OnePath
Online User Manual for Advisers
2011

Table of Contents

1. Introduction

Welcome to OnePath's online ordering site. This site is provided by GEON Group, OnePath's print management partner.

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 assessed by clicking on the 'Help' icon.

Minimum requirements

- Reasonable speed internet access
- Internet Explorer 6 or greater
- Browser configured to enable session cookies

About this manual

This manual is as much a tutorial as a reference guide. While many functions are intuitive, we highly recommend that you grab a cup of coffee and read this manual. It should take no more than 10 minutes.

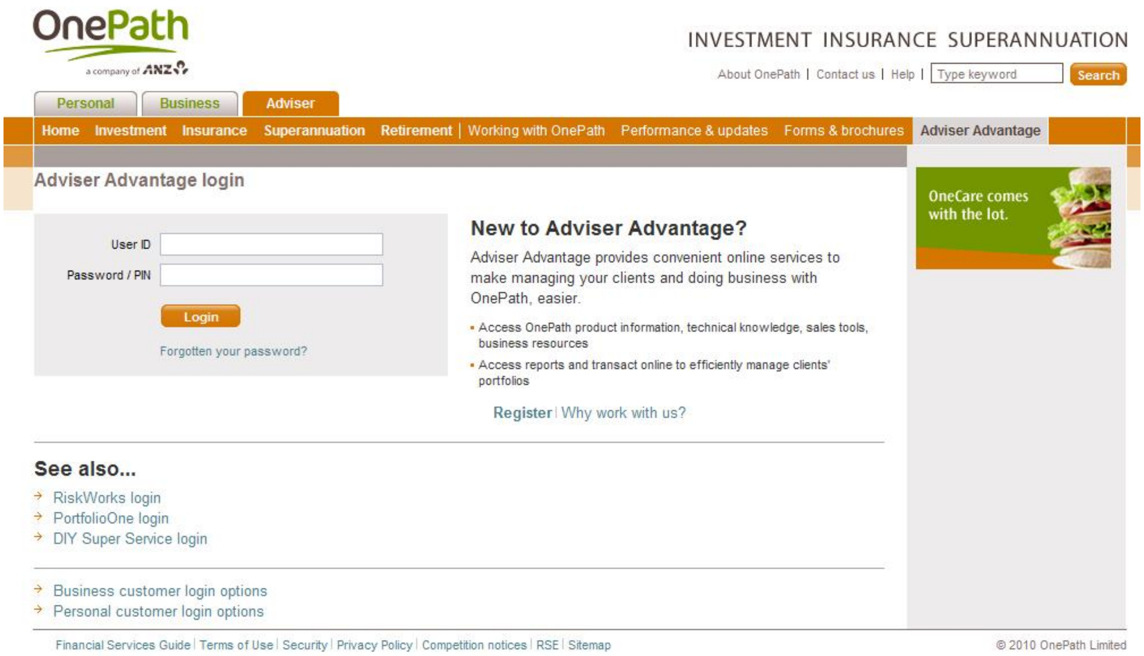
It contains a step-by-step guide on how to login and place an order.

2. How to Sign In

Step 1

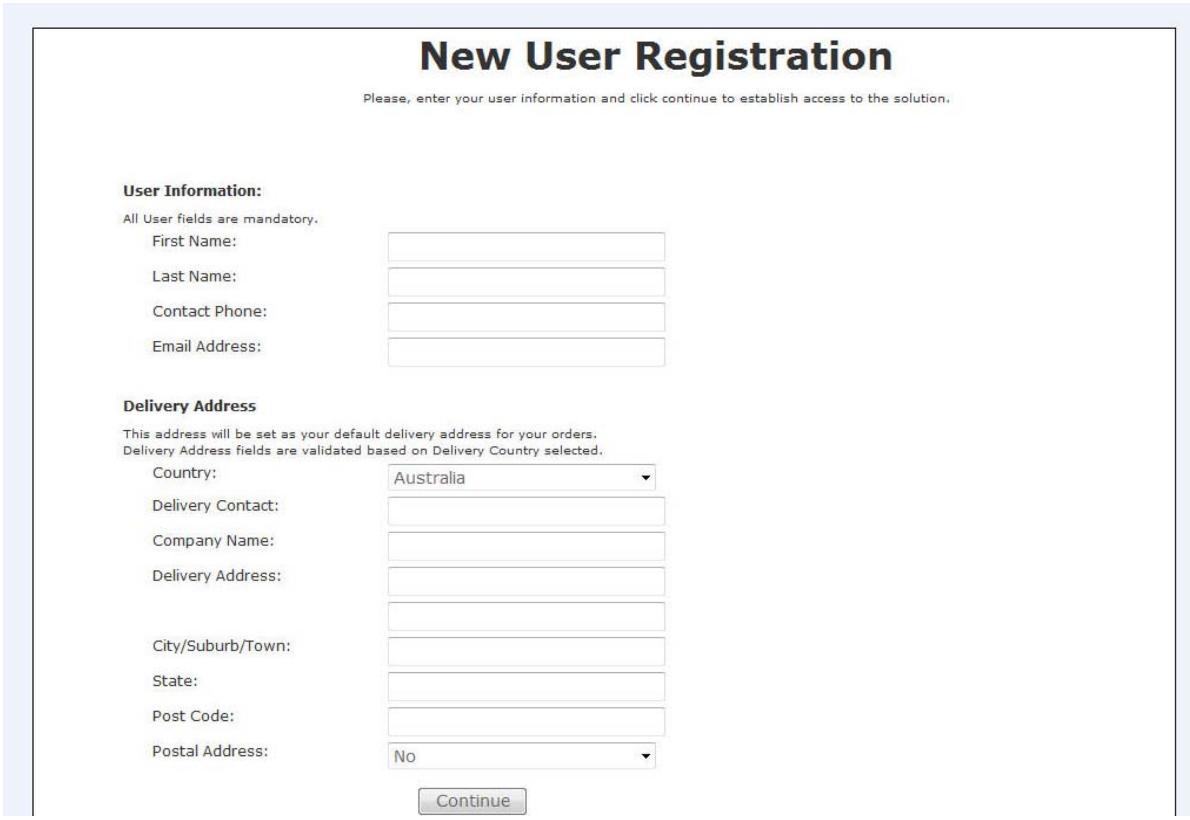
Start your internet browser and log into the Adviser Advantage site located in onepath.com.au and follow the Publications and Forms link.

