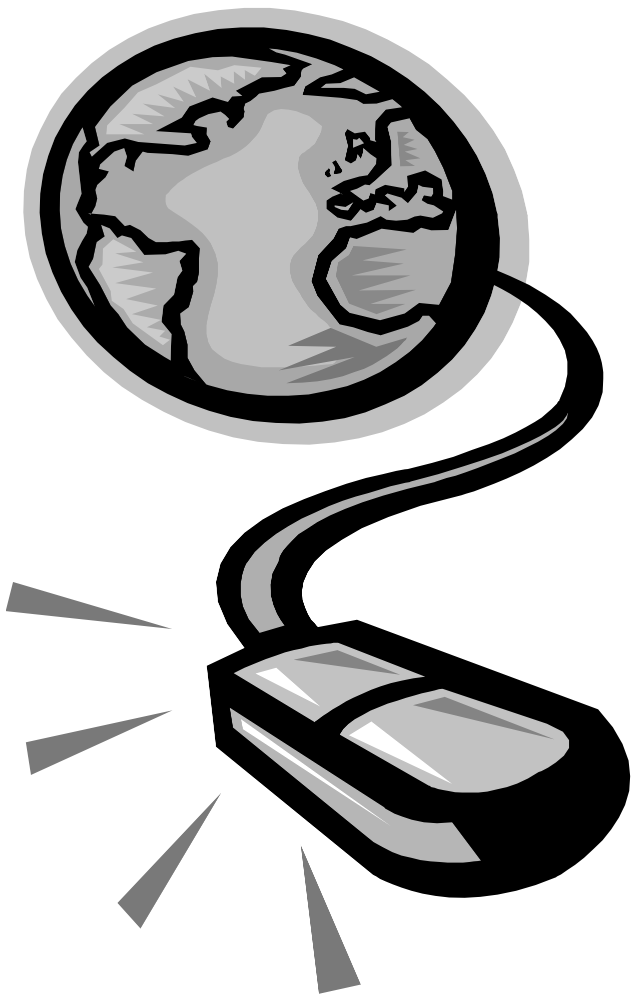
Understanding Online Purchasing



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1 Logging In

Use the following instructions to log into the web site:

Logging In (without Guest Login)

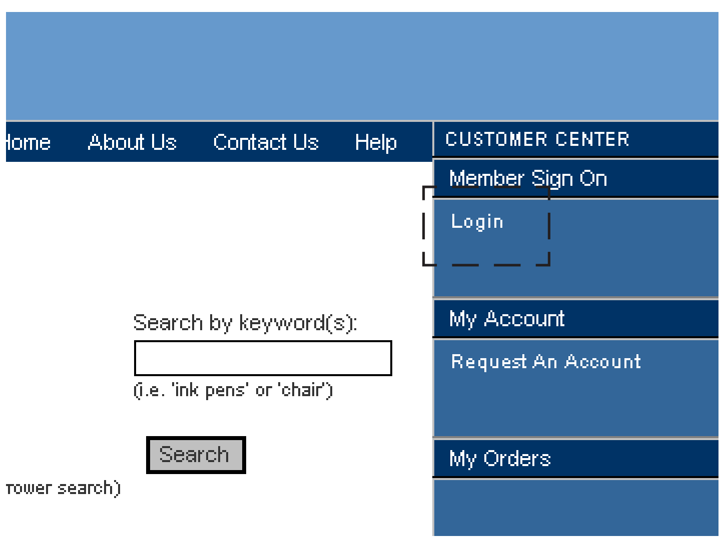
1. Go to your custom URL. The Username and Password boxes open.
2. When this box appears, enter your user name and password and click Go. Press Tab to move between the boxes.
3. The home page displays.

Logging In (with Guest Login)

1. Go to your custom URL. The home page displays. See Figure 1-1.
2. Click Login. Enter your name and password in the Username and Password boxes. Click Go. The home page reappears.

Note: If you forgot your password, type your user name in the Username box under the Forgot Your Password heading and click Go. Your password is immediately sent to you.

Figure 1-1: Logging Into the Web Site (Guest User feature turned on)



2 An Overview of the Web Site

Since each web page can be individually customized, your home page may look slightly different than the figures shown in this handout. For example, some of the links may have different text or be missing from your web page.

This chapter includes instructions for learning how to use the web site. Since the web site is designed with buttons and links, moving around is easy.

After you first log into the web page, the Home page opens, as shown in Figure 2-1. This Home page is comprised of buttons, links, and news.

Note: When you move the cursor over a button, it becomes a pointing finger. Whenever this pointing finger appears, the cursor is over a hypertext link. Clicking on these links takes you to other web pages.

Understanding Buttons

The left side of the page displays the Browse Catalog through ScanClik buttons known as the Order Center, as shown in Figure 2-2. You can use these buttons to move from one web page to the next. These buttons are described below. For further explanation of these buttons and their functions, see **Chapter 3: Using the Order Center.**

Figure 2-1: The Home Page

The Browse Catalog feature displays a list of product categories from which you can choose the items you want to place on the order.

The Quick Order button allows you to enter the number of the item, rather than browse a catalog, so you can quickly place it on order.

The Laundry List feature is a list of items that you purchase on a regular basis. The list is set up by the dealer.

The View Cart feature allows you to view the items in your cart. You can add the items in your shopping cart to your favorites list.

If you need to buy parts for a machine, the Machine Matching Tool feature allows you to select the machine, and the matching parts are listed for you. You can then select which parts you need to order.

The Today’s Specials feature displays a list of items on sale specified by the dealer. You can add these items to your cart or buy them from the Today’s Special window.

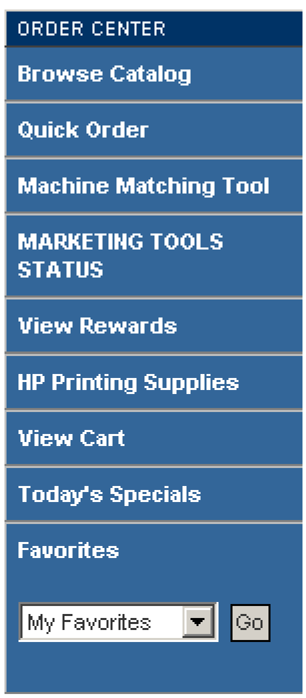


Figure 2-2: The Order Center buttons

The Marketing Tools Status feature lets you view marketing information.

The View Rewards feature allows you to view reward items and their corresponding point values. You can add these items in your shopping cart to gain point rewards.

The Favorites drop down list allows you to select the items from those you frequently purchase. You can add these items to your shopping cart or add or delete items on the list. See **Using a Favorites List.**

The Live Help feature allows you to communicate directly and instantly with the dealer. Click the button and a chat window displays. Type your questions and comments in the text box.

Find HP Products lets you search the Hewlett Packard catalog of products.

Allows you scan to multiple items.

This allows you request a credit return for an item you want to return to your dealer.

Understanding Links

A series of links display across the top of the Home page. The links include the Home, News, About Us, Contact Us and Help links. There are also several buttons in the Customer Center portion of the website. For more information on these buttons see **Chapter 5: Using the Customer Center**.

The Home link lets you return to the home page as you click from web page to web page.

The About Us link briefly describes how the website is designed and how it works.

The Contact Us link acts as an email tool and lets you enter a comment, a complaint, or a suggestion to send to your dealer.

The Help link allows you to view information about each of the features found on the web site. You can learn what the feature is for and how to use it.

