country Name). The 'Order Items' section shows a table with columns for Product Code, Description, Quantity, and Pack Unit. A red box highlights a message: 'The maximum order quantity for [RI Mens TShirts (5XL) - Unit of 1] is 5. This line has been decreased from 7 to 5.' Annotations with arrows point to various elements: '1. Enter Reference number if desired' points to the Reference field; '2. Delivery address populated, change if required' points to the address fields; '3. Select 'Save as Default Address' to keep new address as default' points to the 'Save as Default' button; and '4. Click on 'Submit Order'' points to the 'Submit Order' button.

HOME ORDERING MAINTENANCE SECURITY TERMS EMAIL US REFUND POLICY HELP PDF LOGOUT

Order Details

Order Number: 222632
Status: Draft
Created by: Michael Sutjadi - RI Practice
Cost Centre Name: 10379 - Retireinvest Nowra

Date Approved: 16/02/2019 6:43 AM
Date Last Modified: 16/02/2019 6:43 AM
Reference:
Operator Comments:

Submit Order Save Save and Exit Exit

1. Enter Reference number if desired

4. Click on 'Submit Order'

Delivery

Company Name: 10379 - Retireinvest Nowra
Contact: Michael Sutjadi - RI Practice
Originator's Email*: michael.sutjadi@geongroup
Delivery Comments:

Address Line 1*: 1st Floor Holt Centre
Address Line 2: 31 Kinghorn St
City*: Nowra
State*: NSW
Post Code*: 2541
Country Name*: Australia

2. Delivery address populated, change if required

3. Select 'Save as Default' to keep new address as default

Save as Default Billing Address Book

Order Items

Product Code	Description	Quantity	Pack Unit	Action
RI276M/0101	RI Mens TShirts (5XL) - Unit of 1	5	EACH	Edit Delete

The maximum order quantity for [RI Mens TShirts (5XL) - Unit of 1] is 5. This line has been decreased from 7 to 5.

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Step 6

Order Submission screen – This screen is the final step in the ordering process and displays your 'Order Number' that can be used to follow-up your products with the GEON Helpdesk. It is important to note this number for any future referencing.

To complete your session click 'Exit'.

Thank you for your order.
The order confirmation will be emailed to you.
Please print this screen or note down the following details for future reference.

Reference	
Net	\$0.00
GST	\$0.00
Total	\$0.00

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Step 7

When your order is successfully processed by the system, you will receive an email notification which will outline all the details of your order.

The order number located in the email is the reference used should you need to validate any information regarding your order with the help desk.

Order Details									
Order Number	206205								
Account Number	21RI10376								
Cost Centre Name	10376 - RetireInvest Parramatta								
Reference									
Order Date	Sat Feb 16 07:01:44 EST 2013								
Order Originator	RI Advice Test User 2								
PRISM Delivery Code	AUS-21RI10376-1								
Address									
Attention: RI Advice Test User 2									
10376 - RetireInvest Parramatta									
RI-Parramatta 1st Floor									
17 - 21 Hunter Street									
Parramatta									
NSW									
Australia									
2150									
Product Code	Customer Stock Code	Description	Order Quantity	Available Quantity	Pack Unit	Unit Price	Line Price	Charge Price	Line Comments
RI276M	RI276M/36892	RI Mens TShirts (5XL) - Unit of 1	5	643	EACH	\$0.00	\$0.00	\$0.00	
Line Total									
Net:	\$0.00								
GST:	\$0.00								
Total:	\$0.00								
Charge Total									
Net:	\$0.00								
GST:	\$0.00								
Total:	\$0.00								
For help with your order please contact the helpdesk on 1300 556 770 or email geonlinehelpdesk@geongroup.com .									

5. Creating a Template Order

The following functionality allows you to create a 'Template Order' which you can re-use as required removing the need to create new orders on every occasion. This feature is particularly beneficial for users who order the same products consistently with a higher than normal frequency pattern.

Step 1

- Click on the 'Ordering' tab
- 'Select 'Template Orders' from the drop-down list which will navigate you to the appropriate screen for creating a template order. Template orders can be used as a short cut should you order the same products repeatedly.' Click on 'Add' to begin configuring your 'Template Order'

1. Click on 'Ordering'

2. Click on 'Template Orders'

3. Click on 'Add'

Step 2

- Select the appropriate 'Cost Centre' by clicking on 'Select'

Account Number	Cost Centre Name	City	Country	Account Status	Action
21RIADVICE	RI Advice	Sydney	Australia	Active	Select
21RI10375	10375 - RetireInvest Newcastle	Newcastle	Australia	Active	Select
21RI10376	10376 - RetireInvest Parramatta	Parramatta	Australia	Active	Select
21RI10379	10379 - RetireInvest Nowra	Nowra	Australia	Active	Select
21RI10382	10382 - RetireInvest Woden	Phillip	Australia	Active	Select

Click on 'Select'

Step 3

- Enter a name against your template so that you can easily access at a later date.
- Click on 'Add' to begin assigning products to your template order.

