

# V2.0 NorthSky Website Upgrade

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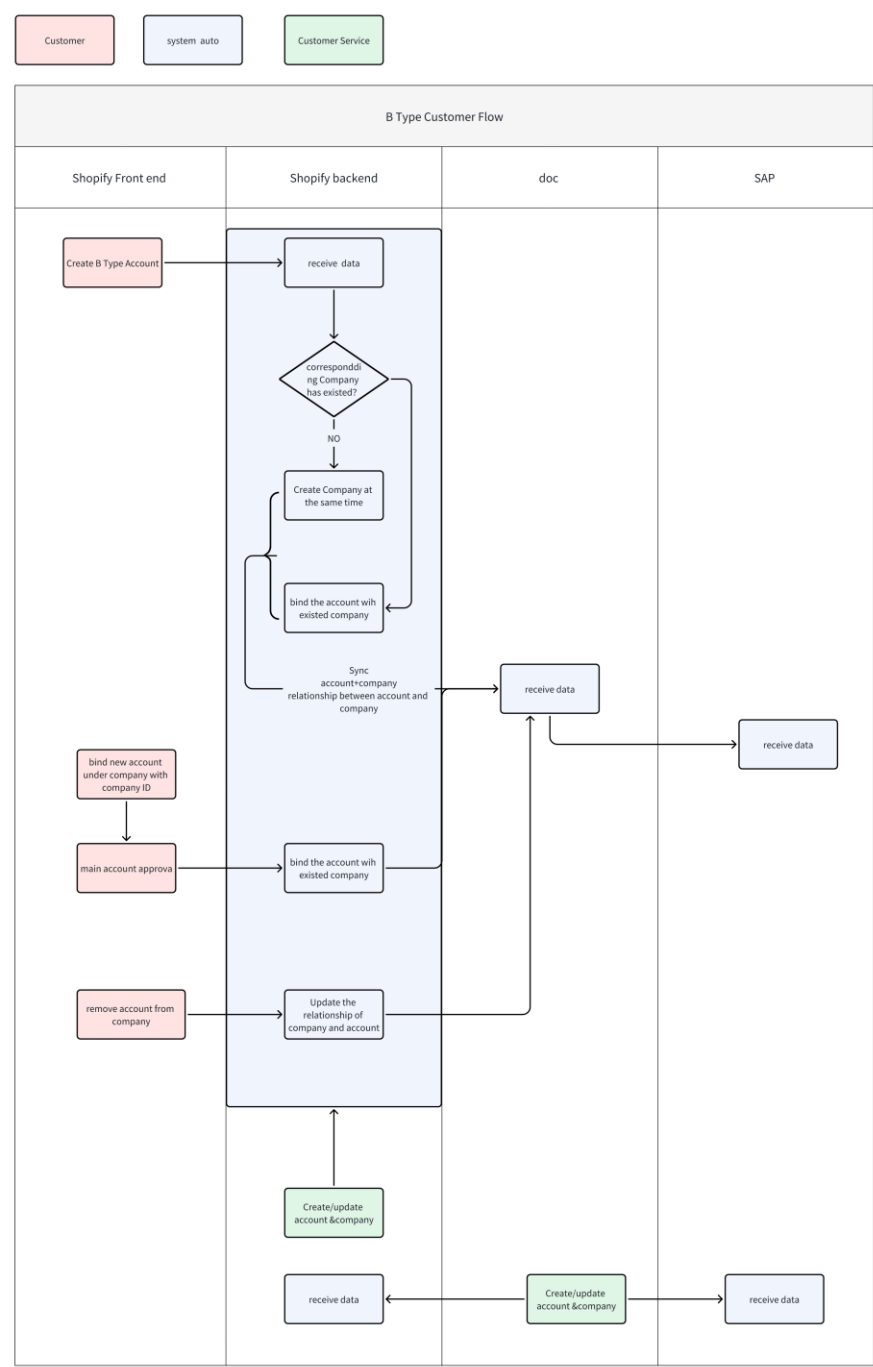
## Background

The NorthSky website was launched on December 1st. For the already launched version, we will have systematic optimization requirements in terms of business, user experience, and processes. The V2.0 version will focus on these three major areas for comprehensive improvements.

## Requirements-By Phase

(Done) 1-Phase 1: Business Customer Registration

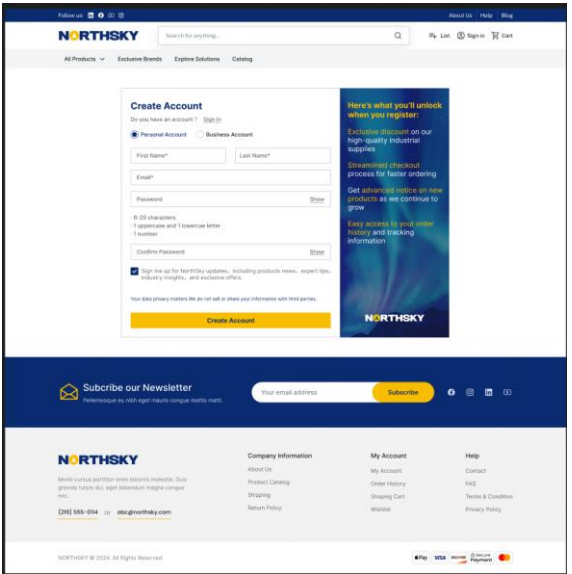
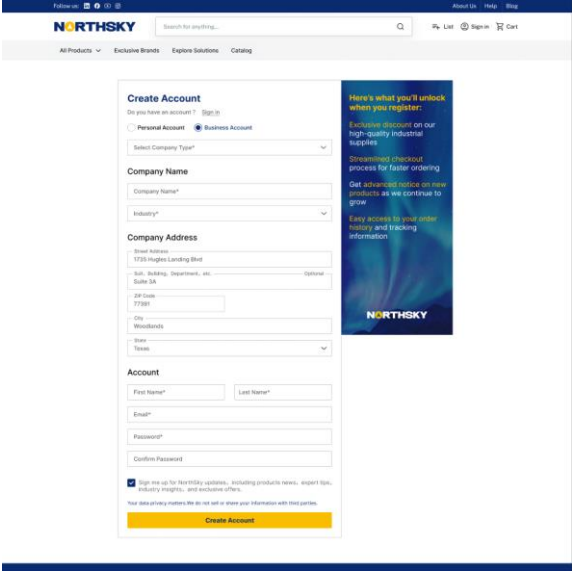
1.0 Business Account Flow



1.1 Business Type Account Creation

1 Account can only bind one Company

One Company can have multiple accounts (can with no account)

Function	
<p>Increase the business type account creation</p> <ul style="list-style-type: none"><li>• If customer choose personal account<ul style="list-style-type: none"><li>◦ Only need to fill in the name and Email</li></ul></li></ul>	
<p>If customer choose business account- Register and Create a New Company</p> <ul style="list-style-type: none"><li>◦ Need to fill out the name and Email</li><li>◦ Need to fill out the company address (new to create)<ul style="list-style-type: none"><li>▪ This company address will display at default shipping address</li></ul></li><li>◦ Industry (required)</li><li>◦ Company name (required)</li><li>◦ Company address (required)<ul style="list-style-type: none"><li>▪ Address 2 is optional</li><li>▪ Others are required</li><li>▪ Only allow us address</li></ul></li></ul> <p>Use the Company to check the duplication, if duplicated, shows: <b>Company already existed, Please input the company authorization code</b></p>	

If customer choose business account - Register and Join an Existing Company

- Customer need to fill out the name and email
- Use the company id to search the company ( Precision search )
  - system returns specific company details based on the input ID.
  - If system cannot return the company shows the error **invalid company id**

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**NORTHSKY** Search for anything...

All Products Exclusive Brands Explore Solutions Catalog

**Create Account**  
Do you have an account? [Sign In](#)

☐ Personal Account ☒ Business Account

Select Company Type\*

Join an existing company\*

Company Authentication Code\*

Account

First Name\* Last Name\*

Email\*

Password [Show](#)

8-20 characters  
1 uppercase and 1 lowercase letter  
1 number

Confirm Password [Show](#)

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**Here's what you'll unlock when you register:**  
Exclusive discount on our high-quality industrial supplies  
Streamlined checkout process for faster ordering  
Get advanced notice on new products as we continue to grow  
Easy access to your order history and tracking information

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Do you have an account? [Sign In](#)

☐ Personal Account ☒ Business Account

Join an existing company\*

Company Authentication Code\*

This code does not exist, please check and try again.

