FinSuiteSA Online Shop

User Training Manual

Version: 1.0
Application: FinSuiteSA Online Shop
Related Application: FinSuiteSA Enterprise

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1. Introduction

1.1 About FinSuiteSA Online Shop

FinSuiteSA Online Shop is an online shopping platform that allows customers to purchase available products from participating shops.

The application also provides a **Deliveries Management** environment for drivers who have been appointed to deliver orders on behalf of a company.

FinSuiteSA Online Shop therefore supports two primary user environments:

Shopper Platform

Designed for ordinary customers who wish to browse products and place orders online.

Deliveries Management — Driver Platform

Designed for drivers who have been authorised to manage and complete deliveries on behalf of a company.

Access rights for the Deliveries Management environment are granted through **FinSuiteSA Enterprise**.

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2. User Accounts and Access

2.1 Creating a User Account

Before using FinSuiteSA Online Shop, a user must create an account.

The account can be created using either:

- An email address; or
- A cellphone number.

Once the account has been created, the user can sign in to FinSuiteSA Online Shop.

2.2 Access to Deliveries Management

Users who are required to work as delivery drivers must be granted the appropriate access rights through **FinSuiteSA Enterprise**.

When a user signs in, FinSuiteSA Online Shop checks the user's access and subscription status.

If the user has valid access and has also been granted rights to use Deliveries Management, the application provides the user with the option to choose between:

- **Online Shopping**
- **Deliveries Management**

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3. Signing Up and Signing In

3.1 User Sign-Up

New users can create an account from the **Sign Up** page.

To create an account:

1. Open FinSuiteSA Online Shop.
2. Select **Sign Up**.
3. Enter the required information.
4. Choose whether to register using an email address or cellphone number.
5. Complete the registration process.

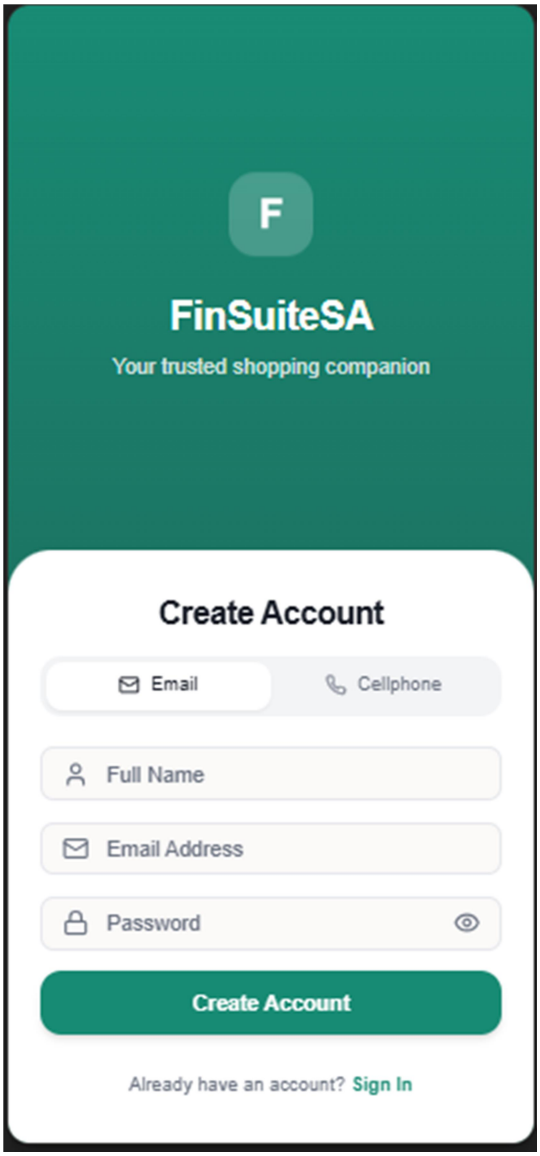


Figure 1.1 — User Sign-Up Page

3.2 User Sign-In

After creating an account, the user can sign in using the credentials created during registration.

To sign in:

1. Open the FinSuiteSA Online Shop application.
2. Enter the registered email address or applicable login information.
3. Enter the password.
4. Select **Sign In**.