1. Enter a 'Template Name'

2. Click 'Add' to assign stock to the template

Step 4

- Click on the 'Search' link.

1. Click on the Search link

Step 5

- If you do not know the item code you can search by key words i.e.: Increases. Your search will then return a list of closest matches to your search criteria.
- Once you have located the item you require click the 'Order' link as highlighted to add an item into your template.

1. Enter the product code or key words

2. Click on 'Order' to add product into your template

Step 6

- Click 'Add' to continue adding products to the template order.
- When you have added all the appropriate products into your template click on 'Save and Exit' which will then save the template into your template list for future use.

1. Click 'Add' to continue adding products

2. Click 'Save and Exit' to save your template

Step 7

- To locate your pre-defined templates choose the ordering tab, then select template orders from the drop-down list. Click the clear icon 'C' to remove the date from the 'Date Raised (From)' field.
- Click on the 'Refresh' button which will return a list of all your template orders.
- To use the template, simply click on the 'Use' link and then complete the delivery details and complete your order. Please refer to Step 3 under section Submitting an Order.

1. Click on 'the clear icon

2. Click on Refresh button.

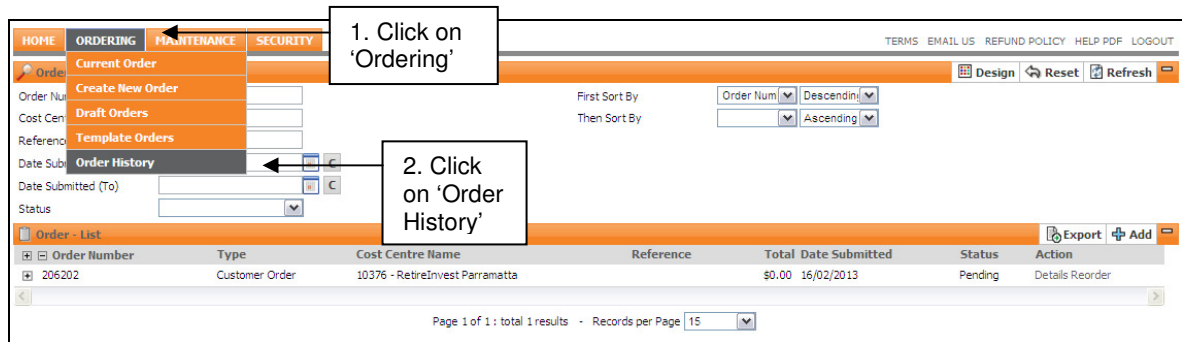
3. Click on 'Use' template

6. Search Order History


The following functionality allows you to search your order history pipeline to follow up on an order or re-use the order details instead of creating a new order from scratch. The status of orders are updated automatically as they are fulfilled by the GEON Warehouse.

Step 1

- Go to the navigational menu on the left of the screen and click on 'Ordering'
- Click on 'Order History' from the drop-down menu



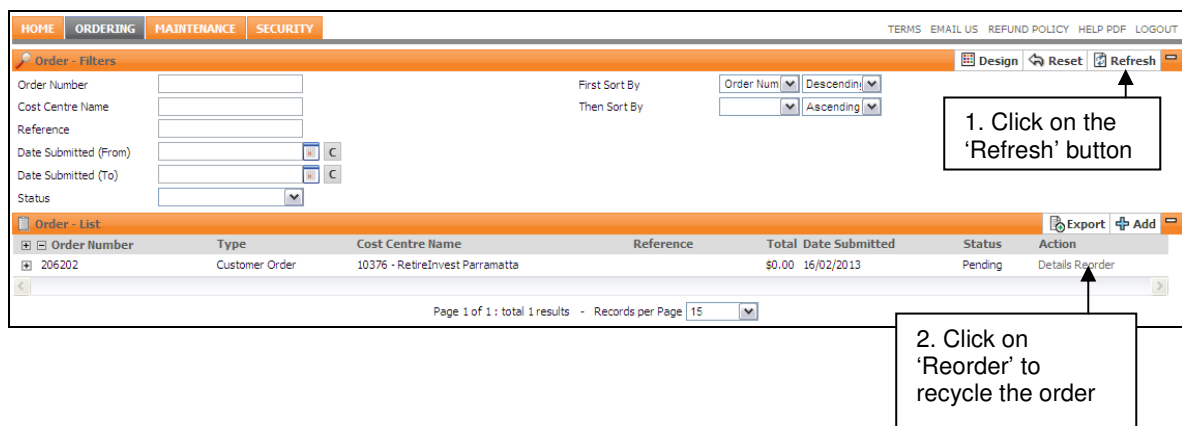
Step 2

- Click the clear icon  to remove the date from the 'Date Raised (From)' field. Click on 'Refresh' to display all previous orders under your user profile.
- Click on the 'Reorder' link if you would like to recycle/re-use your existing order.