Account

First Name\* Last Name\*

Email\*

Password [Show](#)

8-20 characters  
1 uppercase and 1 lowercase letter  
1 number

Confirm Password [Show](#)

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[Create Account](#)

**Here's what you'll unlock when you register:**  
Exclusive discount on our high-quality industrial supplies  
Streamlined checkout process for faster ordering  
Get advanced notice on new products as we continue to grow  
Easy access to your order history and tracking information

**NORTHSKY**

Search Company Code and Display Name

**Create Account**  
Do you have an account? [Sign In](#)

☐ Personal Account ☒ Business Account

Select Company Type\*

Join an existing company\*

Company Authentication Code\*

Account

First Name\* Last Name\*

Email\*

Password [Show](#)

8-20 characters  
1 uppercase and 1 lowercase letter  
1 number

Confirm Password [Show](#)

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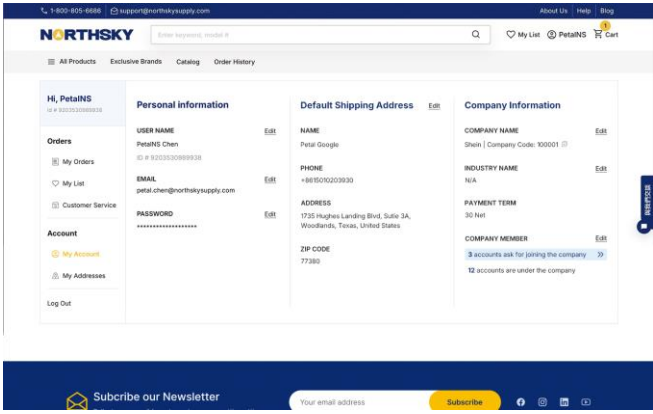
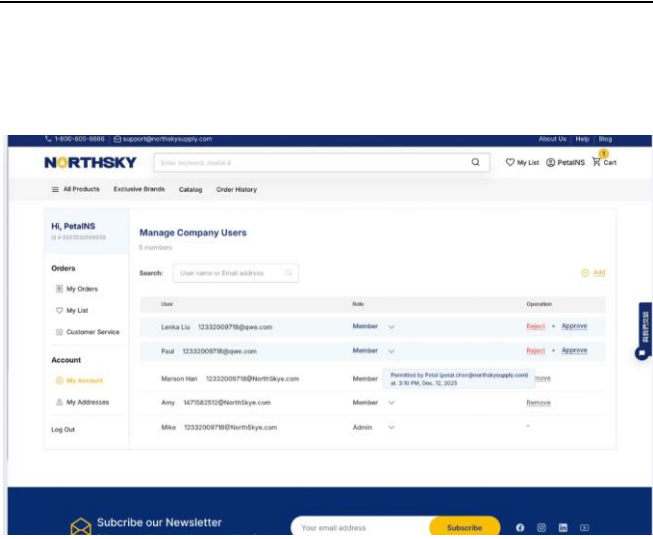
[Create Account](#)

**Here's what you'll unlock when you register:**  
Exclusive discount on our high-quality industrial supplies  
Streamlined checkout process for faster ordering  
Get advanced notice on new products as we continue to grow  
Easy access to your order history and tracking information

**NORTHSKY**

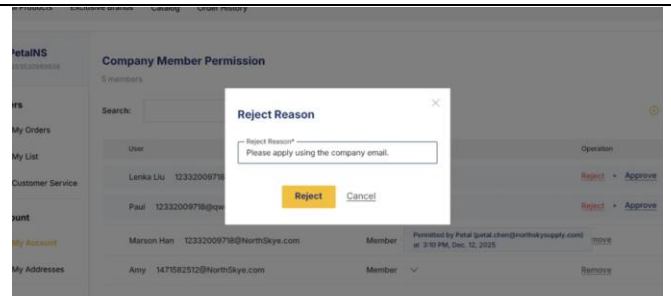
Currently B Type Customer using the verification code to verify the account

## 1.2 Customers Manage Business Type Account

function	
<p>For Admin account</p> <ul style="list-style-type: none"> <li>can manage the staff account <ul style="list-style-type: none"> <li>Approve/reject the join request from staff account</li> <li>Remove the account from company</li> <li>Checking the joined the account information</li> </ul> </li> <li>Can edit the company name/industrial name</li> </ul>	
<p>For main account-approve the join request</p> <ul style="list-style-type: none"> <li>Sent to “Manage Company Users” page after click</li> <li>List will display the pending approval and approved users <ul style="list-style-type: none"> <li>If application rejected, will hide in this page</li> <li>Pending approval data will be displayed at the top of the list.</li> </ul> </li> <li>Main account can approve/deny the request <ul style="list-style-type: none"> <li>Staff account will join the company once Admin account approved the request</li> </ul> </li> </ul>	

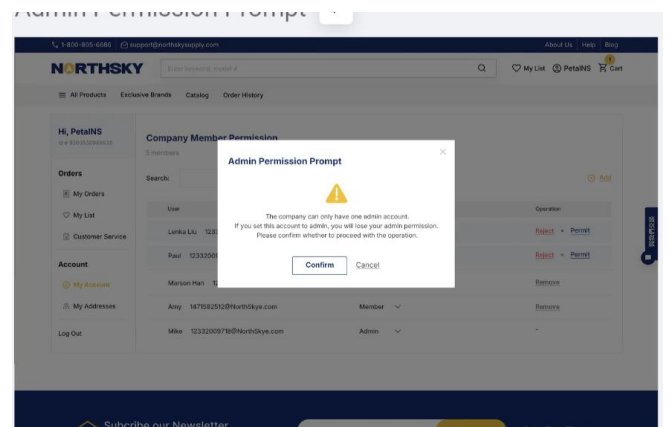
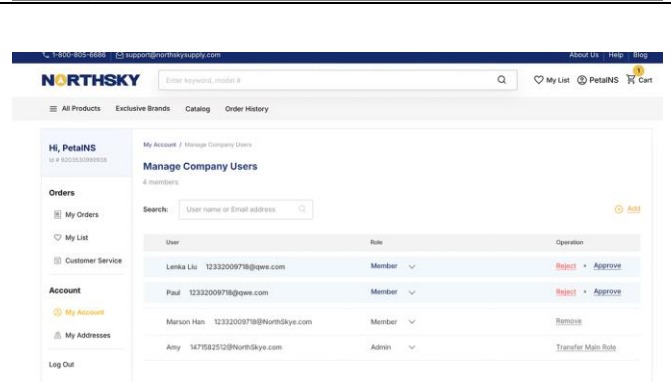
For main account-reject the join request

- Need to fill in the reject reason



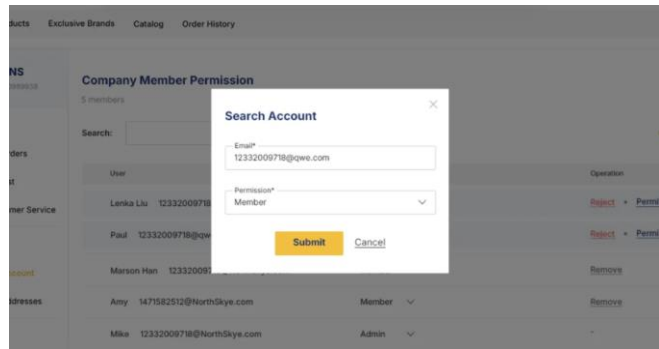
For Admin account: manage the joined member account

- Admin account can remove the staff account from company
- Admin account set other accounts as Admin
  - Click **Transfer Admin role** to pop up the search account pop-up
    - Show the confirmation pop-up once clicking the submit button
    - **Can only search the account under the company**
- Account Order:
  - My Account First
  - Then order by Alphabetic

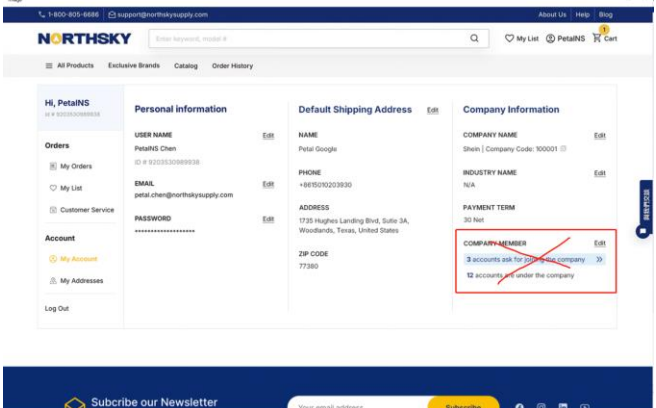
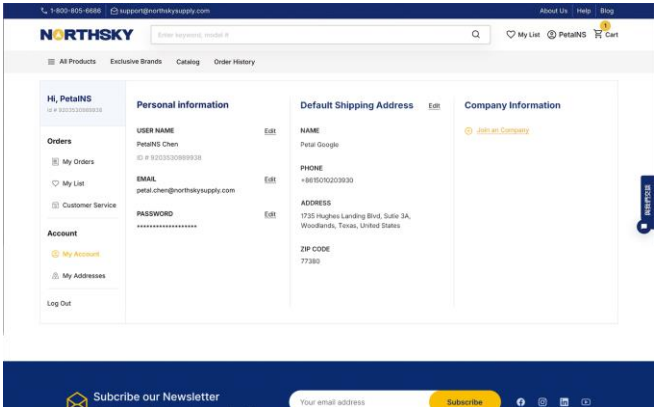
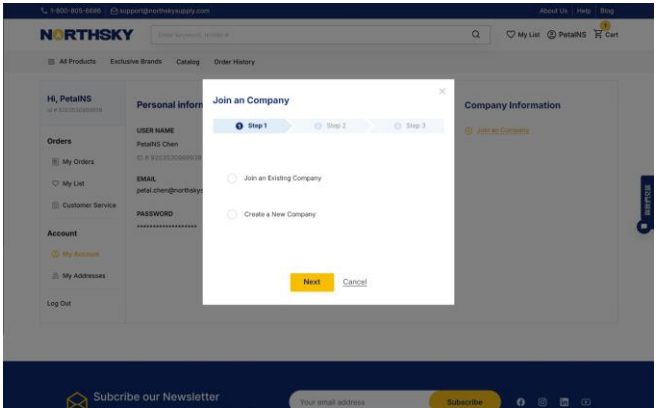


