

OnePath



a company of **ANZ** 

OnePath
Online User Manual for Advisers
2011

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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 accessed 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.

The screenshot shows the OnePath website interface. At the top left is the OnePath logo with the tagline 'a company of ANZ'. To the right, the text 'INVESTMENT INSURANCE SUPERANNUATION' is displayed. Below this is a search bar with the text 'About OnePath | Contact us | Help |' and a search button labeled 'Search'. A navigation menu includes 'Personal', 'Business', and 'Adviser' tabs, with 'Adviser' selected. Below the tabs is a main navigation bar with links: 'Home', 'Investment', 'Insurance', 'Superannuation', 'Retirement', 'Working with OnePath', 'Performance & updates', 'Forms & brochures', and 'Adviser Advantage'. The 'Adviser Advantage' link is highlighted. The main content area is titled 'Adviser Advantage login' and features a login form with fields for 'User ID' and 'Password / PIN', a 'Login' button, and a link for 'Forgotten your password?'. To the right of the login form is a section titled 'New to Adviser Advantage?' with a brief description and two bullet points: 'Access OnePath product information, technical knowledge, sales tools, business resources' and 'Access reports and transact online to efficiently manage clients' portfolios'. Below this is a link for 'Register | Why work with us?'. On the far right is a sidebar with a banner for 'OneCare comes with the lot.' featuring an image of a sandwich. At the bottom of the page, there is a footer with links for 'Financial Services Guide | Terms of Use | Security | Privacy Policy | Competition notices | RSE | Sitemap' and a copyright notice '© 2010 OnePath Limited'.

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:

Delivery Contact:

Company Name:

Delivery Address:

City/Suburb/Town:

State:

Post Code:

Postal Address:

Step 3

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



Marketing material extranet

EXPLORER CATALOGUE WORK HOME ORDERING MAINTENANCE TERMS EMAIL US REFUND POLICY HELP PDF LOGOUT

Cart Your cart is empty.

Search Full Text

Favourites

Browse

Welcome

Welcome OnePath Adviser

Please use the navigation tabs above to select the function you require.
If you have any questions or comments or you just need some assistance, please contact Customer Service on the details below.

Contacts

Customer Service
Email: geonlinehelpdesk@geongroup.com
Phone: 1300 566 770

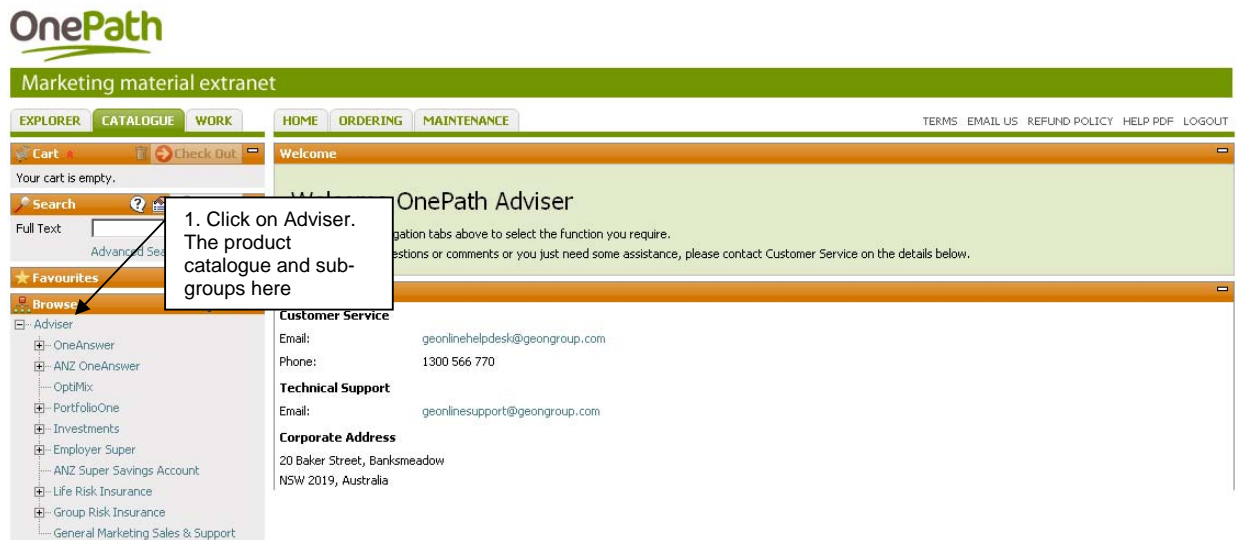
Technical Support
Email: geonlinesupport@geongroup.com