This is the site to order all forms, marketing and sales materials.



Step 2

Once you have successfully logged in for the first time, you will be presented with the following registration page. Please fill in all details as required and click on submit. This screen will not appear after the first log in experience.



New User Registration

Please, enter your user information and click continue to establish access to the solution.

User Information:

All User fields are mandatory.

First Name:

Last Name:

Contact Phone:

Email Address:

Delivery Address

This address will be set as your default delivery address for your orders.
Delivery Address fields are validated based on Delivery Country selected.

Country: Australia

Delivery Contact:

Company Name:

Delivery Address:

City/Suburb/Town:

State:

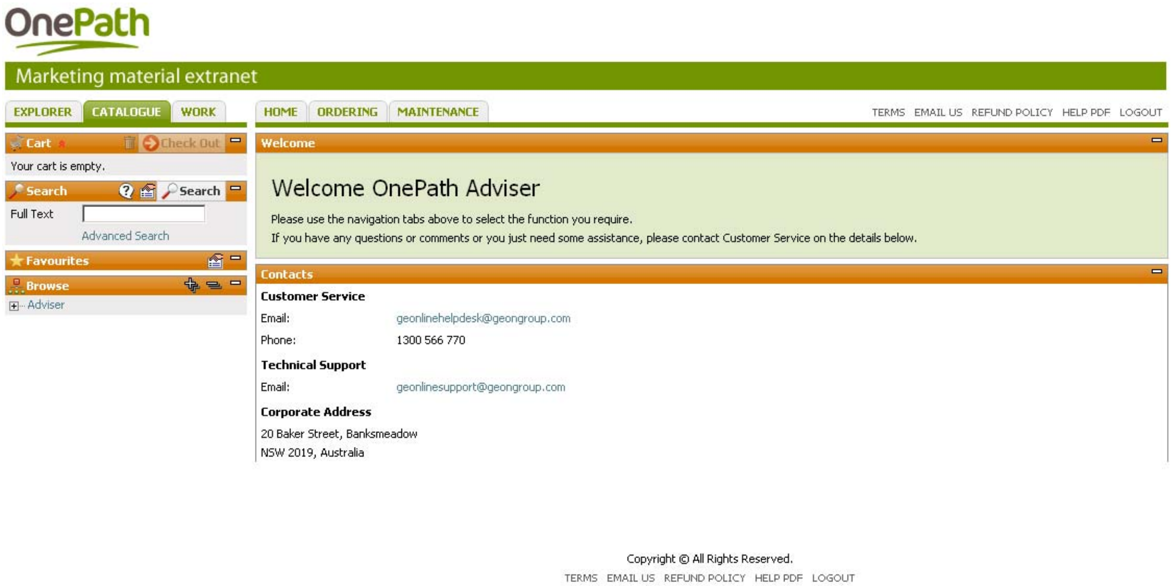
Post Code:

Postal Address: No

Continue

Step 3

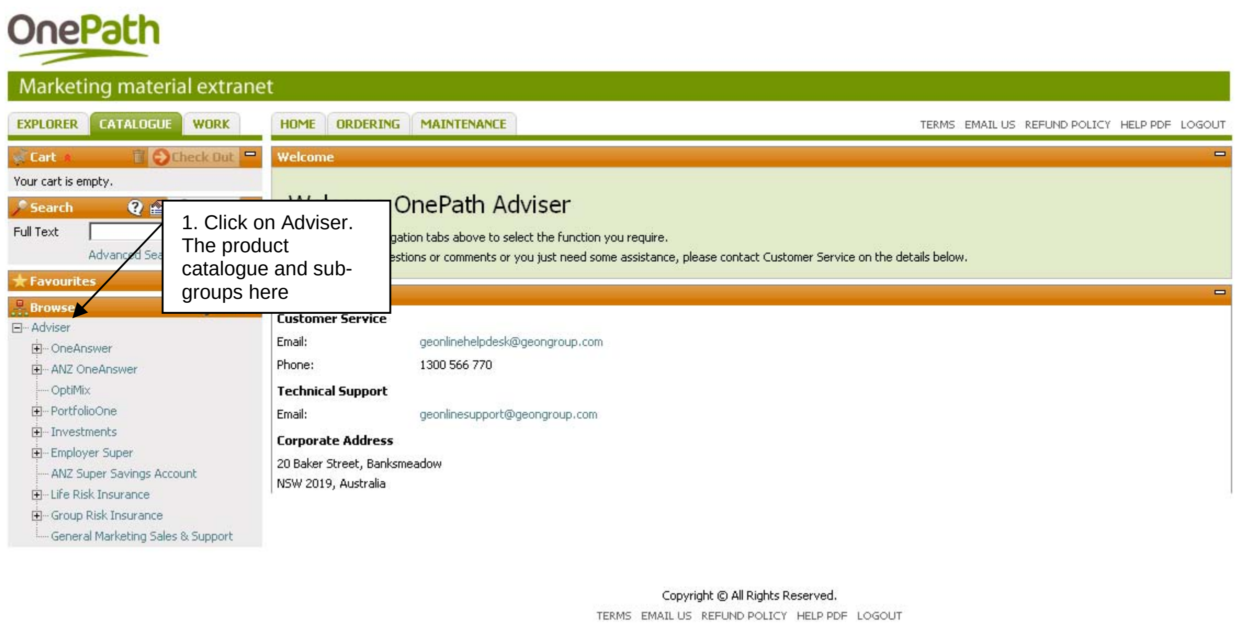
After the registration form is completed you will be forwarded to the Home page.



