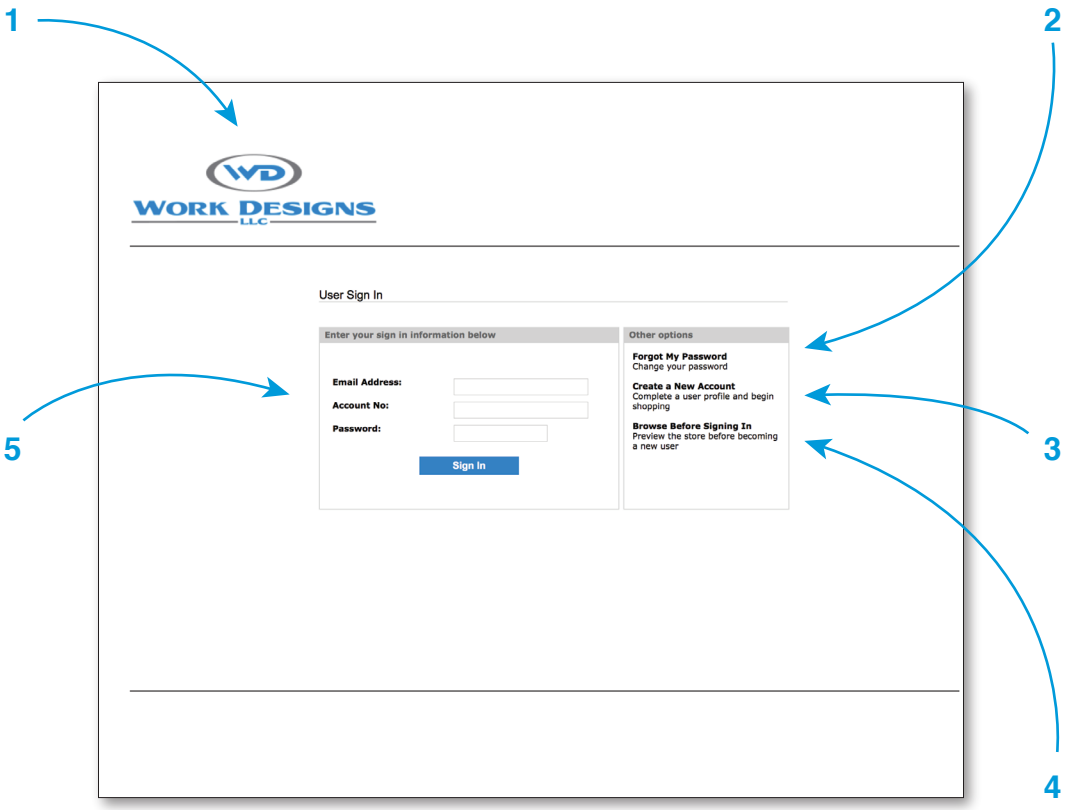
Online Stores
HANDBOOK

WORK DESIGNS LLC

www.workdesigns.com

Sign In Options

Select your preferred user access options.



1: Your Logo Here

Your online store displays your company logo.

2: Change Password

Allow users to reset their own passwords or, if you prefer, disable this feature so that you can maintain control of user passwords.

3: Create New Account

You choose whether to allow users to create their own accounts or to manage user accounts yourself by sending us a list of user information.

4: Privacy Options

Choose whether or not you will allow users to view store products without signing into the store or creating an account.