Corporate Address
20 Baker Street, Banksmeadow
NSW 2019, Australia

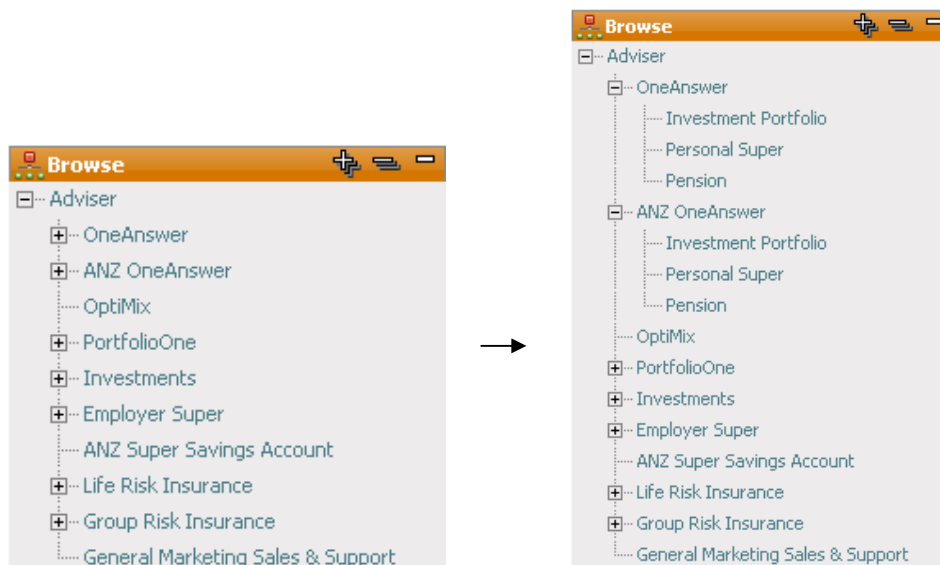
3. How to Submit an Order

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.

The screenshot displays a software interface with a search bar at the top left, a sidebar on the left, and a main content area on the right. The sidebar contains a 'Browse' section with a tree view of product categories. The 'ANZ OneAnswer' category is highlighted with a red box, and its sub-items 'Investment Portfolio', 'Personal Super', and 'Pension' are also visible. The main content area shows a 'Sales Order Product - List' table with two rows of product information. The first row is for 'OP-84866P/1110 - ANZ Share Investment Loan PDS Pack' with a stock level of 376. The second row is for 'OP-L2149P/1110A - OneAnswer Investment Portfolio PDS - For use by ANZ Advisers only' with a stock level of 512. The 'Extra Description' for the second product is highlighted with a red box: 'For use by ANZ Advisers only - With'. There are also small images of product covers for each item.

Description	Stock Level
OP-84866P/1110 - ANZ Share Investment Loan PDS Pack <i>Customer Stock Code:</i> 84866/1110	In Stock ■ 376
OP-L2149P/1110A - OneAnswer Investment Portfolio PDS - For use by ANZ Advisers only <i>Customer Stock Code:</i> L2149P/1110A <i>Extra Description</i> For use by ANZ Advisers only - With	In Stock ■ 512

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.