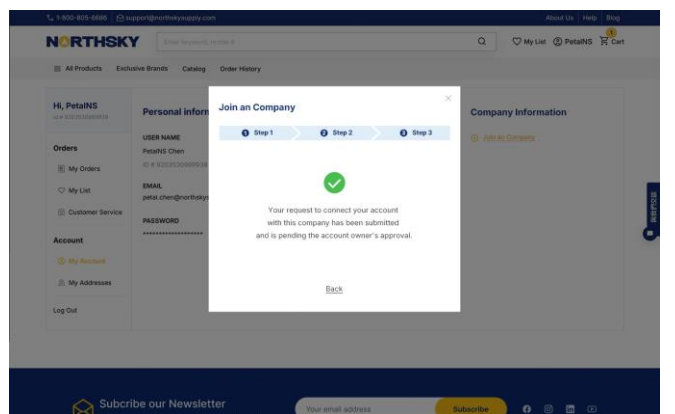
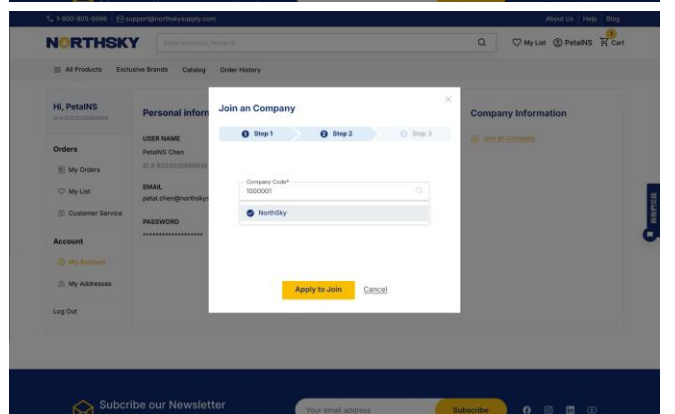
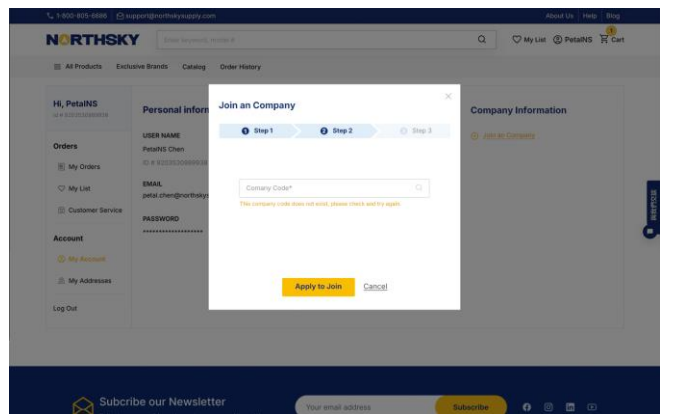
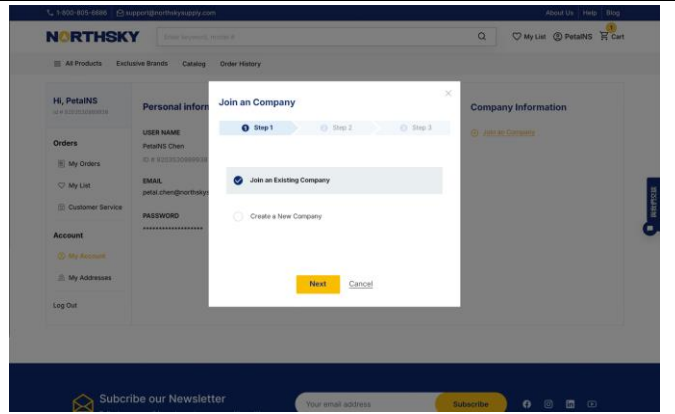
- For Main account can add new account with searched email address
- Admin Account can use the email to search the account to add new account
  - Need to make sure that the searched email address is the NorthSky Personal account
    - If Searched email Address doesn't exist in NorthSky , shows error :  
The email address does not exist in NorthSky. Please confirm the information.
    - If Searched email address already joined another Company , shows error :  
This account has already been assigned to company.
  - If searched account has Pending review
    - Pending current company tips as : This account has already applied to join another company.
    - Pending other company: This

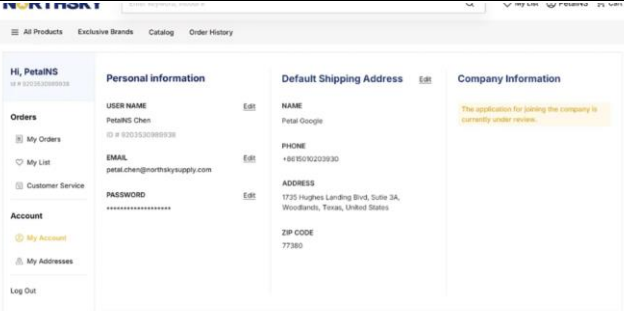
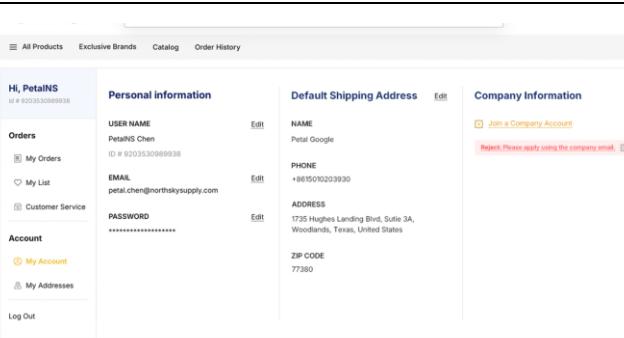
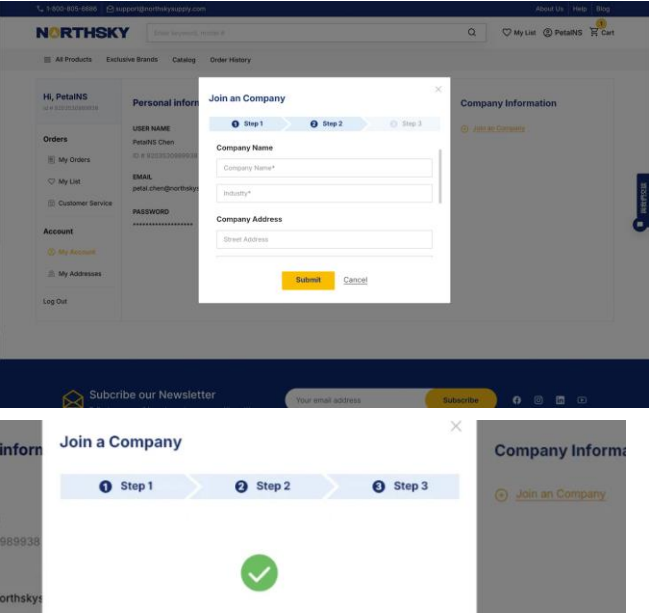
Add new





<p>account has already applied to join another company.</p> <ul style="list-style-type: none"> <li>Can only set searched account as member</li> </ul>	
<p>For Member account</p> <ul style="list-style-type: none"> <li>Can view the company information but cannot edit it after joining the company</li> </ul>	
<p>Personal Account change to B Type Account</p> <ul style="list-style-type: none"> <li>Click to bind the company <ul style="list-style-type: none"> <li>Create new one</li> <li>Join an existing company, using the company id to search</li> <li>The main account needs to approve the join action</li> </ul> </li> </ul>	
<ul style="list-style-type: none"> <li>Join an Existing Company <ul style="list-style-type: none"> <li>Input Company Code</li> <li>Check if it exists: if it has existed, return Company Name</li> <li>Remind and cannot continue if it does not exist</li> <li>Existing company admin account will need to approve the application</li> </ul> </li> </ul>	




<ul style="list-style-type: none"> <li>Member will see the tips that Request is pending review , if the application Request is under review</li> </ul>	 <p>The screenshot shows the 'Company Information' section with a yellow banner stating: 'The application for joining the company is currently under review.' The user's profile details (PetalNS Chen) and shipping address are visible.</p>
<ul style="list-style-type: none"> <li>Personal account can see the reject reason if the application request is rejected <ul style="list-style-type: none"> <li>The rejection reason can be closed, and once closed, it will no longer be displayed.</li> <li>Can apply again if the request is rejected</li> </ul> </li> </ul>	 <p>The screenshot shows the 'Company Information' section with a red banner stating: 'Reject, Please apply using the company email.' A 'Join a Company Account' button is visible below the banner.</p>
<ul style="list-style-type: none"> <li>Create a new company <ul style="list-style-type: none"> <li>And the account which create the company will be the default main account of this company</li> <li>Only allow us address</li> <li>Create new company doesn't have the approval process <ul style="list-style-type: none"> <li>Step 3 shows the verbiage : The new company has been successfully established.</li> </ul> </li> </ul> </li> </ul>	 <p>The top screenshot shows the 'Join an Company' modal form with fields for Company Name, Industry, and Company Address. The bottom screenshot shows the 'Step 3' completion screen with a green checkmark and the text: 'The new company has been successfully established.'</p>
<p>In phase 1, we can only config the Payment terms from Shopify backend. Not allow customer to apply from website</p> <p>B type Account can pay by Payment terms while checking out, placed order will mark as</p>	