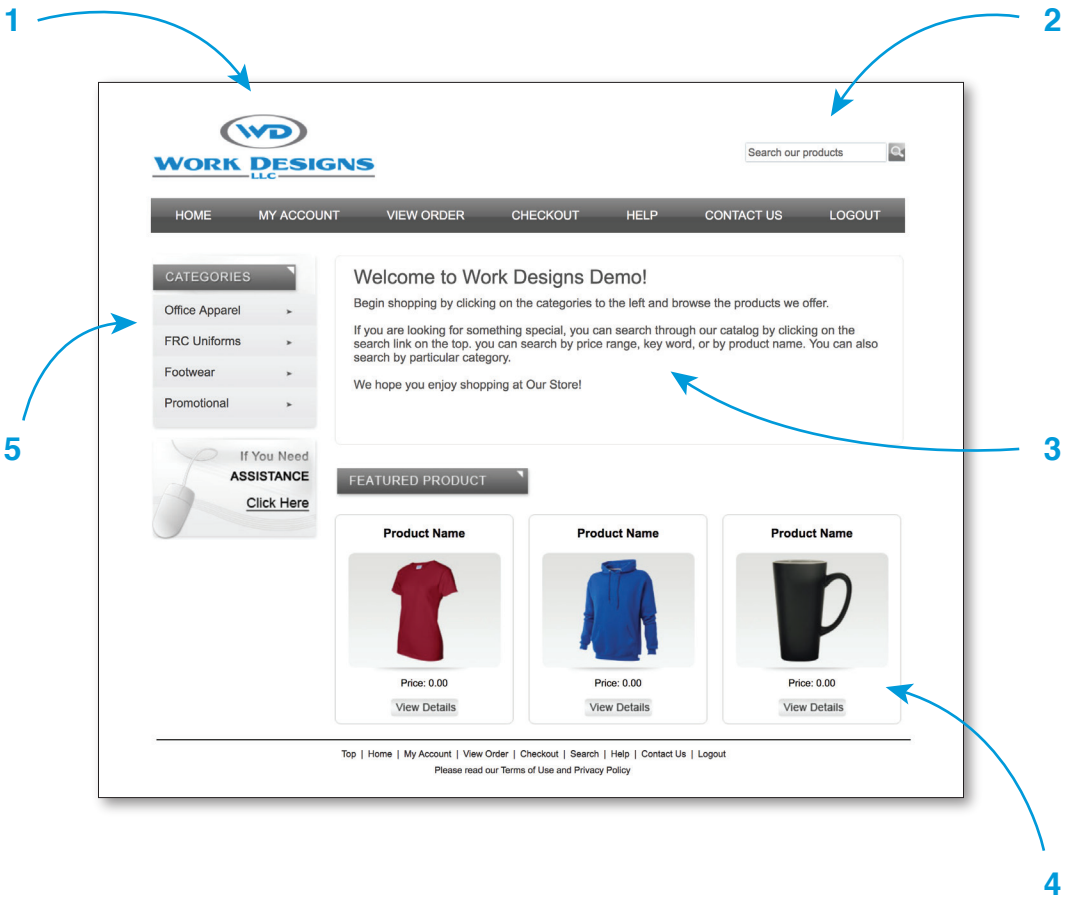
5: Sign In Fields

You can decide whether you want users to sign into their accounts with an email address or by creating an account name or number. You can also decide whether or not you wish to allow browsers to store log in information.

Accessing Your Store: Most of our stores use a web address that begins with “www.costore.com” and ends with the company or store name that you set—such as www.costore.com/shopworkdesigns. However, you also have the option of purchasing a domain like www.shopworkdesigns.com if the domain is available for purchase. You can also help users to locate your store by adding a direct link to the store’s log in page on your company’s primary website.

Custom Homepage

Make it *your* online store.



1: Your Logo Here

Your online store is styled with your logo and company colors.

2: Search Bar

Find items quickly through the search bar that appears in the header of every page.

3: Custom Introductory Text

Leave a personalized message or instructions for users on the homepage.