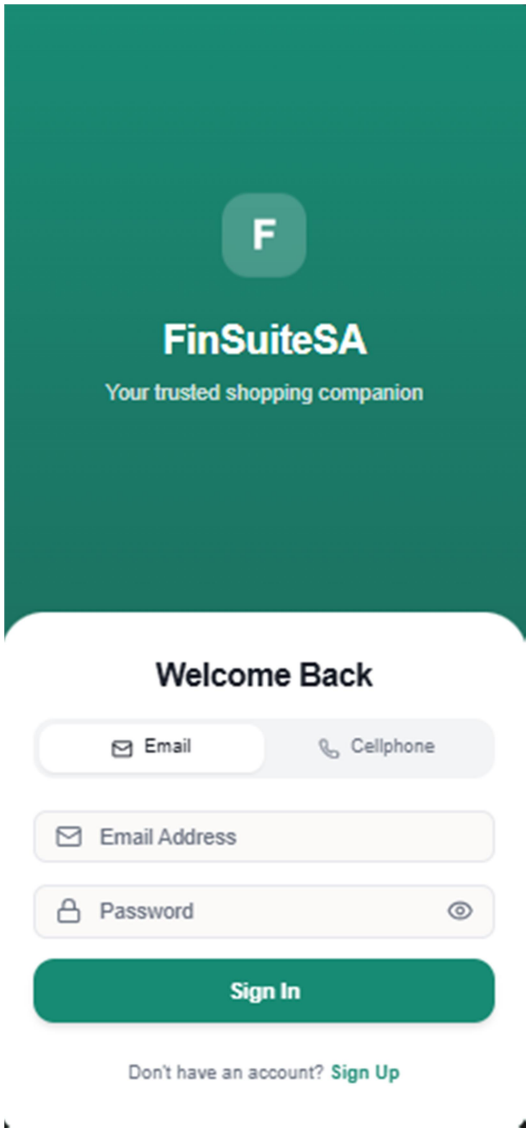


Figure 1.2 — User Sign-In Page

3.3 Access and Subscription Verification

After the user signs in, FinSuiteSA Online Shop checks the database to confirm the user's access and subscription status.

If the required checks are successful, the application grants access.

The system also checks whether the user has been granted access to the **Deliveries Management** platform.

If the user has access to both environments, the application displays the available working environments for selection.

4. Selecting the Working Environment

Users who have access to Deliveries Management can choose the environment in which they wish to work.

The available environments are:

- **Online Shopping**
- **Deliveries Management**

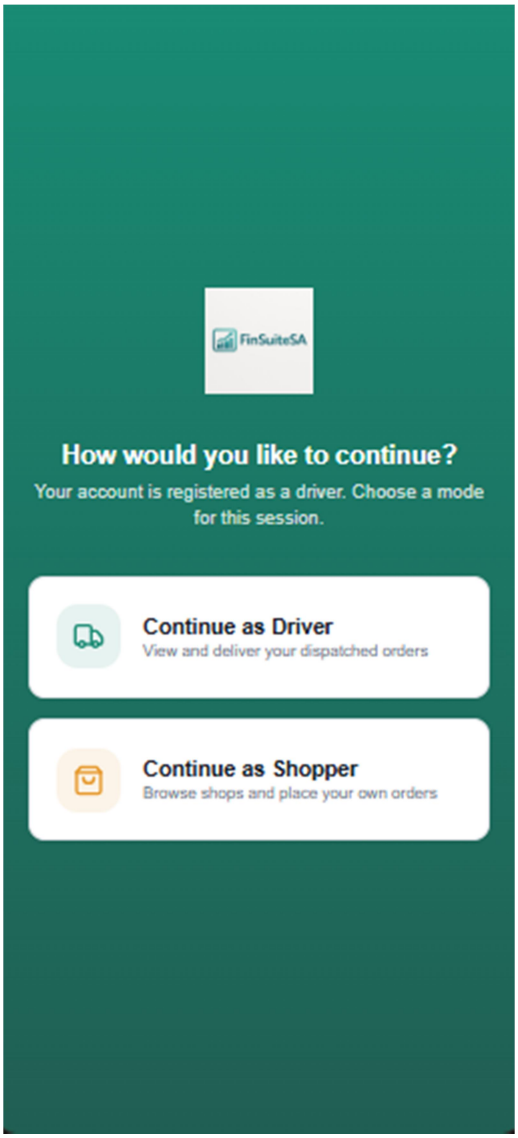


Figure 4.1 — Select Working Environment

Important: The user's ability to access Deliveries Management depends on the access rights granted through FinSuiteSA Enterprise. The email used when

granting access rights through FinSuiteSA Enterprise, should be the same as the email used to sign to FinSuiteSA Online Shop.

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5. Deliveries Management — Driver Platform

5.1 Continue as Driver

When the user selects **Continue as Driver**, the application redirects to the **My Deliveries** page.

The My Deliveries page displays deliveries that have been allocated to the driver.