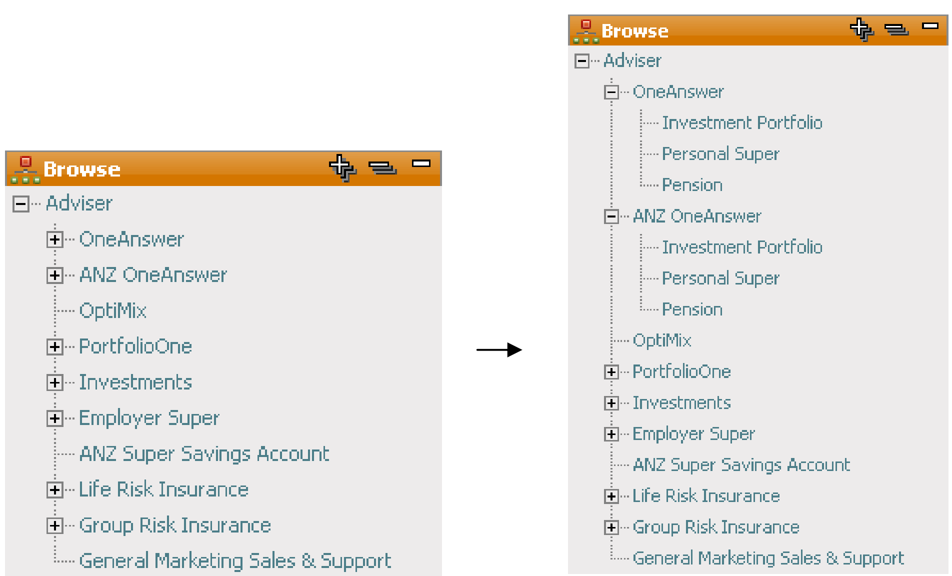
3. How to Submit an Order

Step 1

1. Click on the Adviser 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

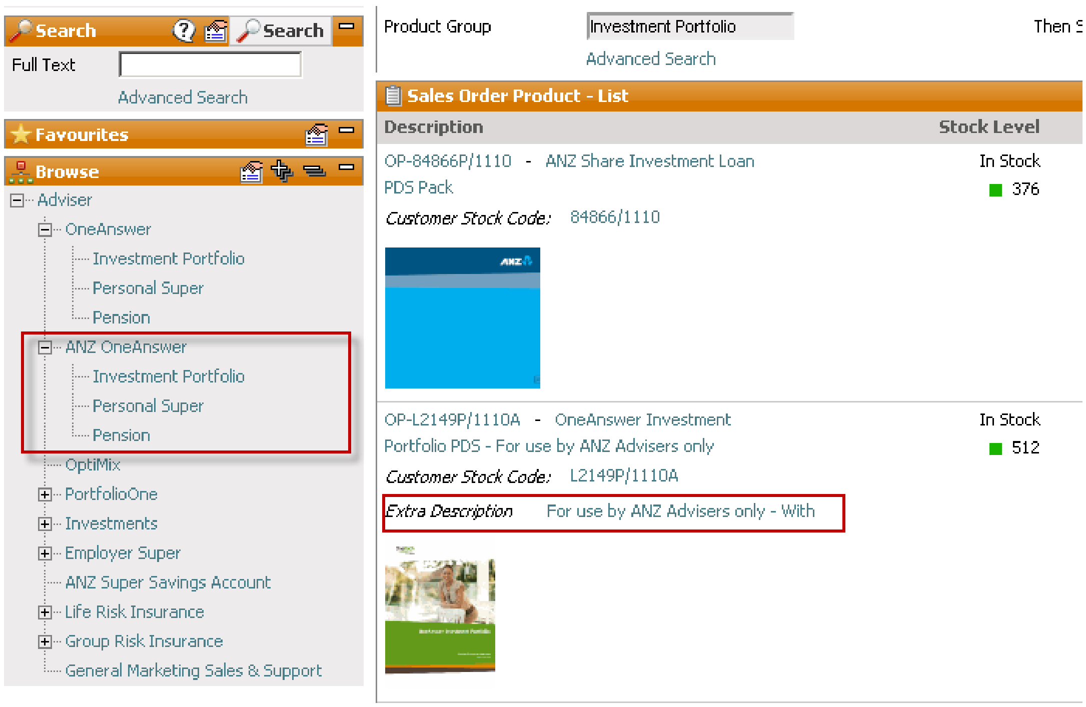


Any catalogue that have a plus sign (+) beside them can be expanded further to view the contents within this category as illustrated above.



Note: Documents that are ANZ brand or have ANZ application forms have **(A)** in the product code.

Please note that ANZ Advisers who require the OnePath OneAnswer branded PDS, these versions can be found under the ANZ OneAnswer folder.   Click on “Investment Portfolio” or “Personal Super” for the version that you require. You will note that the extra description provides instructions that these documents are for ANZ Advisers only.



Step 2

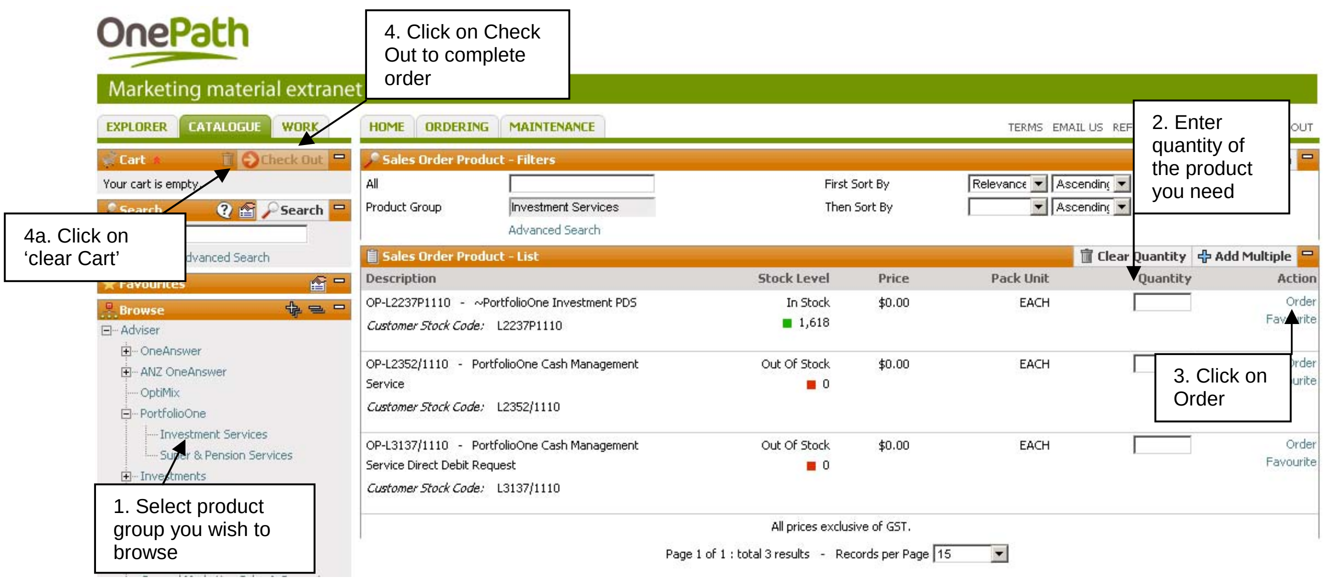
1. When you click on the product sub-group that you wish to browse, the products in this group will appear in the main body of the screen. This will include:
   - OnePath product code
   - Image of the product that can be downloaded as a low resolution PDF
   - Unit of measure
   - Stock availability
   - Order icon

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.

