

Quoting and Buying Process Flows

Visitors

Prices on product pages dynamically if logged in change based on discount and also shows original price

Click to buy or receive quote

Login, Check out as Guest or Register to Join Green Wholesale Club for discounts today. Show credit balance if any

Cart:

1. Single page quote and payment page.
2. Account Credit Card should be reusable.
3. Paypal is the VISA/MC merchant-should allow for direct payment through Paypal.
4. Recommended Items
5. Testimonials and reviews
6. Option to generate a downloadable quote. System generates and emails to customer and agent. System saves.

Shipping:

1. Calculated by weight via UPS
2. Fixed Freight Per Item with Quantity Breaks
3. Freight as % of Item Cost with Quantity breaks
4. Check with Manufacturer and get back to customer with pricing- request to manufacturer automatically sent via email.
5. When Quote comes back, cart is updated automatically. – Possibly web submit form.

Click to Buy and agree to terms.

If referrer present, 1% credited to referrer

Receipt sent via email

If Shipping #4 on any item– this is a quote until we have confirmation. Integration into Quickbooks(QB)

If Quote doesn't turn into sale after 10 days, system sends out follow up, then every 30 days until purchase or cancellation of quote in the system by customer.

2nd Page of Flow

Purchase Order is automatically generated, but not emailed until approved. Vendor queried on lead time, and if lead time exceeds standard lead time, ES is notified. Approval requirement can be waived by product.
Integration into QB

Vendor is paid.
Item shipped and vendor sends a tracking number, and is automatically sent to customer with item identified.

System Calculates difference between gross sale and amount paid to vendors = net profit. Agent % is applied to Net profit for commission calculation.

If Agent# present:
Commission is calculated

Generates notification for commission payment approval

Feedback form sent out 2 weeks after ship. For completing form, they get a one-time coupon code.

List gets dumped to internal mail system or external like Mailchimp or Constant Contact for guest email list

Green Wholesale Club & Agents

Customer Registration into Green Wholesale

1. Name
2. Address
3. Shipping Address
4. Phone
5. Email
6. Username/Email
7. Password
8. Type of Entity
 1. Business
 1. Federal ID #(Use API to verify)
 2. Type
 2. Homeowner
9. Have you been referred by an Agent or other member?
 1. If Yes – Agent or member#
10. Website if applicable
11. How did you find us. (Checkboxes i.e. Search, referral, facebook, etc..)

