OT Group Limited
PART OF PARAGON GROUP

SMARTPAD HANDBOOK

SmartPad
For all your **home & office supplies**

SmartPad is your powerful online business tool.

Time is more precious, budgets are tighter, and the market remains crowded with suppliers vying for your attention, which makes sourcing products tough! But technology can ease these burdens. Better still, it can aid cost control, drive financial savings, empower multi-site teams, optimise human resources, help reduce your carbon impact, and achieve maximum value from your supply chain

This is the exact thinking behind SmartPad – an intuitive procurement platform that helps control costs through budget management functionality, authorisation routes and pre-defined, user-specific product lists, for total expenditure visibility.

This document covers the basic functionality of SmartPad - although there is nothing basic about SmartPad's functionality - in fact it is the most powerful of tools that will help you control costs and achieve efficiencies.

1 **Administration of an account**
- a. Accessing Menu Options
- b. Role Management
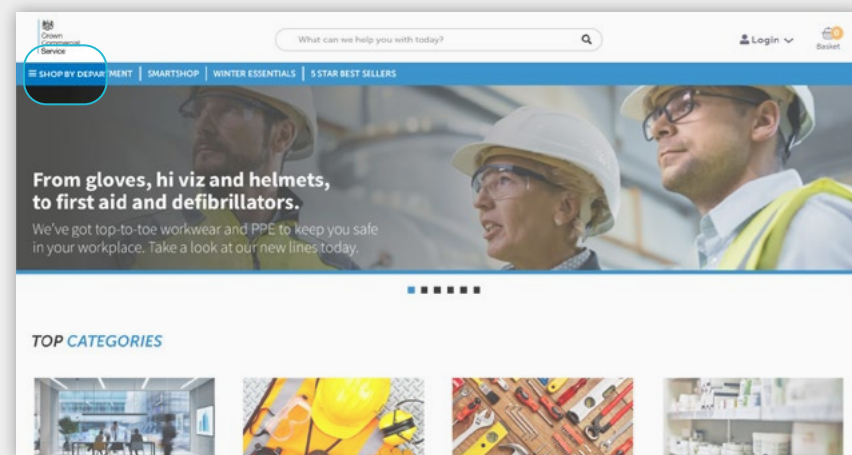- c. User Management

2 **Functionality**
- a. Masquerading users
- b. Business Guest User Functionality
- c. Business intelligence
- d. Small orders
- e. Search
- f. Saved Baskets
- g. Budgets and Authorisations, Restricted selections and Lists
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- k. Document store
- l. Net Market Pricing
- m. ZenDesk integration and Chat

1

Administration of an account

1a. Accessing Menu Options

To access the pop-out menu simply click the MENU item under the logo at the top-left of the screen. Depending on your permissions the options that you are allowed to access will be revealed below.
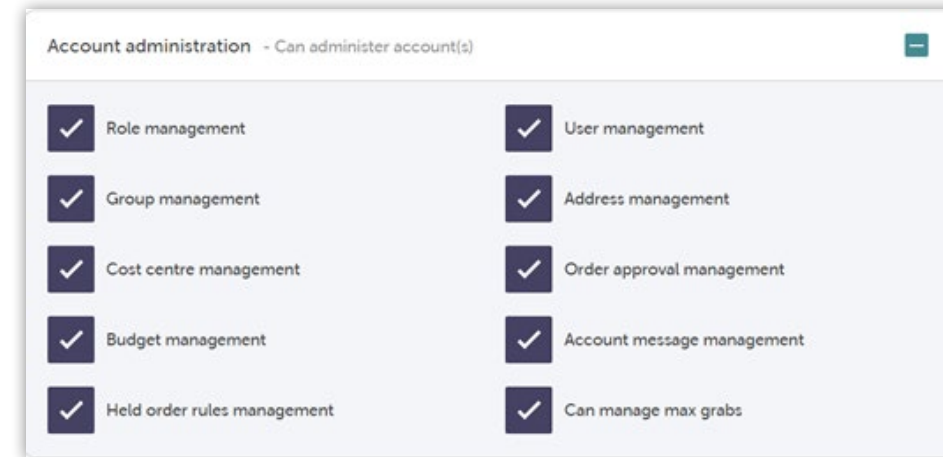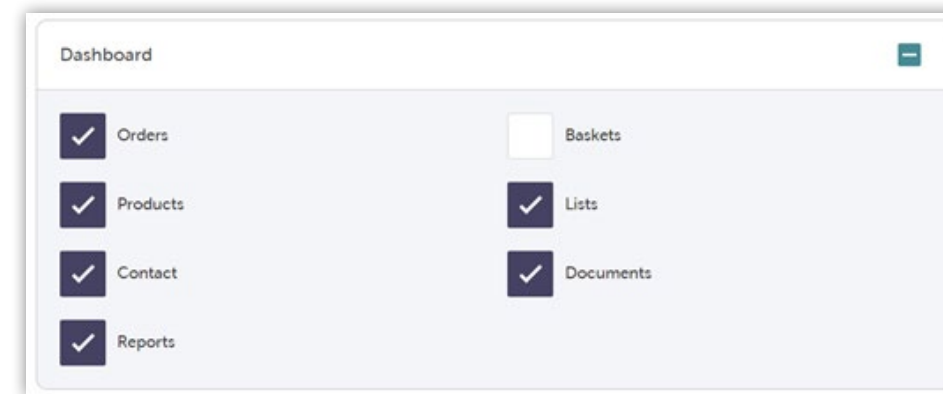

1b. Role Management

In role management you can select the functions and limits of authority of a SmartPad user from the most basic of functions to complex requirements.