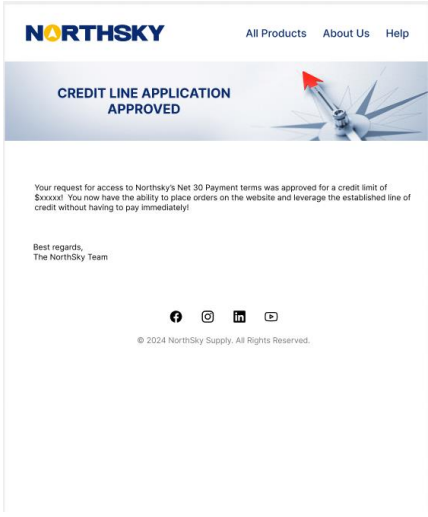
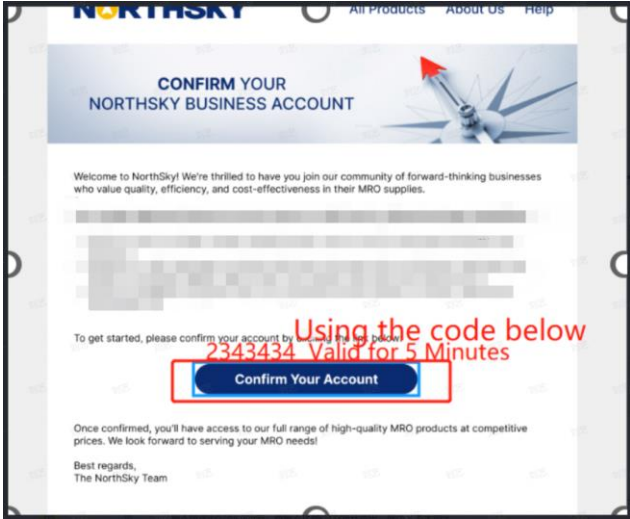
Pending paid and Order sync to SAP after Customer Service click to mark the Order as paid	
<p>Address Logic</p> <ul style="list-style-type: none"> <li>• All account under the same company shares the company address , every account can manage 、 add 、 remove the company address in my address</li> <li>• When user join a company show the First address as default shipping address but every account change the default shipping address for his own <ul style="list-style-type: none"> <li>◦ Add the remove my address is the same as C customer page</li> </ul> </li> </ul>	
<p>Customer service can configure the company account from shopify backend system</p> <ul style="list-style-type: none"> <li>• Remove member/admin account from company 、 add member/admin account for a company</li> <li>• Delete and create company</li> <li>• All the action results need to sync to SAP</li> </ul>	

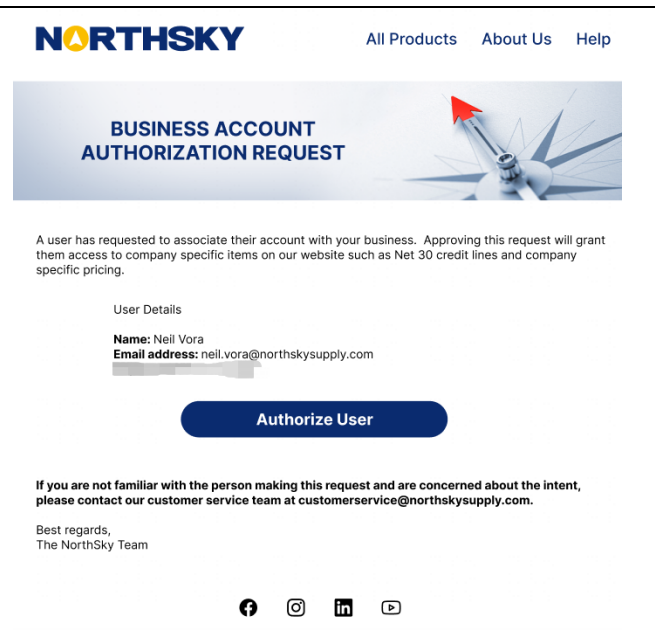
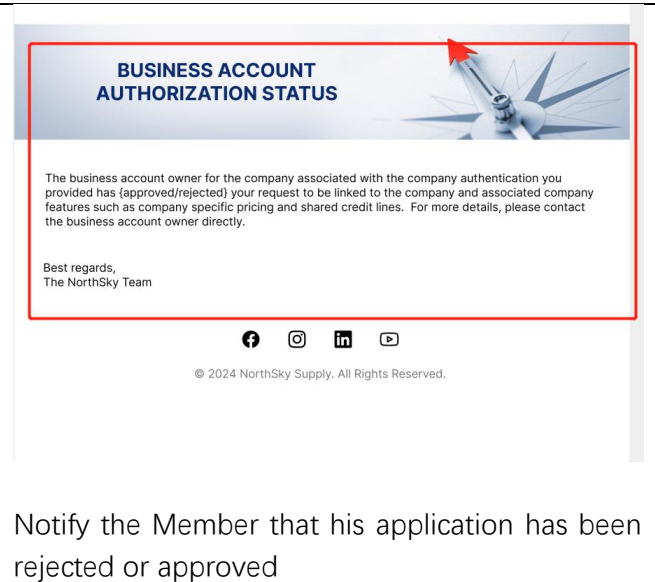
**Doc will have a module to manage Customer information as well, this will have a separate PRD**

### 1.3 Email to Notify Customers their credit changes

[NorthSky Transactional Email – Figma](#)

Scenario	Email Role		Theme	Phases
NorthSky	Customer	Notify main account customer that company payment term has been set		Phases 1

set the payment term for customer company in back end		 <p>The screenshot shows the Northsky website with a navigation bar containing 'All Products', 'About Us', and 'Help'. A prominent banner reads 'CREDIT LINE APPLICATION APPROVED' with a red arrow pointing upwards. Below the banner, a message states: 'Your request for access to Northsky's Net 30 Payment terms was approved for a credit limit of \$xxxxx! You now have the ability to place orders on the website and leverage the established line of credit without having to pay immediately!'. The message is signed 'Best regards, The NorthSky Team' and includes social media icons for Facebook, Instagram, LinkedIn, and YouTube. A copyright notice at the bottom reads '© 2024 NorthSky Supply. All Rights Reserved.'</p>		
Customer Create account and company at the same time	Customer	 <p>The screenshot shows the Northsky website with a navigation bar containing 'All Products', 'About Us', and 'Help'. A prominent banner reads 'CONFIRM YOUR NORTHSKY BUSINESS ACCOUNT'. Below the banner, a message states: 'Welcome to NorthSky! We're thrilled to have you join our community of forward-thinking businesses who value quality, efficiency, and cost-effectiveness in their MRO supplies.' There are two lines of redacted text. Below the redacted text, a message says: 'To get started, please confirm your account by using the code below'. A red box highlights a blue button that says 'Confirm Your Account'. Above the button, the text 'Using the code below 2343434 Valid for 5 Minutes' is displayed in red. Below the button, a message states: 'Once confirmed, you'll have access to our full range of high-quality MRO products at competitive prices. We look forward to serving your MRO needs!'. The message is signed 'Best regards, The NorthSky Team'.</p>	Northsky Business Account Verification	
Member Apply for joining the company	Main Account	<p>Notify the main account someone is applying to join the company</p> <ul style="list-style-type: none"><li>Click the button to jump to the personal page-company manage page to audit</li></ul>	<div>BUSINESS ACCOUNT AUTHORIZATION REQUEST</div>	


				
Main account approve or reject his request	Member account	 <p>Notify the Member that his application has been rejected or approved</p>	Business Account Authorization Status Update	

## 2- Phase 1: UX Improvement

### 6.1 My Orders UX Upgrade


- SO: Displaying the refund information on the Order Detail

Home / My Orders / Order Details

Order Number: <b>A1398001</b>		Order placed on: Nov. 13, 2024 at 01:01:53 AM		Order Status
	1 Color 1	QTY	PRICE	TAX
	MODEL: 245467S	10	\$30.00	\$0.00
	2 Refunded			
	8 Applying a refund			
				Subtotal
				TAX
				Estimated Shipping
				<b>Total</b>

[Invoice/Receipt](#)

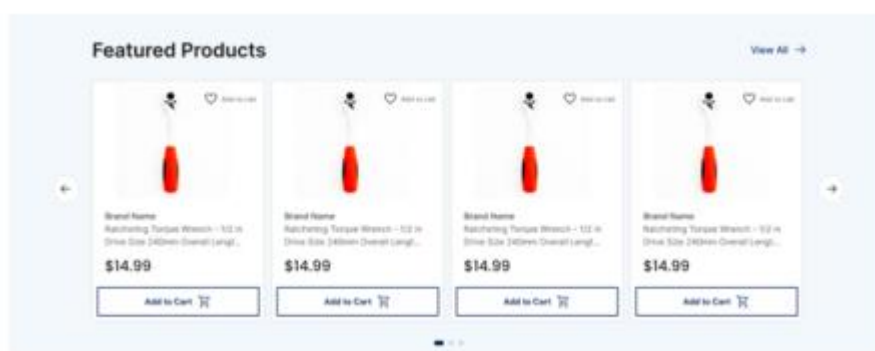
- SO: Click image jump into the SKU PDP

Order number: <b>A1398001</b>		Order placed on: Nov. 13, 2024	
	1 Color 1	QTY	
	MODEL: 245467S	1	