The screenshot shows the OnePath Marketing material extranet interface. The page title is "Marketing material extranet". The navigation menu includes "EXPLORER", "CATALOGUE", "WORK", "HOME", "ORDERING", and "MAINTENANCE". The "Cart" icon shows "Your cart is empty". The "Sales Order Product - Filters" section shows "Product Group" set to "Investment Services". The "Sales Order Product - List" table displays the following data:

Description	Stock Level	Price	Pack Unit	Quantity	Action
OP-L2237P1110 - ~PortfolioOne Investment PD5 Customer Stock Code: L2237P1110	In Stock 1,618	\$0.00	EACH	<input type="text"/>	Order Favourite
OP-L2352/1110 - PortfolioOne Cash Management Service Customer Stock Code: L2352/1110	Out Of Stock 0	\$0.00	EACH	<input type="text"/>	Order Favourite
OP-L3137/1110 - PortfolioOne Cash Management Service Direct Debit Request Customer Stock Code: L3137/1110	Out Of Stock 0	\$0.00	EACH	<input type="text"/>	Order Favourite

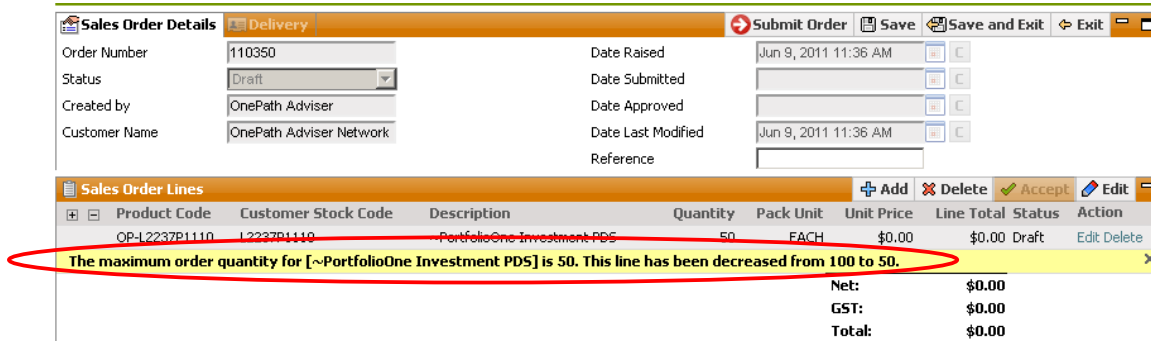
Callouts on the screenshot:

- 1. Select product group you wish to browse (points to "Investment Services" in the filters)
- 2. Enter quantity of the product you need (points to the quantity input field)
- 3. Click on Order (points to the "Order" link)
- 4a. Click on 'clear Cart' (points to the trash icon)
- 4. Click on Check Out to complete order (points to the "Check Out" button)

Page 1 of 1 : total 3 results - Records per Page 15

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.



Sales Order Details Delivery

Order Number: 110350
Status: Draft
Created by: OnePath Adviser
Customer Name: OnePath Adviser Network

Date Raised: Jun 9, 2011 11:36 AM
Date Submitted:
Date Approved:
Date Last Modified: Jun 9, 2011 11:36 AM
Reference:

Sales Order Lines

Product Code	Customer Stock Code	Description	Quantity	Pack Unit	Unit Price	Line Total	Status	Action
OP-L2237P1110	L2237P1110	PortfolioOne Investment PDS	50	EACH	\$0.00	\$0.00	Draft	Edit Delete

The maximum order quantity for [~PortfolioOne Investment PDS] is 50. This line has been decreased from 100 to 50.

Net: \$0.00
GST: \$0.00
Total: \$0.00

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.

Product Details	Stock	Attachment	Groups	Edit On		Exit	
Code	OP-L2237P1110						
Description	~PortfolioOne Investment PDS						
Stock Level			1,618	Quantity On Hand			1618
Pack Unit		Single item		Quantity On Order			0
Pack Size			1	Quantity Quarantined			0
Packs Per Outer			53	Back Order			0
Min Qty			1	Stock Inst. Quantity		Create	
Max Qty			50				
Quantum Order Quantity			1				

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.