Viewing Item Lists

There are two options for viewing item lists. These viewing options are available in viewing laundry lists, today's specials, your shopping cart, favorites lists and searching for items using the machine matching tool. These options are *not* available when browsing the catalog. Choose one of the following options:

- **Streamline View:** This view displays a limited amount of information about the item. This allows for more items to be displayed on a page. The item's SKU, a short description, the list price, your price and unit of measure are displayed. You can adjust the quantity of the item as well. If you want to see more details about the item, you must click the item's SKU link.
- **Exploded View:** This view displays detailed information about the item, along with pictures and descriptive icons. This view limits the number of items per page.

Note: Exploded View is the default view.

To change the view, click the View Items in Streamline View link or View Items in Exploded View link that appears at the top of the page. Once you select the viewing option you want, each item list appears this way throughout the system until you change the view. Your settings save even after you have logged out.

You can change the view at any time.

Automatic Session Logout

Each dealer specifies a number of minutes that a user can leave the system inactive before the user is automatically logged off. If you leave your session inactive for this allotted amount of time you will receive a session time-out notice. If you have any orders in process when this happens, the order is put on hold. To access these orders, log back into the site and select Held Orders in the Customer Center. Select the order you want to open.

Viewing the Privacy Policy

Your dealer has a written privacy policy you can view. From the home page, click the privacy settings link at the bottom left-hand corner of the window. You might need to scroll down the window to find it. The Privacy Settings window opens displaying the dealer's privacy policy.

3 Using the Order Center

In the Order Center you can browse a catalog, use quick order, view a shopping list, set up a favorites list and much more. There are a variety of ways to search. In Chapter 2 you became familiar with the buttons and their basic functions. In this chapter, you learn how to use these buttons to search for items and add them to your order. This chapter also describes how to set up favorites lists.

Browsing the Catalog

If your site is set up to use the Category Search feature, when you click Browse Catalog, the system displays a list of categories from which you can choose the items you want to place on the order. For more details, see the heading **Using Category Search**.

The Browse Catalog feature displays a list of product categories from which you can choose the items you want to place on the order. This is an efficient tool when you don't know the number of the item you want to order, or when you simply want to see a list of the items that are available.

1 Log into the web site. If you need instructions, see **Chapter 1: Logging In**.

Note: If you want to change the department or attention for this order, you must do so before placing any items on the order. For details about changing the department and attention, see **Chapter 5: Using the Customer Cente**r.

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2 When the Home page opens, click Browse Catalog .

3 When the web page opens, you can search by entering item information, or you can use the product categories to view items in the item catalog. Both procedures are described below. See Figure 3-1. If you already know the items you want to purchase you can use the Quick Order feature. See the heading, **Using the Quick Order Feature**.

Searching by Item Information

When you enter item search information, you can enter more than one search criteria to limit the items. For example, you can enter an item stock number, and also choose an item manufacturer. In this case, the web page would limit the items that appear using the stock number and manufacturer you specified.

Step 1: You can search for the item you want to place in this order by using any of the following boxes:

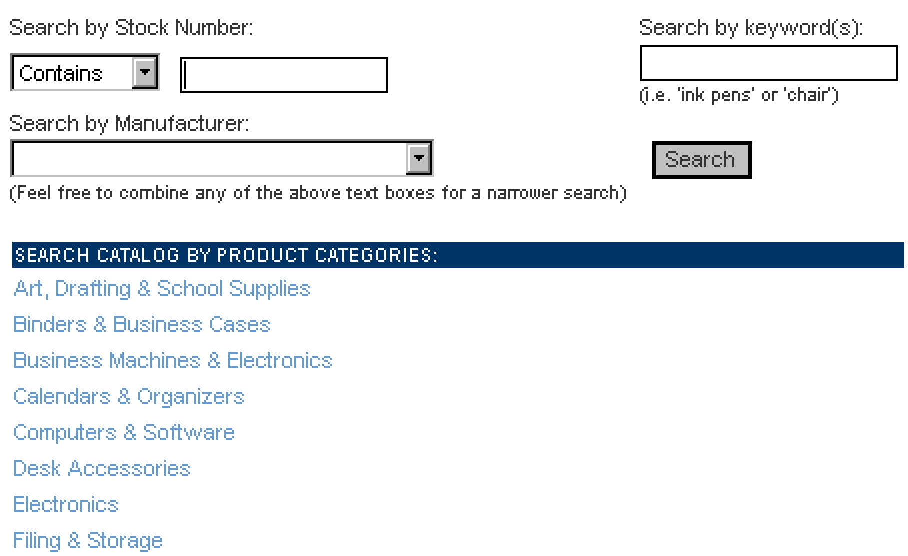
- **Search by Stock Number:** You can use this box to search by the item's stock or catalog number. To do so, enter the item number in the Search by Stock Number box. If you can't remember the complete stock number use the list box to the left and choose either Contains, Starts With, or Ends With.
- **Search by Keyword(s):** You can use this box to search by a description of the item. For example, if you want to order black pens, type pen. You can also abbreviate, typing bin for binder, for instance.
- **Search by Manufacturer:** You can use this box to search for the item by manufacturer's prefix. To do so, enter the item's manufacturer's prefix, MMM or SEL, for example, in the Search by Manufacturer box. If you can't recall the item's manufacturer, click the down arrow and click the manufacturer from the displayed list.

Step 2: After you finish entering the item information, click the Search button. Go to the heading **Placing Items on the Order.**

Searching by Product Category

In addition to entering search information, you can retrieve the item you want to order using the product categories. Product categories contain lists that let you view the items you want to place on the order.

Figure 3-1: Browsing the Catalog



1 Toward the bottom of the Search Category web page, the Search Catalog by Product Categories text appears. Under this text, a list of item categories is shown, Art, Binders, and Calendars, for example. Click the category that contains the item you want to purchase. For example, if you want to purchase file folders, click Files & Filing Supplies.

2 A list containing the item category you specified appears. Click the next category on the list by which you want to further limit your search. For example, to view a list of file folders, click File Folders.

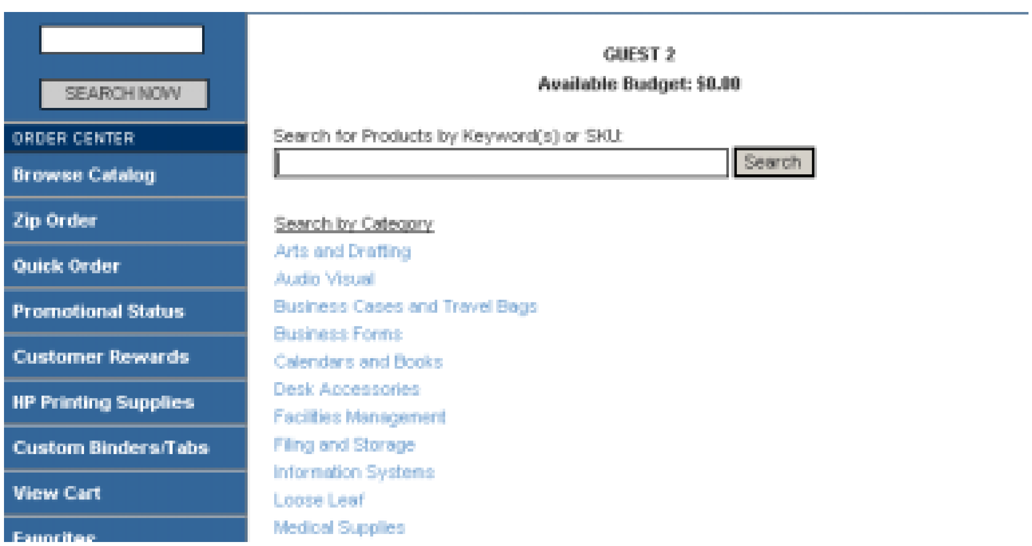
3 The search narrows using the category you specified. Click the next category on the list by which you want to further limit your search. For example, to view colored top tab file folders, click Colored. Go to **Placing Items on the Order**.