This page provides you with a complete history of all orders except draft orders. Note: Draft Orders can be found by clicking on Ordering > Draft Orders.

The Order Number, Cost Centre Name, Reference (if populated), Date Created and Status are all visible on this page so that you can quickly get a view of your order history.

For users with a large order history, you have the option of filtering your history by date, reference, Cost Centre name and number. The search will bring back all closest matches to your search criteria.



7. Search Order History - Reordering

The Order History – Reordering functionality is similar to that of the 'Template Orders'. It allows you to re-use an existing order that you have previously placed without having to re-enter all the product and delivery address details.

By utilising this option you can reduce the processing time of an order. Please refer to Step 2 under section Search Order History.

Step 1

- After you have clicked on the 'Reorder' link, you will be directed to Order Details.

Step 2

- If you wish to modify the pre-populated address, simply write over the existing address. You can also save this as your default address by selecting the 'Save as Default Address' option below the address fields
- To complete the order, click on the Submit Order button and your order will be processed

The screenshot shows the 'Order Details' screen in a web application. The interface includes a navigation bar with 'HOME', 'ORDERING', 'MAINTENANCE', and 'SECURITY'. The main content area is divided into sections: 'Order Details', 'Delivery', and 'Order Items'. The 'Order Details' section contains fields for Order Number (222635), Status (Draft), Created by (Michael Sutjadi - RI Practice), and Cost Centre Name (10385 - Retail). The 'Delivery' section contains fields for Company Name (10385 - RetireInvest Castle Hill), Contact (Michael Sutjadi), Originator's Email (msutjadi@retireinvest.com.au), and Delivery Comments. The address fields include Address Line 1 (8 McMullen Avenue), Address Line 2 (Castle Hill), State (NSW), Post Code (2154), and Country Name (Australia). The 'Order Items' section shows a table with columns for Product Code, Description, Quantity, and Pack Unit Action. The table contains one row with Product Code RI183/0110, Description A4 FSG and Adviser Profile Folder, Quantity 1, and Pack Unit Action PKT20 Edit Delete. Three callout boxes provide instructions: 1. 'You will be directed to the Order Details screen' (pointing to the Order Number field), 2. 'If you have edited the address fields and want to save the address, click the this option' (pointing to the 'Save as Default' button), and 3. 'Click on Submit Order to process your order' (pointing to the 'Submit Order' button). A note below the address fields states: 'To create a user delivery address please enter the address details and press 'Save as Default' before submitting the order. This address will become your editable default address and will be displayed on all future orders.'

1. You will be directed to the Order Details screen

2. If you have edited the address fields and want to save the address, click the this option

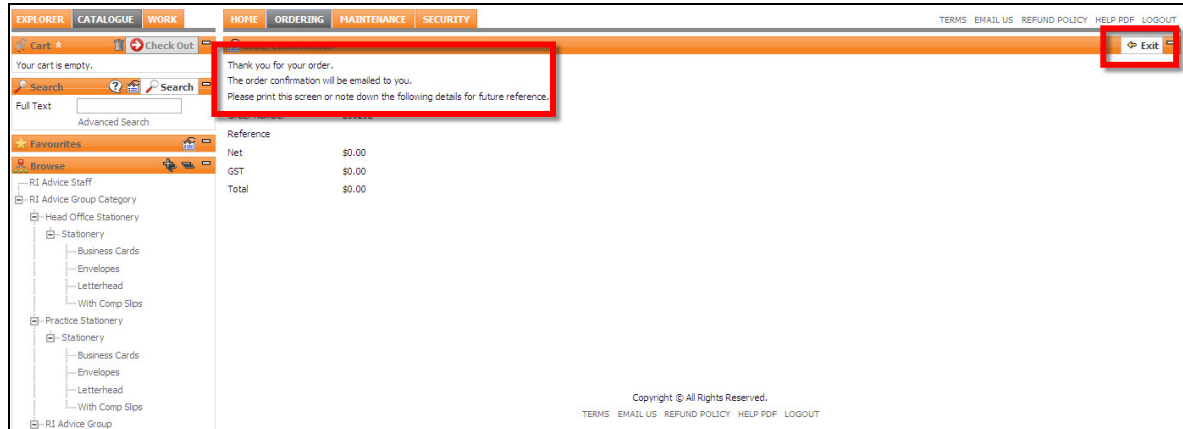
3. Click on Submit Order to process your order

Product Code	Description	Quantity	Pack Unit Action
RI183/0110	A4 FSG and Adviser Profile Folder	1	PKT20 Edit Delete

Step 3

Order Submission Screen – This screen is the final step in the ordering process and displays your 'Order Number' that can be used to follow-up your products with the GEON Helpdesk. It is important to note this number for any future referencing.

Once you have noted your 'Order Number', click on the 'Exit' button highlighted below to navigate out of the 'Order Submission' screen.



Step 4

When your order is successfully processed by the system, you will receive an email notification which will outline all the details of your order including delivery address, contact name, business unit and products ordered.