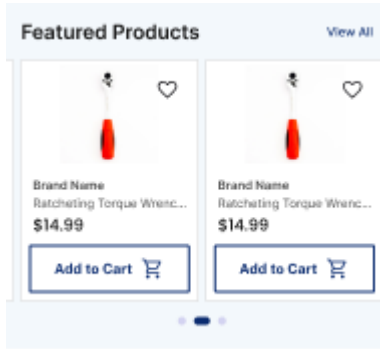
## 6.2 My Orders UX Upgrade

- Add “View All” and a landing page for Featured Products, increase its product quantity

Desktop:



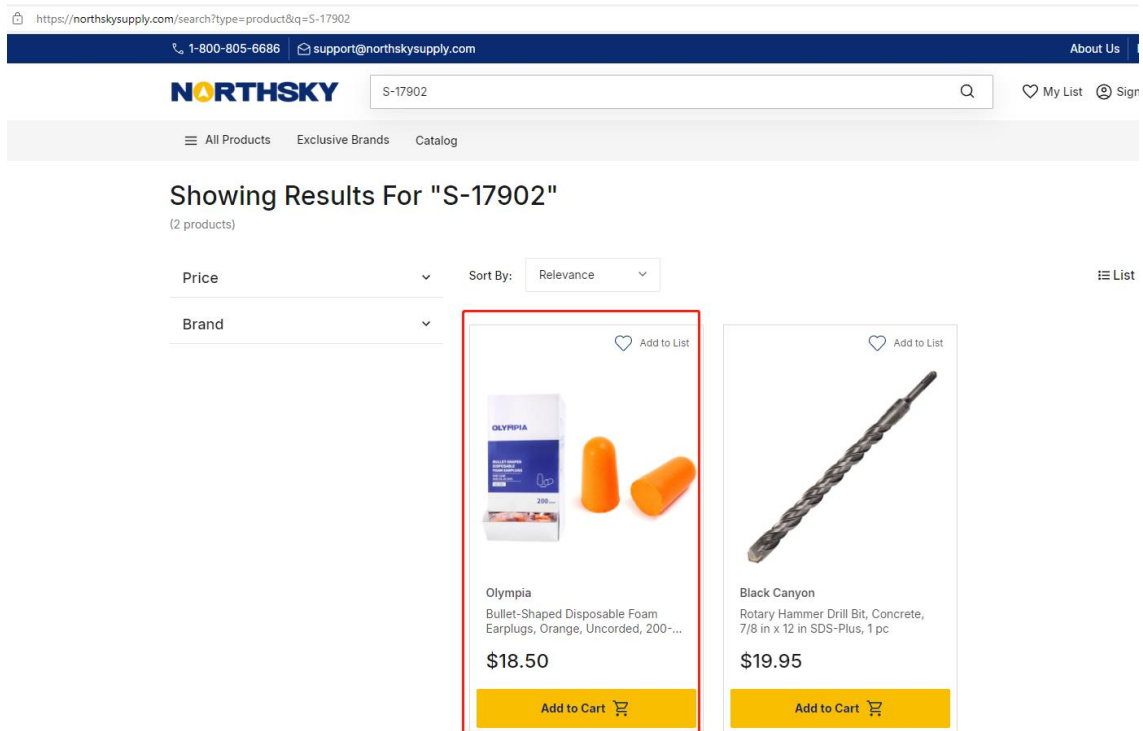
Mobile:



- Increase the capacity of SKUs on Featured Products & New Arrival

## 6.3 Product Display UI Upgrade

- Display model on Grid of Product



- Display the new arrival tags/ICONS on new arrival products
- Mobile-将 Featured Brand 移动到 Blog 上方（PC 端位置不变）
- 将 New Arrival 的商品在 Homepage 上面露出（PC+mobile）
- 优化 Coupon 信息在 website 的展示



- 在购物车 和 checkout 页面展示 Coupon，让用户更容易看到
- 优化 mobile 的商品信息流，保证可以透露出更好的商品
- 优化 mobile 的首页
- 商品的 title hyperlink UX 优化一下

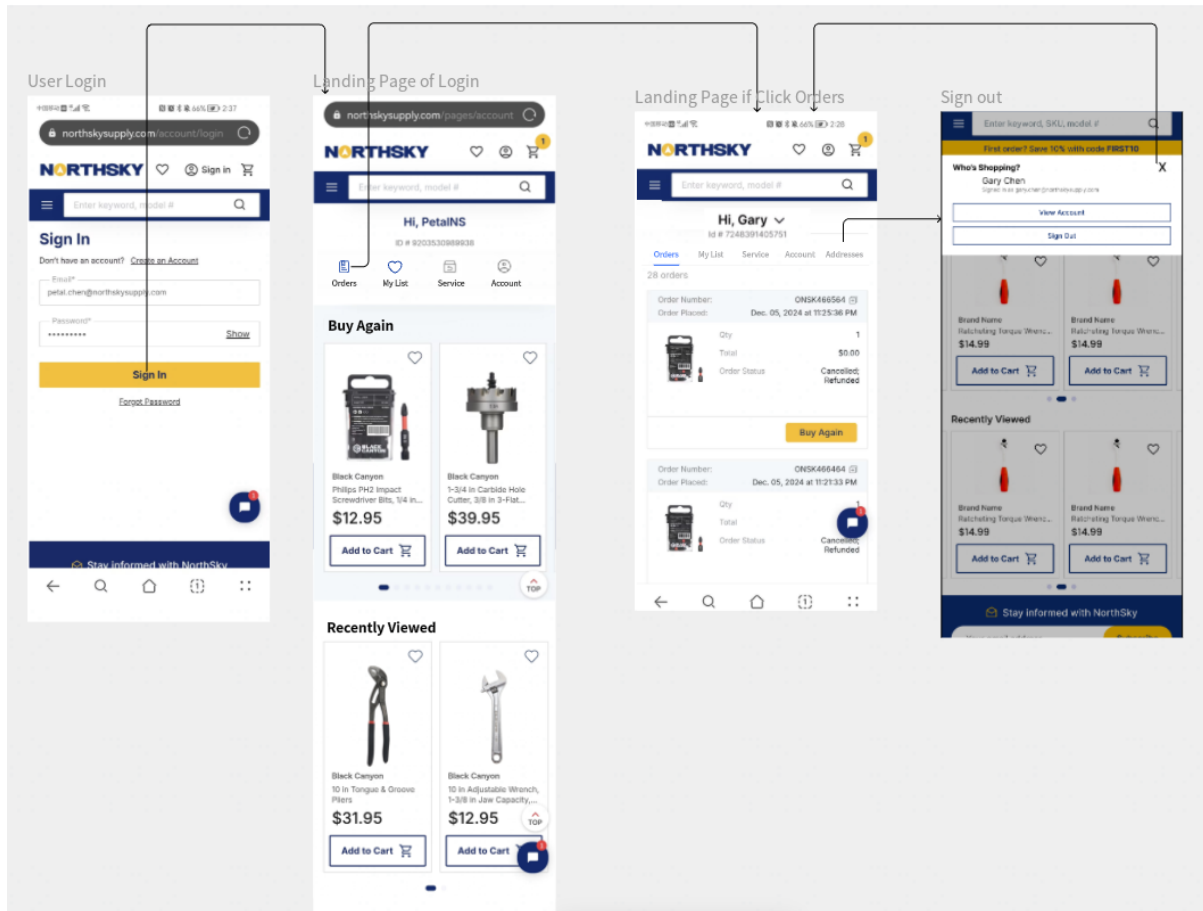
## 2.1 Coupon Upgrade

- Make the presentation of coupons more prominent so that it is easier for users to notice. -->erica

## 2.2 Shopping Card UX Upgrade


- 购物车里面的加购推荐（ Guess You May Need 模块） ---> 需要做

## 2.3 Mobile landing page of Login UX Upgrade



(Done) 3-Phase 1: ETA Display

Stock STATUS	EAT Display	Scenario
In Stock	Expected to arrive on December 20th.2024	In stock >0 Demand qty <=in stock qty

<b>In Stock</b>	<p>5 expected to arrive on December 20<sup>th</sup> 2024.</p> <p>The remaining balance is expected to arrive between December 23<sup>rd</sup> and January 5<sup>th</sup> 2024.</p> <p>The mini date of in transit and lack of stock~max date of in transit and lack of stock</p>	<p>IN STOCK &gt;0</p> <p>Demand qty &gt;in stock qty</p> 
<b>Restocking</b>	<p>Expected to arrive between March 23<sup>rd</sup> and April 6<sup>th</sup> 2024.</p> <p>The mini date of in transit and lack of stock~max date of in transit and lack of stock</p>	<p>IN STOCK =0</p>