Using Category Search

If your site is set up to use the Category Search feature, when you click Browse Catalog, the system displays a list of categories from which you can choose the items you want to place on the order. This is an efficient tool when you want to significantly narrow your search. For example, by default, a search may return thousands of results related to “pen.” With Category Search, the results first bring up a more manageable list of related categories, such as PaperMate Ballpoint Pens, Pentel Pen Refills, Permanent Markers, and so on.

1 Log into the web site. If you need instructions, see **Chapter 1: Logging In**.

Figure 3-2: Using the Category Search Feature



Note: If you want to change the department or attention for this order, you must do so before placing any items on the order. For details about changing the department and attention, see **Chapter 5: Using the Customer Cente**r.

2 When the Home page opens, click Browse Catalog . The system displays the page shown in Figure 3-8. This page lets you search by entering item information, or you can use categories to view items in the item catalog. Both procedures are described below.

- **To Search by Keyword(s) or SKU:** You can use this box to search for an item using keywords. For example, if you want to order black pens, type pen. You can also abbreviate, typing bin for binder, for instance. You can also use this box to search by SKU or item number. To do so, enter the item's stock or catalog number. After you finish entering the item information, click the Search button. Go to the heading **Placing Items on the Order.**
- **To Search by Category:** Categories contain lists that let you view the items you want to place on the order. Under this text, a list of item categories is shown, Arts and Drafting, for example. Click the category that contains the item you want to purchase. For example, if you want to purchase furniture, click Office Furniture. A list containing the item category you specified appears. Click the next category on the list by which you want to further limit your search. The search narrows using the category you specified. Click the next category on the list by which you want to further limit your search. After you finish, go to the heading **Placing Items on the Order.**

Searching the Hewlett Packard Online Catalog

You also have the ability to view the Hewlett Packard catalog and order printers and printer supplies. Use the following instructions to search the HP catalog:

1 Click HP Printing Supplies .

2 The Hewlett Packard online catalog opens. Choose the printer type you want to search and click its link. If you know details about the product you want to search, you can use the Quick Find box. You can enter the printer number, product number or printer name. When you finish entering a search parameter, click the arrow key.

3 Continue selecting item categories until you find the item you want.

Note: Click Back to return to the previous page and click Forward to move to the next page.

4 To select an item, click Add to Cart. This adds the item to your shopping cart.

Note: If Add to Cart is not available for a particular item, the item is likely out of stock or discontinued. This is indicated by a notation next to the item.

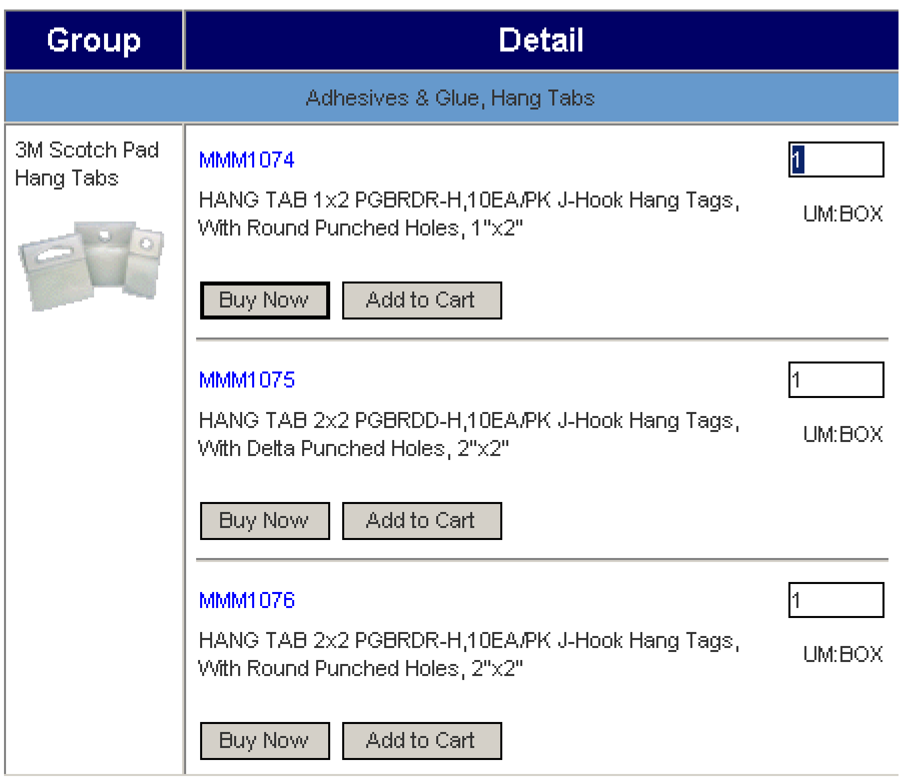
5 When you are finished shopping, click Close Window to return to the main home page.

Placing Items on the Order

A list of items that meet the search terms you specified appear. This includes the item description and item picture, if available. See Figure 3-3.

1 If there are more items than can display on a single page, page number links appear at the top of the page. You can use these links to scroll forward and back through the list of items. For example, if you are on page 1, click 2 to go to the next page. You can also click >> to move

Figure 3-3: List of Items



from page to page. To view the last page of items, click >|. You can also return to the previous page of items by clicking the number previous to the page you are currently viewing or click <<. To go back to the first page, click 1 or click |<.

2 The number of the item appears as a hypertext link. By clicking this item number link, you can view additional information about the item, including an extended item description and the catalog page number. When you finish viewing additional information concerning the item, you can click the Back button on your Internet browser to return to the Search catalog page.

3 To the right of each item is the list price and the quantity box. This box lets you enter the quantity of this item you want to place on the order. Click the quantity box and enter the quantity.

Note: The unit of measure for each item is shown below the price. For instance, “Each,” so you would enter the number of individual items you want. If the unit of measure is Box or Package, the product is sold in boxes or packages of more than one item. For these products, enter the number of boxes or packages you want, not the number of individual items.

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4 Under each item, the Buy Now, Add to Favorites, and Add to Cart buttons appear. These buttons provide several options.

After you select an item, you can also click the Buy Now button to go directly to the Checkout Page.

- **Buy Now:** This button lets you purchase an item immediately. You can use this button when you have placed the last item on the order, or if you only want to buy one item. After you click this button, the Check Out page opens so you can quickly complete the sale.
- **Add to Favorites:** This button lets you add an item to your list of favorites. By adding items to your list of favorites, you can quickly retrieve the item when you want to order it again. To add an item to your list of favorites, click Add to Favorites. The Item Added to Favorites message appears.
- **Add to Cart:** This buttons lets you add an item to a list or cart of items that you want to purchase. Use it to place an item on the order and continue to add items until you are finished. To add an item to your cart, click Add to Cart. The message Item Has Been Added appears.

Note: A popup window displays when you add multiple items to the cart from Quick Order, Favorites, History and Laundry List. This popup message indicates that the items are being added to the cart, so please wait. Do no click Add to Cart again.