You can use these emails to build a history of your ordering pattern.

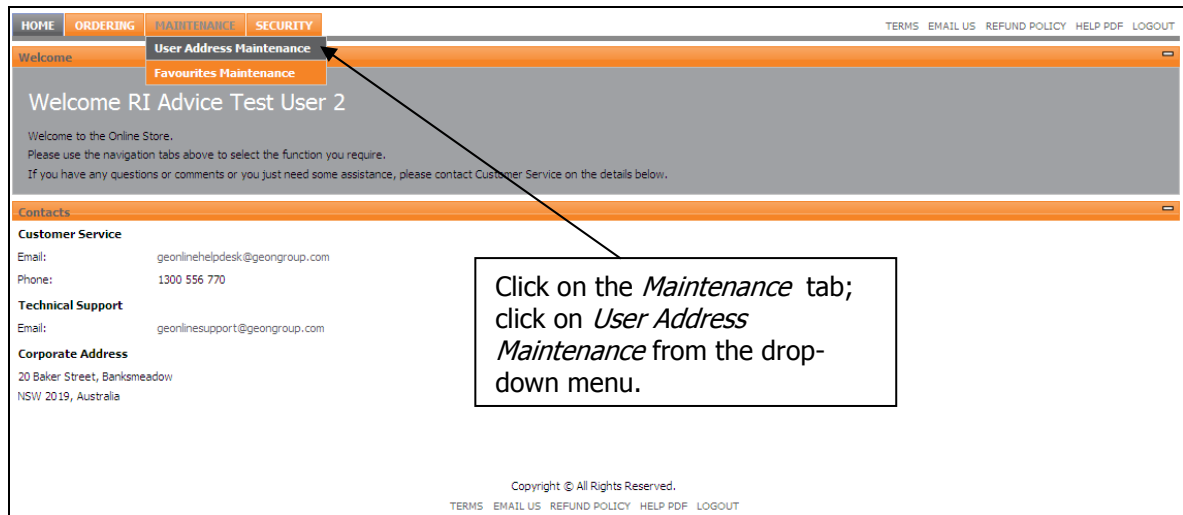
Order Details									
Order Number	206205								
Account Number	21RI10376								
Cost Centre Name	10376 - RetireInvest Parramatta								
Reference									
Order Date	Sat Feb 16 07:01:44 EST 2013								
Order Originator	RI Advice Test User 2								
PRISM Delivery Code	AUS-21RI10376-1								
Address									
Attention: RI Advice Test User 2									
10376 - RetireInvest Parramatta									
RI-Parramatta 1st Floor									
17 - 21 Hunter Street									
Parramatta									
NSW									
Australia									
2150									
Product Code	Customer Stock Code	Description	Order Quantity	Available Quantity	Pack Unit	Unit Price	Line Price	Charge Price	Line Comments
RI276M	RI276M/36892	RI Mens TShirts (5XL) - Unit of 1	5	643	EACH	\$0.00	\$0.00	\$0.00	
Line Total									
Net:	\$0.00								
GST:	\$0.00								
Total:	\$0.00								
Charge Total									
Net:	\$0.00								
GST:	\$0.00								
Total:	\$0.00								
For help with your order please contact the helpdesk on 1300 556 770 or email geonlinehelpdesk@geongroup.com .									

8. Adding an Address

The following section outlines how a user can 'Add' new addresses to their delivery options within the online solution.

Step 1

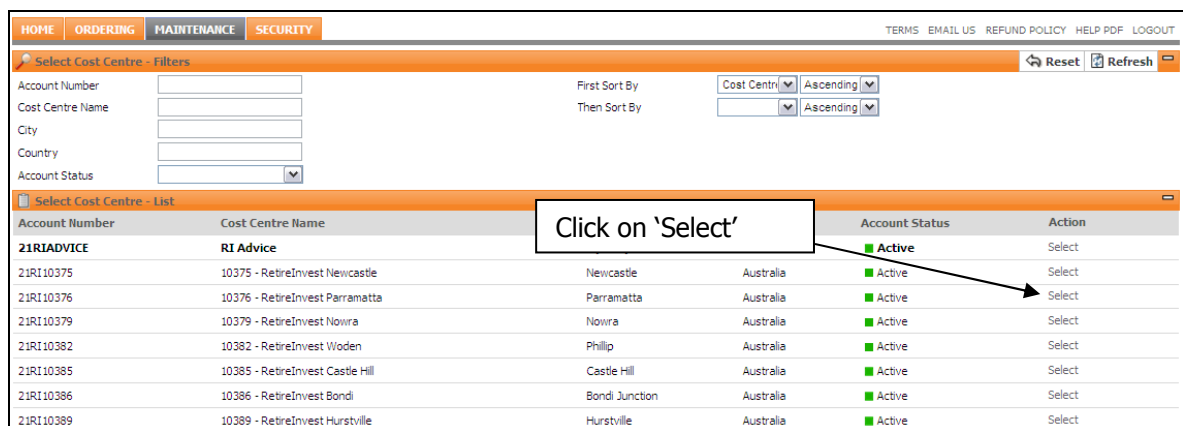
Click on the *Maintenance* tab; click on *User Address Maintenance* from the drop-down menu.