4: Spotlight Featured Items

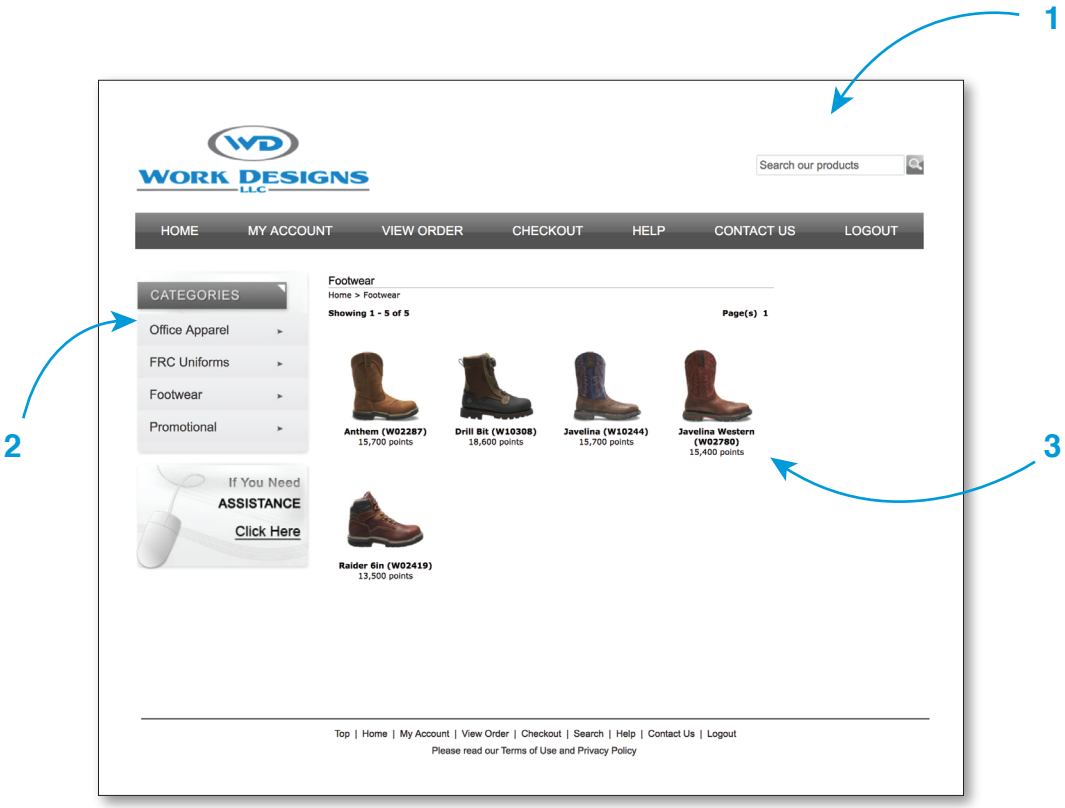
If you would like, you can select items from the store to highlight on the homepage.

5: Custom Categories

Keep products organized and easy to access with sidebar categories. You select category names and which items go in each category. We can limit visibility of certain products on the store by setting up user groups each with access to different items on the store.

Easy Shopping

Browse product thumbnails by category or search bar.



1: Search Bar

Find items quickly through the search bar that appears in the header of every page. You can search by product name, product identification number or keyword.

2: Categories

Clicking on a sidebar category displays all items within that category.

3: Product Thumbnails

Each item on the search or category screen displays a thumbnail image as well as product name and cost (either in points or dollar amount). Clicking on a product thumbnail brings you to the product page. You choose which products are available on the store and which user groups are able to view them.

Detailed Product Pages

Select from product options and view additional images.

1: Shopping Cart and Point Balance

If using a points program, current point balance is displayed below the navigation bar along with shopping subtotal.

2: Product Details

Manufacturer information is included for each product.

3: Product Options

Select product options such as size and color when available.

4: Points and Pricing

If using a points program, prices can be displayed as points or dollars. You choose the description and the point to dollar conversion.