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5 After you finish adding items, click View in the Shopping Cart portion of the web page to view all the items you've placed on the order. See Figure 3-4.

6 When you finish adding and viewing items and you are ready to complete the order, click Check Out. For more information about checking out, go to **Chapter 7: Checking Out**.

Using the Quick Order Feature

The Quick Order feature allows for easy, flexible and speedy ordering. This is an effective tool when you know the item number you want to order. You can enter the item number or a partial item number to place it on the order. If you only enter a partial item number, you can select from a list of items that begin with that number.

1 Log into the web site. If you need instructions, see **Chapter 1: Logging In.**

Note: If you want to change the department or attention for this order, you must do so before placing any items on the order. For details about changing the department and attention, see **Chapter 5: Using the Customer Center**

Figure 3-4: The Shopping Cart Section

2 When the Home page opens, click **Quick Order** . The Quick Order web page opens, displaying 20 default number of lines for quick ordering. See Figure 3-5.

3 You can now start ordering. In the Prefix box, enter the manufacturer's prefix of the item you want to order, MMM or SEL, for example.

Note: Depending on your user settings, the Prefix box may not appear. Instead, the Prefix and Item # box have been combined into a single box. If you do not have a Prefix box, click the Item # box and enter the item prefix and item number all in one string without spaces, PPP33311, for example. In addition, when items are loaded into the dealer's computer, a code is used to identify each manufacturer. You can ask yourdealer for a list of manufacturer's codes for items you frequently purchase.

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4 In the Item # box, enter the number of the item you want to place on the order. If you do not know the item number you can enter the first part of the number, 100 , for example.

6 In the Qty box, enter the quantity of this item you want to purchase. For example, if you want to place two items on the order, type **2**.

7 Enter any item comments in the Comments box. Comments print on the invoice.

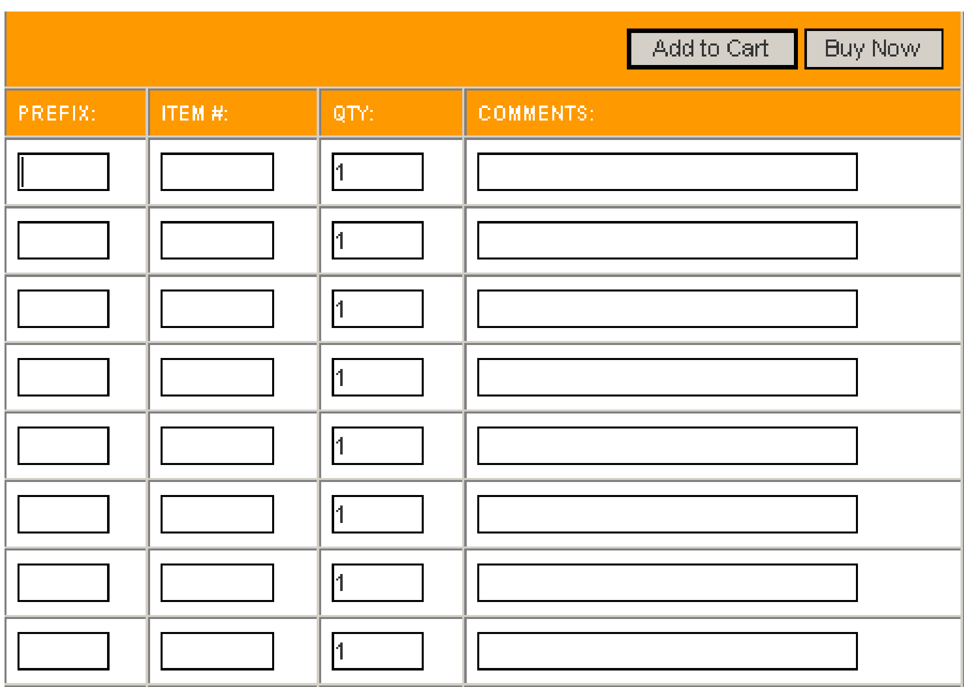

Figure 3-5: The Quick Order Page

8 When you finish adding items, click Add to Cart.

9 The Status box appears. At this point, there are several different messages you might receive.

- **Added to Your Cart:** This message means the item was successfully added to your cart.
- **Click To Order From List:** This means you entered a partial item number. Click the message link. A new window opens with a list of items that begin with the number you entered. Once you have found the item you want to order, complete the quantity box or accept the default quantity and click Add to Cart. A green checkmark appears next to the item to show it was added to your cart.
- **Added as Item XXX:** This message means the item number is different from what you entered, so the item was added to your cart with the new number. (XXX denotes the new item number.)
- **Not Found in Our Database:** This means the item is unavailable or you entered an incorrect item number.
- **Alternate Items Exist, Please Choose from the Following:** This message means that the item you selected was referenced to another item. Click the option next to the item you want to add to your cart. Click Add to Cart once you have chosen the item you want.

10 To view your shopping cart, click View in the Shopping Cart section. For more information about the Shopping Cart, refer to **Chapter 6: Using the Shopping Cart**.

11 When you finish adding and viewing items and are ready to complete the order, click Check Out. For details, see **Chapter 7: Checking Out**.

Using the Machine Matching Tool

Buying machine parts is easy using the Machine Matching Tool. Once you select the machine, matching parts are listed automatically. You can then select which parts you need to order.

1 Log into the web site. If you need instructions, see **Chapter 1: Logging In.**

2 When the Home page opens, click Machine Matching Tool. The Machine Matching Tool web page opens, as shown in Figure 3-6.

3 Choose a machine from the menu, for example, Typewriter. Click the word Typewriter.

4 Choose a manufacturer from the menu. Click the name, for example, Minolta.

5 Choose a model number by clicking the number or name.

6 A list of items that meet the search terms you specified appear. This includes the item description; an item picture, if available; item pricing information; and the item quantity.

7 The number of the item appears as a hypertext link. By clicking this item number or picture link, you can view additional information about the item, including an extended item description and the catalog page number. When you finish viewing additional information concerning the item, you can click the Back button on your Internet browser to return to the Machine Matching Tool page.

8 To the right of each item is the list price and the quantity. This box lets you enter the quantity of this item you want to place on the order. Click the quantity box and enter the quantity.

Note: The unit of measure for each item is shown below the quantity box. For instance, “Each,” so you would enter the number of individual items you want. If the unit of measure is Box or Package, the product is sold in boxes or packages of more than one item. For these products, enter the number of boxes or packages you want, not the number of individual items.

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9 From the drop down list box you have three options. Choose the option you want and click the checkbox next to this option. This drop down list box displays at the top and bottom of the window.

