USER GUIDE

SCHWEIGEN PRO FORMA PORTAL

Version 7.0
Latest version always available for download here

Date	Version	Document Changes
17/12/2019	1.0	Added Account Management
18/12/2019	2.0	Added Product Search, Order Management & Tracking
10/01/2020	3.0	Added Admin Modules
12/02/2020	3.1	Added Salesperson Management
26/05/2020	3.2	Added Quote Creation
01/06/2020	4.0	Version for Distribution (June 2020)
25/05/2021	4.1	Updated Freight & Delivery Charges
27/05/2021	5.0	Updated Customer Details & Sales Documentation
01/06/2021	5.1	Version for Distribution (July 2021)
08/11/2021	6.0	Added Brand Toggle & Mixed Cart Flow
11/12/2022	6.1	Version for Distribution (Schweigen X)
15/05/2023	6.2	Added Filter Option Menu (Schweigen X)
17/11/2023	6.3	Added Payment in Store Option
03/01/2024	6.4	Updated Quote & Checkout Functionalities
06/06/2024	6.5	Updated the Making of Balance Payments
08/09/2025	7.0	Added Brand Toggle, Mixed Cart Flow & Schweigen Referral Sale

Table of Contents

1   Introduction

Welcome to [Schweigen Pro Forma Portal](https://proforma.schweigen.com.au) (https://proforma.schweigen.com.au)

This ecommerce portal is designed for the exclusive use of our valued retailer partners and their staff, to purchase pro forma products from our catalogue/s, simply and securely.

Upon login, you will have access to all inventory, promo, pricing and payment terms available to your business.

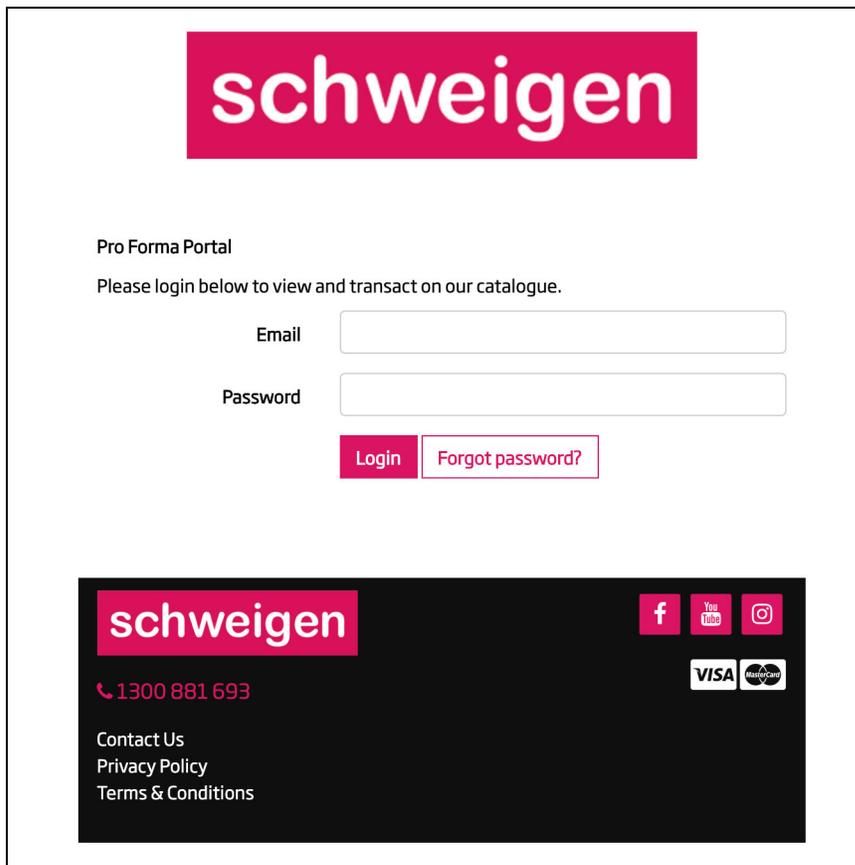All orders are completed in real-time and captured on our ERP system.

It is designed to be user-friendly, and only basic computer literacy is required for its use. However, please do not hesitate to write us at proforma@schweigen.com.au should you require any assistance.