There are three types of user. Basic, Administrator or Supervisor. A user can be assigned the standard role settings or can be set up with the following options:

Account administration – a range of permissions that can be set as follows:

Account administration - Can administer account(s)

- ✓ Role management
- ✓ User management
- ✓ Group management
- ✓ Address management
- ✓ Cost centre management
- ✓ Order approval management
- ✓ Budget management
- ✓ Account message management
- ✓ Held order rules management
- ✓ Can manage max grabs

Dashboard settings

Dashboard

- ✓ Orders
- ☐ Baskets
- ✓ Products
- ✓ Lists
- ✓ Contact
- ✓ Documents
- ✓ Reports

1b. Role Management Cont'd

Order management

Reporting permissions

Requisition lists, document management and support tickets

1c. User Management

Once a profile is set up for a user, this can be managed in User Management. A profile picture, description, email address or telephone number can be set up for users and then their user management can be turned off / on and edited as required such as leavers or changed job roles or SmartPad permissions.


1d. Group Management

As with both User Management and Role Management, Group Management allows the setup of a group of users with the following parameters:

- Cost Centres Account
- Cost Centre Name
- Cost Centres Category
- Roles
- Users
- Budgets
- Delivery Addresses

In addition Addresses, Cost Centres, Budgets and Approvals can be managed through direct links from the menu bar.
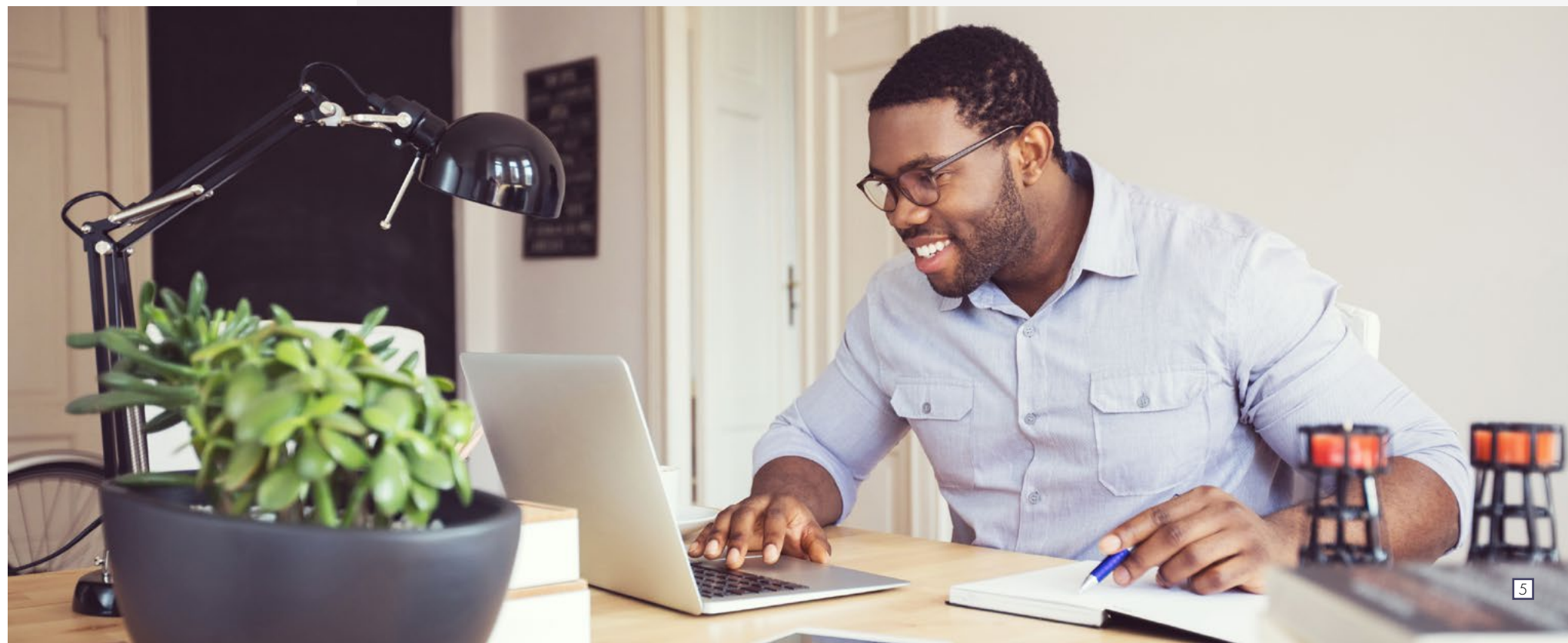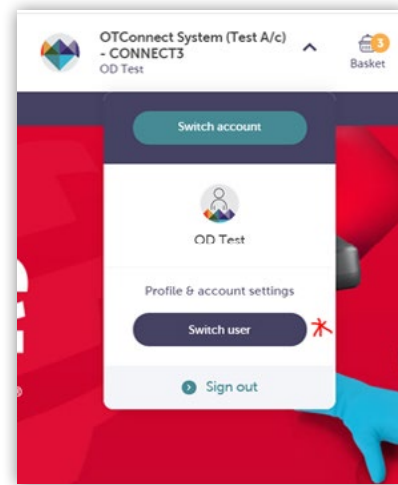
Functionality

In order to get your teams up and running as quickly as possible, we've created a QUICK START USER GUIDE. This is a simple step by step guide which guides you through the basics of logging on, viewing lists, placing orders and re-ordering.