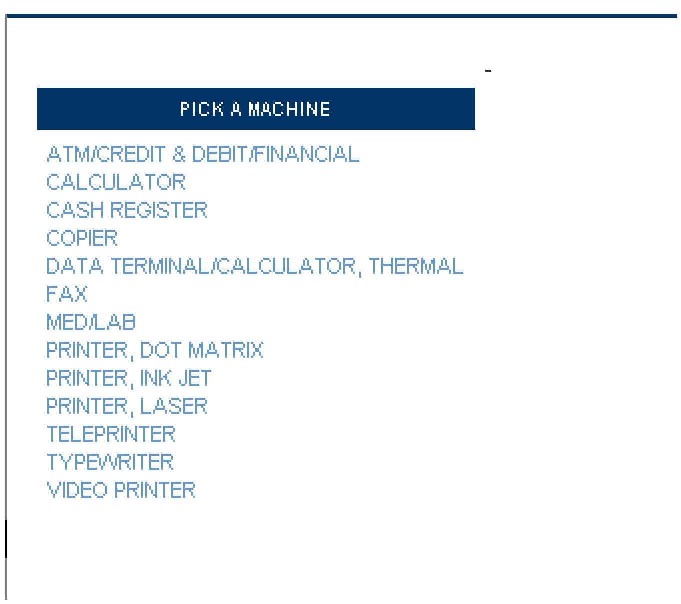

Figure 3-6: Using the Machine Matching Tool feature

- **Add Selected Items to Cart:** This option lets you add an item to the shopping cart for future purchase. Use it to place an item on the order and continue to add items until you finish.
- **Buy Selected Items Now:** This option lets you purchase an item immediately. You can use this option when you have placed the last item on the order, or if you only want to buy one item. After you select this option, the Check Out page opens so you can quickly complete the sale.
- **Add Selected Items to Favorite List:** This option lets you add an item to your list of favorites. By adding items to your list of favorites, you can quickly retrieve the item when you want to order it again.

10 When you finish adding and viewing items and are ready to complete the order, click Check Out.

Using a Contract List

You can also use the Contract feature to place items on an order. This feature works just like a laundry list of items, allowing you to quickly view and choose items that you commonly order. The dealer provides this list for you.

1 Log into the web site. If you need instructions, see **Chapter 1: Logging In**.

2 After the Home page opens, click 

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3 The Contract page opens. The Please Choose a Product Category text appears. Under this text, a list of item categories is shown, Adhesives, Clips & Clamps, and Desk Accessories, for example. Click the category that contains the item to purchase. For example, to purchase paper clips, click Clips & Clamps.

4 A list of items that meet your search terms appears. This includes the item description; an item picture, if available; item pricing information; and the item quantity. Click the item number for more information.

5 Choose an item by clicking the check box at the far left. To the right of each item is the list price and the quantity box. This box lets you enter the quantity of the item to place on the order. Click the cursor in the quantity box and enter the quantity. For example, to order two, type **2**.

Note: The unit of measure for each item is shown below the price. For instance, “Each,” so you would enter the number of individual items you want. If the unit of measure is Box or Package, the product is sold in boxes or packages of more than one item. For these products, enter the number of boxes or packages you want, not the number of individual items.

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6 The list boxes at the top and bottom of the page provide several options for the item you selected.

Note: Once you select one of these options, you must click Go.

- **Add Selected Items to Cart:** This allows you to place the item in your shopping cart. Once the item is in your cart, you can either check out or leave the item there for purchasing later. When you add the item, the Item Status box displays a message that the item was added to the shopping cart.
- **Buy Selected Items Now:** This allows you to go directly to Check Out. The item is added to your order and you can place the order immediately.
- **Remove Selected Items from List:** This allows you to remove any selected items from your list. When you remove the item, the Item Status box displays a message that the item was removed from the list.
- **Add Selected Items to Favorite List:** This option lets you add an item to your list of favorites. By adding items to your list of favorites, you can quickly retrieve the item when you want to order it again.

7 If you did not choose to check out, you can continue adding items to your shopping cart or favorites lists.

Using a Favorites List

You can also use the Favorites feature to place items on an order. Items from your favorites list can quickly be added the item to the order. You can also remove items from your favorites list.

1. Log into the web site. If you need instructions, see **Chapter 1: Logging In.**
2. After the Home page opens, choose a favorites list from the Favorites list box. Click Go. If you do not have a Favorites list set up, click Go.
3. The Favorite Items page opens, as shown in Figure 3-7. This page provides a list of items you've added to the favorite list you selected. At this point, you can select a favorite item to add to the order, add another item to your favorite list, remove an item from your list of favorites, or add another favorites list.

Changing the Status of an Item on a Favorites List

Use the following steps to change the status of an item on your favorites list:

1. Choose an item by clicking the check box at the far left. To the right of each item is the list price and the quantity box. This box lets you enter

the quantity of the item to place on the order. Click the cursor in the quantity box and enter the quantity. For example, to order two, type **2**.

Note: The unit of measure for each item is shown below the price. For instance, “Each,” so you would enter the number of individual items you want. If the unit of measure is Box or Package, the product is sold in boxes or packages of more than one item. For these products, enter the number of boxes or packages you want, not the number of individual items.

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2 The list box at the top of the page provides several options for the item you selected.

- **Add Selected Items to Cart:** This lets you place the item in your shopping cart. Once the item is in your cart, you can either check out or leave the item there for purchasing later. When you add the item, the Item Status box displays a message that the item was added to the shopping cart.
- **Buy Selected Items Now:** This lets you go directly to Check Out. The item is added to your order and you can place the order immediately.

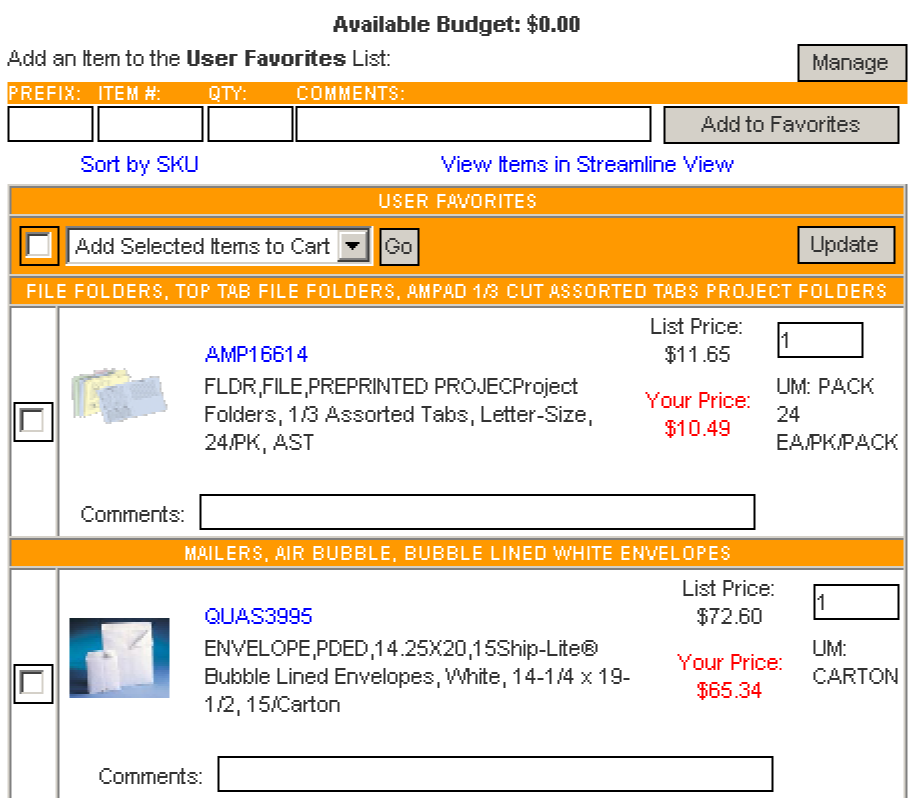

Figure 3-7: A Favorites Page

- **Remove Selected Items:** This lets you remove any selected items from your list. When you remove the item, the Item Status box displays a message that the item was removed from the list.
- **Filter to Selected Items:** This lets you filter your favorites list down to one page that contains selected items. You can then choose certain items to add to the cart or all of them.

