

## Introduction

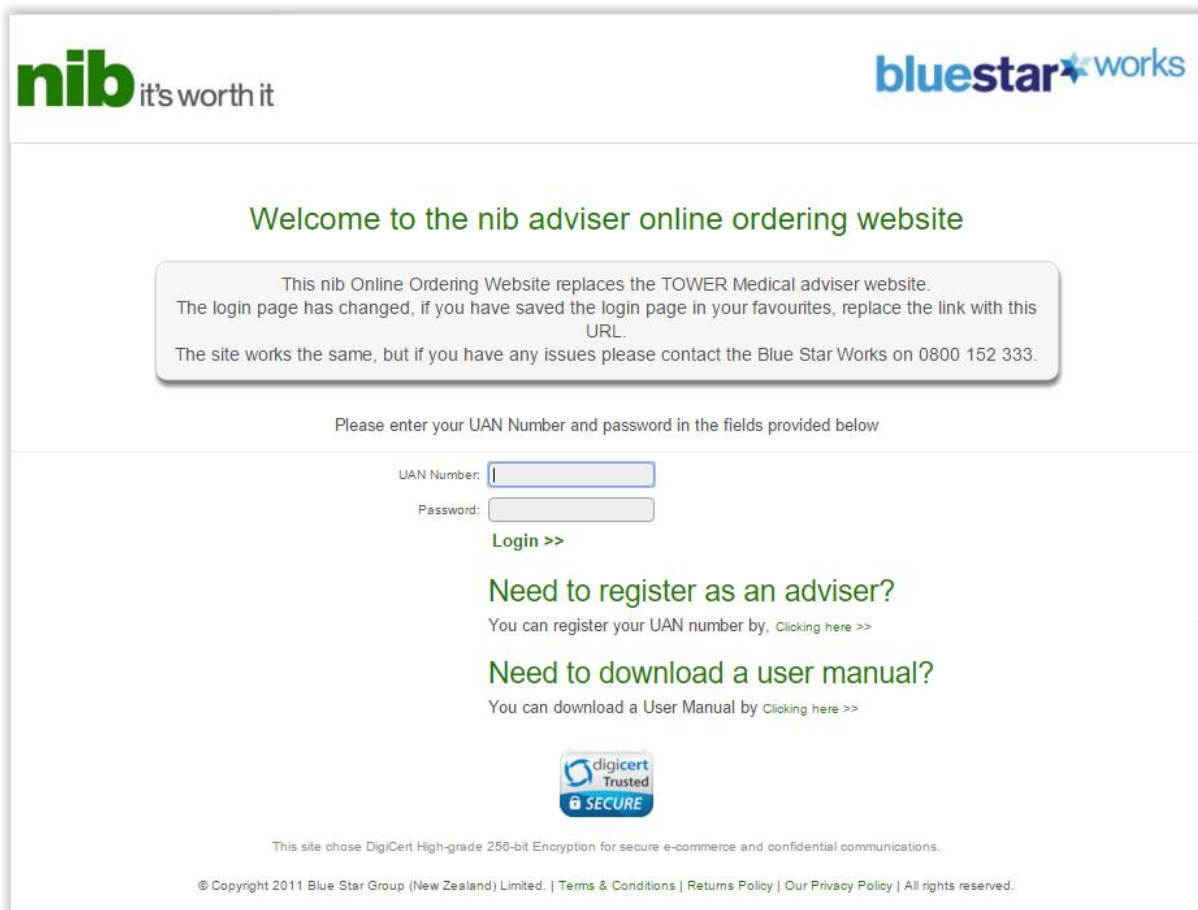
Welcome to NIB Portal System. This site has been created with the intention to assist users with the following:

- Ordering product
- Reviewing previous order history
- Accessing product information such as stock levels and backorders
- Reviewing production jobs
- Reports

The site is a simple and easy method for users to access up to date information. Logging In