Sales Order Details **Delivery** **Submit Order** **Save** **Save and Exit** **Exit**

Order Number: 1103
Status: Draft
Created by: One
Customer Name: One

Date Raised: Jun 9, 2011 11:36 AM
Date Submitted: [] [C]
Date Approved: [] [C]
Date Last Modified: Jun 9, 2011 11:36 AM
Reference: []

Sales Order Lines **Add** **Delete** **Accept** **Edit**

Product Code	Customer Stock Code	Description	Quantity	Pack Unit	Unit Price	Line Total	Status	Action
OP-L2237P1110	L2237P1110	~PortfolioOne Investment PDS	50	E			Draft	Edit Delete

The maximum order quantity for [~PortfolioOne Investment PDS] is 50. This line has been decreased from 50 to 50

GST: \$0.00
Total: \$0.00

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.

1. Delivery address populated

2. Select 'Save as Default Address'

3. Click on 'Submit Order'

Sales Order Lines									
Product Code	Customer Stock Code	Description	Quantity	Pack Unit	Unit Price	Line Total	Status	Action	
OP-L2237P1110	L2237P1110	~PortfolioOne Investment PDS	50	EACH	\$0.00	\$0.00	Draft	Edit	Delete
The maximum order quantity for [~PortfolioOne Investment PDS] is 50. This line has been decreased from 100 to 50.									
						Net:	\$0.00		
						GST:	\$0.00		
						Total:	\$0.00		

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'.

OnePath
Marketing material extranet

EXPLORER CATALOGUE WORK HOME ORDERING MAINTENANCE TERMS EMAIL US REFUND POLICY HELP PDF LOGOUT

Cart Your cart is empty.

Search

Favourites

Browse

- Adviser
 - OneAnswer
 - ANZ OneAnswer
 - OptiMix
 - PortfolioOne
 - Investments
 - Employer Super
 - ANZ Super Savings Account
 - Life Risk Insurance
 - Group Risk Insurance
 - General Marketing Sales & Support

Sales Order Submission

Thank you for your submission. Please print this screen or note down the following details for future reference.

Order Number 110350

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

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
To: GEONline Support
Cc:
Subject: Order 110350 has been placed successfully

Sent: Thu 9/06/2011 11:47 AM

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'

The screenshot shows a web application interface with a navigation menu on the left. The 'ORDERING' menu is expanded, showing options: 'Current Order', 'Create Sales Order', 'Draft Orders', 'Template Orders', and 'Order History'. The 'Template Orders' option is highlighted. A callout box with an arrow points to the 'ORDERING' menu with the text '1. Click on 'Ordering''. Below the menu, there are search and filter options for 'Customer', 'Date Raised', and 'Order History'. A callout box with an arrow points to the 'Template Orders' link with the text '2. Click on 'Template Orders''. At the bottom of the page, there is a table header for 'Template Sales Order - List' with columns for 'Customer Name', 'Date Raised', and 'Action'. A callout box with an arrow points to the 'Add' button in the table header with the text '3. Click on 'Add''. The table shows '0 results' and 'Records per Page 15'.

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.

HOME ORDERING MAINTENANCE TERMS EMAIL US REFUND POLICY HELP PDF LOGOUT

Template Sales Order Details Use Save Save and Exit Exit

Order Number: 110351
Template Name: OP TEST
Created by: OnePath Adviser
Customer Name: OnePath Adviser Network

Modified: Jun 9, 2011 12:31 PM
Jun 9, 2011 12:31 PM

Template Sales Order Lines Add Delete Accept Edit

Product Code	Alt. Code	Description	UOM	Quantity	Unit Price	Line Total	Action
Net:						\$0.00	
GST:						\$0.00	
						\$0.00	

1. Enter a 'Template Name'

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

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.

1. Enter the product code or key words

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

Description	Stock Level	Price	Pack Unit	Quantity	Action
OP-A2570/1110 - ~ANZ Super Savings Account PDS Customer Stock Code: A2570/1110	In Stock 8,482	\$0.00	EACH		Order Favourite
OP-A2592P/1110 - ~ASA Welcome Kit includes welcome CD Customer Stock Code: A2592P/1110	In Stock 971	\$0.00	EACH		
OP-L2201/1110 - ~Corporate Super Insurance Guide Customer Stock Code: L2201/1110	In Stock 3,600	\$0.00	EACH		Order Favourite
OP-L2001/1110 - ~Corporate Super Investment Book Customer Stock Code: L2001/1110	Out Of Stock 0	\$0.00	EACH		Order Favourite
OP-L0922/1110 - ~Corporate Super Member PDS Customer Stock Code: L0922/1110	Out Of Stock 0	\$0.00	EACH		Order Favourite
OP-L0922P/1110 - ~Corporate Super Member PDS Customer Stock Code: L0922/1110	In Stock 4,342	\$0.00	EACH		Order Favourite

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.