2   Logging In

Please use your email address and the assigned password to *Login*.

Click *Forgot Password* to get a new one emailed to you from proforma@schweigen.com.au.

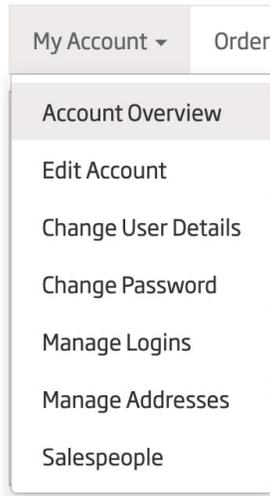Do check your spam or junk filter if this does not appear in your mailbox.

Contact proforma@schweigen.com.au should you still not be able to retrieve your account credentials.
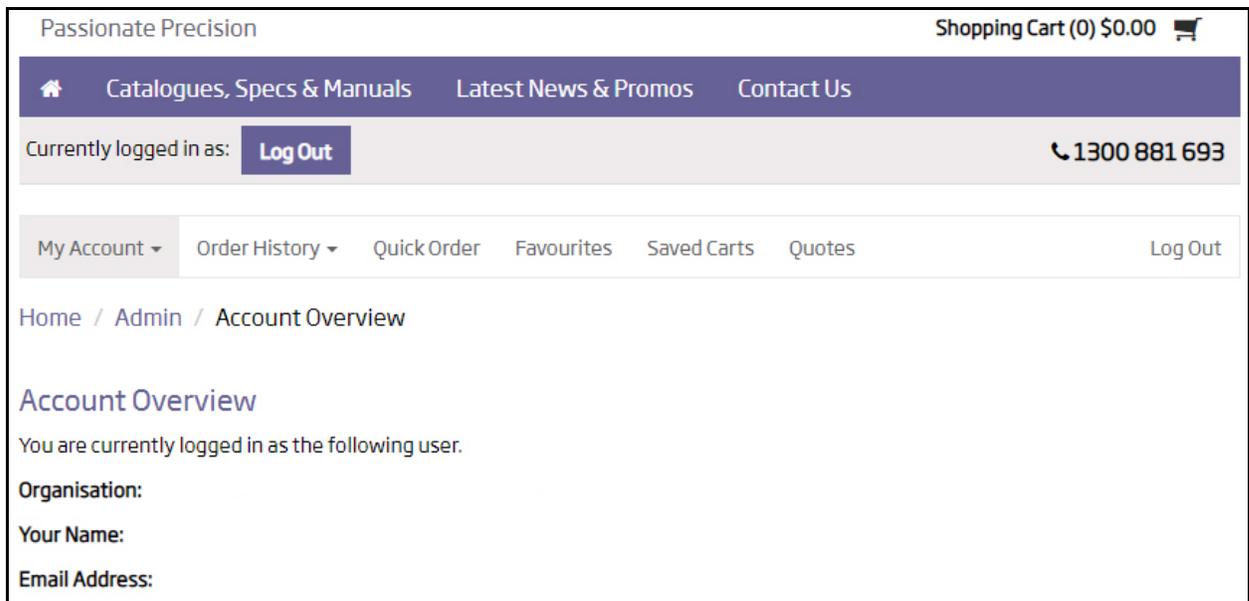
3   Account Management

This section deals with the administration of user accounts and company details on file and in use by the portal.

3.1   Account Overview

The *Account Overview* page identifies the Organisation, Name and Email Address you are logging in to, and transacting as.