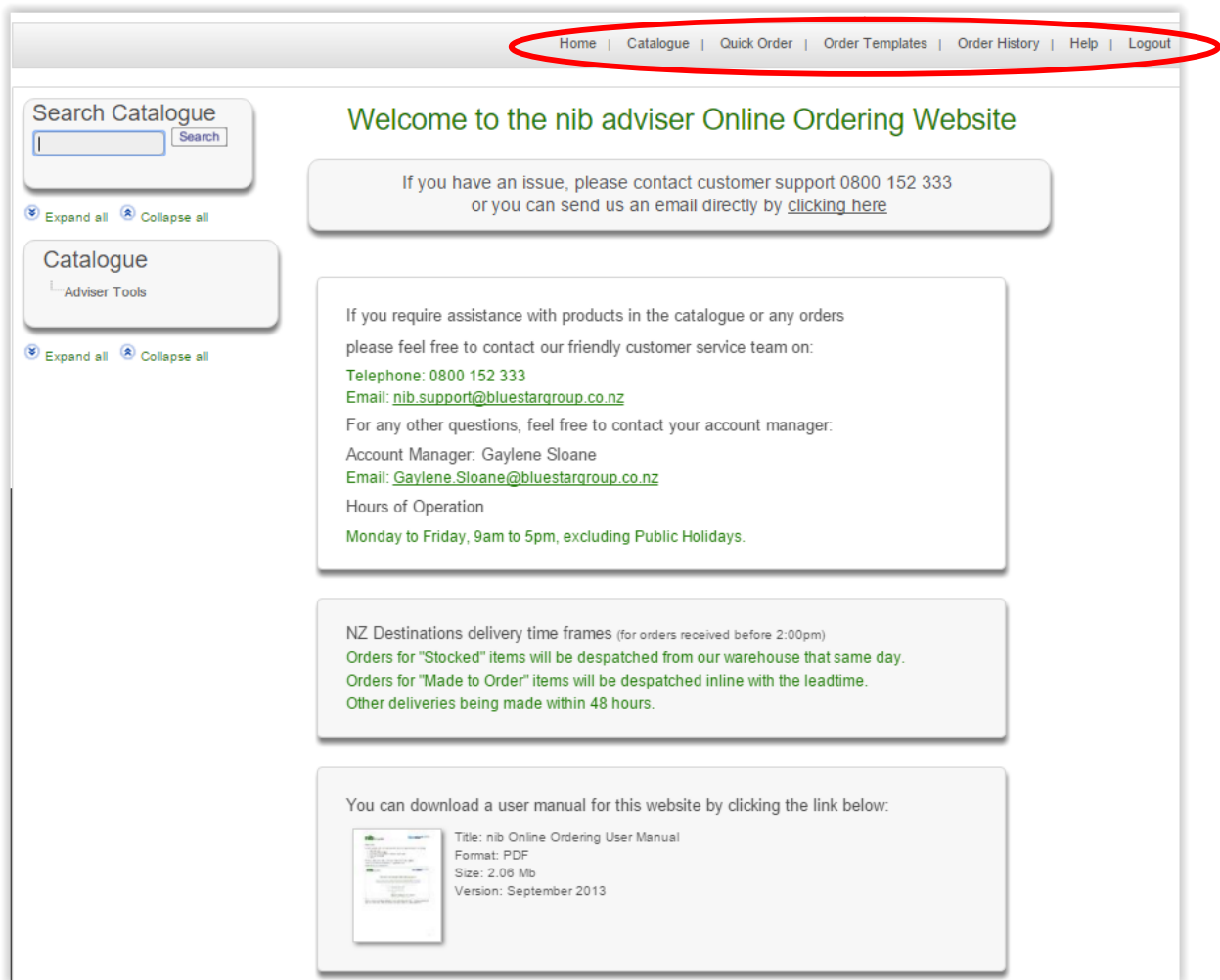
To Access the site please go to the following URL using your Web Browser

[www-ak.bspg.co.nz/login/nib\\_adviser](http://www-ak.bspg.co.nz/login/nib_adviser)



The screenshot shows the login page for the nib adviser online ordering website. At the top, there are logos for 'nib it's worth it' and 'bluestar works'. The main heading is 'Welcome to the nib adviser online ordering website'. Below this is a grey box containing a message: 'This nib Online Ordering Website replaces the TOWER Medical adviser website. The login page has changed, if you have saved the login page in your favourites, replace the link with this URL. The site works the same, but if you have any issues please contact the Blue Star Works on 0800 152 333.' Underneath the message, it says 'Please enter your UAN Number and password in the fields provided below'. There are two input fields: 'UAN Number:' and 'Password:'. Below the fields is a 'Login >>' button. Further down, there are two links: 'Need to register as an adviser?' with a sub-link 'Clicking here >>' and 'Need to download a user manual?' with a sub-link 'Clicking here >>'. At the bottom, there is a 'digiCert Trusted SECURE' logo and a footer with copyright information: '© Copyright 2011 Blue Star Group (New Zealand) Limited. | Terms & Conditions | Returns Policy | Our Privacy Policy | All rights reserved.'