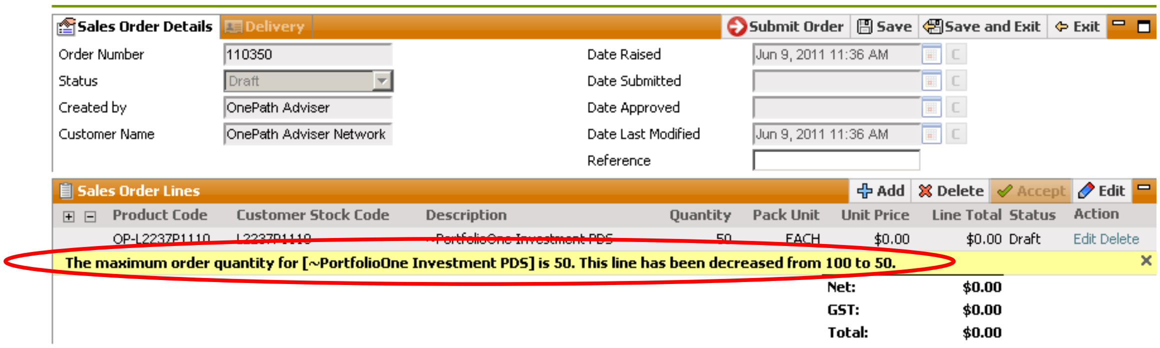
To add more products to your Shopping Cart, you simply follow the above steps again.

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.



Minimum and Maximum Limits

When you order 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 be posted online after you have clicked on the ‘Check Out’ button.

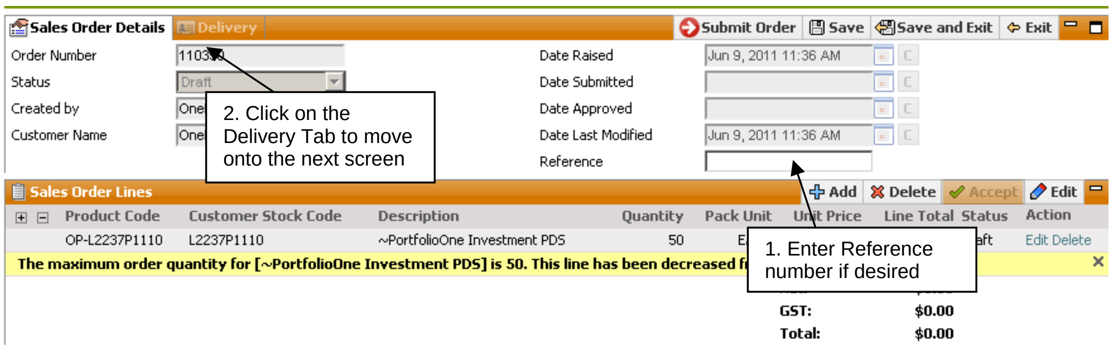


You can quickly identify the minimum and maximum quantities assigned to a stock item by clicking on the stock 'Description' on any product and then clicking on the 'Stock' tab which will bring up the stock metrics as identified below.

Step 3

1. You will then be taken to Sales Order Details, where you can add a Reference if you desire. The ‘Reference’ field can be utilised for populating with a Purchase Order Number, Contact Name or reference number that you can use as a way of differentiating your orders.

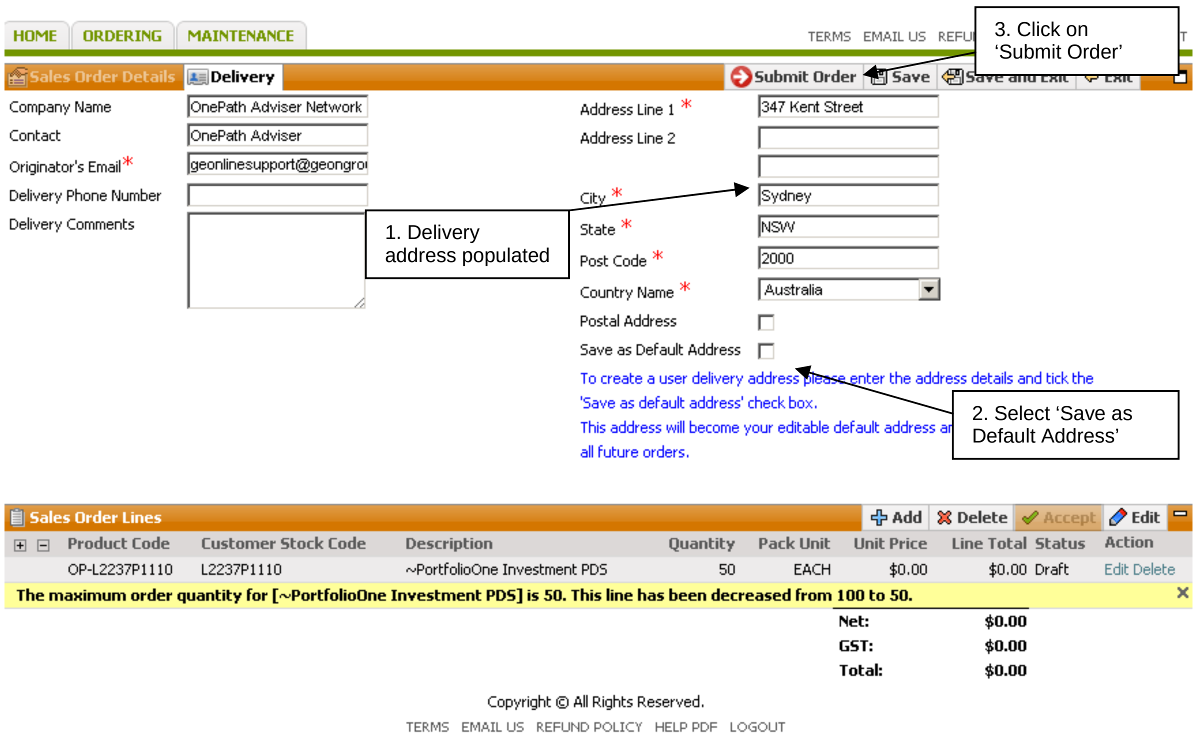
2. Click on the Delivery tab and fill in your delivery specifications.