3.2 Edit Account

Edit Account lets you amend the Company Details on file.
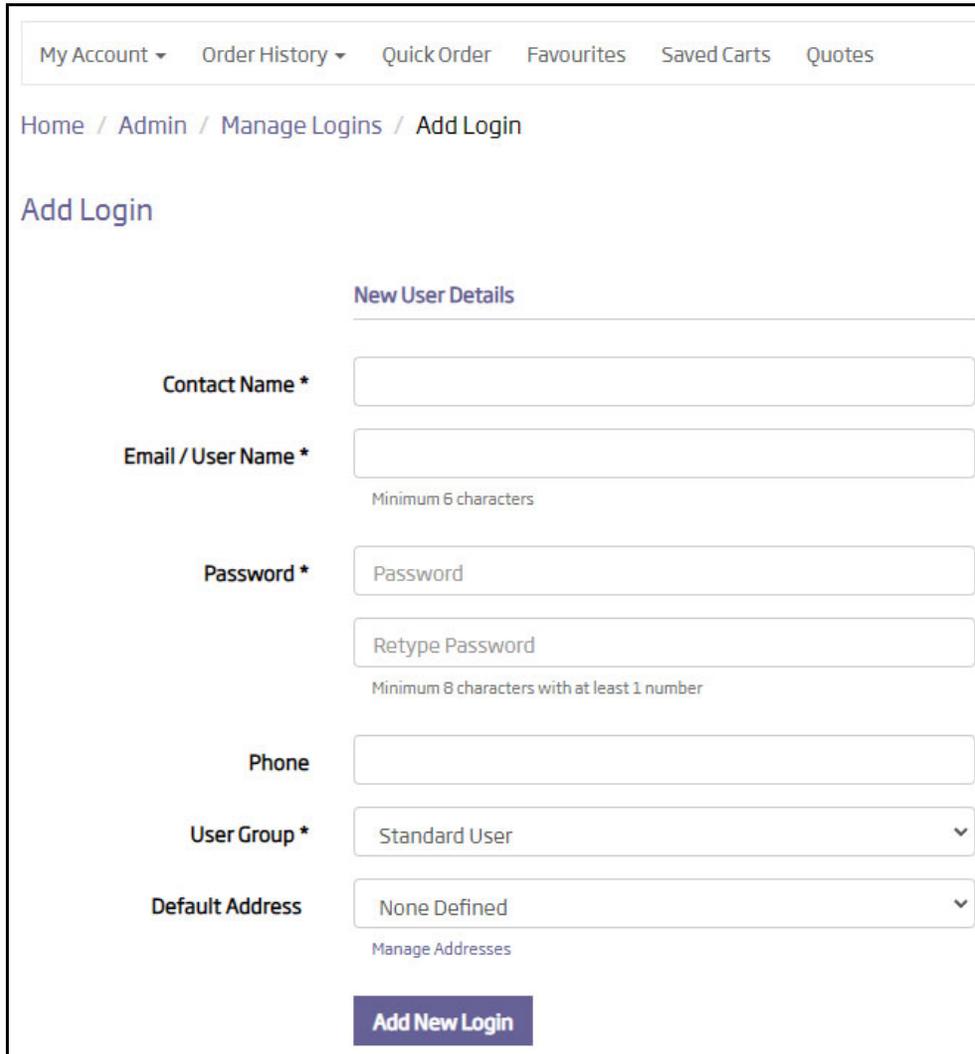

3.3 Change User Details

Change User Details lets you amend details for the account you are logging in with.

3.4 Change Password

Change Password lets you amend the Password for the account you are logging in with.

3.5 Manage Logins

[ADMIN FUNCTION] Admins can add/edit/delete accounts for all users that need access to transact on the portal on the store's behalf. To start, click *Manage Logins* and *Add New User.* Supply user details as instructed on screen.

In the User Group above, Admins can define if a new user is an Admin or Standard User. Only Admin Users have the authority to manage Logins and the *Salesperson* dropdown menu that appears during checkout.

When done, simply click *Add New Login* at the bottom of the form, and the new user may login immediately with his/her email address and password assigned by the Admin.

3.6 Manage Addresses

This lets you amend Addresses that have been saved for easy retrieval and use in the checkout process. This would typically include your store and/or warehouse's delivery address.

To add a commonly used Delivery Address for easy selection during the Checkout process, users may click *Add Delivery Address* and populate the necessary details. Click *Create Address* when done.

3.7 Salespeople

[ADMIN FUNCTION] Admins can create and manage Salespeople that appear on a dropdown menu for selection during the Checkout process.

At least ONE Salesperson needs to be created, before you can start ordering.

To add a Salesperson name for display and selection during the Checkout process, click *Salespeople* and populate the necessary details. Click *Add* when done.