To log in, please select your Business Unit, enter your Username and Password. These will have been provided to you separately to this document. Either press your enter key or use your mouse to click on the Login Button.



Once logged in, you have a number of menu options available.

Home – site information

Catalogue – Online ordering

Quick Orders – quick order form (similar to the Catalogue)

Order History – Online Order History

Help

Log out

## Catalogue - Online Ordering

The Catalogue menu takes you to the online ordering module where you can order a range of printed and personalised products. You can select a category from the menu down the left to display products within this grouping. The products will be displayed within the middle frame as per the below image. You may also search for a product by typing a keyword or code into the Search field.

The screenshot displays the NIB online ordering interface. At the top left is the NIB logo with the tagline "it's worth it". At the top right is the "bluestar works" logo. A navigation bar contains links for Home, Catalogue, Quick Order, Order Templates, Order History, Help, and Logout. On the left side, there is a "Search Catalogue" field with a "Search" button. Below it are expand/collapse controls for "Catalogue" and "Adviser Tools". The main content area is titled "Catalogue" and includes "Place Order" and "Clear Order" buttons, along with a "Quick Order Items: 0" counter. A warning note states: "Note - you must provide a physical delivery address for your order." Below the note, the category "Adviser Tools" is shown with "PLACE ALL" and "CLEAR ALL" buttons. A table lists products:

| Product  | Description                | Unit   | Available | Quantity                       | Action                      |
|----------|----------------------------|--------|-----------|--------------------------------|-----------------------------|
| NIBAFAPP | Application amendment form | PDF    |           | <input type="text"/>           | <a href="#">DOWNLOAD</a>    |
| MDD      | Direct Debit form          | PACK20 |           | <input type="text" value="1"/> | <a href="#">PLACE ORDER</a> |

To place an order, insert the required number in the quantity box and click 'Place Order'. You may continue to add additional items to your order. Once you have completed selecting your items, click on 'Place Order' at the top of the page



### Saving or completing your order

If you wish to save your order for later, click 'Exit'.

## Quick Order Details

**WARNING:** Click complete to place your order

**COMPLETE** **SAVE EXIT**

**!** Note - you must provide a physical delivery address for your order.

General

|               |  |               |                              |
|---------------|--|---------------|------------------------------|
| Order Info    | W1068334   | Ordered By    | 4012                         |
| Order Date    | Dec 2, 2015  | Order Status  | Draft                        |
| Reference     |  | Email Address | yprocter@xtra.co.nz          |
| Delivery Info | Solutions Financial Services, 33 Harlston Rd, Mt Albert, Auckland Attention: Yvonne Procter, ▾ |               |                              |
| Required      | Dec 4, 2015  | Attention     | Yvonne Procter               |
| Comments      |  | Business Name | Solutions Financial Services |
|               |  | Deliver to    | 33 Harlston Rd               |
|               |  |               | Mt Albert                    |
|               |  |               | Auckland                     |
|               |  | Country       | ▾                            |

Customer Order Lines **BROWSE** **PLACE ALL** **EDIT ALL**

| Code                        | Description       | Qty | Unit   | ETA         | Status     | Action                                      |
|-----------------------------|-------------------|-----|--------|-------------|------------|---|
| NIBMDD                      | Direct Debit form | 1   | PACK20 | Dec 4, 2015 | ✓ In-Stock | <a href="#">Edit</a> <a href="#">Delete</a> |
| <b>Sub Total</b>            |                   |     |        | (excl GST)  |            |   |
| <b>Tax (GST)</b>            |                   |     |        |             |            |   |
| <b>Total Amount Payable</b> |                   |     |        | (incl GST)  |            |   |

Number of records: 1, showing all records

**!** **WARNING:** Click complete to place your order **COMPLETE** **SAVE EXIT**

This will take you to a confirmation page advising that your order has been saved but not placed. Take note of the Sales 'Order Number' so that you may easily locate it later for editing or order placement. See page 14 to search orders. The order will be saved as a 'Draft' order.

### My Order Saved

**!** **IMPORTANT: Your order has been saved but has not been placed.**

To place your order you need to exit this screen, return to the order and click the complete button.

Order Number **W913460**

Order Total **\$3.71**

[!](#) If you would like to print a copy of your order, click here

If you have completed your order and wish to place it now, click the 'Complete' button instead.