In addition to this, there is a whole host of functionality SmartPad can offer, including:

2a. Masquerading as a User

SmartPad allows super users to masquerade as a user. This is particularly helpful for training and for our sales team to view what the user views. We can then help users through the ordering process or see the status of a user offering appropriate support.

2b. Business Guest User (BGU)

We know the procurement world has changed because of COVID and HOME WORKING so we've been changing too. The latest innovation to come from our HQ is 'self-serve' functionality for homeworkers.

Designed to provide organisations with the same procurement control they had pre Covid-19 – wherever colleagues may now be – this clever feature allows us to:

- Set EVERY employee up as a home user, so they can buy pre-approved products and services from the usual business account, instantly, with minimal administration and still be GDPR compliant.
- As an OT Group customer, you regain control of your budgets and supply chain, and remote workers have everything they need, exactly when they need it, and delivered straight to their door.
- They'll never be temporarily out of pocket either, which supports your duty of care as an employer.

And you can get started in 3 simple steps:

1 Let's assess your current procurement status, i.e. where have things slipped?

2 We'll set up your home users, with the order permissions and spend authorisation you want to give them.

3 They can then simply log onto SmartPad through our home working area, enter their email for verification and they can order what they need!

A series of checks need to be in place before a customer can trade in this way, these include the following pre-requisites:

- BGU needs to be turned on at the account level.
- The email domains that will participate in BGU need to be identified.
- If a customer has more than one trading account then they must specify which account should be used unless there are very specific email domains for each account, then more than 1 could be used.
- A Template User needs to be created, all BGU users will inherit from this template so it needs to reflect the customers' requirements (permissions)
- The list of products that the BGU users can order need to be created and assigned

Using BGU

To access BGU navigate to https://otsmartpad.co.uk

Click the Login button at the top right and when presented with the overlay click the icon underneath "Are you a home working employee of an existing account?"
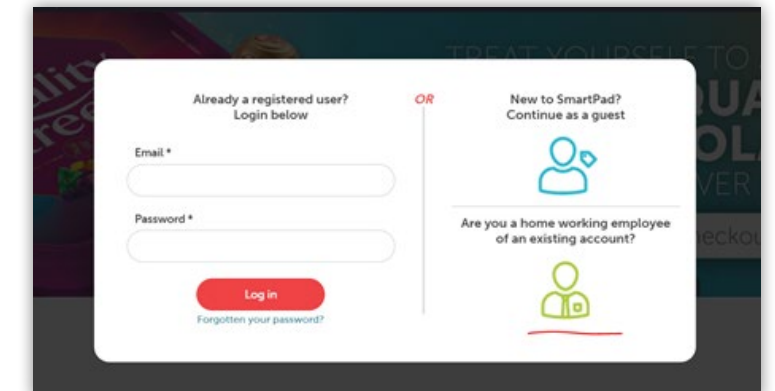
Then enter your email address and click "submit". Note if you receive an error message then the email domain (@somecompany.com in the example below) has not been enabled for BGU, please speak to a company representative to resolve.
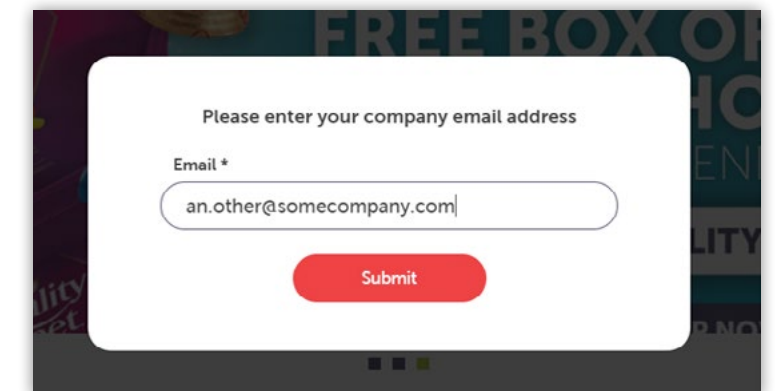
If you enter a valid email address then you will shortly receive an email to your inbox with a one-time link to SmartPad, this link is valid for 12 hours after which it will expire and you will have to complete the above steps again.
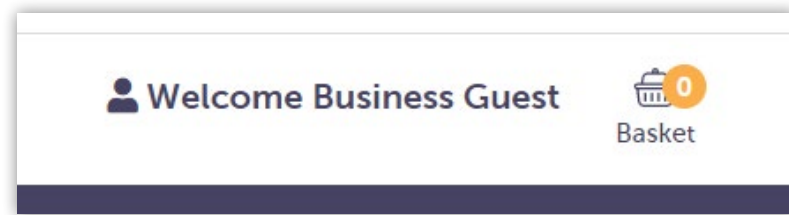
The email will look like the below, click "Verify Email Address" and you will be taken to SmartPad where you will be able to shop according to the rules set up by your business.
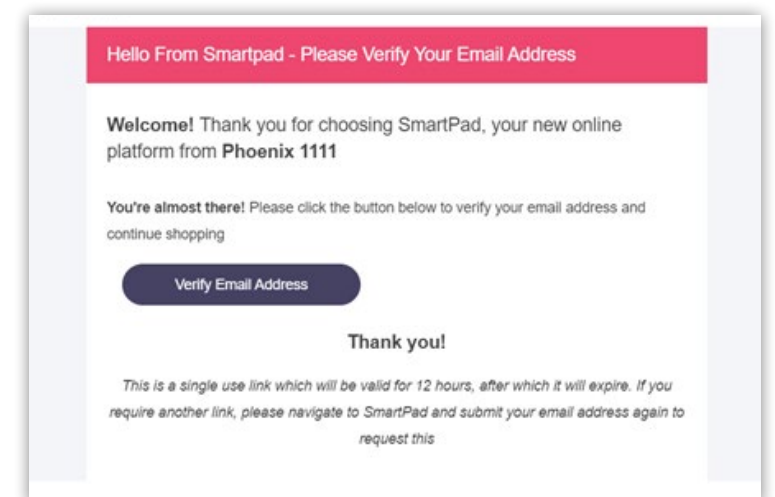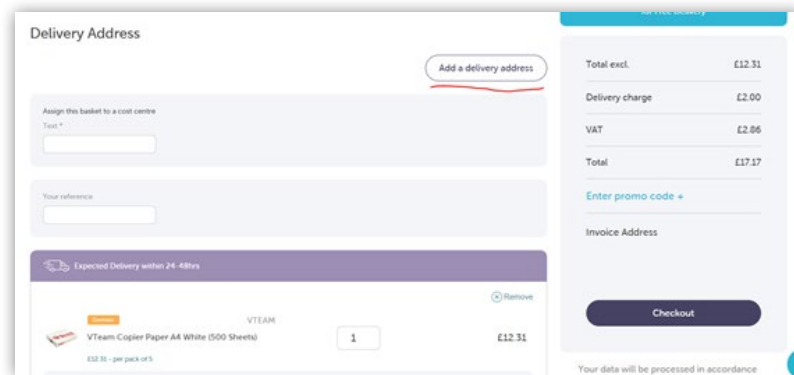
Using BGU Cont'd