Step 4

1. Your delivery address provided on the registration page will automatically populate the required fields.
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.

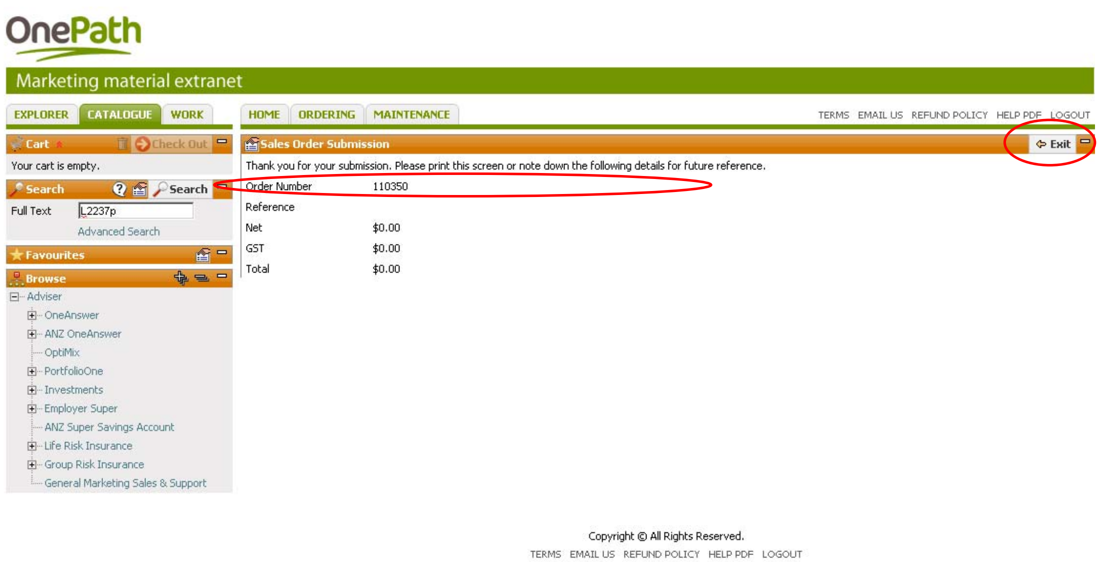
3. To complete the order, click on the Submit Order button and your order will be processed.



Step 5

Sales 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'.



Step 6

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.

From: geonlinehelpdesk@geongroup.com Sent: Thu 9/06/2011 11:47 AM
To: GEONline Support
Cc:
Subject: Order 110350 has been placed successfully

Order Details

Order Number	110350
Account Number	OPADV
Customer Name	OnePath Adviser Network
Reference	
Order Date	Thu Jun 09 11:36:50 EST 2011
Order Originator	OnePath Adviser
PRISM Delivery Code	NSW-OPADV-1

Address

Attention: OnePath Adviser
OnePath Adviser Network
347 Kent Street
Sydney
NSW
Australia
2000

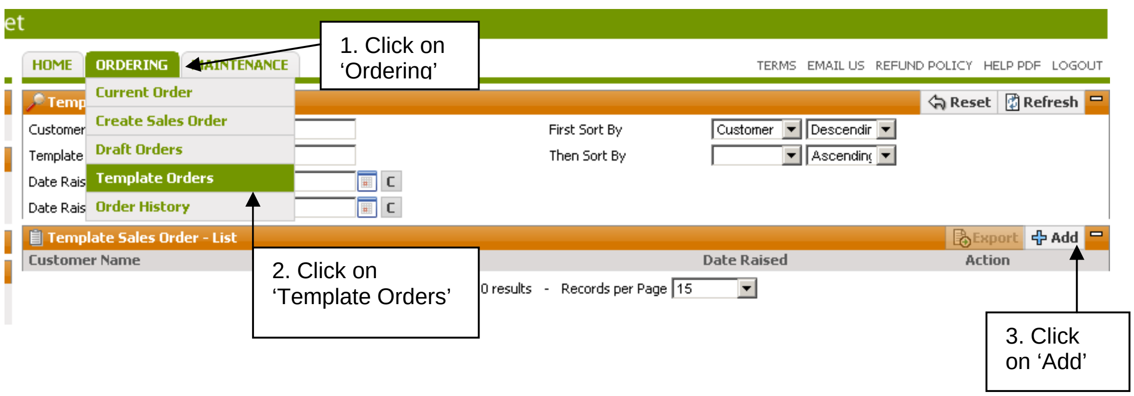
Product Code	Customer Stock Code	Description	Order Quantity	Available Quantity	Pack Unit	Status	Unit Price	Line Price	Line Comments
OP-L2237P1110	L2237P1110	~PortfolioOne Investment PDS	50	1568	EACH	P	$0.00	$0.00	

4. 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 sales orders on every occasion. This feature is particularly beneficial for users who order the same products consistently with a higher than normal frequency pattern.