## 4-Phase 3: Return and Refund interaction optimization

### 4.1-Front End of Customer

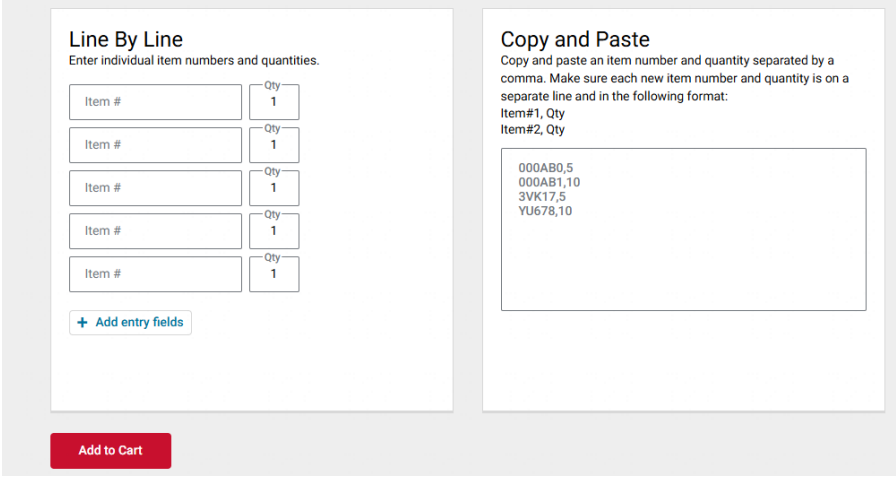
- For Pending approval Status product stock system won't allow customer to apply a Refund or return repeatedly

### 4.2-Backend End of Customer Service

#### Will have another document to describe the detail logic

- Allow customer service to create shipping label and send the shipping label to customer through doc system
- Allow customer service to approval refund/return request from shopify personal center all in doc system, (no need to operate in SAP anymore)
- Attention: if customer told the customer service to refund through live chat or email, customer service needs to process the refund and return in SAP system

## 5 -Phase 2. Bulk Order Creation

Function	
Input the Model ID and corresponding stock qty to add the products <ul style="list-style-type: none"> <li>Click <b>【add to cart】</b>, System Search the</li> </ul>	 <p>The screenshot shows a user interface for adding items to a cart. It is divided into two main sections: 'Line By Line' and 'Copy and Paste'. The 'Line By Line' section has a heading 'Enter individual item numbers and quantities.' and contains five rows, each with an 'Item #' input field and a 'Qty' dropdown menu set to '1'. Below these is a '+ Add entry fields' button. The 'Copy and Paste' section has a heading 'Copy and Paste' and a sub-instruction: 'Copy and paste an item number and quantity separated by a comma. Make sure each new item number and quantity is on a separate line and in the following format: Item#1, Qty Item#2, Qty'. Below this is a text area containing the example text: '000AB0,5', '000AB1,10', '3VK17,5', and 'YU678,10'. At the bottom of the interface is a red 'Add to Cart' button.</p>

## 5.1: Online Testing Process

- product: Create a specific product collection, products added in this collection won't display on the website
- Order: For specific user account, system won't sync the order to SAP

## 6- Phase 3: Tag Sync

### 6.1 Offer API to sync Tag of SKU

Add/delete Tag on SKU: 可以在 Listing 中对商品进行打标 new 和 featured product, 并且标签会在独立站的商品卡片上面展示: Shopify 接口接受 tag 添加和移除信息

### 6.2 Sales Order sync with SAP:

divide the name to two fields of "First Name" and "Last Name"

**Payment Term Customer Flow**

```

graph TD
    subgraph Customer
        A[Apply Payment term]
        D[display payment term]
        E[Display the rejection reason]
        G[Make Order]
        H{exceed the payment term?}
        I[success to make order with payment term]
        J[Cannot make order with payment term]
    end

    subgraph system_auto [system auto]
        C[config payment term in shopify backend]
    end

    subgraph Finance
        B[Finance approve]
    end

    subgraph doc
        F[Receive request]
        D1{approved}
        G1[update the customer main data(payment term)]
    end

    A --> F
    F --> B
    B --> D1
    D1 -- Y --> C
    C --> D
    D1 -- N --> E
    D1 -- Y --> G1
    G --> H
    H -- N --> I
    H -- Y --> J
  
```

- Only Main Account can view the payment term apply entrance if company don't open payment term
- Click to open the apply pop-up

The screenshot shows the Northsky user profile page. At the top, there's a navigation bar with 'NORTHSKY' logo, a search bar, and links for 'About Us', 'Help', and 'Blog'. Below the navigation bar, there's a promotional banner: 'First order? Save 10% with code FIRST10'. The main content area is divided into four sections: 'Personal information', 'Default Shipping Address', 'Company Information', and 'Account'. The 'Personal information' section includes fields for 'USER NAME' (Lenka Liu), 'EMAIL' (y44.eu@nbs.com), and 'PASSWORD'. The 'Default Shipping Address' section includes fields for 'ADDRESS1', 'ADDRESS2', 'ZIP CODE', 'CITY', 'STATE', and 'TX'. The 'Company Information' section includes fields for 'COMPANY NAME', 'COMPANY AUTHORIZATION CODE', 'INDUSTRY', 'PAYMENT TERMS', and 'COMPANY USERS'. The 'Account' section includes a 'Log Out' button.

- Pull out the company and industry information automatically
- Last name / first name-required
- Contact Email address –required
- Phone –optional
- EIN/TIN-optional
  - Click the tips icon to show the wording:
    - Employer Identification Number (EIN) is a nine-digit number used by the IRS to identify a business entity for tax purposes
    - Taxpayer Identification Number (TIN) is a nine-digit number for a business or entity
- Position Title-Optional
- Application Reason-Optional
  - Optional
  - Max support 1000 characters
- Attachment
  - Optional
  - Max support 10 files
  - Can Remove uploaded files
- Business Address
  - Address 2 is optional
  - Others are required

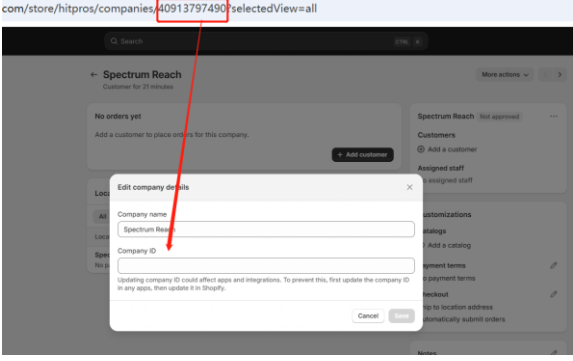
The screenshot shows the 'Apply for Net 30 Terms' form. It includes fields for 'First Name\*', 'Last Name\*', 'Contact Email Address\*', 'Phone Number', 'EIN/TIN' (with a tips icon), 'Position Title', and 'Application Reason' (with a character count of 0/1000). Below these fields is a section for 'Business Address' with fields for 'Country' (USA), 'Street Address' (1750 Hughes Landing Blvd), 'State' (TX), 'ZIP Code' (77061), 'City' (Woodlands), and 'State' (TX). At the bottom, there is a yellow button labeled 'Apply for Net 30 Terms'.

Notify the finance after customer

<p>applying the payment terms</p> <ul style="list-style-type: none"> <li>Send the email to finance</li> </ul>	
<ul style="list-style-type: none"> <li>Main account can view the pending status and rejected status of net 30 terms application <ul style="list-style-type: none"> <li>Every account within the company can see the net 30 payment terms section once the application approved</li> <li>For rejection scenario ,main account can apply again <ul style="list-style-type: none"> <li>Display the new application status if customer apply again</li> </ul> </li> </ul> </li> </ul>	<div> <div> <b>Iress</b> <a href="#">Edit</a> </div> <div> <h3>Company Information</h3> <div> <div>COMPANY NAME</div> <div>Lenka Online Test-Lenka</div> <div><a href="#">Edit</a></div> </div> <div> <div>COMPANY AUTHORIZATION CODE</div> <div>***** </div> </div> <div> <div>INDUSTRY</div> <div>no</div> <div><a href="#">Edit</a></div> </div> <div> <div>PAYMENT TERMS</div> <div>⌚ Application is under review</div> </div> <div> <div>COMPANY USERS</div> <div><a href="#">Manage</a></div> </div> <div>2 authorized company users</div> </div> </div> <div> <h3>Company Information</h3> <div> <div>COMPANY NAME</div> <div>Lenka Online Test-Lenka</div> <div><a href="#">Edit</a></div> </div> <div> <div>COMPANY AUTHORIZATION CODE</div> <div>***** </div> </div> <div> <div>INDUSTRY</div> <div>no</div> <div><a href="#">Edit</a></div> </div> <div> <div>PAYMENT TERMS</div> <div>✕ Rejection: reject reason </div> <div><a href="#">Apply for Net 30 Terms</a></div> </div> <div> <div>COMPANY USERS</div> <div><a href="#">Manage</a></div> </div> <div>2 authorized company users</div> </div>
<ul style="list-style-type: none"> <li>Main account &amp; Staff Account can both click <b>【manage】</b> to view the Payment term orders and amount <ul style="list-style-type: none"> <li></li> </ul> </li> <li>Customer can search the Payment terms according to the Period, and status <ul style="list-style-type: none"> <li>Payment terms within the search date range will be retrieved</li> </ul> </li> </ul>	