3 If you did not choose to check out, you can continue placing items on your order.

Adding an Item to the Favorites List

Use the following steps to add a new item to your favorites list:

Note: To add an item to one of your favorites lists when browsing the catalog, select a list in the Favorites List list box. Otherwise, the item is added to the list in the box.

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1 From the Main Menu, choose a favorites list from the My Favorites list box. Click Go.

2 Enter the manufacturer prefix, item number, and quantity.

3 Click Add to Favorites. The item is added to the list. The message Item Added to Favorites appears.

To place this item on the order, refer back to **Adding an Item to the Order**.

Removing an Item from the Favorites List

1 Choose a favorites list from the My Favorites list box. Click Go.

2 Find the item to delete and click the check box next to it.

3 From the list box at the top, select Remove Selected Items From List and click Go.

Viewing Items on a Favorites List

1 In the Favorites section, select the Favorites list to view from the drop down list box and click Go.

2 The favorites list displays with all the items on the list.

3 You can view item information and an item picture if available. You can also add comments about the item in the Comments box.

Sorting the Items on a Favorites List

1 When you are viewing a favorites list, you can sort using two methods:

- **Sort by SKU:** Click this link to view the items on your favorites list by SKU or item number. The items are sorted by item number in alphabetical and numerical order.

- **Sort by Group:** Click this link to view the items on your favorites list by group. The items are sorted by group in alphabetical order.

Only SuperUsers can assign lists to users.

Managing Favorites Lists

Using the Favorites Management page, you can add, remove, copy, rename and view lists. In addition, SuperUsers can assign lists to users. To open the Favorites Management page, shown in Figure 3-8:

1. Choose a favorites list from the My Favorites list box. Click Go.
2. When the favorites list opens, click Manage.

Adding a Favorites List

1. Open the Favorites Management page.
2. In the box to the left of the Add List button, type a unique name for the new list. Click Add List.
3. The new list is added to your favorites lists. Click View to begin adding items to it.

Removing a Favorites List

1. Open the Favorites Management page.
2. Click the Remove button corresponding to the list to delete.
3. At the message Click Continue to Permanently Remove the List, click Continue.

Note: Before you delete a list, make sure the list no longer contains any saved favorite items.

---

4. The list is deleted, along with its items.

Copying a Favorites List

1. Open the Favorites Management page.
2. Click the Copy button corresponding to the list to copy.

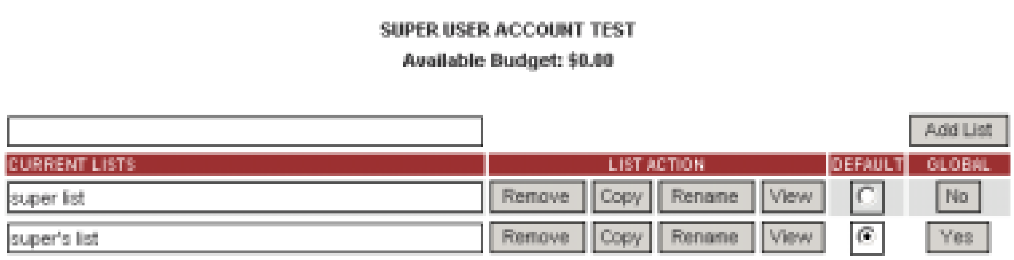


Figure 3-8: Favorites Management Page

3 At the Copy List With a New Name Of message, enter the new name.

4 Click Continue.

5 The duplicate list is added to your favorites lists with a new name. Click View to begin adding items to it.

Renaming a Favorites List

1 Open the Favorites Management page.

2 On the list of Current Lists, highlight the name to replace.

3 Enter the new name over the old name. Click the corresponding Rename button.

4 When the list is renamed, the List Renamed message appears above the Current Lists column. Click View to see the list.

Assigning Lists Globally

1 Open the Favorites Management page.

2 The Global column has a status button corresponding to each favorites list.

- The status button of lists that are currently assigned globally to users is Yes. To remove a list's global assignment, click Yes. The status button changes to No.
- The status button of lists that are not currently assigned globally to users is No. To assign a list globally, click No. The status button changes to Yes.

Requesting a Return

1 Log into the web site. For instructions, see **Chapter 1: Logging In.**

2 After the Home page opens, click 

.

3 The Request Return page opens, as shown in Figure 3-9.

4 Enter the Prefix of the item number you want to return in the Prefix box.

5 In the Item # box, enter the item's number.

6 In the Qty box, enter the amount of the item you want to return. For example, if you bought five cameras, but you want to only return three of them, enter 3 in this box.

7 In the Reason drop down box, select a reason for returning the item. For example, you can select wrong item, damaged or poor quality.

8 When you finish entering information, click Search for Item. The system searches through your order history for this item.

9 Based on your dealer’s setting, you receive a message informing you of the return request status.

Using the Marketing Tools Status Feature

This marketing tool lets you receive discounts on the orders you place. For example, you may receive a discount by purchasing specific items, or you might receive a discount based on your month-to-date total.

1 Log into the web site. For instructions, see **Chapter 1: Logging In.**

2 After the Home page opens, click 

.

3 The Marketing Tools Status page opens, as shown in Figure 3-10. At this point, you can view the marketing information and whether it is currently active or inactive.

Using Rewards

You can use the Reward feature to gain points to use towards purchases. You can view a catalog of item rewards as well as view items set with specific point rewards. Another Reward feature lets you contact an individual when you have questions or concerns regarding the Reward system. When using the Reward Account History Page, you can view account-specific reward credits and debits.

1 Log into the web site. For instructions, see **Chapter 1: Logging In.**

2 After the Home page opens, click 

.

3 The Reward Catalog page opens, as shown in Figure 3-11. At this point, you can view products by category, or you can view items within a specific point range.