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

1. Click 'Add' to continue adding products

Product Code	Alt. Code	Description	UOM	Quantity	Unit Price	Line Total	Action
OP-A2570/1110	A2570/1110	~ANZ Super Savings Account PDS	EACH	1	\$0.00	\$0.00	Edit Delete
Net:						\$0.00	
						\$0.00	
						\$0.00	

Step 6

1. To locate your pre-defined templates, click the clear icon **C** 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.

The screenshot shows a web application interface for 'Template Sales Order'. At the top, there are navigation tabs: HOME, ORDERING, and MAINTENANCE. On the right, there are links for TERMS, EMAIL US, REFUND POLICY, HELP PDF, and LOGOUT. Below the navigation is a 'Template Sales Order - Filters' section with input fields for Customer Name, Template Name, Date Raised (From) (set to May 10, 2011), and Date Raised (To). There are 'C' icons next to the date fields. To the right of the filters are sorting options: 'First Sort By' (set to Custom) and 'Then Sort By' (set to Ascending). There are 'Reset' and 'Refresh' buttons. Below the filters is a 'Template Sales Order - List' table with columns: Customer Name, Template Name, Date Raised, and Action. The table contains one row: OnePath Adviser Network, OP TEST, Jun 9, 2011, and Action links: Delete Details Use. At the bottom, there is a pagination bar: 'Page 1 of 1 : total 1 results - Records per Page 15'. Three callout boxes with arrows point to specific elements: '1. Click on the clear icon' points to the 'C' icon next to the 'Date Raised (From)' field; '2. Click on Refresh button.' points to the 'Refresh' button; '3. Click on 'Use' to order' points to the 'Use' link in the 'Action' column of the table.

1. Click on the clear icon

2. Click on Refresh button.

3. Click on 'Use' to 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 click on 'Ordering'
2. Click on the 'Order History'

The screenshot shows a web application interface with a navigation menu on the left. The 'ORDERING' menu is expanded, and the 'Order History' option is highlighted. A callout box points to the 'Ordering' menu item with the text '1. Click on 'Ordering''. Another callout box points to the 'Order History' option with the text '2. Click on 'Order History''. The main content area displays a table of sales orders with columns for Order Number, Type, Customer Name, Reference, Total, Date Submitted, Status, and Action. The table contains one row with the following data:

Order Number	Type	Customer Name	Reference	Total	Date Submitted	Status	Action
110350	Customer Order	OnePath Adviser Network		\$0.00	Jun 9, 2011	Confirmed	Details Reorder