The screenshot shows the top navigation bar with tabs for HOME, ORDERING, MAINTENANCE, and SECURITY. The MAINTENANCE tab is selected, and a dropdown menu is open, showing 'User Address Maintenance' and 'Favourites Maintenance'. A callout box with an arrow points to the 'User Address Maintenance' option. The main content area displays a welcome message for 'RI Advice Test User 2' and contact information for Customer Service, Technical Support, and Corporate Address. The footer contains copyright information and links for TERMS, EMAIL US, REFUND POLICY, HELP PDF, and LOGOUT.

Step 2

If you have access to more than one (1) Cost Centre, 'Select' the appropriate cost centre the product/s will be charged against; otherwise go to next step.



The screenshot shows the 'Select Cost Centre - Filters' section with input fields for Account Number, Cost Centre Name, City, Country, and Account Status. Below this is the 'Select Cost Centre - List' table. A callout box with an arrow points to the 'Select' button in the 'Action' column of the first row.

Account Number	Cost Centre Name	Account Status	Action
21RIADVICE	RI Advice	Active	Select
21RI10375	10375 - RetireInvest Newcastle	Active	Select
21RI10376	10376 - RetireInvest Parramatta	Active	Select
21RI10379	10379 - RetireInvest Nowra	Active	Select
21RI10382	10382 - RetireInvest Woden	Active	Select
21RI10385	10385 - RetireInvest Castle Hill	Active	Select
21RI10386	10386 - RetireInvest Bondi	Active	Select
21RI10389	10389 - RetireInvest Hurstville	Active	Select

The screen will show two Add buttons, "Add Customer Address" and "Add New Address" (fig 1)

(fig 1)

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Add Customer Address – allows the user to set a customer address as a default address.

1. Click *Add Customer Address* button (fig 1)
2. Select the required delivery address (fig 2)
3. Confirm that the address details are correct, alter if necessary (fig 3)
4. Click *Save and Exit* button (fig 3)

(fig 2)

Page 1 of 1: total 1 results - Records per Page 15

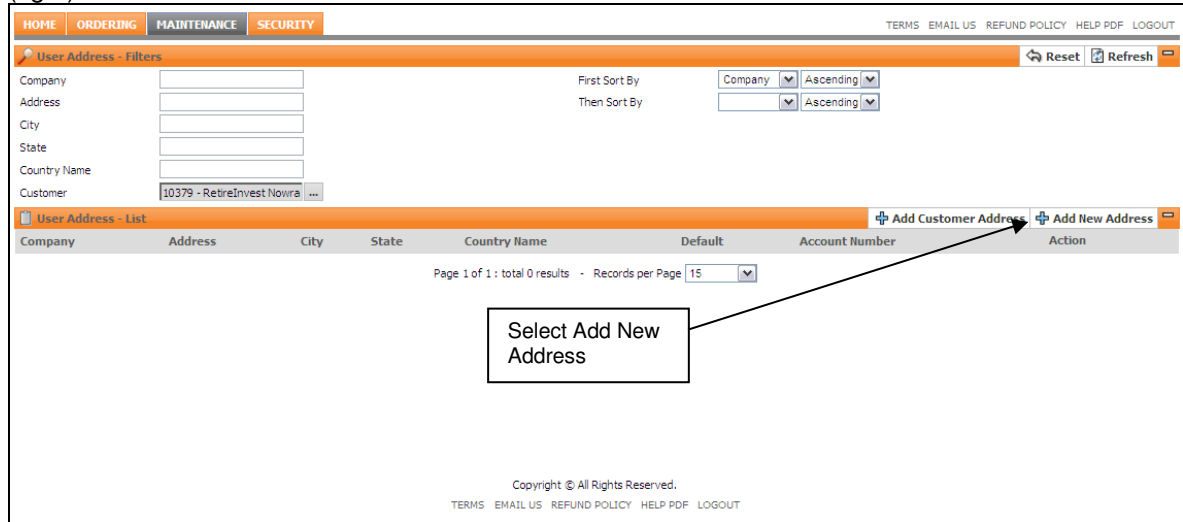
(fig 3)