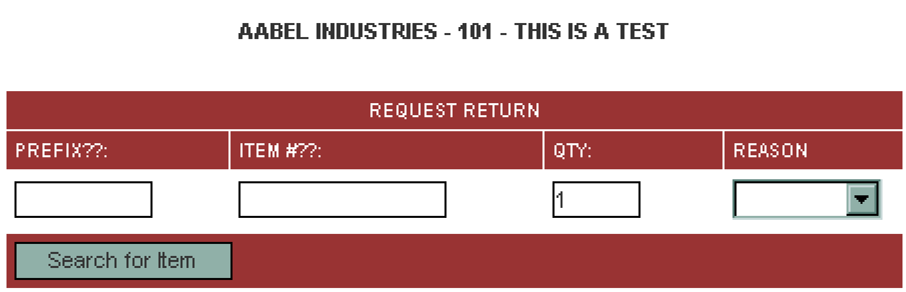


Figure 3-9: Request Return Page

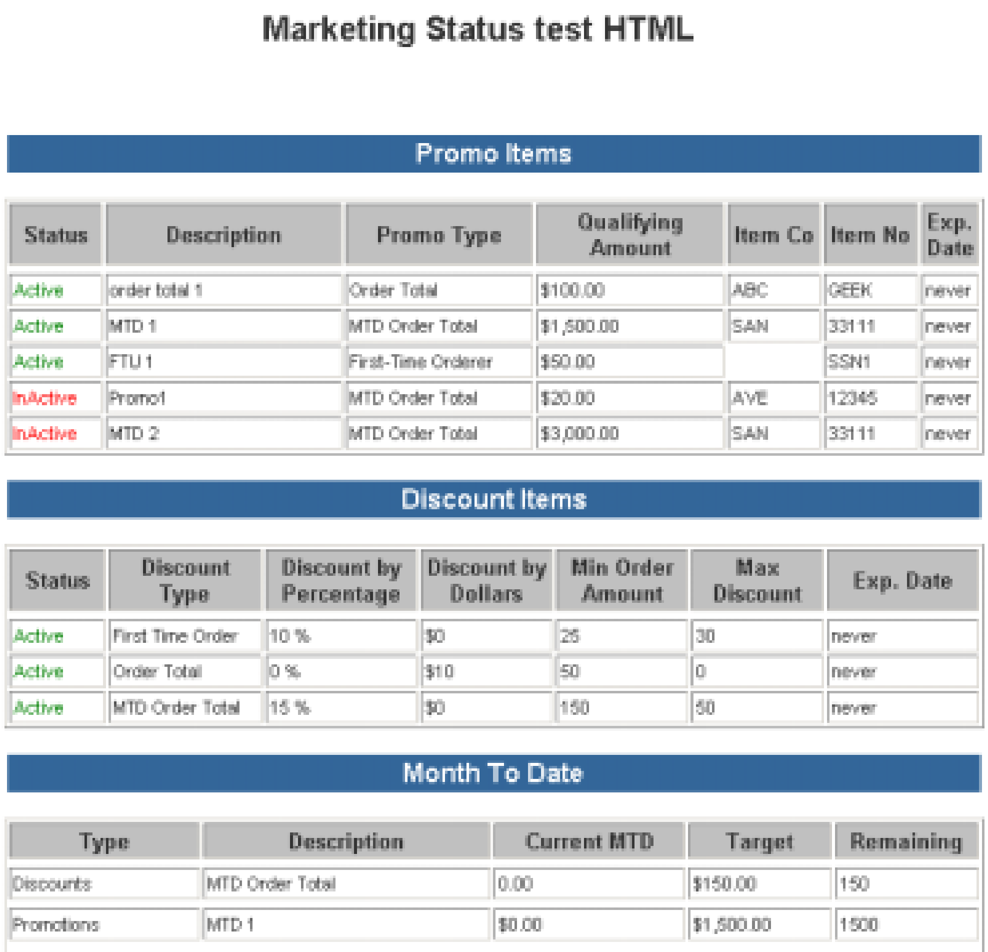
- **View Product by Category:** Click the category by which you want to view items and their corresponding points, Hardware, for example.
- **View Product by Point Range:** Click the point range for which you want to view items, below 1,000, for example.

4 The system opens the Display Point Catalog page, showing the items that meet the category or point range you selected. Check the box corresponding to the item you want to place on the order.

5 In the corresponding Quantity box, enter the quantity of this item you want to order.

6 At this point, you can continue shopping, or you can click Check Out to proceed to the Checkout page. For details, see **Chapter 7: Checking Out**.

Figure 3-10: The Marketing Tools Status Page



Marketing Status test HTML

Promo Items

Status	Description	Promo Type	Qualifying Amount	Item Co	Item No	Exp. Date
Active	order total 1	Order Total	$100.00	ABC	GEEK	never
Active	MTD 1	MTD Order Total	$1,500.00	SAN	33111	never
Active	FTU 1	First-Time Orderer	$50.00		SSN1	never
InActive	Promo1	MTD Order Total	$20.00	AVE	12345	never
InActive	MTD 2	MTD Order Total	$3,000.00	SAN	33111	never

Discount Items

Status	Discount Type	Discount by Percentage	Discount by Dollars	Min Order Amount	Max Discount	Exp. Date
Active	First Time Order	10 %	$0	25	30	never
Active	Order Total	0 %	$10	50	0	never
Active	MTD Order Total	15 %	$0	150	50	never

Month To Date

Type	Description	Current MTD	Target	Remaining
Discounts	MTD Order Total	0.00	$150.00	150
Promotions	MTD 1	$0.00	$1,500.00	1500

Viewing Reward History

1. Open the Reward Catalog page.
2. Click the Reward History link.
3. The system displays the order date and transaction; the total order dollar amount; the credits and debits; along with any notes for the order.

Viewing the Current Point Balance

1. Open the Reward Catalog page.
2. Click the Current Point Balance link.
3. The system displays your current point balance.

Reporting Reward Discrepancies

You use this feature to report problems, concerns, or questions you have regarding the Reward system.

1. Open the Reward Catalog page.
2. Click the Report Discrepancy link.
3. The system displays the Report Discrepancy page. Enter the following information:
    - **From:** The system defaults to your email address. However, to select a different address, click the From box and enter the email address you want to use.

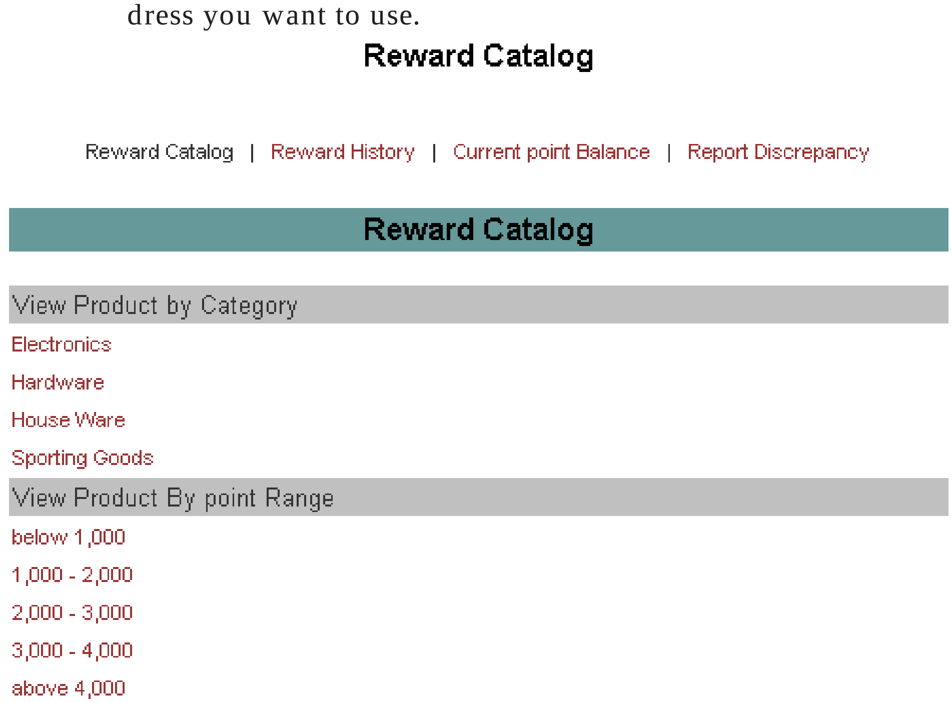


Figure 3-11: The Reward Catalog Page

- **To:** This box displays the email address where your message will be sent. This box is for display purposes only.
- **Subject:** Enter the subject for the email you are sending.
- **Text:** Enter the text for this email containing your question, request or concern.

4 When you finish, click Send Mail.

Using the Zip Order Feature

The Zip Order feature is a condensed, efficient way to order from your favorites lists. It is similar to using a Favorites List and Quick Line Ordering. You can also change the quantity of the items on your favorites list. When you specify the item quantities, you can also click the Buy Now button to go directly to the checkout page.

1 From the Dealer Station Home Page, click 

.

2 When the Zip Order window opens, click the down arrow in the My Zip Lists box and choose the favorites list you want to view. The list immediately opens.