<ul style="list-style-type: none"><li>• Display the Period \Total Used Amount\Payment Terms limitation Amount \Remaining Amount</li><li>• Order Detail<ul style="list-style-type: none"><li>○ Click to download the order information within the payment term</li><li>○ CSV:<ul style="list-style-type: none"><li>▪ Order Name<ul style="list-style-type: none"><li>• ONSK123232</li></ul></li><li>▪ Order Date<ul style="list-style-type: none"><li>• 2025/2/18</li></ul></li><li>▪ Currency<ul style="list-style-type: none"><li>• USD</li></ul></li><li>▪ Subtotal<ul style="list-style-type: none"><li>• 17.9</li></ul></li><li>▪ Shipping Fee<ul style="list-style-type: none"><li>• 5</li></ul></li><li>▪ Tax<ul style="list-style-type: none"><li>• 1.27</li></ul></li><li>▪ Discount<ul style="list-style-type: none"><li>• 0</li></ul></li><li>▪ Total Paid<ul style="list-style-type: none"><li>• 24.17</li></ul></li></ul></li></ul></li></ul>	<div><div>de FIRST10</div><div><div>ng Address <a>Edit</a></div><div><div>Company Information</div><div><div>COMPANY NAME</div><div>Lenka Online Test-Lenka</div><div><div>COMPANY AUTHORIZATION CODE</div><div>***** <a>👁</a></div></div><div><div>INDUSTRY</div><div>no</div><div><div>PAYMENT TERMS</div><div>Net 30</div><div><div>COMPANY USERS</div><div>2 authorized company users</div></div></div></div></div></div><div><div><div>Hi, Iku</div><div>NEW ACCOUNT</div></div><div><div>My account   Payment Terms   Payment Detail</div><div>Payment Terms</div><div>2 payments</div><div><div>Period</div><div>Start Date</div><div>~</div><div>End Date</div></div></div><div><div>Orders</div><div><div>My Orders</div><div>My List</div><div>Customer Service</div></div><div><div>Account</div><div>My Account</div><div>My Addresses</div></div><div><div>Log Out</div></div></div><div><table><thead><tr><th>Period</th><th>Payment Used Amount</th><th>Remaining Amount</th><th>Status</th><th>Order detail</th></tr></thead><tbody><tr><td>2024-12-12 ~ 2025-1-11</td><td>\$300 (Limitation: \$ 2000)</td><td>\$1700</td><td>Open</td><td><a>Download</a></td></tr><tr><td>2024-11-12 ~ 2024-12-11</td><td>\$100 (Limitation: \$ 2000)</td><td>-</td><td>Closed</td><td><a>Download</a></td></tr><tr><td>2023-10-12 ~ 2024-11-11</td><td>\$100 (Limitation: \$ 2000)</td><td>-</td><td>Closed</td><td><a>Download</a></td></tr><tr><td>2023-09-12 ~ 2024-10-11</td><td>\$100 (Limitation: \$ 2000)</td><td>-</td><td>Closed</td><td><a>Download</a></td></tr></tbody></table></div></div></div></div>	Period	Payment Used Amount	Remaining Amount	Status	Order detail	2024-12-12 ~ 2025-1-11	\$300 (Limitation: \$ 2000)	\$1700	Open	<a>Download</a>	2024-11-12 ~ 2024-12-11	\$100 (Limitation: \$ 2000)	-	Closed	<a>Download</a>	2023-10-12 ~ 2024-11-11	\$100 (Limitation: \$ 2000)	-	Closed	<a>Download</a>	2023-09-12 ~ 2024-10-11	\$100 (Limitation: \$ 2000)	-	Closed	<a>Download</a>
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2023-09-12 ~ 2024-10-11	\$100 (Limitation: \$ 2000)	-	Closed	<a>Download</a>																						
<ul style="list-style-type: none"><li>• <b>Limitation Amount</b> of payment terms: configured by finance or others in doc system<ul style="list-style-type: none"><li>○ If finance the limitation , Changes made to the amount in the current month will take effect in the following month</li></ul></li><li>• <b>Used Payment Amount</b><ul style="list-style-type: none"><li>○ The total amount of orders placed within the payment term cycle</li></ul></li><li>• <b>Remaining Amount</b> of payment terms<ul style="list-style-type: none"><li>○ <b>Limitation Amount –Used payment amount</b></li></ul></li></ul>																										
<div>Checkout support payment terms</div> <ul style="list-style-type: none"><li>• -any account within the company can</li></ul>																										



<p>place order by payment terms</p> <ul style="list-style-type: none"> <li>-if order amount exceeds the remaining amount of the payment terms, fail to choose the payment terms to place order <ul style="list-style-type: none"> <li>But Customer can choose other payment method to place the order</li> <li>error: <b>The balance in your account for the current billing period is not sufficient. Please opt for an alternative payment method or get in touch with our customer service</b></li> </ul> </li> </ul>	
<p>Remaining Requirements from phases 1</p>	
<ul style="list-style-type: none"> <li>Address LogicAll account under the same company shares the company address, every account can manage 、add、 remove the company address in my address</li> <li>When user join a company show the First address as default shipping address but every account change the default shipping address for his own <ul style="list-style-type: none"> <li>Add the remove my address is the same as C customer page</li> </ul> </li> </ul>	
<p>Customer service can configure the company account from shopify backend system</p> <ul style="list-style-type: none"> <li>Remove existing member/admin account from company、 add existing member/admin account for a company</li> <li>Delete and create company</li> <li>All the action results need to sync to SAP</li> <li>Customer can view the data change</li> </ul>	

<p>from shopify backend</p> <ul style="list-style-type: none"> <li>• Fill the Company id of the system into the Company id field in the background by default while creating a new Company.</li> </ul> <p>PS: if staff account is applying to join the</p> <p>Note: a backend created company cannot be searched if this company don't have a main account</p>	
<ul style="list-style-type: none"> <li>• Send an email to staff account if customers service add this account to a company</li> </ul>	

- Sales or finance operate the payment terms status in backend system?
- Only finance to approve the net 30 terms?

TBD: What are the options for payment terms: only net 30 terms?

1-Whether there should be a maximum limit for the credit line ?

2-if order Amount exceed the credit line, do we allow the customers to place order?

if allow what's the next step ?

3-if company customer apply for Payment terms, can we use the email to notify the 【finance? 】 to configure the Payment terms for customer

4-if order Amount is within the credit line, will the order need to sync to sap and fulfillment automatically?

5-Do we need to send the invoice for customers if they placed the Payment terms order

6-if we keep the Payment Status of net 30 order as Pending Payment (not paid ) do we have a role to manage the payment Status after we receive the money from company customer

7-how customer Service or finance to manage the net 30 order? do they need a place to pull out the orders within a specific Period to manage the Payment Status?

### 7.3 Payment Term-Payment Term Order

- Payment terms order will sync to sap automatically even the payment status=pending payment
  - amount if the order is canceled (fully or partially) while the payment status is Pending
- For all the payment orders don't send the payment email to customers, because we will receive the payment offline
- Can place order with net 30, and cannot place order if order amount exceed the credit line (but can choose the Other Payment to pay the order)
- Support the credit limit config on company customer
  - If customers service changes the credit limit, use the newest credit limit to calculate the remaining credit line
  - E.G: T1 credit limit=1000, used amount=100 , so the remaining amount (the amount that customers can place Order) =900
  - T2 customer service change the credit line =2000 , so the remaining amount=1900, used =100
- Set 1<sup>st</sup> of each month as the day that reset the used amount =0
- Pay Attention : **Shopify cannot automatically reset the credit remaining amount, which requires manual management. Since Shopify lacks the ability to manage the start and end dates of billing cycles, the only way to achieve**

**this capability is to migrate the net 30 management to Doc**

## 7.4 Payment Term-Doc Backend End (DOC)

- Finance approve the net 30 term application in doc system
- Finance need to configure the Payment terms in shopify backend

## 7.5 System docking

- Receive the new Customer and update info from doc (Phase 2)
- Pass the customer info (including relationship of account and company) to doc system (Phase 2)
- Receive the payment term approve info (Phase 2)
- Pass the application request to doc system (Phase 2)
- Pass the customer info (including relationship of account and company) to SAP system

## 7.6 Customer Center/Payment Term (Finance) Center in DOC

Will have a separate PRD

## 7.7 Notify customer after they apply the credit (Hold)

Scenario	Email Role		Phases
Customer Main account Apply for the	NorthSky Business / Cusomter	Notify both customer and business that application has submitted	Phases 2
NorthSky approved	Customer	Notify customer main account that payment term is approved, and tell them the limitation of	Phases 2

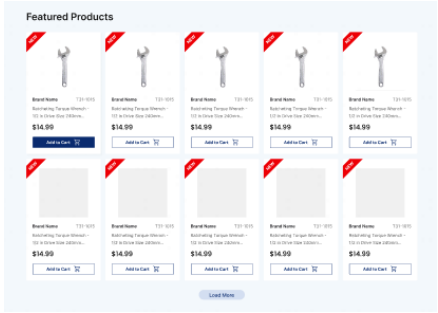
		payment term	
NorthSky rejected	Customer	Notify customer main account that payment term is rejected	Phases 2