Salespeople	
Current Salespeople	
Name	
Angela Witford	Delete
Ben Mckinnon	Delete
Bill Good	Delete
New Salesperson	
Salesperson Name *	
Add	

3.8 Schweigen Referral Sale

A *Schweigen Referral Sale* has been added to the Salesperson dropdown list during checkout. This option is only meant to be used by <u>*Schweigen Account Managers*</u> when putting in a pro forma referral sale on behalf of the store. Sales Correspondence for such orders will display "Schweigen Referral Sale" where the name of a Salesperson will typically appear

Payment for this purchase is collected by Schweigen, and any applicable rebates/commissions will be credited to your store at the end of each month.

Account Managers putting in a Referral Sale order may credit the name of any Salesperson from the store who put the customers through to them. The name of the Salesperson may be entered into the box titled <Delivery Date & Instructions> during Checkout, along with any other details or instructions.
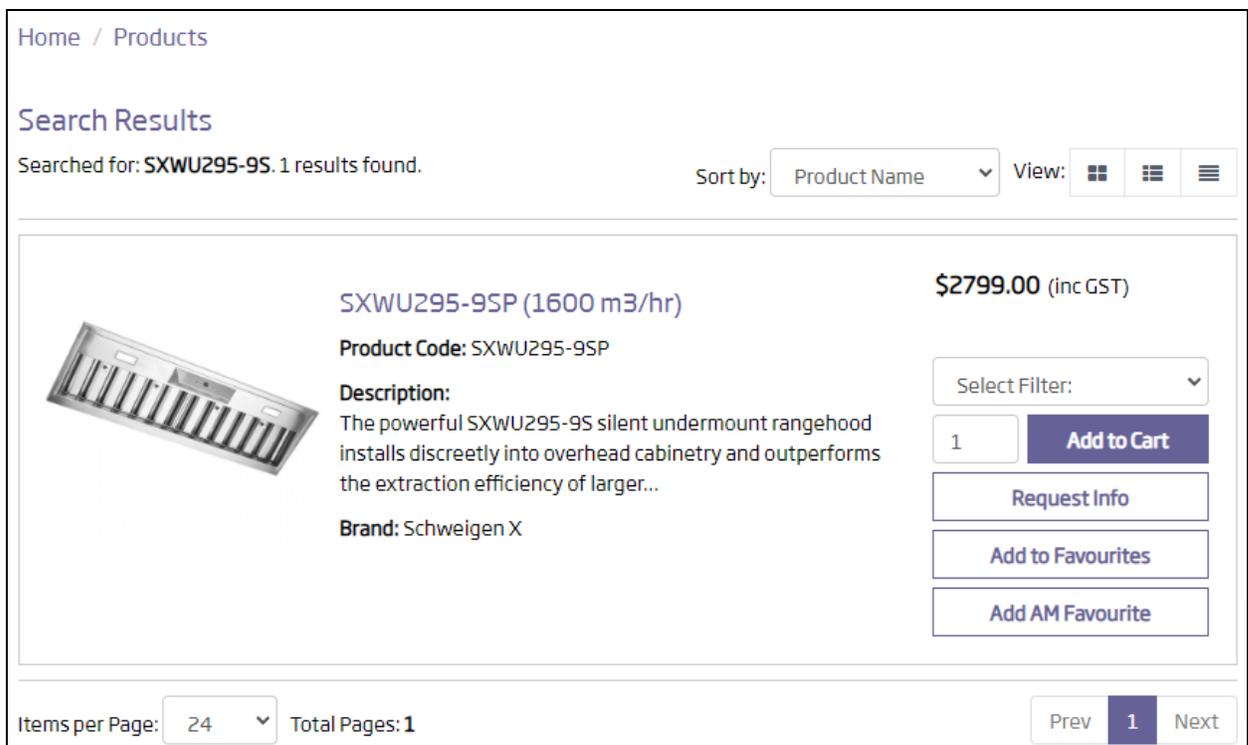
4   Product Search