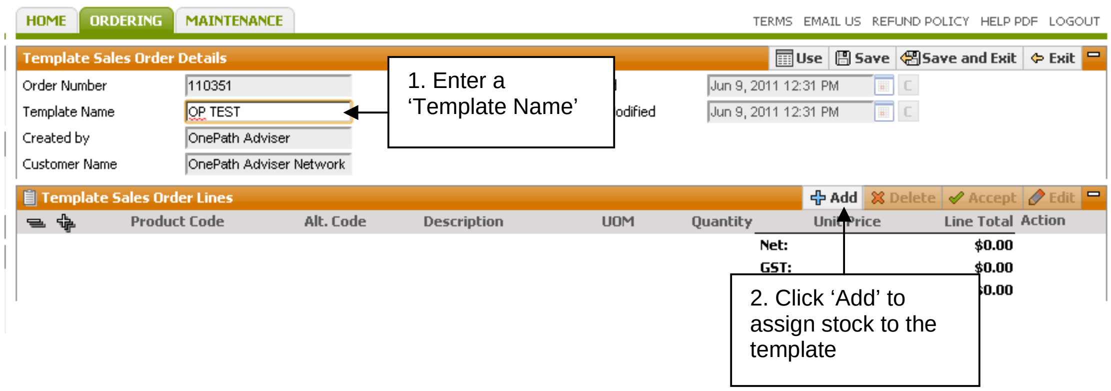
Step 1

1. Click on ‘Ordering’
2. Click on ‘Template Orders’ link which will navigate you to the appropriate screen for creating a template order which can be used as a short cut should you order the same products repeatedly
3. Click on ‘Add’ to begin configuring your ‘Template Order’



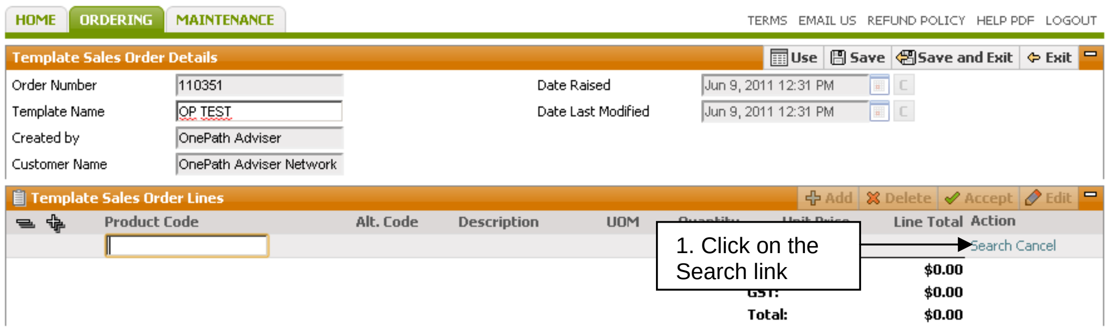
Step 2

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



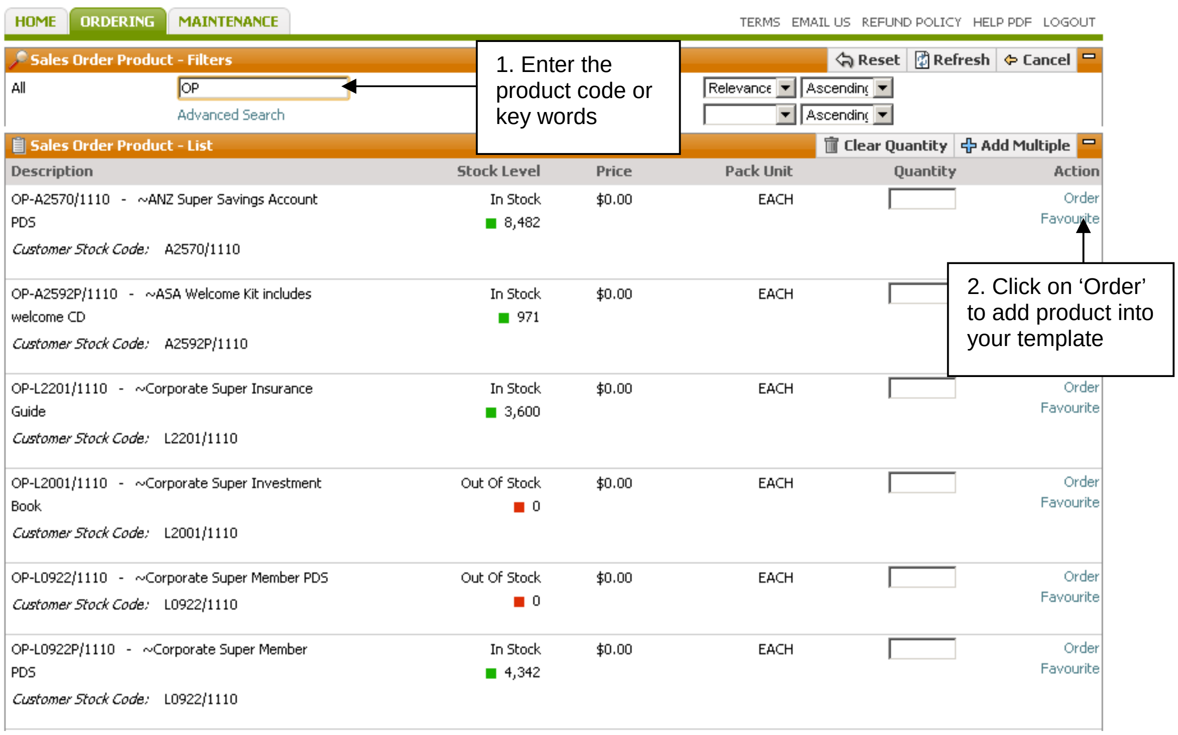
Step 3

1. Click on the ‘Search’ link.



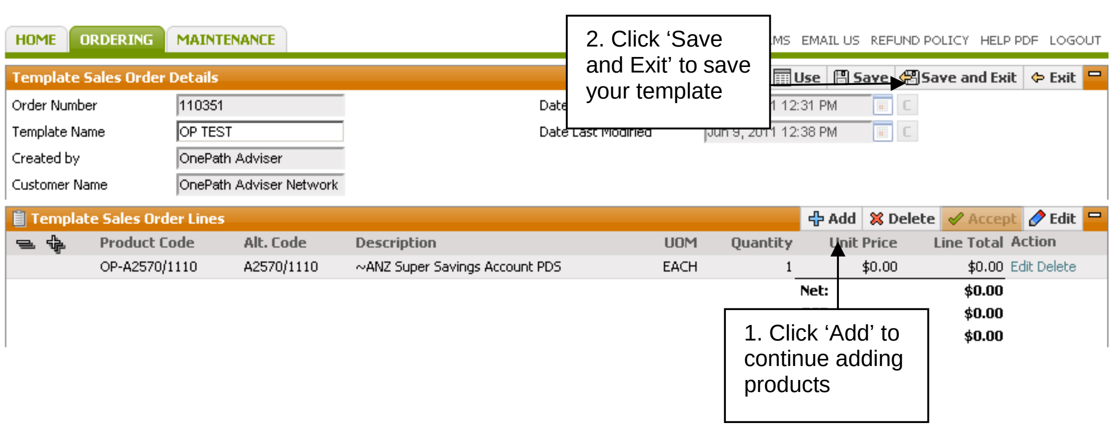
Step 4

1. If you do not know the item code you can search by key words ie: OneAnswer. Your search will then return a list of closest matches to your search criteria.
2. Once you have located the item you require click the ‘Order’ link as highlighted to add an item into your template.