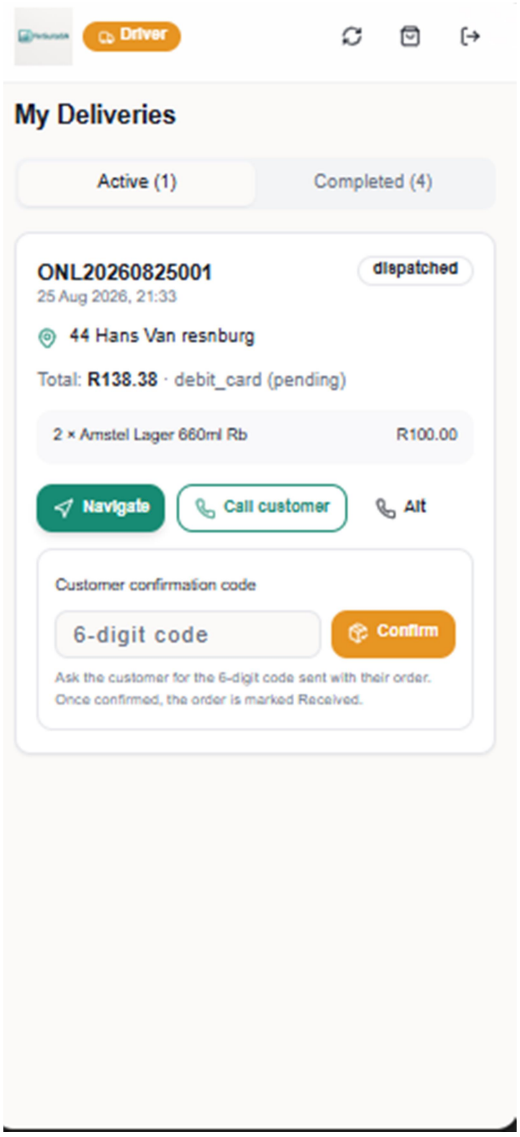


Figure 5.1 — My Deliveries

5.2 Viewing Completed Deliveries

The driver can also filter the delivery information to view deliveries that have already been completed.

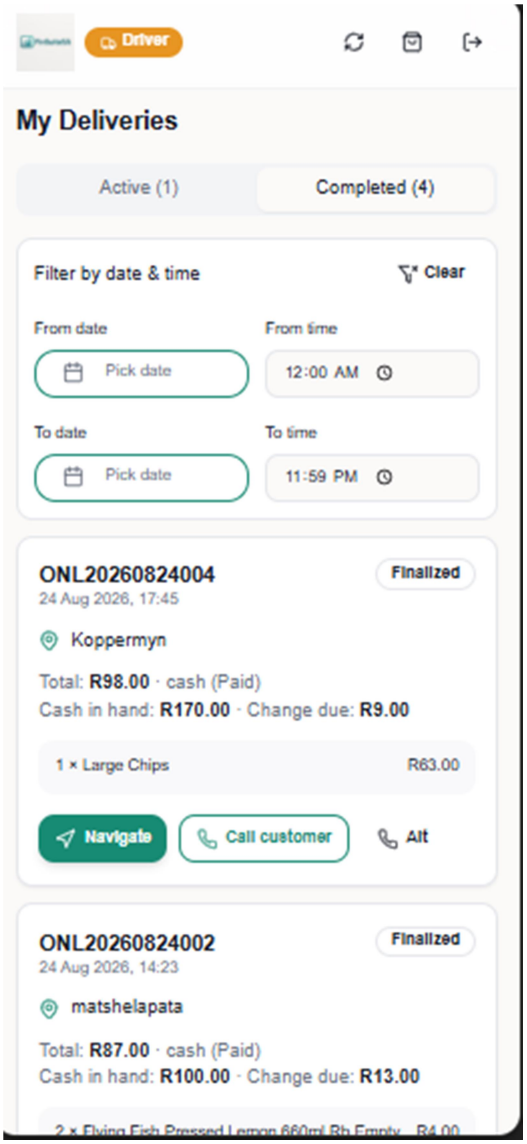


Figure 5.2 — Completed Deliveries

5.3 Switching Between Driver and Shopper Platforms

A user with access to both environments can switch between the **Driver Platform** and **Shopper Platform**.

The switch option is available at the top-right of the screen.

To switch environments:

1. Select the switch button in the top-right corner.
2. Select the environment you wish to use.
3. Continue working in the selected environment.

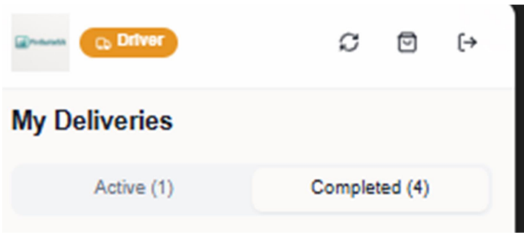


Figure 5.3 — Switching Between Driver and Shopper Platforms

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6. Shopper Platform

6.1 Continue as Shopper

When the user selects **Continue as Shopper**, the application redirects to the **Choose Your Shop** page.

The page displays shops whose subscriptions are currently valid.