4.1   Search Bar

The *Search Bar* is located below the brand logo on the top left. Simply type in the model you seek and click the magnifying glass to search and display the results.
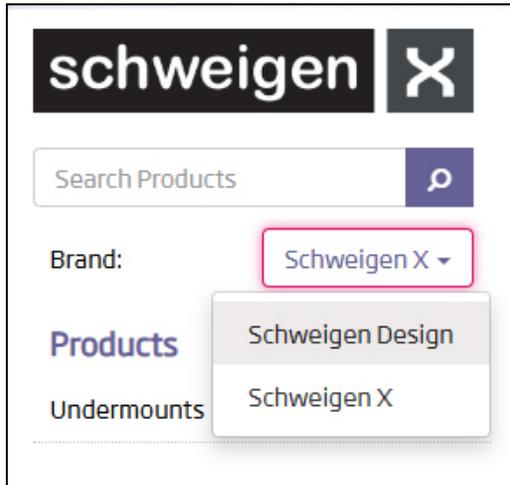
4.2 Brand Toggle

Brands are easily accessible from the same menu on top left. Click to view all Brands available to you, and select one to view all product categories within.

4.3   Side Nav

Product Categories are easily accessible from the same menu on top left. Click one to view all products within your category of choice, sortable by *Product Name/Code* and displayed in your view of choice.

Currently, Schweigen X has just Undermount Rangehoods available. Schweigen Design has both Islands and Wallmount Rangehoods available.

4.4   Request Info

Got a question about a particular model? Click *Request for Info* on the product listing and send your queries through the form provided. Schweigen will get back to you as soon as they can.

4.5 Add to Favourites

To add commonly searched or popular items to your Favourites folder, click *Add to Favourites*.

And they will always be accessible from the *Favourites* folder on your *Account Menu*.

5   Creating a Quote

5.1   Create Quote

When you're ready to create a quote with the items you've added to your shopping cart:
-   Click *Shopping Cart* at top right
-   Click *Create Quote*

A pop-up box will appear to inform you that this Quote will always be available from *Quotes* in your Account Menu.

Quotes are only valid for 14 days from the date of its creation and subject to stock availability. Promotional terms and conditions apply for time-limited sale/discounted items.

-   Enter Customer Details as prompted in the form fields overleaf
-   Click *Save Changes* when done

Create Quote   ✕

This Quote will be saved. You can access it via the Quotes option in your Account Menu. Quotes are only valid for 14 days from the date of its creation and subject to stock availability. Promotional terms and conditions apply for time-limited sale/discounted items.

Quote Name *

> Q080124

Salesperson *

> Norman   ⌄

Customer Name *

> Bono Jericho

Customer Email *

> bonojericho@gmail.com

Customer Mobile *

> 0432857548

Address *

> 1 Tree Hill

City / Suburb *

> Monash

State *

> Victoria   ⌄

Postcode *

> 3150

Country *

> AU

                                              Close   **Save changes**

Click *Close* to stop or *Save Changes* to complete.

5.2   View Quote

The new created quote is accessible anytime by clicking *Quotes* on your account bar.

From the *Search Quotes* tool bar, quotes are searchable by Customer Name, Quote ID or Salesperson.

Click to View or Remove (delete) your selected Quote

5.3   Print/Email Quote

Click *Quotes* on your account bar. Find your Quote of choice and click *View*.

Click *Print* to send to your printer for a hardcopy or *Restore to Cart* to make it the active cart to complete your checkout.

View Quote

Print   **Restore to Cart**

Quote Details

Name:	Q080124
Date:	January 17, 2024
Contact Name:	Oliver Fraatz
Company Name:	SCHWEIGEN IN - TESTING
Address:	Unit 8, 3-4 Anzed Court Mulgrave, VIC AUSTRALIA , 3170
Quote ID:	1564626

Code	Product Name	Qty	Unit	GST	Total
SXQU330-9SP	SXQU330-9SP (1600 m3/hr) (Baffle)	1	$2726.36	$272.64	$2999.00

Customer Details

Salesperson:	Norman
Customer Name:	Bono Jericho
Customer Mobile:	0432857548
Customer Email:	bonojericho@gmail.com
Customer Address:	1 Tree Hill Monash, VIC AUSTRALIA , 3150

Account Details

Bank:	Westpac
Account Name:	Schweigen Pty Ltd
BSB Number:	033181
Account Number:	390407

Quotes are only valid for 14 days from the date of its creation and subject to stock availability. Promotional terms and conditions apply for time-limited sale/discounted items.