Note: you will see the following in the top right corner.

Add things to basket and when ready proceed to Checkout.

During Checkout you will be asked to add your delivery address, this will be visible to you but for GDPR purposes will be redacted so that other users in your organisation cannot see it.

Before you can continue further with checkout you will need to check the box confirming that you accept your home address can be used for processing your order.
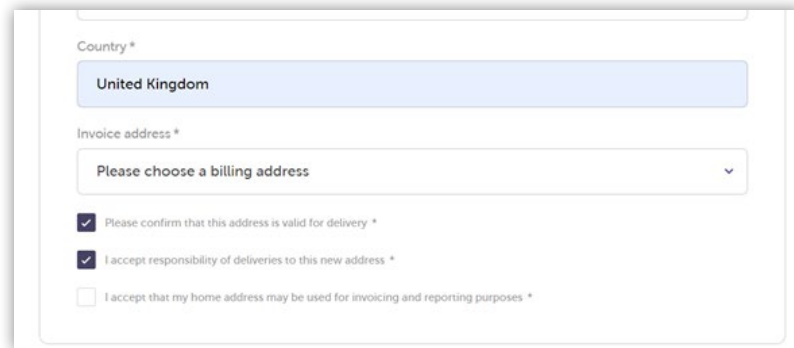
Once you have completed Checkout you will receive an order acknowledgement from SmartPad. If your order requires approval it will not be released for processing until the approver has approved the order.

If you want to place another order then repeat the process from the start. The email verification link is only available for 12 hours and can only be used for one order at a time.

2c. Business Intelligence

Business intelligence still remains overlooked by so many organisations. Often time pressures restrict the ability to deep-dive into the metrics that really matter, when it comes to activities such as the procurement of your workplace supplies.

However, within the current business climate, we understand our customers will be under an overwhelming degree of pressure to reduce costs and increase efficiencies wherever possible. That's where the business intelligence function within SmartPad, our online procurement platform, can help.

SmartPad provides a robust self-serve reporting and analytics capability all at the click of a button – giving you complete control and visibility of your expenditure and empowering you to make data-driven commercial decisions. The business intelligence module is a powerful tool to help you as a customer access and interrogate data. From the Reports menu, you can select:

- KPI Data Reports
- Spend Reports
- Cost Centre Data Analysis Reports
- Product Sector Analysis Reports

- Order Type Analysis
- Contract interrogation reporting
- Returns and credits analysis