## 8-Phases 2: Put the Order in hold if shopify mark as high or medium risk

Function	
<ul style="list-style-type: none"> <li>Hold the Order in shopify, don't sync to SAP if shopify mark this order as high or medium risk</li> <li>Set the fulfillment Status as on hold at the same time</li> </ul>	
<ul style="list-style-type: none"> <li>Provide an entrance to resync order to SAP manually with tag (Customer service tag order as non-risk manually)</li> <li>Reset the fulfillment Status as unfulfillment if order resync to SAP successfully</li> </ul>	
<ul style="list-style-type: none"> <li>Notify Email</li> <li>Send email when orders are high risk or medium risk, to <a href="mailto:support@Northsky.com">support@Northsky.com</a> ; <a href="mailto:gary.chen@northskysupply.com">gary.chen@northskysupply.com</a> ; <a href="mailto:yi4.liu@zkh.com">yi4.liu@zkh.com</a> ; <a href="mailto:yefen.chen@zkh.com">yefen.chen@zkh.com</a></li> <li>Themes: Hold Risk Order ONSK 1232323</li> <li>Content: Order : ONSK1232323 is a risk order, Please check</li> </ul>	

## 9-Phases 2: PC and H5 UX& UI Upgrade

module	function
Account Creation – opersonal account (PC+H5 both)	<ul style="list-style-type: none"> <li>Add Job Function (drop down, not required) <ul style="list-style-type: none"> <li>Maintenance &amp; Engineering</li> <li>Safety /EHS</li> </ul> </li> </ul>

	<ul style="list-style-type: none"><li>○ Purchasing</li><li>○ Production</li><li>○ Operations</li><li>○ Management</li><li>○ Contractor</li><li>○ Student</li><li>○ Other (input)</li><li>• Company Name (input , not required)</li><li>• Industry (drop down, not required)<ul style="list-style-type: none"><li>○ Keep as Industry options in business account</li></ul></li></ul>
Account Creation – business account	<ul style="list-style-type: none"><li>• Add Job Function (drop down, required)<ul style="list-style-type: none"><li>○ This Filed will be displayed even customer choose 'join an existing Company'</li></ul></li></ul>
Homepage Upgrade	<ul style="list-style-type: none"><li>• Display feature products and new products in featured products module</li></ul> <div data-bbox="794 1102 1233 1413"></div> <ul style="list-style-type: none"><li>○</li><li>○ Feature products and new products come from new collection and Feature product collection</li><li>○ And new collection is from doc system that skus are tagged as new</li><li>○ Customer can click load to view more which will max up to 4 rows , will lead customer to click view all ( direct to featured product landing page ) if Homepage already load to 4 rows</li></ul>

Measuring & Layout Tools

Measuring & Layout Tools

Shop More

Brand Name T31-1015  
Ratcheting Torque Wrench - 102 in  
Drive Size 240mm Overall Leng...  
\$14.99

Add to Cart

Brand Name T31-1015  
Ratcheting Torque Wrench - 102 in  
Drive Size 240mm Overall Leng...  
\$14.99

Add to Cart

Brand Name T31-1015  
Ratcheting Torque Wrench - 102 in  
Drive Size 240mm Overall Leng...  
\$14.99

Add to Cart

- Measuring & layout tools

- Create a collection for this part, allow business to add product in it manually

- Cover pic will be configured offline

- Landing Page change

Home / All Product Categories

### All Product Categories

products

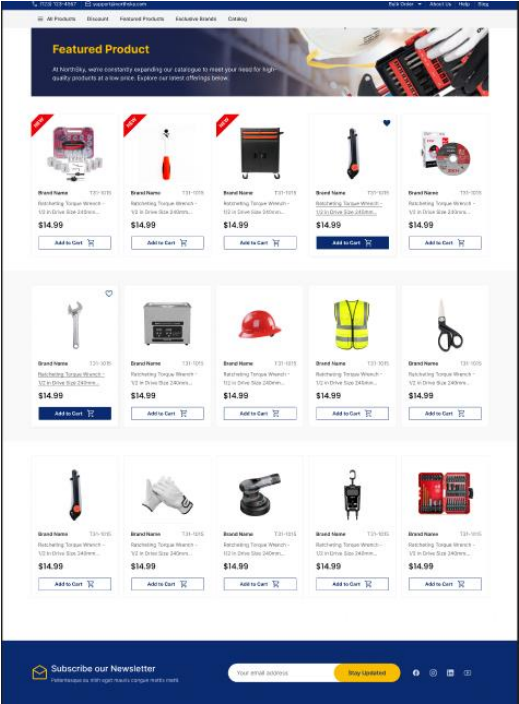
Northsky's ever-expanding product portfolio covers a comprehensive range of industrial solutions for all your most pressing and consistent MR needs, from safety glasses and gloves to combination wrenches and power tool drill bits. It's all part of our mission to provide our customers w the highest quality maintenance, repair and operations products—without the premium price tag.

Category page Upgrade

Hand Tools

Our adjustable wrenches and wrench sets are versatile hand tools made to take on a wide range of fastener installation and fastener removal tasks. Featuring adjustable jaws and multiple jaw capacities, these wrenches offer a secure grip on fasteners from both the top and side. Ideal for construction, fabrication and...

Price		To	
\$ 1200		\$ 1200	
Brand			

	<ul style="list-style-type: none"><li>Both new and featured product display in this page</li></ul> 
Cart	Guest customer sign in <ul style="list-style-type: none"><li>Add the product in guest cart to signed cart</li></ul>
Video	Adapt to vertical videos (main image and PDP), and do not perform any truncation on the videos
invoice	Send an invoice email for net 30 order when tracking number is added on Pay Attention: don't send the receipt Email again for net 30 order <a href="#">NorthSky Transactional Email – Figma</a>



	<div><div>INVOICE</div><div></div><div><p>www.northskysupply.com 1-800-805-6686</p><p>Northsky 1725 Hughes Landing Blvd, 3A The Woodlands, TX 77380 Customer PO: 495268</p><p>Order No: ONSK352264 Invoice Date: 4/24/2025 Payment Due: 3/22/2025 Payment Terms: Net 30</p></div><div><p><b>Sold To :</b> Gary Chen      <b>Billing Address :</b> Gary Chen <b>Ship To :</b> Gary Chen      14200 Lutheria Way 14200 Lutheria Way      Saratoga, CA 95070 Saratoga, CA 95070</p></div><table><tr><th>ITEM LINE</th><th>ITEM#</th><th>ITEM DESCRIPTION</th><th>UNIT</th><th>UNIT PRICE</th><th>QTY</th></tr><tr><td>1</td><td>AC9663228</td><td>Hook and Loop Sanding Discs Grit</td><td>PCS</td><td>19.9</td><td>3</td></tr><tr><td>2</td><td>AC9663228</td><td>Hook and Loop Sanding Discs Grit</td><td>PCS</td><td>19.9</td><td>3</td></tr><tr><td>3</td><td>AC9663228</td><td>Hook and Loop Sanding Discs Grit</td><td>PCS</td><td>19.9</td><td>3</td></tr><tr><td>4</td><td>AC9663228</td><td>Hook and Loop Sanding Discs Grit</td><td>PCS</td><td>19.9</td><td>3</td></tr><tr><td>5</td><td>AC9663228</td><td>Hook and Loop Sanding Discs Grit</td><td>PCS</td><td>19.9</td><td>3</td></tr></table><table><tr><th>SUB-TOTAL</th><th>TAX</th><th>SHIPPING</th><th>DISCOUNT</th><th>TOTAL</th></tr><tr><td>368.3</td><td>1.55</td><td>18.32</td><td>-367.37</td><td>40.82</td></tr></table><p><small>THIS PURCHASE IS GOVERNED EXCLUSIVELY BY NORTHSKY'S TERMS OF SALE, INCLUDING IS DISPUTE RESOLUTION REMEDIES, AND IS CERTAIN WARRANTY AND DAMAGES LIMITATIONS AND DISCLAIMERS IN EFFECT AT THE TIME OF THE ORDER, WHICH ARE INCORPORATED BY REFERENCE HEREIN. NORTHSKY'S TERMS OF SALE ARE AVAILABLE AT <a href="http://WWW.NORTHSKYSUPPLY.COM">WWW.NORTHSKYSUPPLY.COM</a></small></p><p><small>These items are sold for domestic consumption. If exported, purchaser assumes full responsibility for compliance with US export controls. Diversion contrary to US law prohibited.</small></p><p><small>ACH Instruction: JPMorgan Chase Bank Bank Address: JPMorgan Chase New York, NY 10017 ACH routing number: 111000614 Account number: 599502062 Please include the order number in ACH reference (addenda) field</small></p><p><small>We appreciate your business!</small></p><div></div></div>	ITEM LINE	ITEM#	ITEM DESCRIPTION	UNIT	UNIT PRICE	QTY	1	AC9663228	Hook and Loop Sanding Discs Grit	PCS	19.9	3	2	AC9663228	Hook and Loop Sanding Discs Grit	PCS	19.9	3	3	AC9663228	Hook and Loop Sanding Discs Grit	PCS	19.9	3	4	AC9663228	Hook and Loop Sanding Discs Grit	PCS	19.9	3	5	AC9663228	Hook and Loop Sanding Discs Grit	PCS	19.9	3	SUB-TOTAL	TAX	SHIPPING	DISCOUNT	TOTAL	368.3	1.55	18.32	-367.37	40.82
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PO box block	<ul style="list-style-type: none"><li>Do not sync the order to SAP if order Shipping Address 1 contains the PO box （Po PO po pO ； P.O P.o p.o p.O; Box BoX BOX BOx box boX bOx bOX ） after order created</li><li>Customer service can add [non-po box] tag to trriger the order sync to SAP</li></ul>																																														