5: Product Images

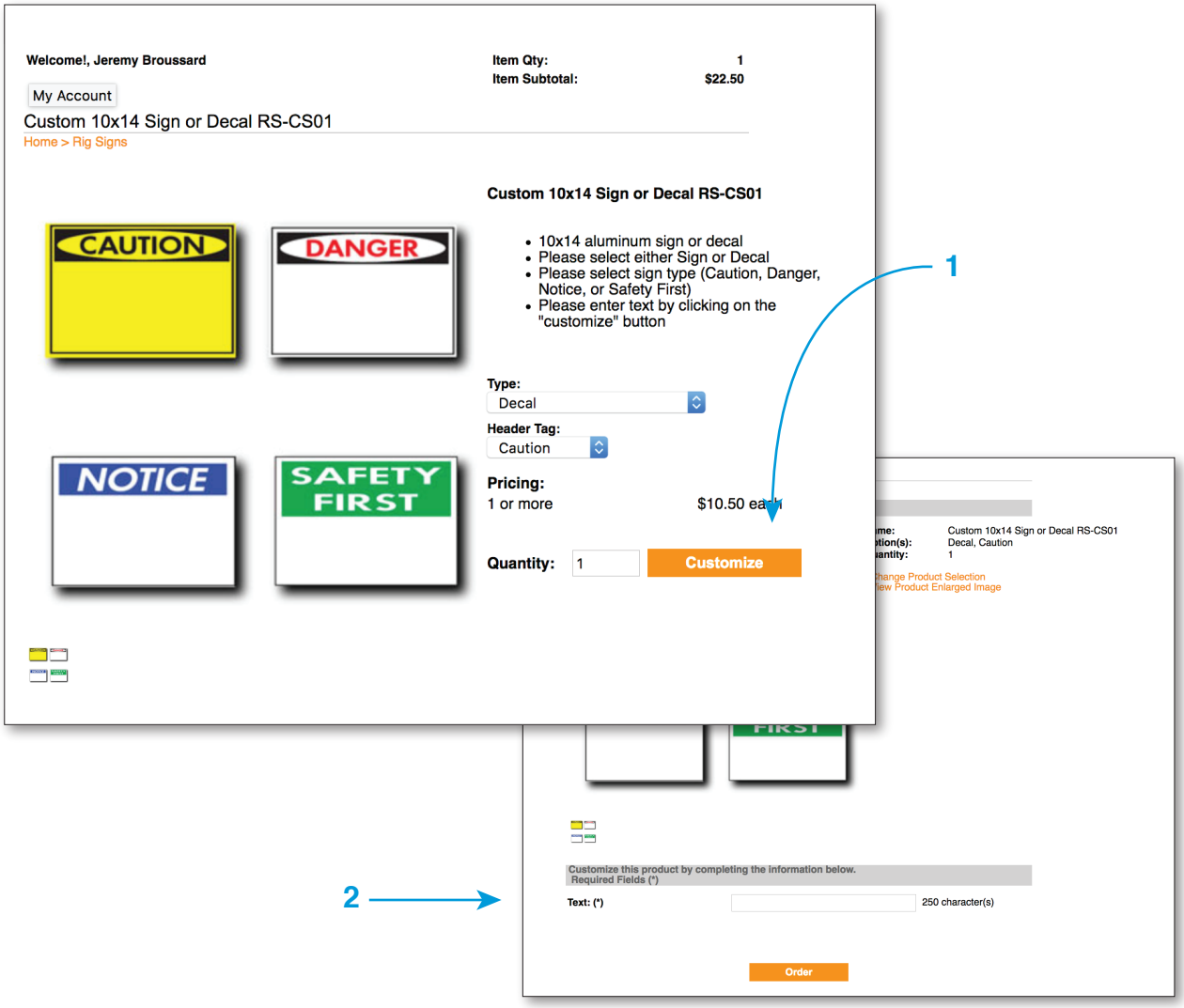
Hover over thumbnails to see enlarged product images, details, color options, and different views when available.

6: Store Assistance

Users can contact us with any questions about the store or items.

Personalized Items

Enter text for customized signs and apparel.



1: Customize Button

If an item has a personalization option—such as an embroidered name or custom sign text—the “order” button will be replaced with a “customize” button. Clicking this button will take the user to another page where that information can be entered.

2: Text Fields

Custom text can be entered here. Depending on the item, there can be multiple boxes for entering text in different places. We can also set character limits. Once the text is entered, clicking “order” will add the personalized item to the user’s shopping cart.

Shopping Cart

View or edit your order.

1: View Order

Access your shopping cart from any page by clicking “View Order” in the navigation menu.

2: Pricing

Item pricing is displayed in points or dollars.

3: Item Links

Delete items from your cart, return to product page, or view order information.

4: Quantity

View or make changes to item quantities. Save changes by clicking the “Update” link below.

