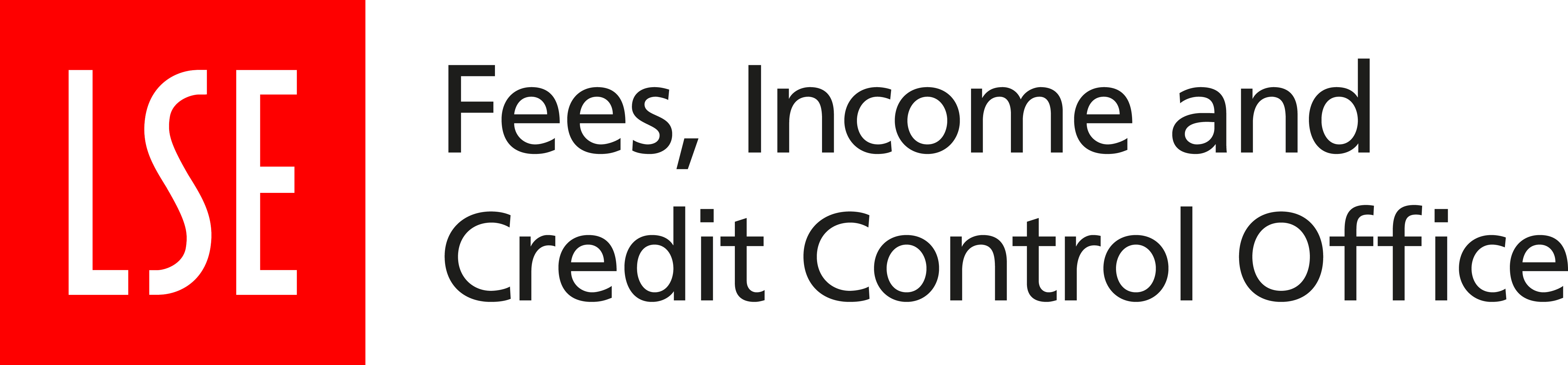
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**Online Store**

**Staff User Guide and Procedures**

**July 2015**

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1. Introduction  
  
The term “Online Store or Store” is an online solution offered by the School to allow customers and students to purchase products, book attendance at conferences, events or seminars, and requires full payment to be made in advance for the service or product at the time of booking.

2. Getting Access

Before you can request items to be placed on the store, you need to complete a new user request form and get this authorised by your budget holder, see annex 1. A copy of the form can be downloaded from the Forms and Toolkits webpage. Once completed this should be scanned and emailed to **Onlinestore@lse.ac.uk.** This will grant you access to run reports and view information relating to products and services for your budget area.You will also at this stage be granted automatic access to Issuetrak Self service portal.

3. IssueTrak

All enquries and communication should be submitted via IssueTrak, the Self Service portal facilitates full tracking. For a full overview of IssueTrak see annex 2 & annex 3  
  
4. Store Structure & Ownership

The Store is controlled and maintained by Finance with responsbilities allocated accordingly for various aspects of the store. As a user of the Store you too have a responsibility to ensure you are clear of what is required of you. Please refer to this document for a full breakdown of who does what see: **Online Store Management and responsibility,** see annex 4.

5. Store Management & Responsibilities

Functionality and responsibility for the day to day running of the Store and its various areas lies with the Fees, Income and Credit Control team within Finance. Tasks are categorised into 4 key areas, details of this and colleagues within FICC who can assist with each area can be found here. **FICC Online Store Resourcing**, see annex 5.

6. Store Categories  
  
For full details of how an item is categorised within the Store and for what options are available, please refer to **Store Guide – Products & Services**, see Annex 6.

7. Using the Store

Getting products and events set up couldn’t be easier. Once access has been approved, colleagues are able to work through a purpose built Toolkit which guides you through the request process step by step. The Toolkit has been designed to ensure all the data needed to create an item will be collected and recorded so that all of Shool’s reporting and management information needs are met, but primarily that customers are supplied with all the information needed when considering the purchase.

8. Sign off

Before we can activate your product / service / event you will be required to submit a SIGN OFF form, this is to ensure that you are happy with testing carried out and you are satisfied with the layout and quality of information displayed for your item. Once we have received your sign-off, we will aim activate your item on the store within 24-48 hours.

you should complete the **Sign off form**, log into Issuetrak and select option FICCOS01a for Product singoff or FICCOS02a for Conference/Event signoff. You should attach the completed signoff form to this ticket, see annex 7.

