Wholesale Website - Ideas & Requirements

- Prices
  - Hide prices until logged in
  - Custom price list based on customer
  - Tiered price discount for full pallet quantity
- Products
  - Show/hide products for specific products (mainly custom branded products)
  - Product tags which are used for filters should sync across zoho and the store
- Ordering
  - Payment on account (instead of checkout online)
  - Customer ability to submit details
    - Add Purchase Order Number
    - Add delivery date
  - Drawdown existing items
- Customer Account
  - View orders
  - View tracking numbers and shipment info
- Integration with Zoho Inventory (https://www.zoho.com/inventory/api/v1/)
  - Orders
    - Send new orders to Zoho as Sales Order – mapping all fields
    - Correctly map customer across web and zoho
  - Products
    - Tag items in Zoho to show online (Yes/no to make available for sale)
    - Product data from zoho should be shown on the product page online such as product/carton dimensions and weights, materials, etc.
  - Shipments
    - When shipped – push the tracking number back to online store
  - Invoices
    - If paid online then an invoice should be generated in Zoho and sent to the customer on payment.
    - If payment is on account then an invoice should not be generated. This will be done manually by us after we have shipped.
  - Price list
    - Should sync between zoho and site

https://apps.shopify.com/customer-pricing?ot=cca29ef2-93c0-434d-a866-e9ee18bb3d62&surface_detail=wholesale&surface_inter_position=1&surface_intra_position=1&surface_type=search_ad

Configure app to sync with price lists created in Zoho for customers.

https://apps.shopify.com/locksmith?ref=lightward

Configure Locksmith App to hide certain products and only show to specific clients.

A new menu item should appear for customers to view their custom products which are only visible to them.

<u>Zoho Specifics</u>

Items: The following fields are attributed to each product in Zoho Inventory and should interact with the Shopify site in the following way.

Products in Zoho should be shown on the shopify website based on the following criteria. Ideally we can manage the product information all from Zoho but it is probably better for us to add product descriptions directly into Shopify admin.

Field in Zoho Inventoy	Relation to Shopify
-Product Name -SKU -Dimensions -Weight -EAN -Product Dimensions -Net Weight (g) -Pcs per Pack -Packs per Carton -Pcs/Ctn -Material -Sustainble	Show on the product page of the website
-Product Type	Used to classify which product category the product is listed in. For example: Cutlery, Lunchboxes, etc.
-Customer Restrictions	Used to determine if the product should be visible to all visitors or if it is hidden to customers and only shown to specific users using the Locksmith App. For example some items are custom made with the client's branding on it. This should only be shown to specific customers when they login using their email address.
-Sell Online?	Should the product be visibly available to sell online at all? Some items will be completely hidden from sale. We will also use this for example if we want to take a product down early due to low inventory levels.

Customers:

Field in Zoho Inventory	Relation to Shopify
-Contact Persons Information -Address Book -	Sync between accounts
-Price List	Prices set in Zoho should automatically apply to the user's account when using the shopify website. This can be done using the Bold Custom Pricing App but it must be integrated with Zoho so that we can setup and manage a customer's pricing from Zoho.
-Customer Group	A way to group similar customers together and apply certain criteria to multiple customers. For example some of our customers have multiple depots or locations and the best way

	for us to manage them is have each location setup as a unique customer in our system. In this case we would issue a unique login for each depot to the client. The 'Customer Group' field allows us to show/hide products, change prices, etc. to a group of customers instead of doing it individually.
-Allow Payment on Account	Customer has a credit account with us. They should be able to confirm the order but are not required to pay at checkout – they are simply submitting an order which will be invoiced manually later. This ability to bypass checkout should only be possible for customers with 'Yes' as the value in this field.

'Stock Drawdown' feature

Scenario: A customer of ours will purchase in advance an order of custom products and pays upfront. We will produce the products and store them in our warehouse. Currently the customer has to call/email us and ask for us to send them a few boxes every week or to check how many they have left in stock.

I would like to create a way that the customer can simply login to the website, view how many pieces of a product they have left in stock and then request for a delivery. I am open to suggestions on how this will look or operate. Naturally it will need to sync with Zoho Inventory to receive the information about quantity left in stock and then also submit a new delivery request to us.

Zoho Inventory has a feature called "Pick List" which I believe we can use for this. (https://www.zoho.com/uk/inventory/help/picklist/) The website user can select items from previous orders which they would like delivered – and we receive this on the backend as a picklist.

Questions:

- How is the best way to link a 'Customer' in Zoho to an account on the website? For new customers this is straight forward but for existing accounts how will the site be able to link an email address to a specific customer account to start with?