5: Update Changes to Cart

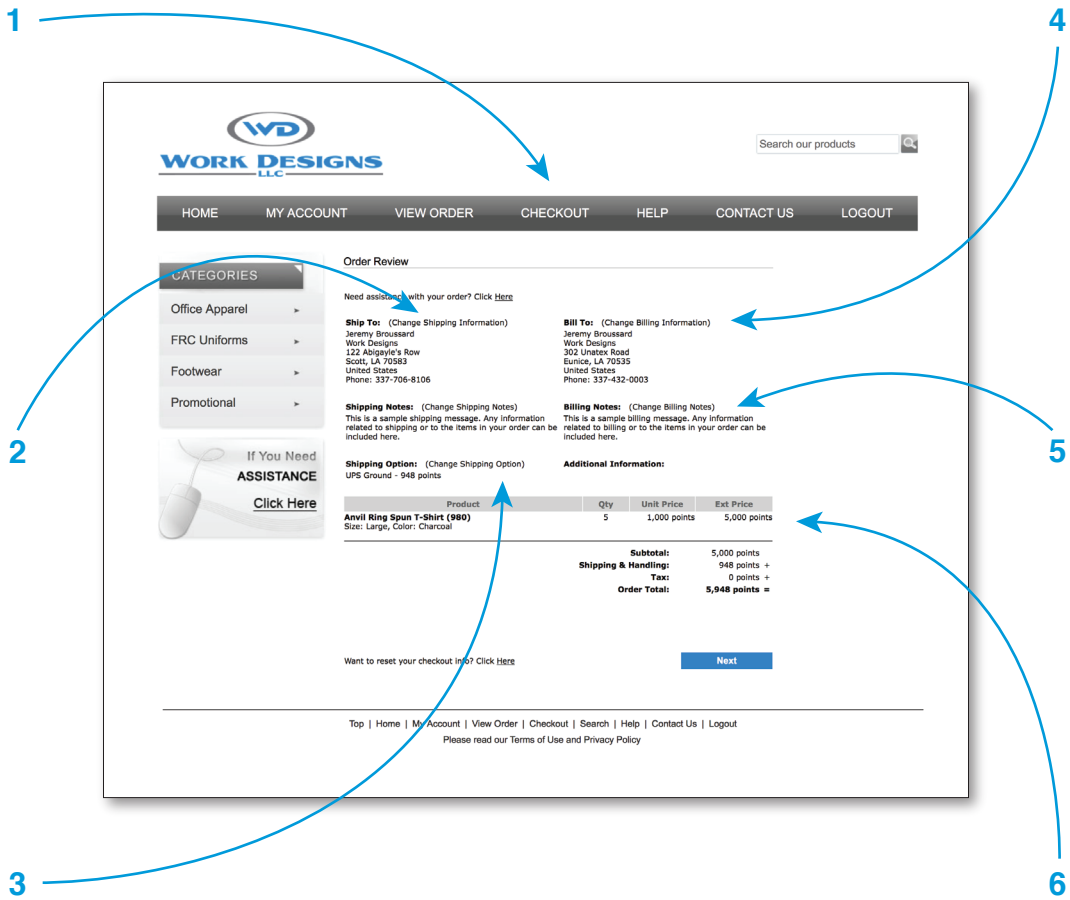
If you need to change an item quantity, click this link to save those changes.

6: Checkout Button

Once your order is finalized, click this button to continue to the checkout page.

Order Review

Review your order, set addresses, and leave any additional notes.



1: Checkout

Continue to checkout from any page by clicking "Checkout" in the navigation menu.

2: Shipping Address

Set or make changes to your shipping address by clicking this link. If your company uses predetermined shipping addresses, they can be selected from a list on the following page.

3: Set Shipping Options

Clicking this link will allow the user to set delivery or carrier options if available. In most cases we use UPS Ground, however a "Free Delivery/Pickup" or "Invoiced Shipping" option is sometimes available.

4: Billing Address

Enter billing address if required.