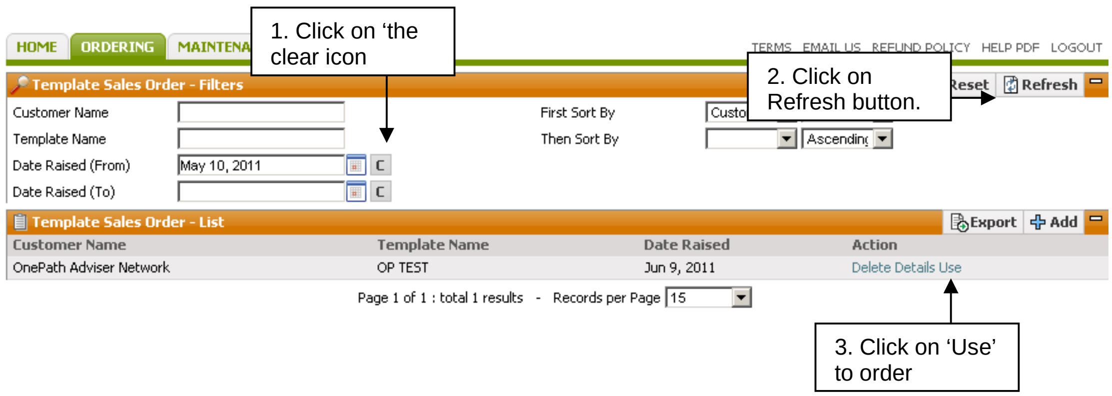
Step 5

1. Click ‘Add’ to continue adding products to the template order.
2. 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.



Step 6

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



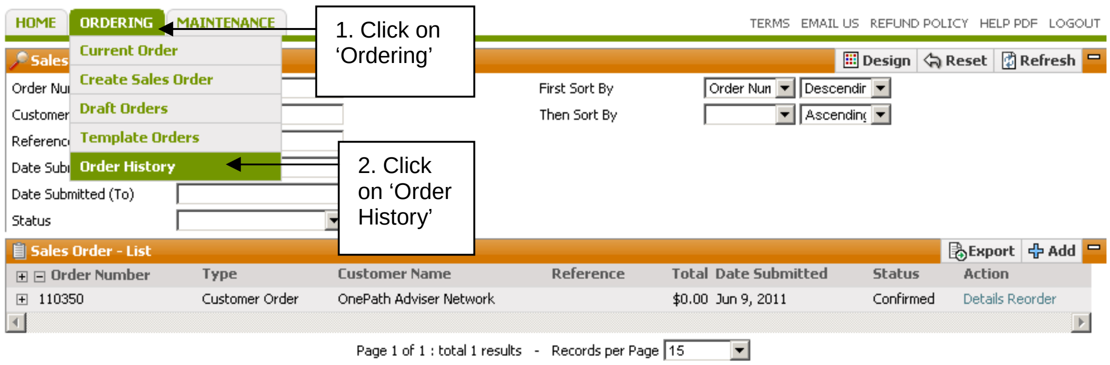
5. Search Sales Order History

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

1. Go to the navigational menu on the left of the screen and lick on 'Ordering'

2. Click on the 'Order History'



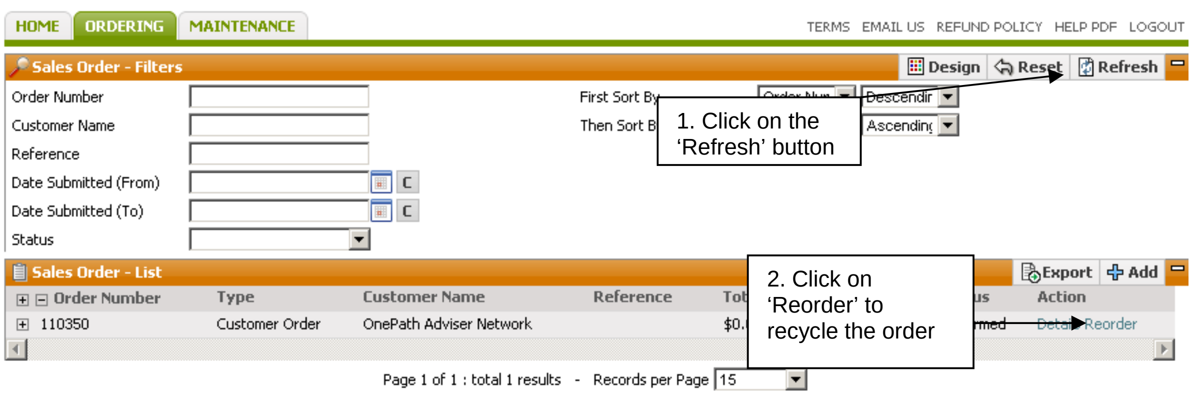
Step 2

1. Click the clear icon C to remove the date from the 'Date Raised (From)' field. Click on 'Refresh' to display all previous sales orders under your user profile.
2. 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, Customer 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, customer name and number. The search will bring back all closest matches to your search criteria.