Save Save and Exit Exit

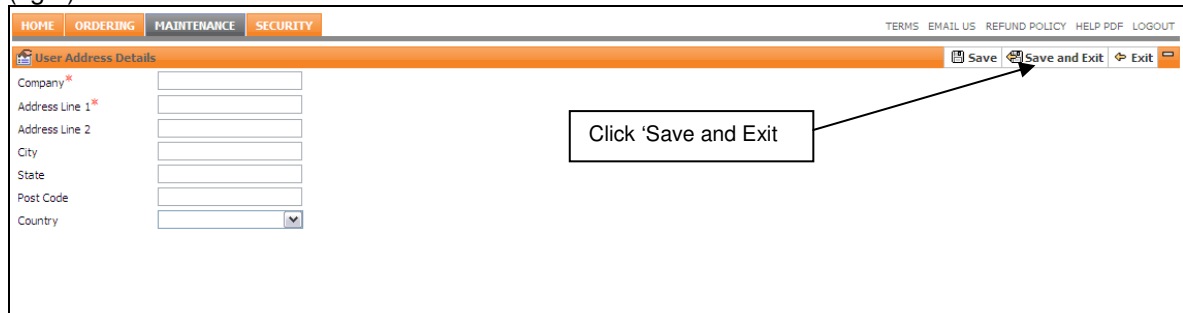
Add New Address – Allows the user to create a new address

1. Click *Add New Address* button (fig 5)
2. Fill out the address fields (fig 6)
3. Click *Save and Exit* button (fig 6)

(fig 5)



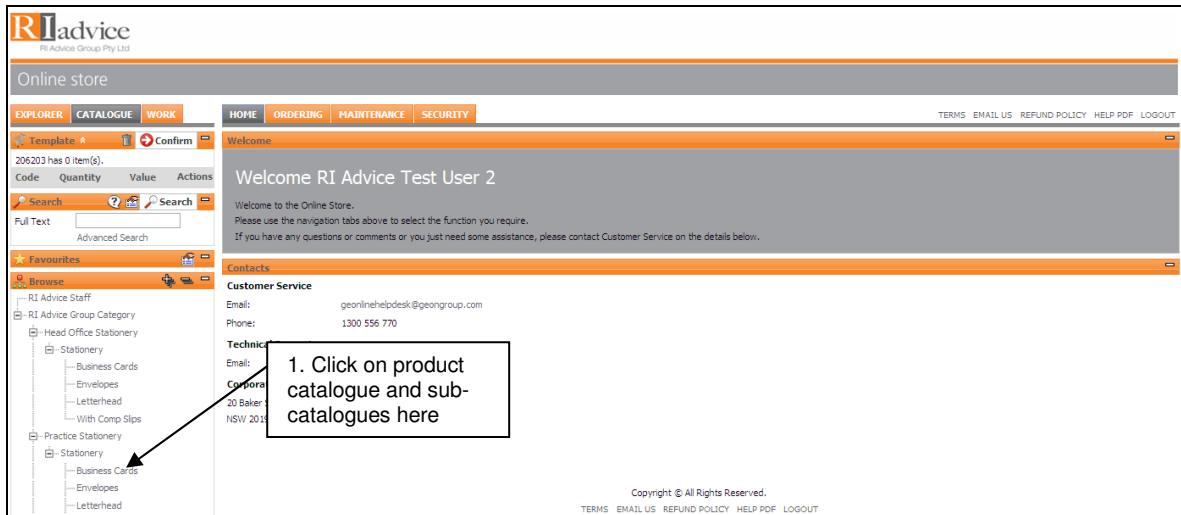
(fig 6)



9. Ordering On Demand Stationery

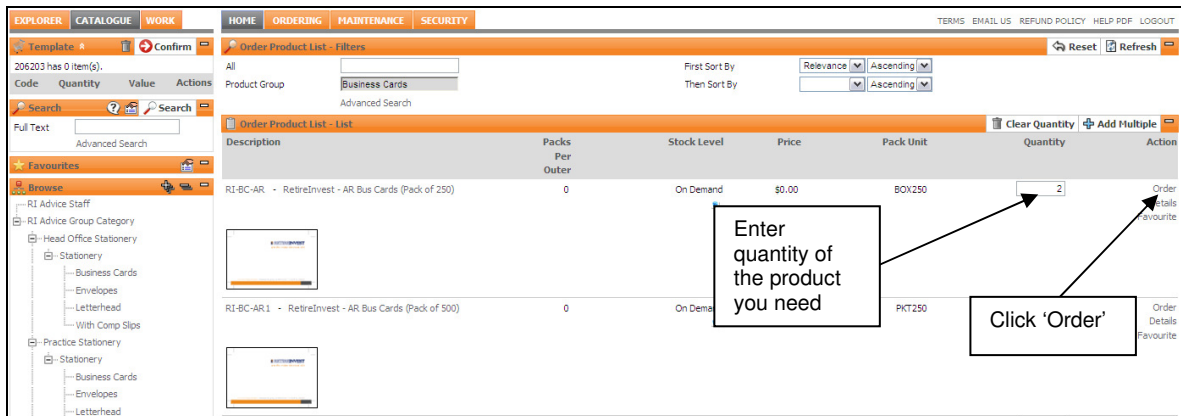
Step 1

Click on the Staff catalogue on the left hand side of the screen under the Browse section. This will open the catalogue listing as illustrated in the screen preview below



Step 2

When you click on the product sub-group that you wish to browse, the products in this group will appear in the main body of the screen.