5: Notes

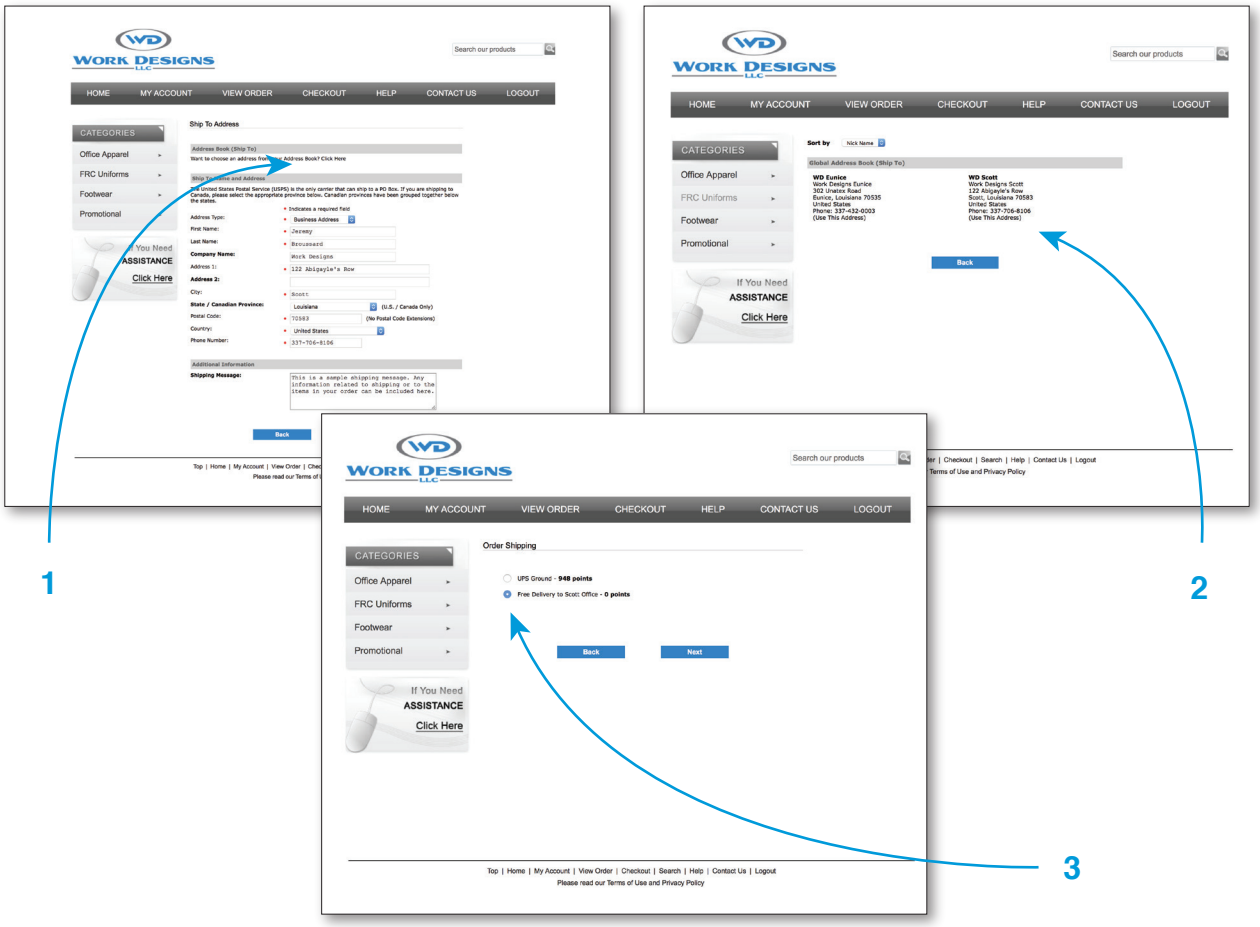
The user can leave shipping, billing, or item notes here if needed.

6: Review Order and Continue

After reviewing the order, click "Next" to continue to the payment screen.

Shipping Options

Select predetermined shipping or delivery options.



1: Enter or Select Address

If your store has set shipping addresses, those addresses can be selected from an address book by clicking this link on the “Ship To Address” page. You can access this page by clicking “Change Shipping Information” on the “Order Review” page.

2: Select Location

Select a location from the address book by clicking “Use This Address,” located at the bottom of the address.

3: Select Delivery Options

If your store has free delivery, monthly shipping invoices, or a shipping option other than UPS Ground, those delivery options can be selected here. This page is accessed by clicking on “Change Delivery Option” on the “Order Review” page.

Payment Options

Review your order, set addresses, and leave any additional notes.

1: Select Payment Type

If the store allows for more than one payment method, the order total can be applied to the correct payment type here. The store allows for payment by points, purchase orders, or credit cards. Any of these payment methods can be turned on or off. You can also decide if a particular payment type—such as purchase orders—requires approval by a “Parent User” that you designate. The parent user receives email notification of orders in need of approval. Once an order is approved, the child user can log back into the store and complete that order.