Free home deliveries are available to metro areas of Melbourne, Sydney, Canberra, Adelaide, Brisbane, and Perth. Standard Charge of $80 per rangehood applies for all other postcodes, except for the following which we don't currently deliver to: 803, 822-827, 852, 854-859, 862-869, 872, 880-905 and 6798-6799.

Email Quote

Email Copy (optional)   Enter customer's email addres

A copy will always be sent to you, if you need another copy to go to another address, enter it here

Verification Code *   ENTER THE ALPHANUMERIC CHARACTERS YOU SEE ABOVE

Can't read the image? Try Another

Send

To email the quote to your customer, enter his/her email address in the cell beside *Email Copy* and complete the *Verification Code*. The designated admin of your account will always receive a copy of the quote you send your customer.

6   Making a Purchase

6.1   Add to Cart

When you're ready to make a purchase, first select a Filter or Colour Option, and specify number of units when prompted, before clicking *Add to Cart*.

The filter or colour option will be captured in the name of the item purchased. It will also reflect in the Order Confirmation emails and related documents.

6.2 Quick Order

If you have the exact product code on hand, you may click *Quick Order*, input the model number and specify the quantity to quickly add to your *Shopping Cart*.

6.3   Check Out

When you're ready to make payment on the selections in your cart, click *Shopping Cart* on the top right of your screen.
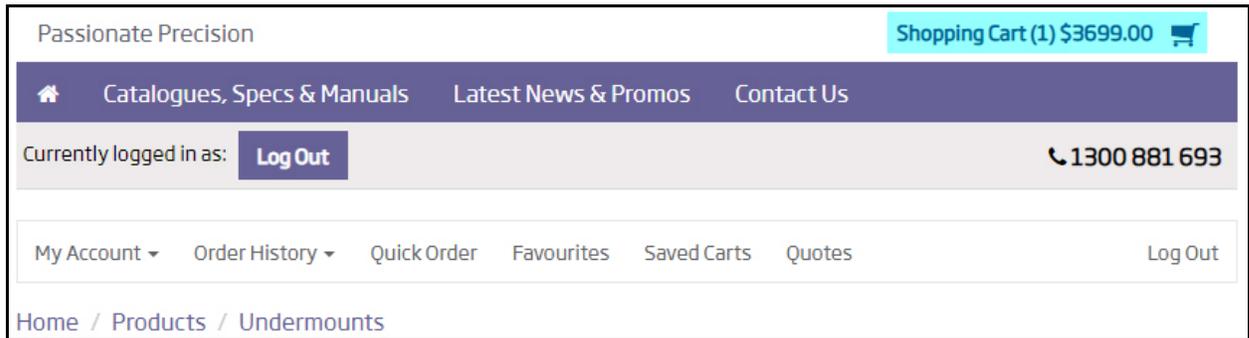
Check that the Quantity and Product Code of the item/s in your cart are correct. Modify as necessary before clicking *Checkout*.
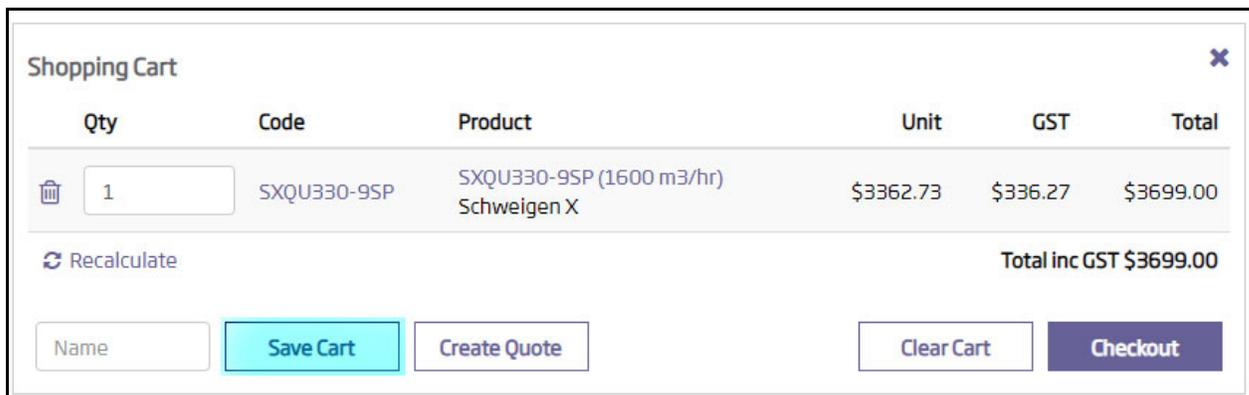
In the event that you can and need to purchase items from different brands, <u>please complete the transaction for all items in one brand first, before switching to the other to complete purchase of the rest</u>. You will get a reminder in red when attempting to check out items from different brands in the same cart.
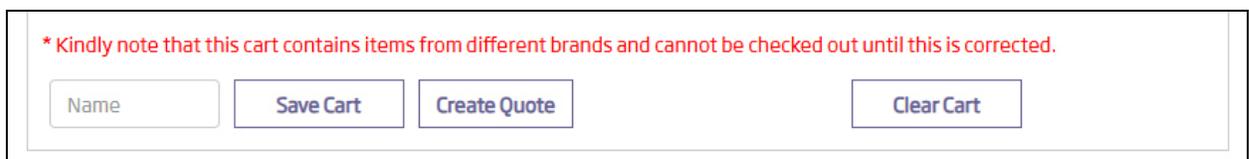
Step 1) Address