9. Change Requests

Once a request has been submitted, there is an opportunity to amend or change the request, bear in mind any changes required should be raised with the Online Store Support Team as a matter of urgency. This is especially relevant when a product is live on the Store. You should be aware that any complaints, costs or claims that arise as a result of a inaccurate request are the responsibility of the budget area and will not be dealt with by Finance. If a change is required you should complete the **Change Request Form**, log into Issuetrak and select option FICCOS11 Product change request. You should attach the completed form to this ticket, see annex 8.

10. Returns & Cancellations

Where a customer wishes to cancel an order, or return a product, the customer is required to complete and submit a Cancellation from and return this to the email or contact supplied with the confirmation of purchase email. A copy of the order cancellation form is available to download **via the Forms and Toolkits webpage**

Colleagues are required to be conversant with customers’ entitlement in this area and be in a position to advise and respond to customers queries. Full details can be found in the **Online Store Policy 2015/16.**

11. Refunds

In cases where the School is unable to supply or comply with the product request, the School agrees to refund payment(s) received subject to the terms and conditions set out in the **Online Store Policy 2015/16**. Colleagues are required to ensure a refund request authorising the refund is sent to Fees, Income & Credit Control by completing the online request available via <http://www.lse.ac.uk/intranet/LSEServices/financeDivision/Fees,-Income-and-Credit-Control/Refunds/Refunding-payments.aspx>   
Colleagues should be aware that customers should not be advised to contact Finance directly for a refund as these will not be considered unless they have been authorised by the budget area that requested the product placement

12. Advance & Repeat Booking

There’s no need to wait until the product or event is due to go live before requesting Finance to launch; the sooner the request is made the better. All requests can be loaded onto the Store, but not made live until the required time, so complete control is maintained. Additionally, where there are regular or repeat occurences it’s possible to make these available as and when required; it’s not necessary to issue a new request for these items.

13. Service Level Agreements

Finance will strive to process all requests within guaranteed timeframes, these can be found in annex 9.

14. Consultation & Advice

In addition to the online help and documentation available, it is possible to book a consultation with a member of the Online Store Support Team for a face to face discussion if you are experiencing any diffculties with any aspect of the store. An online appointment booking system allows you to choose a date and time convenient to you; **To book a consultation please visit our homepage and click on Book a consultation or navigate to** <http://onlinestore.setmore.com/services>

15. Complaints

If you should experience any difficulties, or feel the service provision has not been satisfactory, then an approach should be made on the first instance to a member of the Store Support Team. If necessary, is it possible to escalate an issue by booking an appointment with the Online Store Manager/Deputy Online Store Manager: See escalated eqnuiry: <http://onlinestore.setmore.com/services>

16. Dashboard

As part of your user access, you will be able to run reports and gather information about your sales, income and general trading history in your area by using the reporting Dashboard. This can be accessed via **SSRS Reporting tool. Please visit our homepage and click on Dashboard promo box**

17. Online Store Policy

A detailed and comprehensive Store policy is avaialble **Online Store Policy 2015/16**, this forms part of the terms and conditions that customers will adhere to and will be required to accept prior to making a purchase. It provides clear guidance for customers and staff on all aspects of activity and associated areas relating to the Store. Colleagues should always refer to this for guidance or where clarification is needed.

# Annex 1

# 

**Date:**

# Online Store - User Request Form

|  |  |
| --- | --- |
| Staff Details | |
| Staff Name |  |
| E-mail |  |
| Phone |  |
| Staff ID |  |
| Room / Building Location |  |
| Department Details | |
| Department or Division |  |
| Section or Team |  |
| Name of Budget Holder |  |
| I confirm the above member of staff is authorized to request items can be advertised and added to the Online Store for sale on my behalf and in accordance with the School’s terms and conditions for Store product placement. | |
| Budget holders name  (Please Print name) |  |
| Budget Holder Signature |  |
| Expected Store Activities – C:\Users\BIRDM\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\0YOKLZF3\cUrqJ[1].pngall applicable | |
| Non chargeable items |  |
| Products |  |
| Events |  |
| Student / Individual Related |  |
| Commercial / Business Related |  |

Annex 2 IssueTrak ticket types

|  |  |  |
| --- | --- | --- |
| **Name(Code)** | **Subject & Workflow** | **Notes** |
| FICCOS01 | Product setup request | This status should be chosen when you submit a product request to the Online Store Support Team |
| FICCOS01a | Product request requiring review & signoff | When the Support team have processed your request formal signoff is required. |
| FICCOS02 | Conference/Event setup request | This status should be chosen when you submit a conference/event request to the Online Store Support Team |
| FICCOS02a | Conference/Event requiring review & signoff | When the Support team have processed your request formal signoff is required. |
| FICCOS03 | Product enquiry | This status should be chosen where you have a general product enquiry |
| FICCOS04 | Conference/Event enquiry | This status should be chosen where you have a general conference/event enquiry |
| FICCOS05 | Technical Issue | This status should be chosen for all system or techical related issues |
| FICCOS06 | Report access request | Reporting access is granted upon successful validation of User request form. This code is used by the support team for tracking purposes. |
| FICCOS08 | Refund enquiry | Refunds are managed by the Fees Team, if you choose this option we will ensure uour request is allocated to the appropriate support representative |
| FICCOS09 | Online Store user access request | Online Store Support option only, |
| FICCOS10 | Other | Any enquiries which are not covered |
| FICCOS11 | Change request | This status should be chosen where you require a change to a product , event or conference |