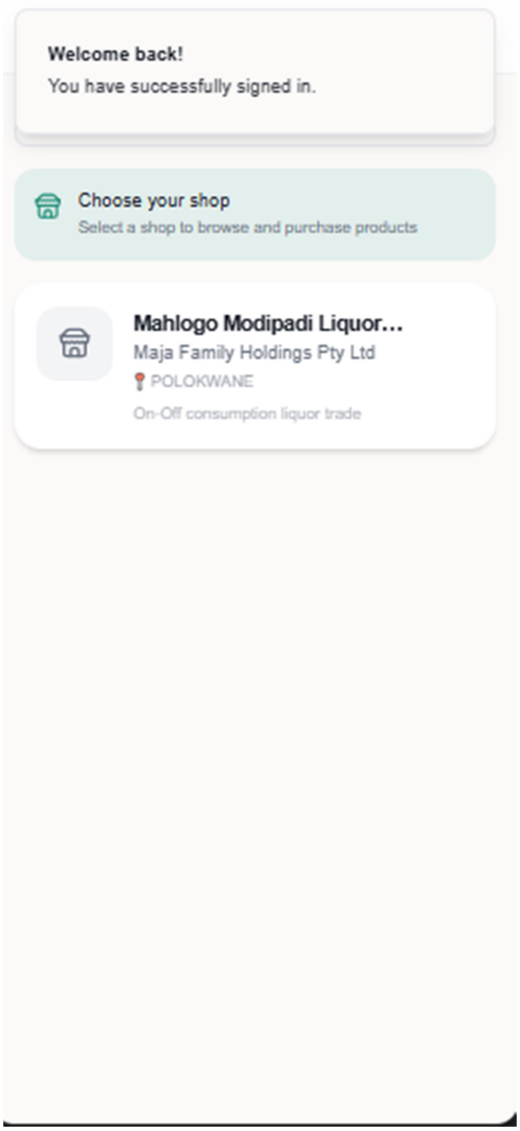


Figure 6.1 — Choose Your Shop

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7. Selecting a Shop

7.1 Choose a Shop

The user must select the shop from which they wish to purchase products.

To select a shop:

1. Review the available shops.
2. Select the required shop.
3. The application will display the available products for the selected shop.

Only shops with a valid subscription are presented to the user.

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8. Browsing and Selecting Products

8.1 Shopping List

After selecting a shop, the user is redirected to the shopping items available from that shop.

Only products that are currently available are displayed.

The system also limits online purchases to the quantity currently available.

To select products:

1. Browse the available products.
2. Select the required product.
3. Select the required quantity, where applicable.
4. Continue selecting products until the shopping list is complete.

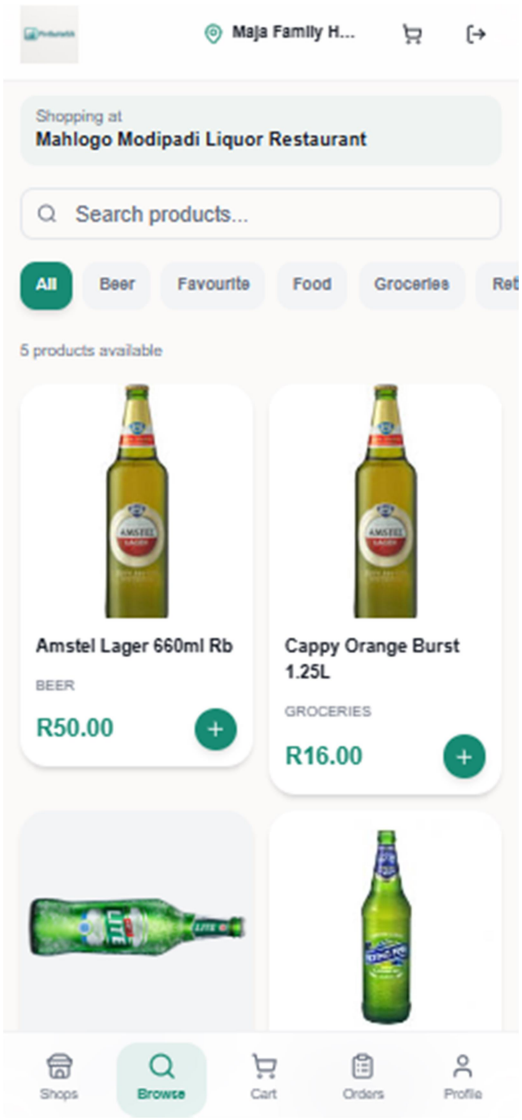


Figure 8.1 — Available Products / Shopping List

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9. Shopping Cart

9.1 Reviewing Selected Items

Products selected for purchase are added to the **Shopping Cart**.

Once the user has finished selecting products, the shopping cart can be opened to review the selected items.

To review the shopping cart:

1. Select the **Shopping Cart** icon.
2. Review the selected products.

3. Confirm that the items are correct.
4. Proceed to checkout when ready.

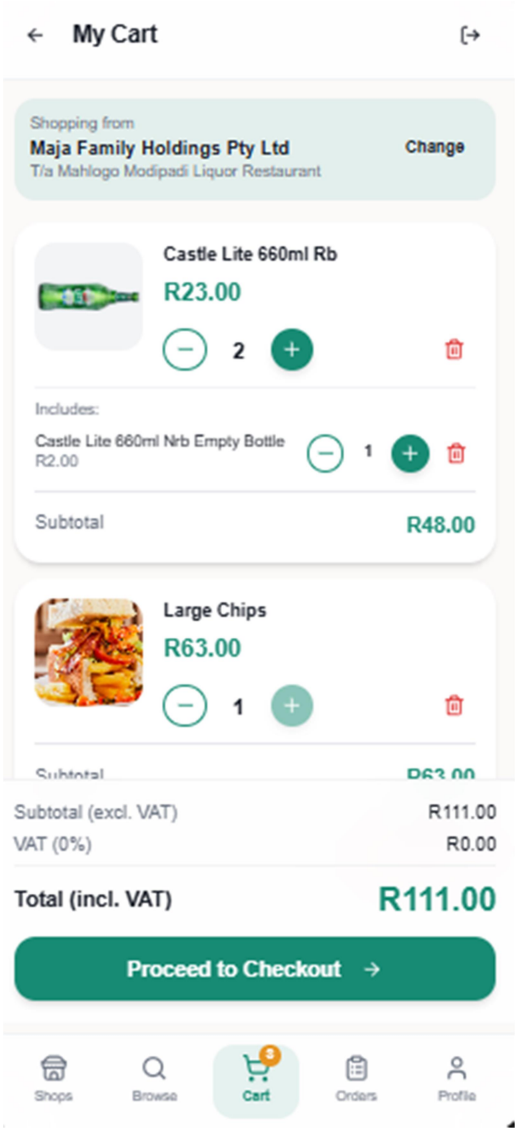


Figure 9.1 — Shopping Cart

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10. Checkout

After reviewing the shopping cart, the user can proceed to checkout.

The checkout process requires the user to select how the order will be received:

- **Collection**
- **Delivery**

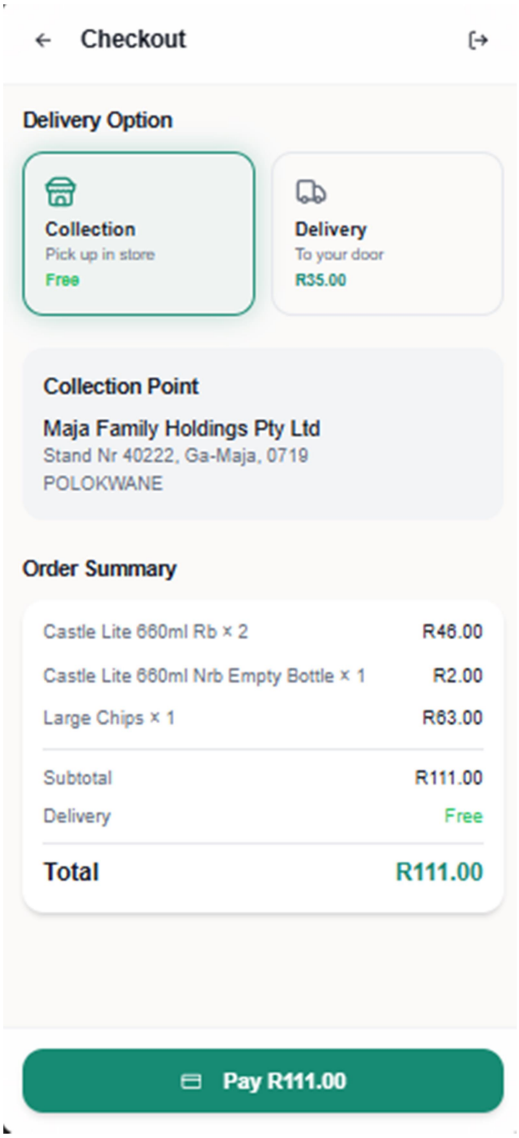


Figure 10.1 — Checkout and Fulfilment Option

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11. Collection Orders

11.1 Selecting Collection

If the user chooses **Collection**, the order will be processed for collection rather than delivery.

After selecting Collection, the application redirects the user to the **Select Payment Method** page.

Process

Checkout → Collection → Select Payment Method

11.2 Selecting the Payment Method

The user can select the payment method they wish to use for the order.

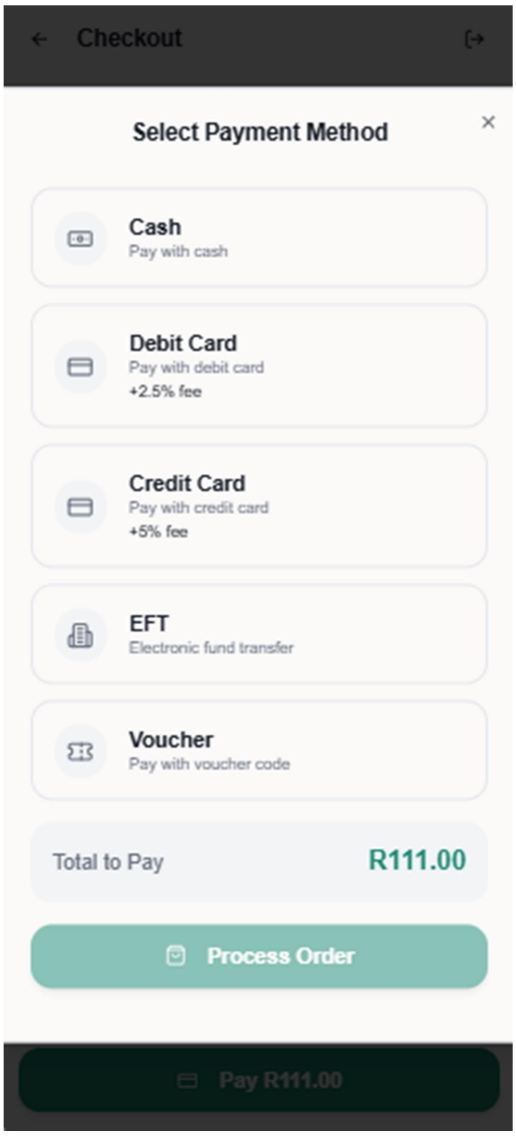


Figure 11.1 — Select Payment Method — Collection

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12. Delivery Orders

12.1 Selecting Delivery

If the user chooses **Delivery**, additional delivery information is required.