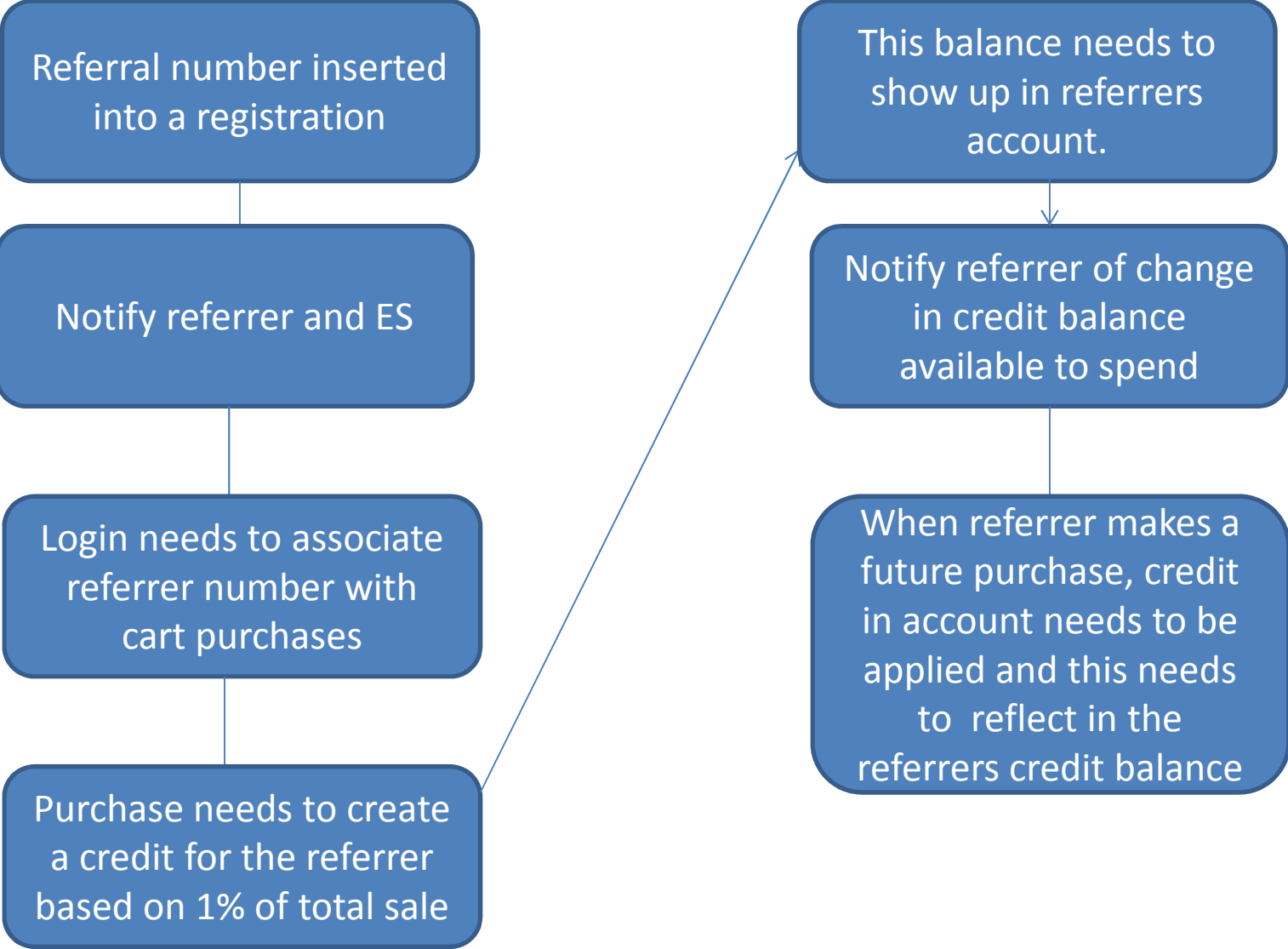
Send out confirmation email

Customer Clicks link on confirmation email

Take Them To Login page.

This should be the destination page for Green Wholesale Club button off of homepage. There should also be a headline and text describing the club itself.

Referral Credit Flow



Agents

Agent Login

1. Anytime Agent is logged in on behalf of customer or any customer with an agent # attached, all quotes, calc reports, etc.. Have agent name and contact info listed on document.
2. All emails cc'd to agents

Agent Activities

1. Create a new GWC member or login on their behalf.
2. Use design tool, use ROI Calc, shop like any other visitor, login dictates discount
3. Email outputs/quotes to customer.

Agent Sign-up Form

1. Name
2. Address
3. Phone
4. Email
5. Tax ID#
6. Have you been referred by an Agent?
7. Username/Email
8. Password
9. Website if applicable.
10. How did you hear about Eco-Smart?
11. Describe your background and interests, and your plans for promoting Eco-Smart.

Same Confirmation process
as Customer Registration

Tools & E-Forms

Lighting Design Tool and ROI Calculator

Design Recommendation Tool

1. Existing wattage?
2. Existing Lamp Type?(Drop down)
3. Existing Fixture Type?(dropdown)
4. Mounting Height?
5. Application?.(Dropdown)

Show them recommendations and give option to Download Report – They give up an email and we give them a report. They can also get linked to the recommended products