All of these reports are fully configurable and can be produced in graph or data formats.
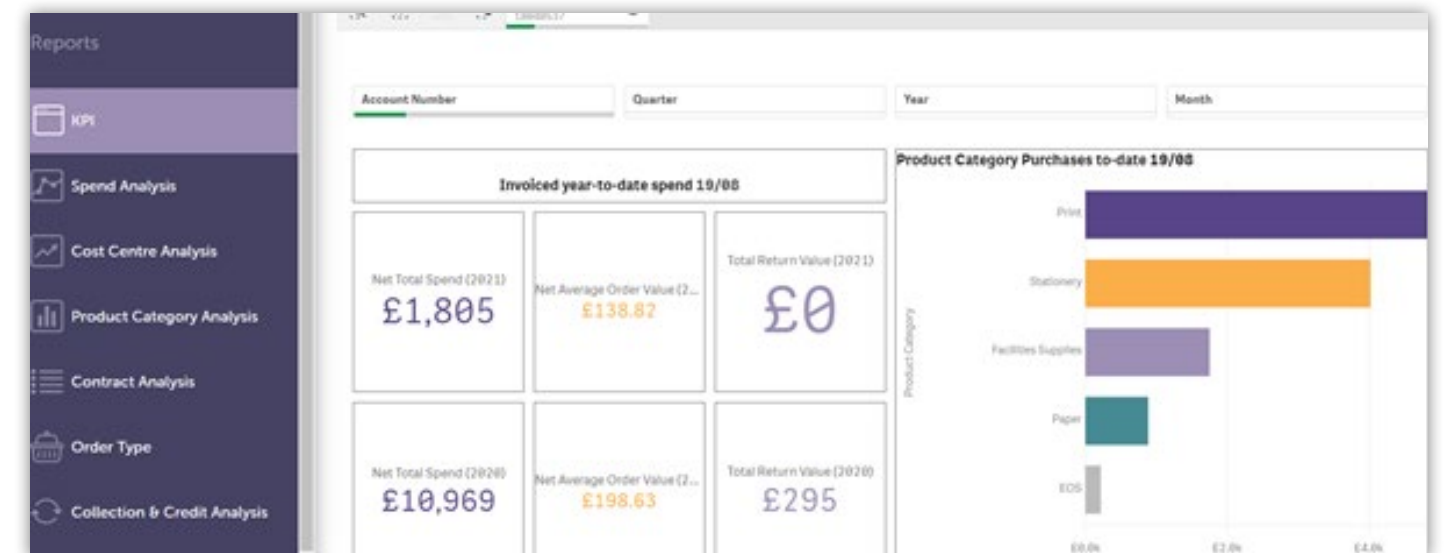
2d. Small Orders and Order Value Parameters

We have seen a large increase in home working over the last year because of the pandemic and many companies are adopting home working or hybrid working for their staff. As a result, orders are smaller and with more delivery points resulting in higher costs. SmartPad helps users by showing them what they need to spend to qualify for free delivery.
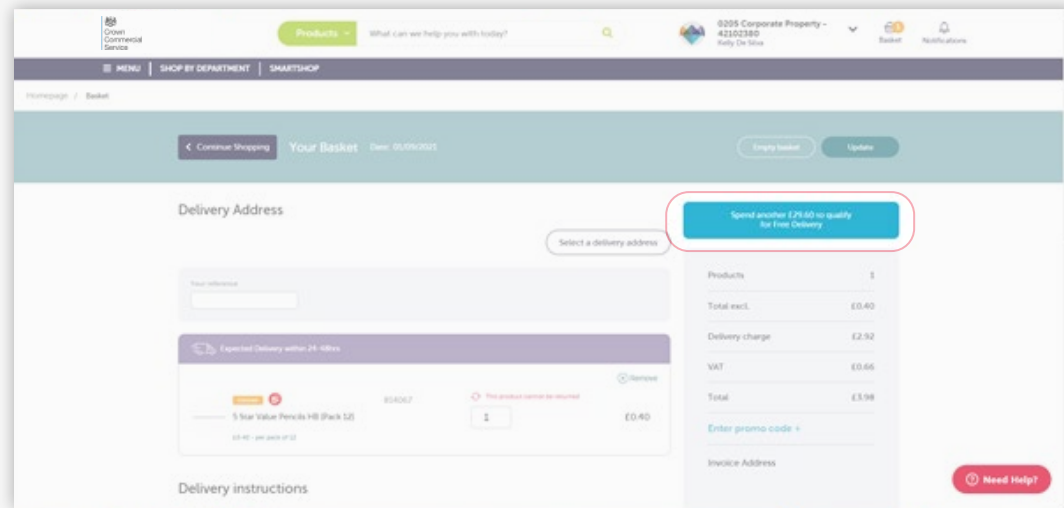
2e. Search