- Select the name of the Salesperson to whom this sale should be attributed to. Please speak with your admin if one has not been created for selection.
- Enter Purchase Order number. If none is provided, the system will auto-generate one.
- Store Details should be auto-populated with details on hand. Enter anew if not.
- Under Shipping Information, select from list of stored addresses or enter anew.
- Click *Save Address* if this is a new one that will be commonly used in future.
- **Enter preferred delivery date and notes in the *Delivery Date & Instructions* box**.
- Customer Details should appear if the cart has been restored from a saved quote.
- Click *Continue* when you're ready to move on to Freight.

-

Step 2) Freight

- Check Shipping Address
- Review Home Delivery Policy
- Select desired *Freight Option*
    - Charges for Home Deliveries are auto-appended based on postcode of delivery address supplied (FOC if in Metro areas, $80 otherwise – excluding areas we don't currently deliver to)
- Select from the *Payment Methods* available to your business:
    - *Credit Card* refers to either the store's or the customer's credit card. This payment method gives stores the ability to accept partial payment (minimum 20%) of the total due. The portal auto-calculates the minimum sum. This may be manually edited to a higher sum as required.
    - *Direct Deposit* refers to funds transfer from either the store's or customer's bank accounts
    - *Payment in Store* refers to payments paid to and collected by the store - inclusive of payment via cash, credit card, gift cards and financing arrangements.
    - *On Account* refers to existing bank arrangement between Schweigen and store.

Step 3a) Payment by Credit Card
- Review order details
- If you need to go back a step to make edits, click *Address* or *Freight*
- If not, enter card details and click *Pay Now*

Address	Freight	Payment	Complete
✓	✓	3	4

You are making a partial payment of **$739.80** against the order total of **$3699.00**.

Please fill out your card details to complete your order. See below for details on your order.

Order ID	3313108
Total	$739.80

Card Holder Name

Card Number

Expiry Date

MM/YYYY

Security Code

Pay Now

This site is protected by reCAPTCHA and the Google Privacy Policy and Terms of Service apply.

Step 3b) Payment by On Account or Direct Deposit
- Review order details
- When ready, click *Place Order*

Please review the order details displayed below and click the **"Place Order"** button at the bottom of the page.

Your Details

Purchase Order Number	SXR - Q123123
Name	HN - Testing
Email	oliver.fraatz@straightsell.com.au
Phone	12341234

Delivery Details

Recipient	Warehouse Supervisor
Address	Warehouse 1 Warehouse 1 ACT 1234 AUSTRALIA
Notes	
Salesperson	Norman

Bill To

Customer Name	Bono Jericho
Customer Email	bonojericho@gmail.com
Customer Mobile	0432857548
Address	1 Tree Hill Monash VIC 3150 AUSTRALIA

Payment Method

Payment in-store

Order Details

Qty	Code	Product Name	Unit	GST	Total
1	SXQU330-9SP	SXQU330-9SP (1600 m3/hr) (Baffle)	$2726.36	$272.64	$2999.00
1	Freight	Delivery to store	$0.00	$0.00	$0.00
				Total inc GST	$2999.00

Place Order

6.4   Making Balance Payments

Under *Order History*, select *Previous Orders*.

