**Appendix E – Detailed Specification for online Store**

The eShop is built to be fully mobile friendly, with a responsive design which means it renders correctly for all types of device (e.g. desktop, tablet, smartphone).

**Full features list**

##### Product & Event Browsing

* Create unlimited products for the product catalogue
* Organize the product catalogue with unlimited categories and regions
* Highlight important products in a featured product section
* Upsell related products
* Associate products together for required or recommended parings
* Customize the layout of the shopping cart
* Create product listings that are easily sortable
* Build customizable search controls
* Enable purchases to be shared via social media or email
* Display product availability with low stock numbers
* Collect waitlists and send notifications when space becomes available
* List events on the site and point to external sites for the registration if applicable
* Create rich detail pages with (multiple) zoomable images

##### Event Registration

* Display events on a calendar
* Limit registration by age, gender, or grade
* Register a team of participants for an event
* Allow customers to register without creating an account
* Register participants by uploading a spreadsheet

##### Checkout and Payment Options

* Collect customer information in the cart or during checkout
* Build custom forms to be completed by customer
* Allow customers to complete forms later
* Support multiple shipping addresses per order
* Allow for pickup locations
* Customers can save shipping addresses for future purchases
* Enable customers to save credit cards for faster checkouts
* Integrate with PayPal
* Place credit on customers’ accounts
* Choose from a variety of discount programs, e.g. multiple purchase, early bird, etc
* Build complex or simple coupon codes
* Create subscription products with recurring payments
* Enable customers to drop in to single instance of a recurring event
* Allow customers to place a deposit and pay off over time

##### Event Coordinators

* Enable coordinators to communicate with event participants via email
* Allow coordinators to activate and inactivate member accounts
* Tag products with "requires approval", and enable coordinators to approve or deny purchases

##### Customer Service Tools

* Enable customers to submit support tickets
* Create FAQ articles that are accessible during the ticketing process
* Easily navigate support ticket queue
* Set follow-up reminders and tasks for support tickets
* View response time per ticket
* View detailed customer account records
* Create popup help text for each shopping cart page
* Reset passwords administratively or enable via self-help tools

##### Account & Order Management

* Use advanced search tools to locate accounts and orders
* Impersonate accounts to investigate issues
* Allow one account to have multiple participants
* Create and manage accounts as an administrator
* Create and manage orders as an administrator
* Add notes to orders and accounts, and view system created notes
* Refund or cancel entire order or specific items
* Use a robust transfer tool for exchanges
* View complete payment histories by account or by order
* Add post order discounts and fees
* View and print signed disclaimers
* View and manage course enrolment by account
* Print or email order and account statements
* Grant access to document library files by account
* Manage memberships per account and participant

##### Customer Accounts

* Allow for customers to view their order history and statuses
* Send automated email notifications regarding things like orders, refunds, waitlists, and upcoming events
* Enable customers to have multiple address on account, with a default
* Allow for customers to have multiple credit cards on account, with a default
* Enable customers to create and manage multiple participants under their account
* Allow customers to recover their abandoned carts
* Create certificates that can be archived by customers, and allow them to access them via their account
* Setup notification and reminders, and send them to customers via email
* Allow customers to manage purchased gift cards and vouchers
* Enable customers to view their signed disclaimers and waivers
* Allow for customers to access and update their processed forms
* Let customers re-print confirmation emails and order statements
* Allow customers to add funds to their accounts for future purchases
* Enable customers to make payments on products purchased with deposit

##### Analytics & Reports

* Create rich visual reports to analyse sales and other data
* Build in depth and customizable spreadsheet reports
* Reports regarding revenue, accounts, discounts, payments, staff, and system management
* Create sales reports with general ledger and sub-account codes
* View customer form data in reports
* View reports within a browser, or download as a spreadsheet
* Customize reports with filters, sorting, and field aliasing
* Export to accounting software and use export lock to eliminate double entries
* Drag and drop to easily build customized dashboards

Media/Certificate Generator

* Create flyers for events, print or send via email
* Create name badges for conference attendees
* Build course and attendance certificates that are personalized for the participant
* Use operators to pull data into fields to create endlessly personalized media
* Format media in letter and legal size, with landscape or portrait orientation
* Insert background images and/or have multiple images on a single line
* Revoke certificates, or set them to expire
* Enable customers to print their certificates via the account dashboard

##### Theme, Layout and Branding

* Customize the look and feel of the website
* Have a truly “your organisation” site, free of any other branding
* Choose from a library of themes as a starting point, or start from scratch
* Preview how your theme looks throughout your site and on mobile devices
* Have multiple themes active, and use different themes on different parts of your site
* Create special themes to be active during seasonal and promotional occasions
* Use unique themes per product, page, or domain
* Write CSS and HTML markup for additional modifications

##### Mobile Support

* Support the most popular mobile browsers on the latest devices
* Allow the site's layout to change based on screen width
* Preview the site's design on various screen sizes
* Reap SEO benefits from being compliant with Google's Mobile Friendly Test
* Enable mobile users to pinch to expand product images
* Allow for waivers and disclaimers to be signed with a touch signature
* Cache pages for faster loading times

##### Import Manager

* Import data from our other systems
* Import account data with system fields such as name, gender, address, email, company, and legacy ID
* Create custom fields to store data during import
* Import staff data with system and custom fields, including the ability to specify position and employment status
* Import learner data with system and custom fields, including transcripts and the ability to assign courses, tracks or paths
* Import roster data with system and custom fields, including the ability to add items to an order, update form questions, create account balances, and add participants to events

##### Document Library

* Upload documents to be accessed by customers or students
* Granted access via product purchase or via an administrator
* Add documents formatted in PDF, Word, XLS, PNG, JPG and other popular formats
* Add descriptions and tags for each document
* Use search controls and filters to find documents
* Allow files to be embeddable or downloadable
* Track downloads to know when and by whom documents are accessed

##### Search Features

* Provide various search controls for the product catalogue
* Allow for search results to be filtered by things like price, date, distance, and age
* Display search results in a grid, a list, or by thumbnail images
* Automatically create a site map
* Add product keywords to refine or broaden search results

##### Content Management

* Compose and publish content pages, news articles, and blog posts
* Select from a library of layouts, modify them, or build own
* Drag and drop widgets to easily build content
* Choose from widgets including a text editor, images (slideshow or single, icons, buttons and videos
* Integrate products into content pages
* Define column widths for desktop viewers and for mobile users
* Design and build complex pages without writing code
* Create custom URLs for content pages
* Create unique themes for individual pages
* Control when pages are published by date range
* Secure content by authentication and by membership

##### Security

* Achieve highest level of PCI compliance - service level 1
* Offer SSL security for shopping cart
* Tokenize credit card numbers
* Tokenize sensitive account information
* Set admin user permissions per page and control
* Set admin user group permission per page and control
* Encrypt passwords and session cookies
* Restrict access to pages and posts by authenticated user or memberships
* Restrict access to products by account, unique URL, or email address domain

##### Calendar Management

* Create calendars for your events
* Calendar events can be on a single day or span multiple days
* Use product catalogue calendars as an entry point for purchases
* Use administrative calendars for event management
* Organize calendars via colour designations
* Create meetings and appointments with automatic attendee notifications and recurring appointments