Finding the right product or information on SmartPad is driven by the Elastic Search function.
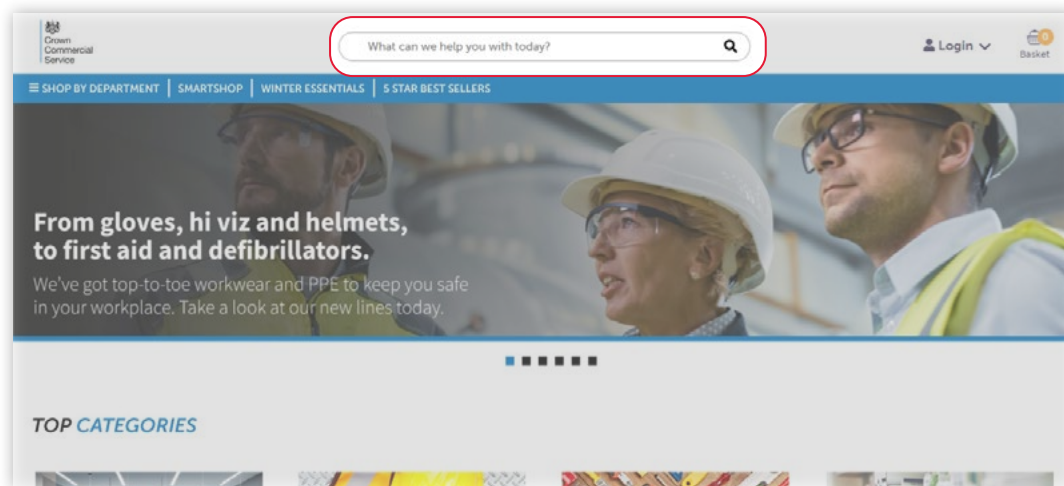

SmartPad's elastic search function will give: type-ahead search results, ability to handle miss-spellings, category search and granular filtering tools (filter by attribute for products). The search includes a comprehensive search for products, orders, delivery notes, invoices, credit notes, addresses, cost centres, users (and everything relating to that user), budgets, authorisations, documents, lists, categories, accounts and groups.

The first products our search will return will be contracted products followed by non-contracted own brand products; and then non-contracted branded items.

If a user has restrictions placed on their SmartPad account these will be reflected in what can be searched for.

2f. Saved Baskets

As a SmartPad end user you have the ability to save your basket so that you are able to return at a later date to complete your order. This means you can order throughout the day or even have multiple baskets allowing you to shop for different cost centres or delivery addresses.
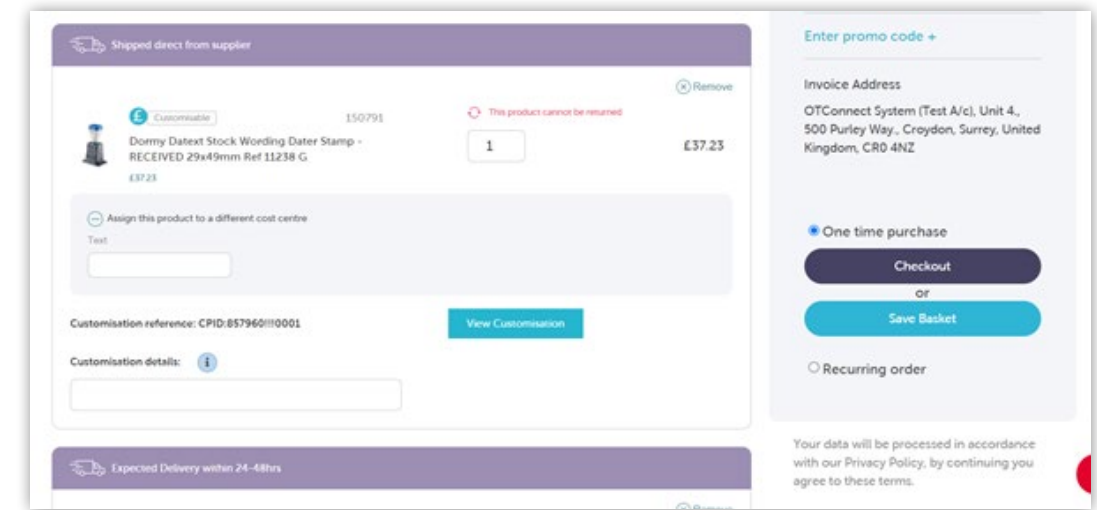
Saved baskets have 4 options. These options are: **Load, Switch, Replace and Delete.**

Load
When clicked this saved basket will be loaded into the basket of the user, if there are already products within the basket the current basket and saved basket will be merged. If there are no products in the basket then the saved basket simply loads into the current basket. If a user hovers over "Load" they will see text which reads "This/These product/s will be loaded into your basket".

Switch
When clicked this saved basket will be loaded into the basket of the user. If there are already products in the basket then these will be moved into a new saved baske t and the saved basket will be moved into the basket. If a user hovers over "Switch" they will see text which reads "This basket will switch with your current basket. Your current basket will be saved."

Replace
When clicked this saved basket will move into the basket of the user and replace whatever products are currently sat in the basket. If a user hovers over "Replace" they will see text which reads "This basket will replace your current basket with this saved basket".

Delete
When clicked this saved basket will be deleted from the system forever. If a user hovers over "Delete" they will see text which reads "This basket will be deleted".