The user can provide delivery-location information in several ways:

- Enter the delivery address.
- Record a voice note explaining how to reach the address.
- Use the current-location option.
- Use a combination of these options.

The delivery fee is automatically added when the delivery option is selected.

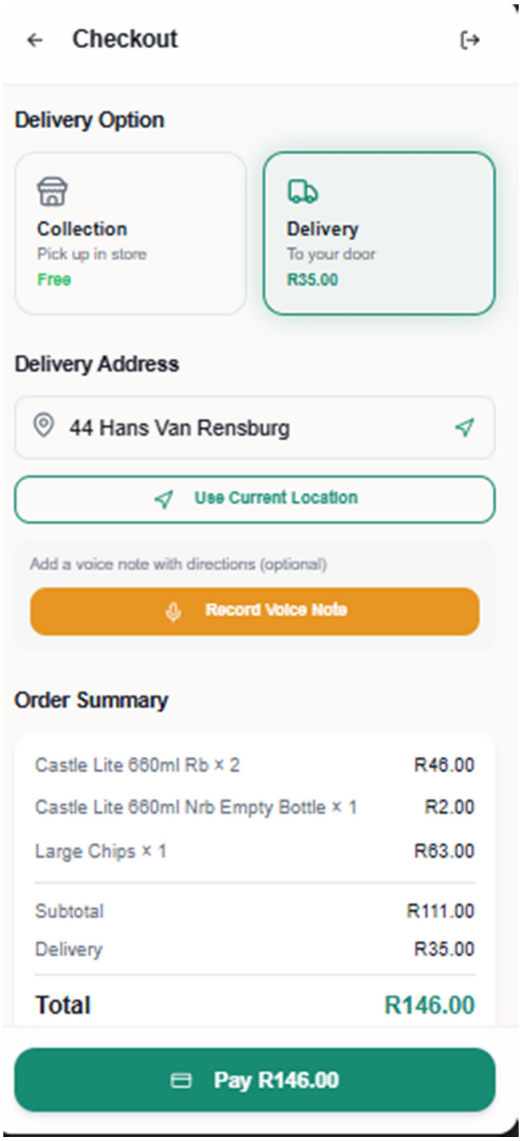


Figure 12.1 — Delivery Address

12.2 Providing Delivery Instructions

The user should provide sufficient information to assist the driver in locating the delivery destination.

Depending on the available options, this may include:

- A physical address.
- Current location.
- Voice instructions.
- A combination of location information and instructions.

Important: A delivery fee is automatically added when the Delivery option is selected.

12.3 Selecting Payment for a Delivery Order

After the delivery information has been captured, the application redirects the user to the **Select Payment Method** page.

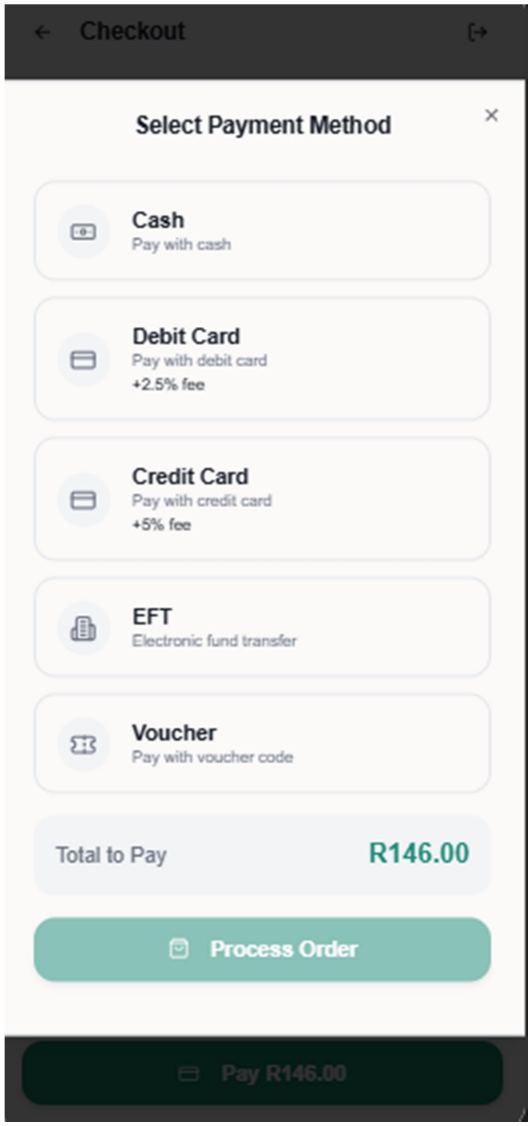


Figure 12.2 — Select Payment Method — Delivery

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13. Selecting a Payment Method

After selecting the fulfilment method, the user must select the applicable payment method.

The available payment options should be selected according to the options presented by the application.

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14. Cash Payments

14.1 Entering Cash in Hand

When the user selects **Cash** as the payment method, the user is prompted to enter the amount of cash that will be available.