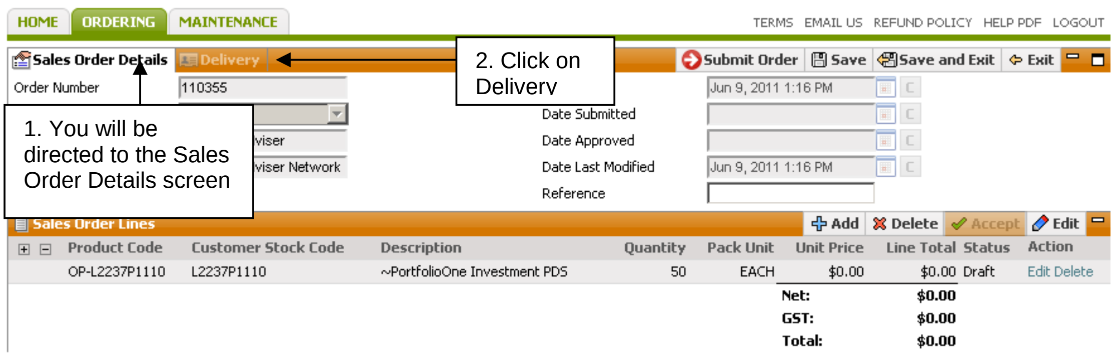
6. Search Sales Order History - Reordering

The Sales 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 Sales Order History.

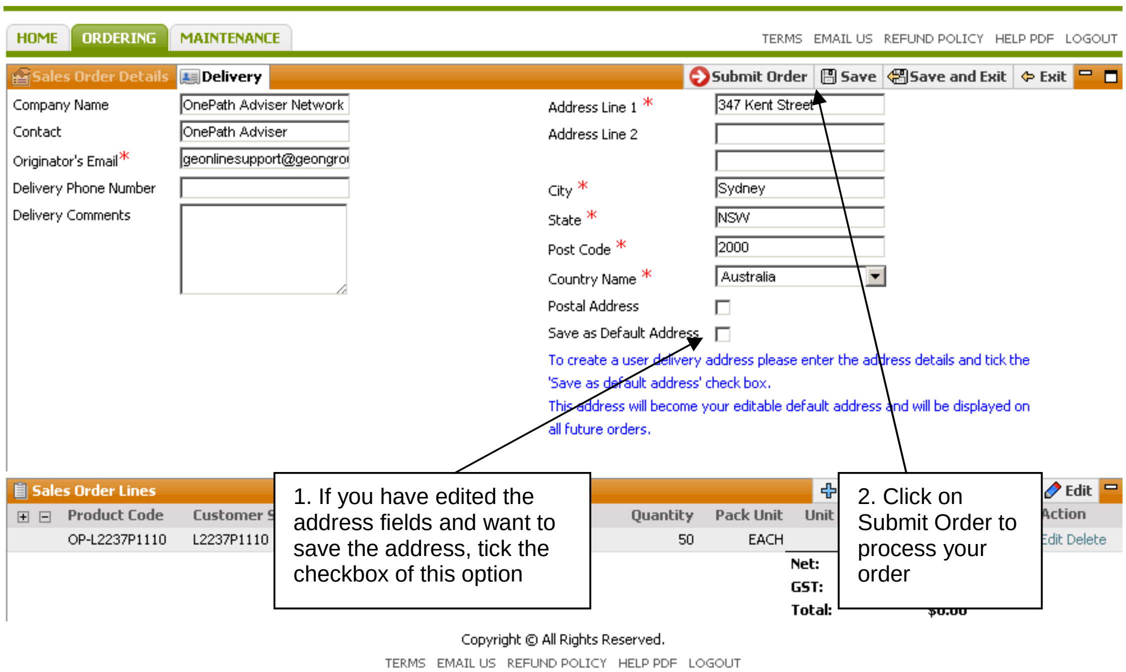
Step 1

1. After you have clicked on the 'Reorder' link, you will be directed to Sales Order Details.
2. Confirm that the product in the order is correct and then click on the 'Delivery Tab'.



Step 2

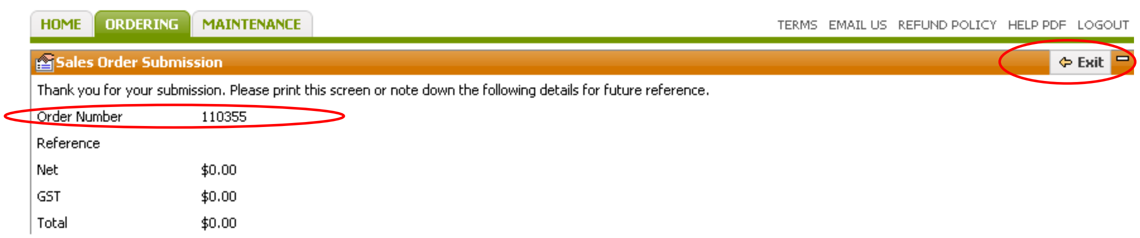
1. Once you have clicked on the 'Delivery Tab', if you wish to modify the pre-populated address, simply write over the existing address. You can also save this as your default address by selecting the 'Save as Default Address' option below the address fields
2. To complete the order, click on the Submit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



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 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 including delivery address, contact name, business unit and products ordered.

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

From: geonlinehelpdesk@geongroup.com
To: GEONline Support
Cc:
Subject: Order 110355 has been placed successfully
Sent: Thu 9/06/2011 1:25 PM

Order Details

Order Number 110355
Account Number OPADV
Customer Name OnePath Adviser Network
Reference
Order Date Thu Jun 09 13:16:04 EST 2011
Order Originator OnePath Adviser
PRISM Delivery Code NSW-OPADV-1

Address

Attention: OnePath Adviser
OnePath Adviser Network
347 Kent Street
Sydney
NSW
Australia
2000

Product Code	Customer Stock Code	Description	Order Quantity	Available Quantity	Pack Unit	Status	Unit Price	Line Price	Line Comments
OP-L2237P1110	L2237P1110	~PortfolioOne Investment PDS	50	1518	EACH	P	$0.00	$0.00	

7. Helpful Contacts

GEONline and Progress of Orders.

GEON staff are available to support you with system navigation or delivery enquiries.

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

8. Frequently Asked Questions

ORDERING YOUR STATIONERY AND SALES MATERIALS

1. **How do I search for a product using a stock code?**

Stock codes are unique identifies that differentiate customer products from one another. Each code consists of 10-20 characters, and can be made of letters or numbers. eg: OP-L2148/0908. 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. %00594%

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

2. **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: OP-L2148p/0908 – Partial code: L2148(Using L2148 will locate all the correct product in the system. Using OneAnswer will locate all the OneAnswer products)

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

3. 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 'Sales 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.

4. 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.

5. 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

6. 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.

7. Can I view these products from the website?

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

8. 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 ‘Sales 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 click 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.

9. 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.

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.