Saved baskets will be deleted after 30 days so that the user does not have a never ending list of saved baskets. We will send the end user a message 7 days before the basket is deleted.
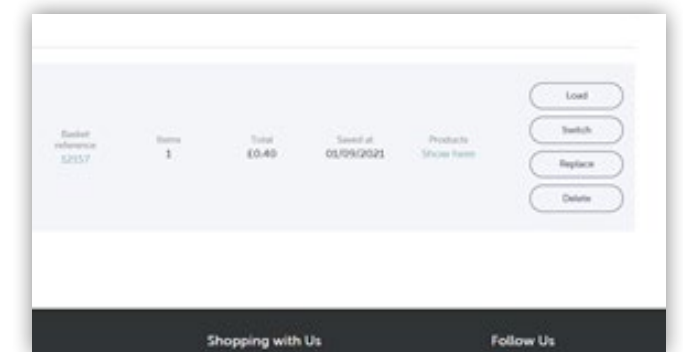
2g. Budgets and Authorisations

Keeping control of spend is vitally important, that's why SmartPad offers a comprehensive set of features all designed to help you reduce costs and maintain control. Budgets and Authorisations can be set as follows:

Require Approval if:

- Order Value Is: X
- Number of Items Is: X
- Order contains products within a certain list:
- Order contains products not within a certain list:
- Order contains a product within a certain category:
- Order contains a product not within a certain category:
- Order contains certain products:
- Order is placed by certain users:
- Order is placed by certain groups:
- Has Cost Centre Level Account
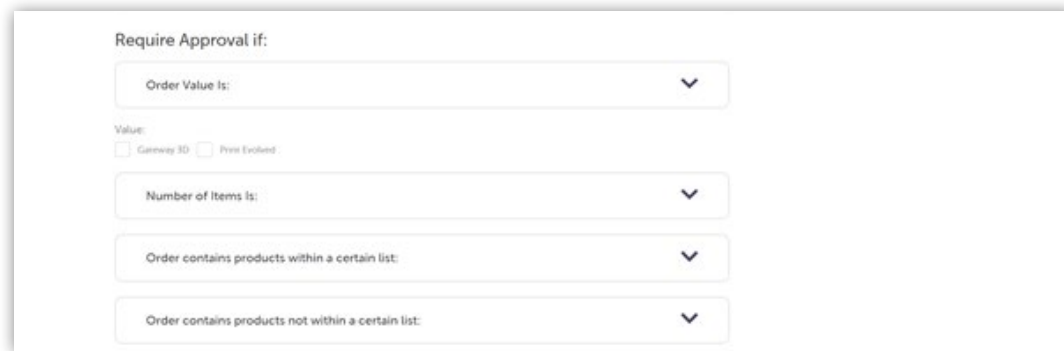
Assigned Approvers

You can set up as many approval levels (hierarchies) as you need. You can add an additional approval level or set up temporary approvers for holidays as required.
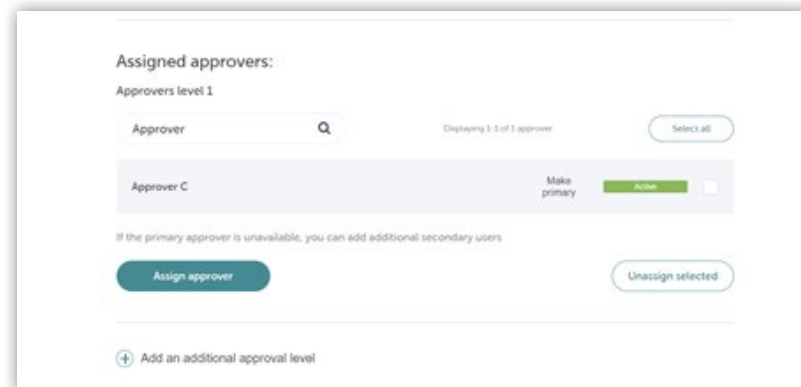

Budgets

A comprehensive budget feature in SmartPad allows for a selection of budget and authorisation rules to be applied. These include:

- Monthly Budget
- Order Budget
- Order limit budget type
- Max order value
- Exceeded order budget action
- Display Warning
- Block Order
- Authorise
- Period Budget
- Period limit budget type
- Period type
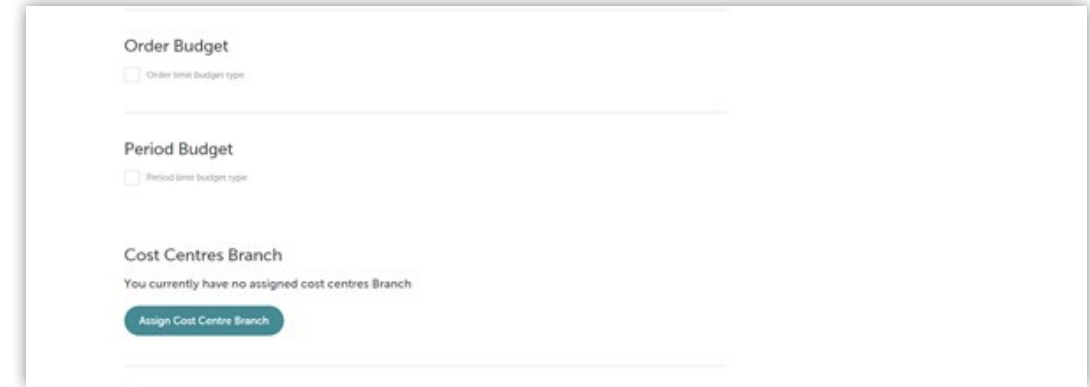
A further set of comprehensive sub categories allows even further fine tuning of authorisations and budgets:

- Fixed amount per period
- Carry budget over
- Exceeded period budget action
- Display Warning
- Block Order
- Authorise
- Period budget applies to
- Single shared budget
- Budget applies separately to each user
- Budget applies separately to each cost centre
- Cost Centres Account
- Assign Cost Centre Account
- Users
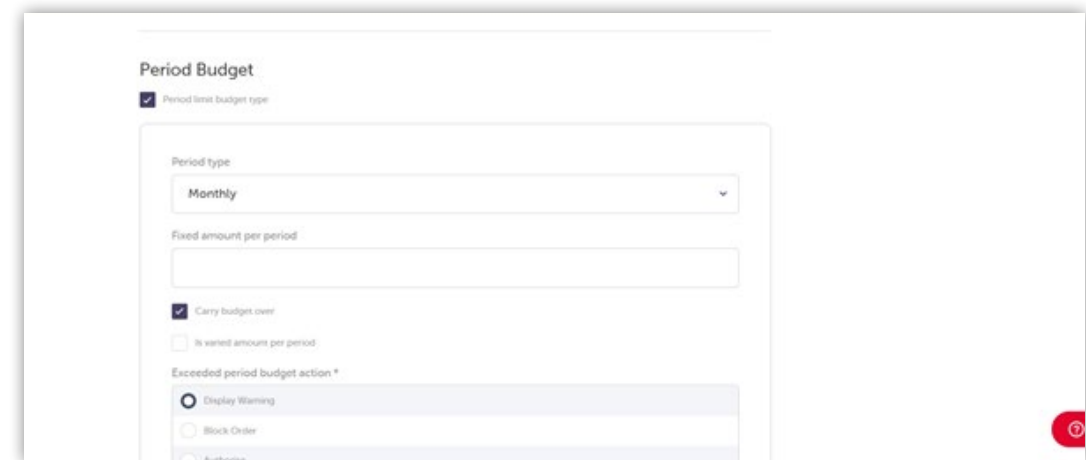
2h. Order Management

Held Orders can be set to release at a time of your choosing.

You can now set the frequency and preferred delivery day.

Note that subscriptions run for a maximum of two years after which they can be renewed. Depending on your permissions you can update or cancel your subscription at any time. If you try to buy a product that is on a subscription during the normal checkout process the system will warn you that you are adding a subscription product to your basket but it won't prevent you from adding it.

2i. Subscriptions (Repeat Orders)

Our Subscriptions functionality allows users to subscribe to a basket of goods and have that basket automatically fulfilled according to a schedule of your choosing. Please note it is not possible to subscribe to customisable products and these will be removed from any basket that you want to subscribe to.

To subscribe to a basket select Recurring Order during checkout and then click the "Subscribe to this basket" button.

Once you have saved your subscription click the Submit Order button to place your order. Your first order will be submitted immediately and future orders will be scheduled according to the subscription you have set up.

Subscription orders are highlighted within the order listing screen for ease of reference.

Depending on your permissions you will be able to manage your subscription from the Subscription Orders menu item.

2j. Purchase Order Management

Purchase orders may be vital to your organisations running and accounting. Your business practices may require you to have a mandatory purchase order. SmartPad can be configured to only accept orders with a purchase order applied and for that purchase order to have the correct formatting alpha / numeric to allow the order to proceed.

2k. Document Store

SmartPad allows the storage of documents and links applicable to the user and account. For example a 'how to' document could be created specifically for users dovetailing company procedures with SmartPad protocol, or a document detailing who to contact in the customer's company.

The Document Store can be accessed through Quick Links.

QUICK LINKS

- My orders
- Product lists
- Help & Support
- Documents
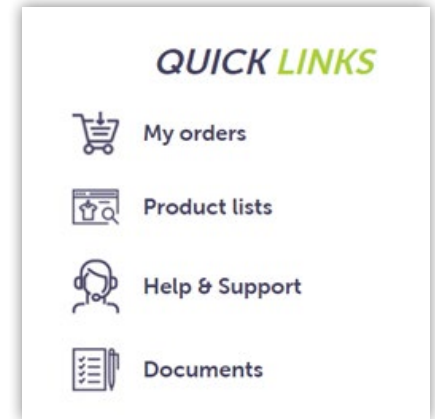
2l. Net Market Pricing

SmartPad is set up with your agreed contract prices and pricing structure. However, SmartPad now provides access to hundreds of thousands of products online from a wide variety of suppliers. If your contract allows these products to be ordered then to ensure price competitiveness we have priced non core lines so that they are discounted to within a small tolerance of the leading online retailers. That way you know you will always be receiving great value for money and not be paying high prices for non-core lines.

2m. Help and Support - ZenDesk Integration

SmartPad has instant help and support built into its functionality. There is a comprehensive self-serve list of answers to frequently asked questions, or you can seek support by raising a ZenDesk ticket. This gives full traceability of all requests and can be used to support account reviews, KPI deliverance and good account management. You can see how a ticket is progressing through SmartPad's reporting function. We can report on telephone calls, direct requests and chats. We encourage feedback on all tickets to help us deliver continuous improvement.

Search 🔍

ID	Subject	Assigned To	Created	Last Activity	Priority	Ticket Type	Status
917132	Small Order Charge	Emma Lewis	2 weeks ago	2 weeks ago	High		Closed
913910	DRA	Gary O'Dea	3 weeks ago	2 weeks ago	High		Closed
913004	Chat with William Sims	Penny Holland	3 weeks ago	2 weeks ago	Low		Closed
910864	Phone Call from: William Sims	Aileen O'Connor	3 weeks ago	3 weeks ago	Low		Closed