Order ID	Date	Sales Person	Amount	Recipient	Delivery Address
3101558	May 20, 2022 Placed by Account Manager	Kaylie Hyde	$3699.00	Jason O'Malley	123 Hyde Road, Wheelers Hill, VIC 3150 AUSTRALIA
3101223 1234	May 20, 2022 Placed by Account Manager	Marion Child	$2799.00	Jerry Testing	123, 123, WA 123 AUSTRALIA
2911035 TEST ORDER	Nov 12, 2021 Placed by Account Manager	Marion Child	$1899.00	Jason O'Malley	Shop 124 Adelaide Arcade, Adelaide, SA 5000 AUSTRALIA

Click *Order ID* to see payment details under *Notes*. Call *1300 881 693 (select option 2 or 4)* with customer's credit card details when you are ready to pay the balance amount.

Order Details

Note: A partial payment of **$1199.00** was made against the order total of **$3199.00**. The outstanding balance for this order is **$2000.00**.

Qty	Code	Product Name	Unit	GST	Total
1	GA-600SP	GA-600SP (1600 m3/hr)	$2908.18	$290.82	$3199.00
1	Freight	Delivery to store	$0.00	$0.00	$0.00

Total inc GST $ 3199.00

Alternatively, you may also wire the money to our bank account (*BSB: 0331181 | Account number: 390407*) - referencing the *Order ID* for tracking.

When the item is shipped, the corresponding tax invoice will appear, paid in full, under *Order History/Invoices*.

7   Tracking Orders

To retrieve past orders, click *Order History* on your *Account Menu*. Select *Previous Orders* and click the *Order ID* of choice to view full transaction details.

Alternatively, click *Invoices* and select the *Invoice#* of choice to view and print as required. From here, you can filter to view just *Invoices, Credits* or *Invoices & Credits*.

8   Logging Out

For security reasons, please remember to and keep your login credentials safe, and log out from the portal each time you're done.

If you encounter issues that are not addressed by this user guide, or have any questions, please contact your Schweigen Sales Rep for additional support, or write us at proforma@schweigen.com.au.

APPENDIX

schweigen

PAID

Tax Invoice

Schweigen Pty Ltd
Unit 4/1-5 Lake Drive Dingley Village, VIC 3172
AUSTRALIA

Tel: 1300 881 693
Email: proforma@schweigen.com.au
Web: https://2449edit.straightsell.com.au/

Date:	05 Mar 2024
Invoice No:	IN070707
Purchase Order No:	Portal-3698209-1569792
Account No:	SCHINTEST
Status:	CLOSED
Terms:	PP

Delivery Method:	
Due Date:	05 Mar 2024
Amount Due:	$ 0.00
Invoice Amount:	$ 2999.00

Deliver To:

HomeDeliveryCustomer2Name
HomeDeliveryCustomer2 Address
Norman, VIC, 3150 AU

Unless otherwise advised, delivery will typically take 7-10 business
days upon receipt of payment in full and is subject to possible delays
due to the ongoing Covid-19 pandemic.

Bill To:

Salesperson: Norman
HomeDeliveryCustomer2Name
proforma@schweigen.com.au
045112345678
HomeDeliveryCustomer2 Address
HomeDeliveryCustomer2 City, VIC, 3150

Qty	BkOrd	Code	Product Name	Unit	GST	Total
1	0	HOMEDELIVERY	Home Delivery	$ 0.00	$ 0.00	$ 0.00
1	0	SXQU330-9SP	SXQU330-9SP	$ 2999.00	$ 0.00	$ 2999.00

SubTotal Ex GST	$ 2726.36
Total GST	$ 272.64
Total Inc GST	$ 2999.00

Payment Details: Westpac BSB: 033 181 | Account: 390 407
Note: A payment processing fee of 2.2% applies to Amex

PRINTED VIA WEBSITE

     30