This will place your order and take you to an Order Confirmation screen. In this instance you will be advised that your order has been successfully placed.

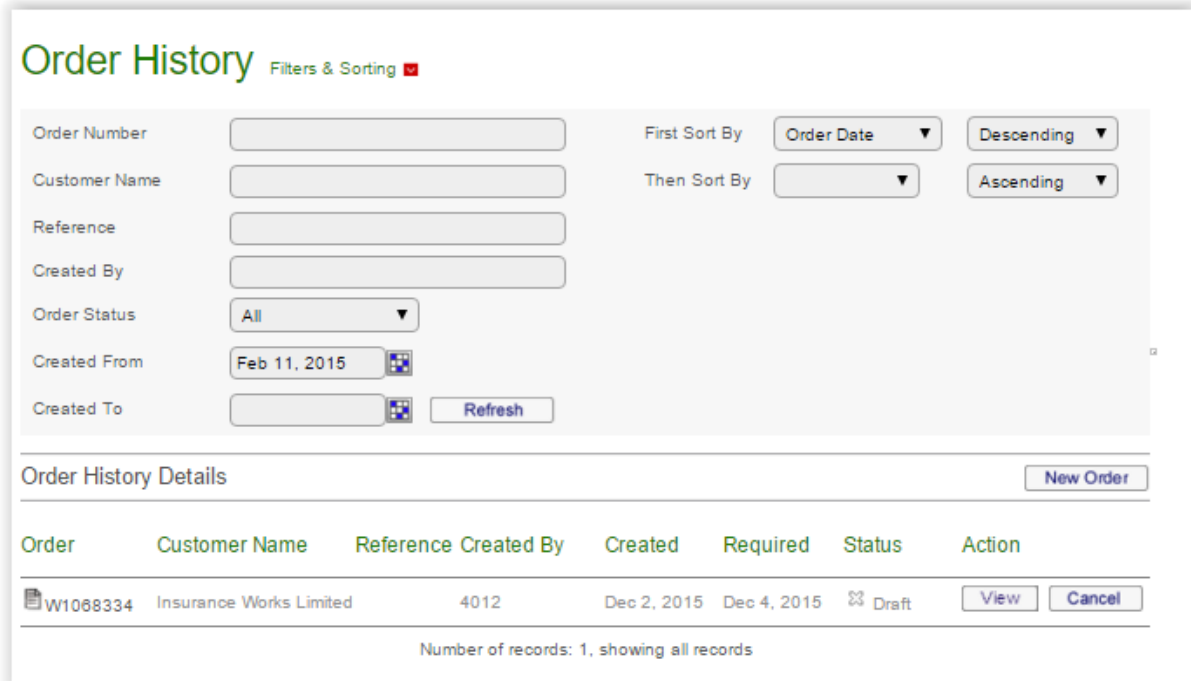
Take a note of the Sales 'Order Number' to assist with locating your order if you have any queries.

## Orders - Online Ordering History

The Orders menu allows you to review any order placed or saved through the online ordering site. You can filter your search in a number of ways:

- Sales Order Number
- Created by (i.e. Username)
- Reference
- Order Status
- Date range

The below shows orders placed since Feb 11, 2015. Click 'Refresh' to run the search.



The screenshot displays the 'Order History' interface. At the top, there is a title 'Order History' with a 'Filters & Sorting' link. Below this are several filter fields: 'Order Number', 'Customer Name', 'Reference', 'Created By', 'Order Status' (set to 'All'), 'Created From' (set to 'Feb 11, 2015'), and 'Created To'. To the right of these fields are sorting options: 'First Sort By' (set to 'Order Date') and 'Descending', and 'Then Sort By' (empty) and 'Ascending'. A 'Refresh' button is located at the bottom right of the filter section. Below the filters is a section titled 'Order History Details' with a 'New Order' button. A table lists the order details:

| Order    | Customer Name           | Reference | Created By | Created     | Required    | Status | Action                                      |
|----------|-------------------------|-----------|------------|-------------|-------------|--------|---|
| W1068334 | Insurance Works Limited | 4012      |            | Dec 2, 2015 | Dec 4, 2015 | Draft  | <a href="#">View</a> <a href="#">Cancel</a> |

At the bottom of the table, it says 'Number of records: 1, showing all records'.

This area of the site is useful to:

- Retrieve saved orders for further editing and completion (Status will show as 'Draft').
- Review your order activity over a date range.
- Review past orders to check status.

Click 'Show' next to the order you wish to view or process.