2: Purchase Order Number

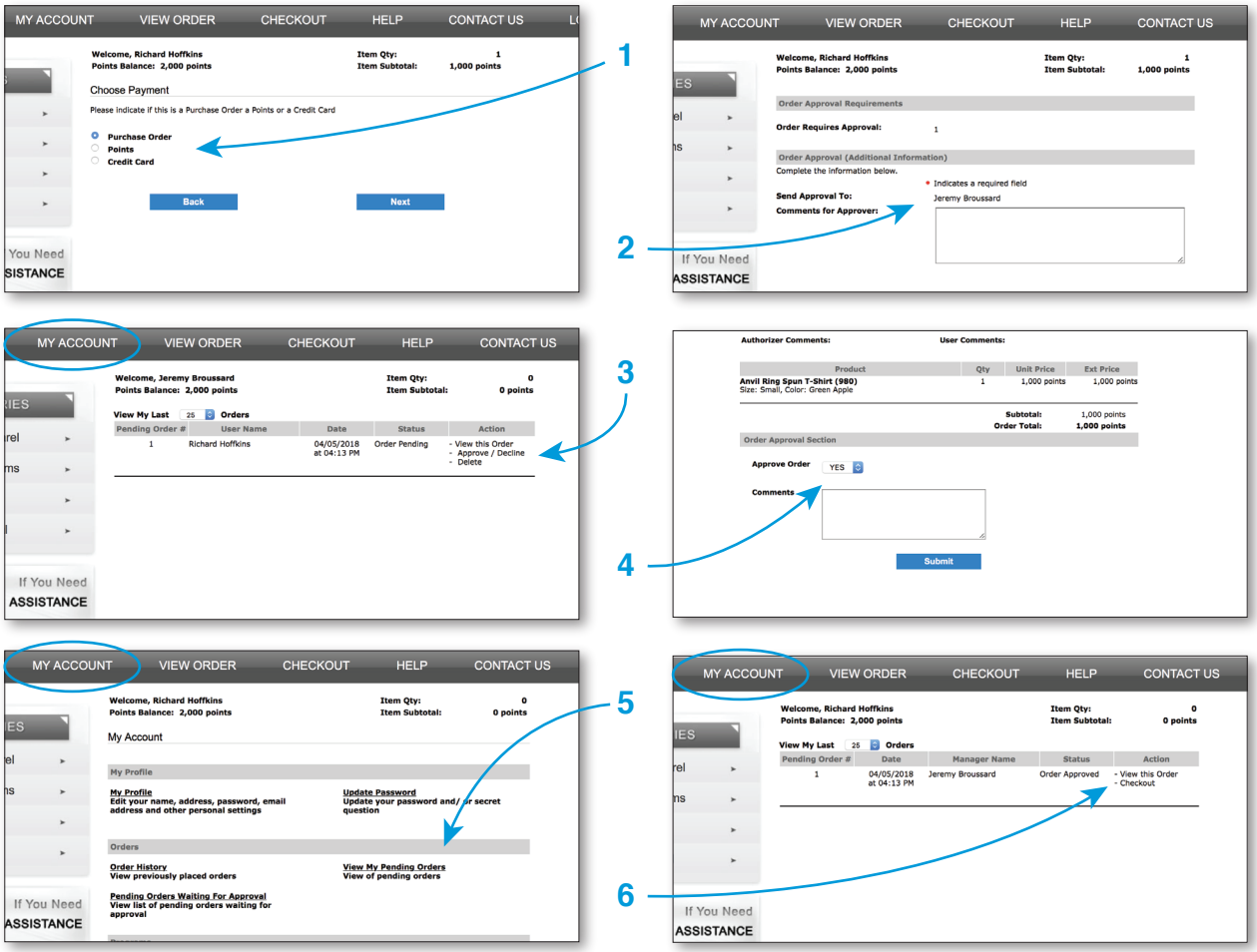
If paying by purchase order, an order number can be entered here.

3: Credit Card Information

Credit card information can be entered here. Our credit card orders are processed securely through PayPal, and no credit card information is captured or stored by Work Designs.

Order Approvals

Set up an order approval process for certain users or payment methods.



1: Select Payment Type

If a child user order requires approval, the user will need to select payment type before completing the order.

2: Send for Approval

The child user selects the parent user (if more than one) and places the order request.

3: Approval Notification

The parent user receives email notification that an order requires approval. Orders can also be approved by clicking on the “Pending Orders Waiting for Approval” link on the parent user’s “My Account” page, then “Approve/Decline.”

4: Select Approve / Decline

The parent user approves or declines the order.

5: View Pending Order

The child user must then complete the order through his or her “My Account” page.

6: Complete Order

The child user completes the order by clicking “Checkout” and then receives confirmation.

Manage Users and Points

Users and points can be easily added to the store through spreadsheets.