Annex 3 Issuetrak Solutions

|  |  |  |
| --- | --- | --- |
| **Name(Code)** | **Subject & Workflow** | **Solution(Ticket closed)** |
| FICCOS01 | Product setup successful | Your product request has been successfully set up. |
| FICCOS02 | Conference/Event setup successful | Your product enquiry has been successfully resolved. This ticket will now be closed. |
| FICCOS03 | Product enquiry resolved | Your product enquiry has been successfully resolved. This ticket will now be closed. |
| FICCOS04 | Conference/Event enquiry resolved | Your conference/event enquiry has been successfully resolved. This ticket will now be closed. |
| FICCOS05 | Technical Issue resolved | The technical issue you highlighted has successfully resolved. This ticket will now be closed. |
| FICCOS06 | Report access granted | Your request for access to reporting in the Online Store has has been granted. This ticket will now be closed. |
| FICCOS08 | Refund enquiry allocated | As advised all refund requests should be directed to the refunds team, we have forwarded your enquiry to them.This ticket will now be closed. |
| FICCOS09 | Online Store user access granted | You have been successfully set-up to use the Online Store . This ticket will now be closed. |
| FICCOS10 | Other | Your <<<<ISSUE>>>>>> has been successfully resolved. This ticket will now be closed. |
| FICCOS11 | Change request | Your product change request has been successfully implemented. This ticket will now be closed. |

Annex 4 Online Store Management & Responsibility

Annex 5 FICC Online Store Resourcing

Annex 6 Store Guide – Products & Services

Annex 7 Sign Off Form

# 

**Date:**

|  |  |  |  |
| --- | --- | --- | --- |
| Sign-off Staff Details | | | |
| Staff Name |  | | |
| E-mail |  | | |
| Phone |  | | |
| Staff ID |  | | |
| Room / Building Location |  | | |
| Product/Event/Conference Details | | | |
| Name of Product/Event |  | | |
| Product code/Booking prefix |  | | |
| IssueTrak number: |  | | |
| Product or Event Details |  | | |
| Questions: Please choose Y/N If No please provide details in boxes below | | | |
| Have you viewed all pages? | | Yes / No |  |
| Has the item been placed in the correct category? | | Yes / No |  |
| Is the summary description of the product /event correct | | Yes / No |  |
| Is the detailed description of the product /event correct? | | Yes / No |  |
| Is the picture of the product / event acceptable? **Please note:** You must ensure that you have obtained relevant permission for any images used. | | Yes / No |  |
| Are the prices listed correct? | | Yes / No |  |
| I confirm that I am authorizing the Product/Event/Conference to be made ’Live’. I confirm that I have read and understood both the Online Store user guide and the School’s terms and conditions for Store product placement. | | | |
| Staff name  (Please Print name) | |  | |
| Staff Signature | |  | |

Annex 8 Change Request Form

# 

**Date:**

# Product / Event Change Request/Cancellation

|  |  |  |
| --- | --- | --- |
| Staff Details | | |
| Staff Name |  | |
| E-mail |  | |
| Phone |  | |
| Staff ID |  | |
| Room / Building Location |  | |
| Product Details | | |
| Is product LIVE on Store | Yes / No | |
| Product code |  | |
| IssueTrak number: |  | |
| Order Ref No |  | |
| Product or Event Name |  | |
| Product or Event Details |  | |
| Changes Required – C:\Users\BIRDM\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\0YOKLZF3\cUrqJ[1].pngall applicable. State Why or New Requirements | | |
| Withdraw Product |  |  |
| Product Changes |  |  |
| Event Changes |  |  |
| Returns & Cancellations |  |  |

Annex 9: Service level agreements

|  |  |  |  |
| --- | --- | --- | --- |
| **Severity** | **Response** | **Resolution** | **Days** |
| High | 48 hours | 72 hours | Mon-Fri |
| Medium | 72 hours | 120 hours | Mon-Fri |
| Low | 96 hours | 168 hours | Mon-Fri |