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

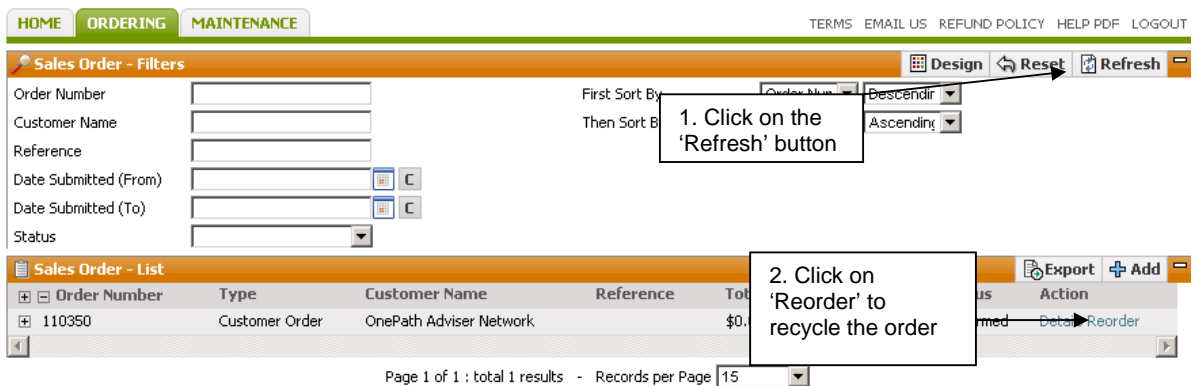
Step 2

1. Click the clear icon  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.



The screenshot shows the 'Sales Order - Filters' section with input fields for Order Number, Customer Name, Reference, Date Submitted (From), Date Submitted (To), and Status. There are 'Clear' icons next to the date fields. The 'Sales Order - List' section displays a table with columns: Order Number, Type, Customer Name, Reference, Total, and Action. A single row is visible with Order Number 110350, Type Customer Order, and Customer Name OnePath Adviser Network. The Action column contains 'Details' and 'Reorder' links. A 'Refresh' button is located in the top right of the filters section, and a 'Reorder' link is in the Action column of the table. Two callout boxes provide instructions: '1. Click on the 'Refresh' button' and '2. Click on 'Reorder' to recycle the order'.

Order Number	Type	Customer Name	Reference	Total	Action
110350	Customer Order	OnePath Adviser Network		\$0.	Details Reorder

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

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’.

The screenshot shows the 'Sales Order Details' screen. At the top, there are navigation tabs: HOME, ORDERING, and MAINTENANCE. On the right, there are links for TERMS, EMAIL US, REFUND POLICY, HELP PDF, and LOGOUT. The main header includes 'Sales Order Details' and 'Delivery' tabs. Below the header, there are fields for Order Number (110355), Date Submitted (Jun 9, 2011 1:16 PM), Date Approved, Date Last Modified (Jun 9, 2011 1:16 PM), and Reference. A callout box points to the 'Delivery' tab with the text '2. Click on Delivery'. Another callout box points to the 'Sales Order Details' header with the text '1. You will be directed to the Sales Order Details screen'. Below the header is the 'Sales Order Lines' table.

Product Code	Customer Stock Code	Description	Quantity	Pack Unit	Unit Price	Line Total	Status	Action
OP-L2237P1110	L2237P1110	~PortfolioOne Investment PDS	50	EACH	\$0.00	\$0.00	Draft	Edit Delete
						Net:	\$0.00	
						GST:	\$0.00	
						Total:	\$0.00	

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

HOME ORDERING MAINTENANCE TERMS EMAIL US REFUND POLICY HELP PDF LOGOUT

Sales Order Details **Delivery** Submit Order Save Save and Exit Exit

Company Name OnePath Adviser Network
Contact OnePath Adviser
Originator's Email * geonlinesupport@geongroi
Delivery Phone Number
Delivery Comments

Address Line 1 * 347 Kent Street
Address Line 2
City * Sydney
State * NSW
Post Code * 2000
Country Name * Australia
Postal Address
Save as Default Address

To create a user delivery address please enter the address details and tick the 'Save as default address' check box.
This address will become your editable default address and will be displayed on all future orders.

Sales Order Lines

Product Code	Customer S	Quantity	Pack Unit	Unit	Action
OP-L2237P1110	L2237P1110	50	EACH		Edit Delete

Net: GST: Total: \$0.00

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TERMS EMAIL US REFUND POLICY HELP PDF LOGOUT

1. If you have edited the address fields and want to save the address, tick the checkbox of this option

2. Click on Submit Order to process your order

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.

The screenshot shows a web interface with a navigation bar at the top containing 'HOME', 'ORDERING', and 'MAINTENANCE'. On the right side of the navigation bar are links for 'TERMS', 'EMAIL US', 'REFUND POLICY', 'HELP PDF', and 'LOGOUT'. Below the navigation bar is a header for 'Sales Order Submission' with a red circle around an 'Exit' button. The main content area contains a thank-you message and a table with the following data:

Order Number	110355
Reference	
Net	\$0.00
GST	\$0.00
Total	\$0.00

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 Sent: Thu 9/06/2011 1:25 PM
To: GEONline Support
Cc:
Subject: Order 110355 has been placed successfully

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 identifiers 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.