- Once you have located the item you wish to select, enter the quantity in the box provided.
- You then click on the Order link at the far right side of the product you wish to order. This will add the item to your Shopping Cart.
- Click on the *Order* action, located at the far right side of the product you wish to order.
Note If you have access to more than one (1) Cost Centre Select the relevant Cost Centre (see Step 3), otherwise go to step 4.

Step 3

Click on 'Select'

The screenshot shows a web application interface with a navigation menu at the top (EXPLORER, CATALOGUE, WORK) and a sub-menu (HOME, ORDERING, MAINTENANCE, SECURITY). The main content area is titled 'Select Cost Centre - Filters' and contains several input fields for filtering: Account Number, Cost Centre Name, City, Country, and Account Status. There are also sorting options for 'First Sort By' and 'Then Sort By'. Below the filters is a table titled 'Select Cost Centre - List' with the following data:

Account Number	Cost Centre Name	City	Country	Account Status	Action
21RIADVICE	RI Advice		Australia	Active	Select
21RI10375	10375 - RetireInvest Newcastle	Newcastle	Australia	Active	Select
21RI10376	10376 - RetireInvest Parramatta	Parramatta	Australia	Active	Select
21RI10379	10379 - RetireInvest Nowra	Nowra	Australia	Active	Select
21RI10382	10382 - RetireInvest Woden	Phillip	Australia	Active	Select
21RI10385	10385 - RetireInvest Castle Hill	Castle Hill	Australia	Active	Select
21RI10386	10386 - RetireInvest Bondi	Bondi Junction	Australia	Active	Select

A callout box with the text 'Click on 'Select'' and an arrow points to the 'Select' button in the table row for '21RI10382'.

Step 4

1. Complete all fields
2. Click *Preview* to review what the finished product will look like


Layer	Layer Content	<input type="checkbox"/> Hide all options	Hide	Thumb	
Stationery Details					
Page 1					
Name, Title, Office	name surname		<input type="checkbox"/>		
	Qualifications		<input type="checkbox"/>		
	Other Qualifications		<input type="checkbox"/>		
	Title		<input type="checkbox"/>		
	Proprietor	Office Name	<input type="checkbox"/>		
Phone, Email	t 00 9999 9999		<input type="checkbox"/>		
	f 00 8888 8888		<input type="checkbox"/>		
	m 0444 444 444		<input type="checkbox"/>		
	e name.surname@riadvice.com.au		<input type="checkbox"/>		
Address, Postal	street address, suburb state postcode		<input type="checkbox"/>		
	postal address, suburb state postcode		<input type="checkbox"/>		
Page 2					
BC Back Option	--Select--		<input type="checkbox"/>		
Web Address	www.riadvice.com.au		<input type="checkbox"/>		
<small>NOTE - Invalid entry details or entry combinations will result in the layer not being displayed.</small>					
			<input type="button" value="Cancel"/>	<input type="button" value="Reset Values"/>	<input type="button" value="Preview"/>

Complete all the fields

Click on 'Preview' to see what the finished product will look like when printed

Step 5

It is important to review entries on the stationery. If entries are correct click 'Place Order', to amend click 'Edit Again', to abandon order click 'Cancel'


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Firstname Surname CFP® Other Qualifications

Title

Proprietor Office Name

t 00 9999 9999 f 00 8888 8888 m 0444 444 444

e name.surname@riadvice.com.au

street address, suburb state postcode
postal address, suburb state postcode

Authorised Representative RI Advice Group Pty Ltd ABN 23 001 774 125 AFSL 238429

10. Search & Sort Fields

The search function offers simple or advanced search features. *Simple* will match all fields whereas *Advanced* will match specific fields. Results are displayed within the Browse Catalogue screen.

The screenshot shows a search interface with the following elements:

- Search bar with a magnifying glass icon and a search button.
- Search fields: Code, Customer, Stock Code, Description, Extra, Description, Min Qty, Max Qty, Stock.
- Sorting options: First Sort By (Relevance, Ascending), Then Sort By (Relevance, Ascending).
- Navigation buttons: Favourites, Browse, RI Advice.

Wildcard Searches

Function	Example	Expected Return
*	123*	Find all matches starting with 123. Example returns '123', 12315, 123000005, 1231115 etc.
?	123?5	Find any matches that are five characters long starting with '123' ending with '5'. Example returns 12315, 12325, 12335, 12345 etc.
*	123*5	Finds any matches starting with '123' ending with '5'. Example returns 123000005, 12305, 1231115 etc.
? *	123?5*	Finds any matches starting with 123 with any character in the 4th position, followed by a 5 and any characters following the 5. Example returns 12315, 12325, 123A5, 123B5, 123A5000, 123B500 etc.

Syntax Searches

When using syntax searches, each field is scanned for the content of the search.