This information allows the cashier/driver to prepare the correct change for the customer.

To record a cash payment:

1. Select **Cash** as the payment method.
2. Enter the amount of cash that will be handed over.
3. Review the amount.
4. Continue to finalise the order.

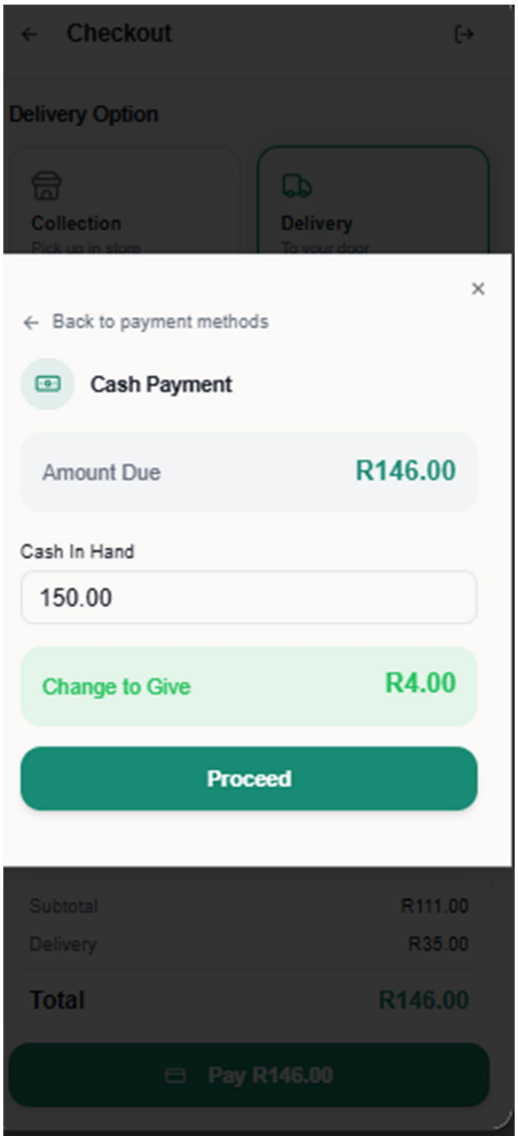


Figure 14.1 — Cash Payment

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15. Finalising an Order

15.1 Customer Verification

Before the order is finalised, the user is required to:

- Take a selfie using the phone.
- Provide their phone number.
- Provide an alternate phone number.

These details must be provided before the order can be finalised.