1

Import Mode	CoreXpand User Id	User Email	User AlternateId	User Password	User First Name	User Last Name	User Company Name	User Address1	User Address2	User City	User State	User Zip Code	User Country	User Phone	User Fax
0		user1@domain.com		Password	First	Last	Company Name	123 Main St.		Scott	LA	70583	US	777-777-7777	777-777-7777
0		user2@domain.com		Password	First	Last	Company Name	123 Main St.		Scott	LA	70583	US	777-777-7777	777-777-7777

Instructions:

1. Remove first row containing header info.
2. Save the file as tab delimited.
3. If using import mode of 1 to modify a user, you can leave the password field blank and the users' password will not be changed.

Program Name	User Identifier	TransactionDate	Expiration Date	Points Earned	Transaction Description
Safety Points	email01@companyname.com	1/1/2018	6/30/2018	200	Points for January 2018 - June 2018
Safety Points	email02companyname.com	1/1/2018	6/30/2018	200	Points for January 2018 - June 2018
Safety Points	email03companyname.com	1/1/2018	6/30/2018	200	Points for January 2018 - June 2018

1. Remove first row containing header info.
2. Save the file as tab delimited and into .csv file
3. Please leave the expiration date blank, If the points are not expiring.
4. If using this file to remove points, add a negative sign in front of the point amount. You cannot have an expiration date on a negative entry.

2

1: User Import

If you wish to add users to the store directly, instead of allowing them to create their own accounts, you can use our "User Import" spreadsheet. Simply fill out the columns for each user you wish to add and email the spreadsheet to us. We will take care of the rest!

If you have any questions about a column, you can hover over the the description row at the top for more information—or just give us a call! Changing the "Import Mode" code sets whether you want to add, change, or delete a user.

2: Points Upload

Adding points works the same way. All you have to do is enter information into the "Points Upload" spreadsheet and send it to us.

Enter the name of the points program in the first column and the user's email address or log in ID in the second column. Next enter the date you wish points to be added, the points expiration date (if points need to expire), and the points you wish to add (this column must be filled out). Finally, enter short note about the transaction in the last column (this is a description for record keeping purposes).

Run Reports

We can help you to run reports on points and store activity.

Store Order Detail Report
[4/1/2018 - 4/5/2018]

Id	Date	Order Information	Item Info
6569883 TEST Type: O	04-03 2018	**Bill To:** Ids: 6308242 / ---- Jeremy Broussard jeremyb@workdesigns.com **Ship To:** Jeremy Broussard 122 Abigayle's Row Scott, Louisiana 70583 United States 337-706-8106 **Purchase Order :** PO Num: test order Amount: 1,804.00	Product SKU: 980 Product: Anvil Ring Spun T-Shirt (980) Size: Small, Color: Black Stock #: Qty: 1 Price: 10.00 Line Total: 10.00 **Subtotal:** 1,795.96 **Shipping & Handling:** 8.04 **Tax:** 0.00 **Order Total:** 1,804.00
6572567 TEST Type: O	04-05 2018	**Bill To:** Ids: 6308242 / ---- Jeremy Broussard jeremyb@workdesigns.com **Ship To:** Work Designs Eunice 302 Unatex Road Eunice, Louisiana 70535 United States 337-432-0003 **Purchase Order :** PO Num: this is just a test Amount: 1,000.00 **Notes:** **Shipping:** This is a sample shipping message. Any information related to shipping or to the items in your order can be included here. **Billing:** This is a sample billing message. Any information related to billing or to the items in your order can be included here.	Product SKU: 980 Product: Anvil Ring Spun T-Shirt (980) Size: Large, Color: Charcoal Stock #: Qty: 1 Price: 10.00 Line Total: 10.00 **Subtotal:** 1,000.00 **Shipping & Handling:** 0.00 **Tax:** 0.00 **Order Total:** 1,000.00

Work Design Point Balance By Program									
for Work Designs Demo - NC (workdesignsdemo) - 13070									
04/05/2018 05:10PM									
UserID	FirstName	LastName	UserEmail	UserAlternateID	ProgramID	ProgramDescription	ProgramBalance	UserPointBalance	PointsSpent
6308242	Jeremy	Broussard	jeremyb@workdesigns.com		10078	WD Safety Points	2000	2000	0
6497817	Jason	Masters	jmasters@corexpand.com	sjmasters@bellsouth.net	10078	WD Safety Points	10000	10000	0
6499193	Richard	Hoffkins	richardh@workdesigns.com		10078	WD Safety Points	2000	2000	0

Reports

You can contact us any time you wish to run a report on your store. We can run reports that provide information on user point balances, points spent or added to individual user accounts, order histories within a date range, and more!