Function	Search Function/Example	Expected Return
	Envelopes	Would return all products with Envelopes in any of the description fields.
	Envelopes ENV	Would return all products containing either Envelopes or ENV in the same description fields.
OR	Envelopes OR ENV	Would return the same results as the search above.
AND	Envelopes AND SS	Would return all products containing both Envelopes and SS in the same description field.

Quotes " " are used when combining separate words e.g. "Head Office" to treat as single search criteria. A sample search example would be Envelopes AND "Head Office" which would return all products containing both Envelopes and Head Office in the description line of the same field.

11. Helpful Contacts

GEONline and Progress of Orders.

GEON staff are available to support you with catalogue and delivery enquiries.

- Email geonlinehelpdesk@geongroup.com
- Phone 1300 556 770 – Business Hours (EST)

12. Frequently Asked Questions

ORDERING YOUR STATIONERY AND SALES MATERIALS

Can I use the 'back' button on the browser?

No. To control navigation use the options made available on the resident web page. Pressing the 'back' button will log you out of the website

How do I search for a product using a stock code?

Stock codes are unique identifiers that differentiate customer products from one another. Each code consists of 10-20 characters, and can be made of letters or numbers. eg: RI280B. When searching using a code, you can enter any part of the code in the GEONline search field with the wildcard symbols which will return all closest matches. ie. %280%


Note, the wildcard symbols are the percentage signs (%).

If I don't have a code, can I search another way?

There are other criteria that you can also use when searching for a stock item:

Description – search using key words (Some words may be abbreviated or shortened to fit the entire name of the stock item into the system.)

Your Reference – search by using a portion of the reference code. This narrows down your search to a particular group of items. Eg: Full code: RI208B – Partial code: RI208 (Using RI208 will locate all the correct product in the system. Using RetireInvest will locate all the RetireInvest products)

Wildcard and Syntax Searches – Click on the  icon to guide you on other advanced search features.

Why won't my order submit?

If you do not have adequate delivery address details in the system, your order will not be processed (an error message will confirm this).

Your delivery address can be located with the 'Delivery' tab which is contained in the 'Order Details' screen. There, you can allocate an existing address, or add the company name if it is missing. Delivery addresses which are not contained in the pre-defined drop-down list can be added by choosing the 'One-Off Delivery Address' in the drop-down list.

What is a Back Order?

When a stock item shows unavailable, there is no stock of that item in the warehouse.

Orders may still be placed against the item, and when the replenishment of stock arrives in the warehouse, the back-orders will then be despatched.

What quantities do I order?

When ordering stock items, the UNIT quantity may vary.

Each – means that you can order in single units

Box 250 – some items (eg: envelopes) come grouped, so ordering 1 = 1 x box of 250

How long will it take for my order to be delivered?

All orders placed before 12 noon will be despatched by road freight the same business day, unless otherwise agreed.

The below table highlights the standard delivery timeframes across Australia.

Destination	Delivery if order received prior to 12 pm	Delivery if order received after 12 pm & before 4 pm
NSW Country	Next Working Day	Within 2 Working Days
Melbourne Metro	Next Working Day	Within 2 Working Days
Victoria Country	2 Working Days	2 Working Days
Brisbane Metro	Next Working Day	Within 2 Working Days
Qld Country	2 Working Days	Within 3 Working Days
Adelaide Metro	2 Working Days	2 Working Days
SA Country	3 Working Days	Within 4 Working Days
Perth Metro	5 Working Days (Deliveries only on Tuesday & Friday)	5 Working Days (Deliveries only on Tuesday & Friday)
WA Country	5 Working Days (Deliveries only on Tuesday & Friday)	6 Working Days (Deliveries only on Tuesday & Friday)
Sydney Metro	Next Working Day	Next Working Day
Nthn Territory	5 Working Days	5 Working Days
Tasmania	4 Working Days	Within 4 Working Days
ACT	Next Working Day	Within 2 Working Days

Please note: the above delivery times are a guide only.

Can I view these products from the website?

Most of the products can be viewed online by clicking on the thumbnail preview.

How do I edit my cart or delete an item?

Items can be removed or added to your cart by simply clicking the 'Edit' button which can be found in the 'Order Details' screen. If for an example an item has the incorrect quantity allocated, you can click on 'Edit' and adjust the quantity to suit.

Adding items to the cart is as simple as clicking on the 'Add' button, then clicking on the 'Search' link which will navigate you to the Catalogue where you can add items. Note, once you have added the items you will need to click on 'Check Out' to update the cart.

How do I view the status of my order?

You can view the status of your order by navigating to the option menu on the left hand-side and clicking on 'Order History'. This link, will take you to a new view where you will need to click on 'Refresh'. Once you have done this a list of all your orders and their status will appear.

Status Descriptors:

- New = this refers to any new orders that you have made that are yet to be processed by GEON's warehouse.
- Confirmed = Orders that have been processed by GEON's warehouse.
- Closed = Orders that have been processed and dispatched.
- Back order = Orders that do not have sufficient stock on hand for successful completion of the order.