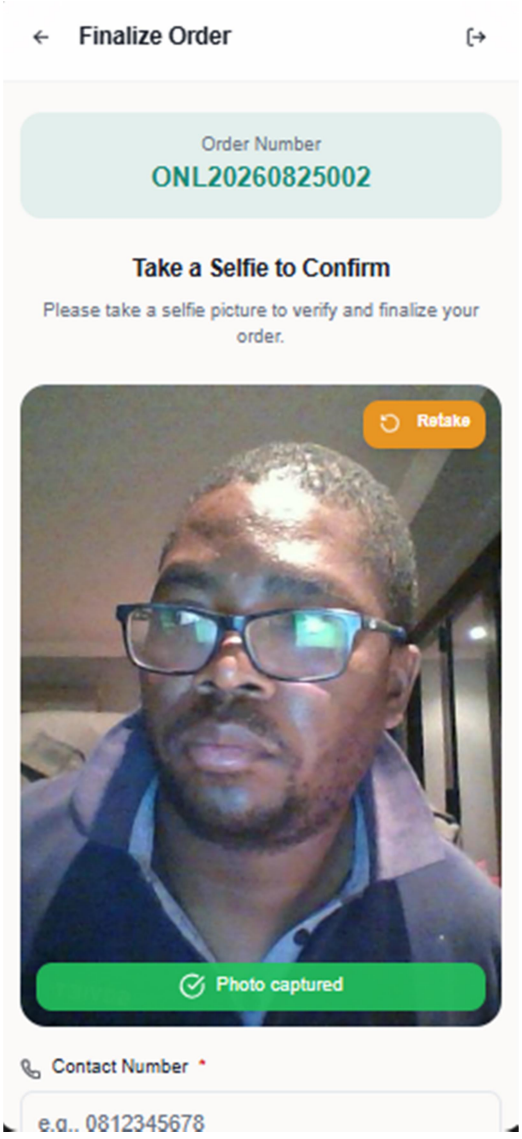


Figure 15.1 — Finalise Order

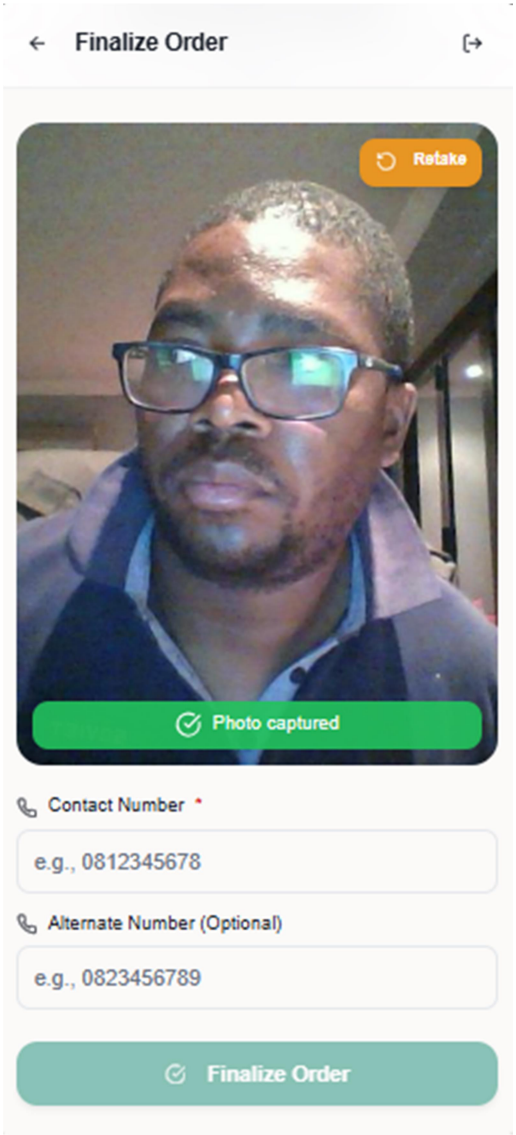


Figure 15.2 — Finalise Order — Customer Details

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16. Order Confirmation

After the order has been successfully finalised, the user receives:

- An order number.
- An order confirmation message.

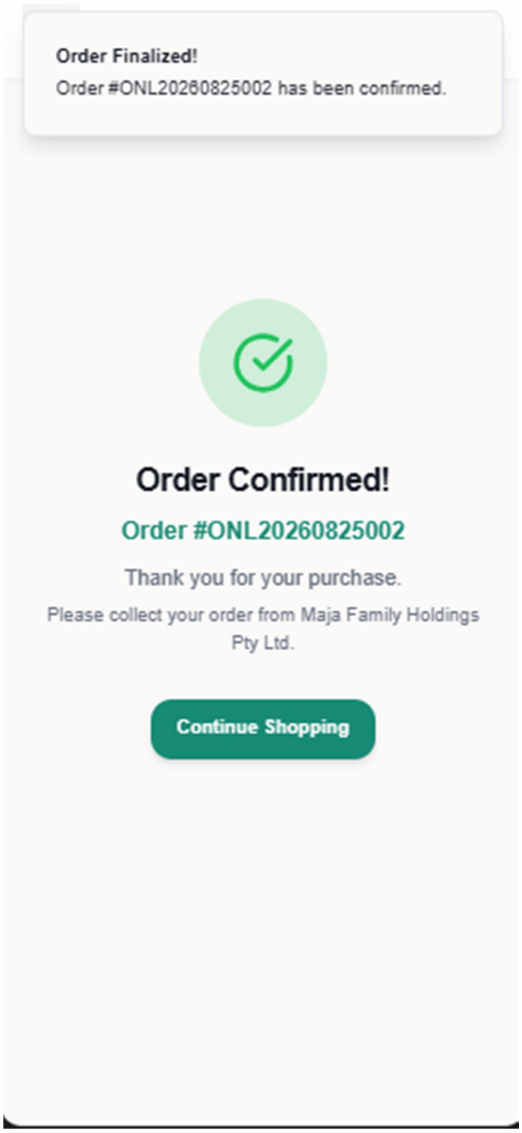


Figure 16.1 — Order Confirmation

Insert the existing screenshot showing the confirmed order and order number.

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17. Complete Online Shopping Workflow

The complete shopper process can be summarised as follows:

Create Account
↓
Sign In
↓
Access & Subscription Verification
↓

Continue as Shopper
↓
Choose Your Shop
↓
Browse Available Products
↓
Select Products
↓
Shopping Cart
↓
Checkout
↓
Choose Collection or Delivery

If Collection:

Collection
↓
Select Payment Method
↓
Finalise Order
↓
Order Confirmation

If Delivery:

Delivery
↓
Enter Delivery Information
↓
Select Payment Method
↓
Enter Cash Amount — if Cash is selected
↓
Finalise Order
↓
Order Confirmation

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18. Complete Driver Workflow

The driver workflow can be summarised as:

Sign In
↓
Access & Subscription Verification
↓

Continue as Driver
↓
My Deliveries
↓
View Allocated Deliveries
↓
Complete Delivery
↓
View Completed Deliveries

A user with the appropriate access rights can switch between the Driver Platform and Shopper Platform using the switching option available at the top-right of the screen.

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19. Quick Reference

Shopper

Sign In → Shopper → Choose Shop → Select Products → Cart → Checkout → Collection/Delivery → Payment → Finalise → Confirmation

Collection

Checkout → Collection → Payment → Finalise Order → Confirmation

Delivery

Checkout → Delivery → Delivery Address/Instructions → Payment → Finalise Order → Confirmation

Driver

Sign In → Driver → My Deliveries → Manage Deliveries → Completed Deliveries

Switch Platform

Switch Button → Shopper / Driver

End of Manual

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