Integrates into email follow up system

Cost Benefit Analysis Calc

1. Average Hours per day?
2. Average Days per week?
3. Melded KWH Rate?
4. Air Conditioning? Yes/No

Download Report – They give up an email and we give them a report

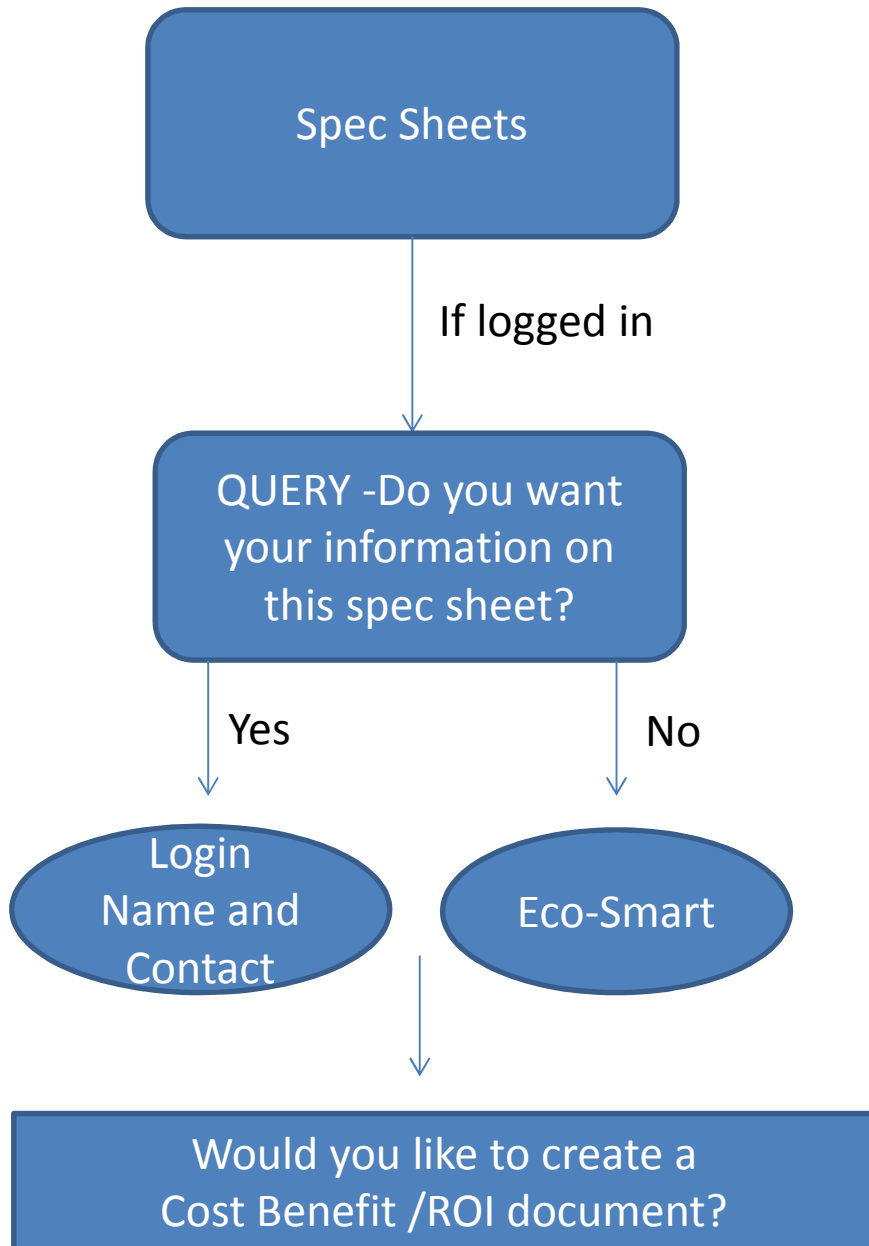
Integrates into email follow up system

Eco Rubber Design Tool

Eco-Rubber Design Tool

1. Location(Dropdown)
2. Subsurface (Dropdown)
3. Preferred Surface Design(Drop down)
4. Expected Traffic(dropdown)
5. Fall Height (Dropdown)
6. Ship to Zip code (dynamic positioning)
7. Notes

Spec Sheet Flow



E-Forms

- We want to include a form the property can sign to authorize their utility company to give us copies of their bills, both before and after the retrofit.
- We will also offer a survey by a licensed electrician for a fee, if they don't want to do the survey themselves - that fee to be credited towards their purchase of \$2500.00 or more.
- Lighting Survey (Static)
- Eco-Rubber Quote form (Dynamic)

To Do list for site

- Add On the right of phone number in either the blue or the green, SDVOB– Link to a page where ES will provide content.
- Join Green Wholesale club links to information page with submit form.
- Add more logos to beauty slide.
- Create an incentive program to get testimonials and before and after pictures – this could be dealt with during the feedback form process.
- Change Green Wholesale Club language to remove “automatic” discounts.
- When you refer a new member to The Green Wholesale Club, you will be eligible to receive credits towards your future purchases.

Development Considerations

- Self Serve
 - Can categories and products be added easily
 - Will it be programmed that the design templates will take spacing into consideration after adding products and categories
 - Pricing can be changed easily
- Maintenance
 - Ongoing maintenance costs for updates and/or slight changes.