3 You can use the following tools with Zip Order:

- **Zip # of Blank Lines:** You can customize the number of lines that display for zip ordering. You can have as few as five or as many as 20. Use the Zip Lines drop down list box and select the number of lines you want to display. Once you select the number of lines, the page updates immediately with the number of blank lines you chose. This setting is saved even after you end your session.
- **Zip Default Quantities:** The Zip Default Quantities box allows you to quickly order each item on the favorites list. Click Zip Default Quantities and the quantity boxes immediately update with the quantity you have saved in the favorites list.
- **Quantity**:**Quantity:** The Quantity box allows you to determine how much of an item you want to order. Click in the Quantity box corresponding to the item you want to order and enter the amount. For example, if you want to order two, type 2 in the Quantity box.
- **Adding an Item to the List:** You can quickly add an item if you know the item company and item number. On an empty line, enter the item company in the COMPANY box. In the ITEM # box, enter the item number and in the QUANTITY box, enter the

quantity. When you finish adding information, click Add to Cart. (These items are one time only. They do not get added to your favorites list.)

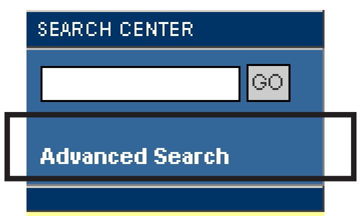
4 When you finish adding items and specifying item quantities, you can add the items to the cart, or you can immediately go to the checkout page.

- To add your items to your shopping cart, click Add to Cart. To view your shopping cart, click View in the Shopping Cart section. When you finish adding and viewing items and are ready to complete the order, click Order in the Shopping Cart section. See **Chapter 7: Checking Out**.
- To immediately go to the checkout page, click Buy Now. The checkout page opens so you can complete the order. See **Chapter 7: Checking Out**.

4 Using the Search Center

The Search Center offers a quick way to search for an item. In the Search Center, enter an item you are looking for, binders, for example. A list of items displays that matches the item keyword you entered. You can then either search by using another keyword or select an item from the list. See Figure 4-1.

You can also use the Advanced Search feature for another quick way to search for an item. The Advanced Search feature allows you to search by keyword, stock number or manufacturer. You can access Advanced Order from your search in the Search Center window or click the link in the Search Center box. See Figure 4-1. For information on searching the catalog and placing an order, refer back to **Chapter 3: Using the Order Center.**



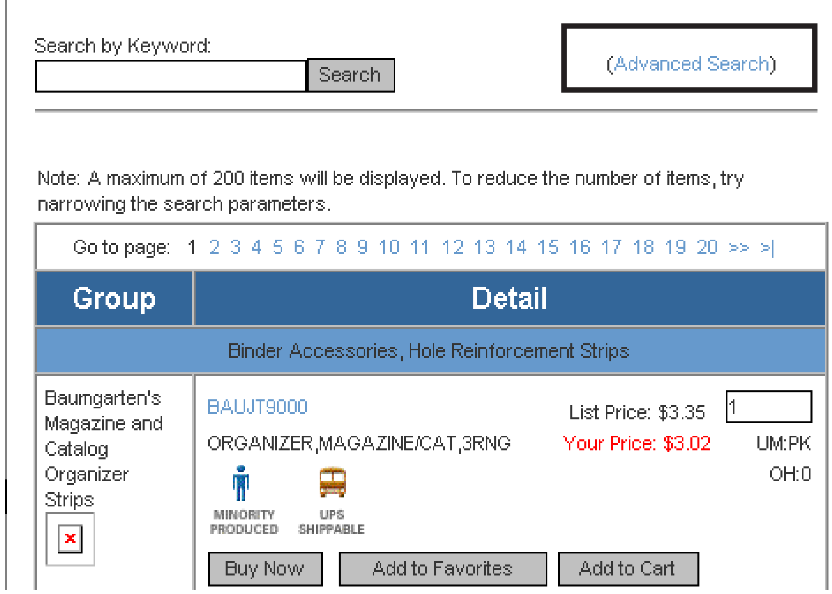


Figure 4-1: Using the Search Center

5 Using the Customer Center

The Customer Center helps you manage a user's account. There are several features in this section that help personalize your account. You can change departments and attentions, view order history, change information and view favorites.

Using Member Sign-On

The member sign on section allows you to log in, log out and change departments and attentions. The instructions for each of these features is described below.

Logging In

When you open the website, click Login in the Member Sign On portion of the Order Center. Type your user name and password. For more information, see **Chapter 1: Logging In.**

Note: This feature appears only if you have the Guest Login feature.

Logging Out

When you are finished browsing and placing orders, you can exit the website by clicking Logout in the Member Sign-On portion of the web page.

Changing the Department and Attention

You can change the department and the attention for an order. An attention represents to whom the order is going. If you want the order to be directed to a particular individual, you can specify an attention. If you need to change the department or the attention for this order, you *must* do so before placing the order.

To change the department or attention for this order, use the following instructions:

1. Log into the web site. If you need instructions, see **Chapter 1: Logging In**.
2. After the home page opens, click Change Dep / Attn in the Member Sign On portion of the web page.
3. The Change Department web page opens, as shown in Figure 5-1. Your current account number, department and attention name display at the top of the page.

- To change the department for an order, enter the four-digit department code in the Direct Department Entry box. For example, if the department code you want to use is ACCT for accounting, enter ACCT in this box. If available, you can also click the down arrow in the Change Department list box, and click the department you want to use for this order. Click Change Department.
- To change the attention for this order, enter the attention number in the Direct Attention Entry box. If available, you can also click the down arrow in the Attention list box, and click the attention you want to use for this order. Click Change Attention Name. The attention you specified is used for this order.

4 When you finish changing the department or attention for this order, you can begin placing items on the order. Click Home. See **Chapter 3: Using the Order Center**.

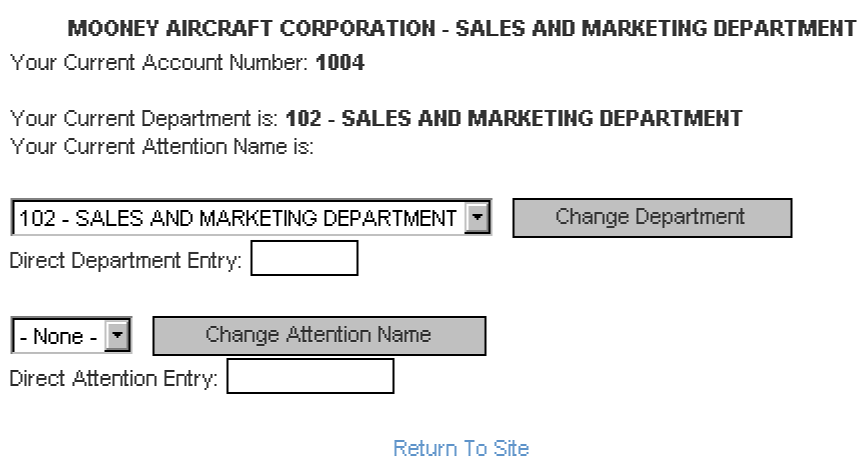
My Account

The My Account section allows you to change your information, allow approval forwarding, edit budgets and add or search for users. The instructions for each feature are described below.

Edit Budgets

This feature allows you to set up or change your monthly or P/O budget. You can change or set up your current budget or any budgets for the following year. Your budgets can change from month to month. Use the following directions to set up or change your budget.

Figure 5-1: Changing the Department and Attention



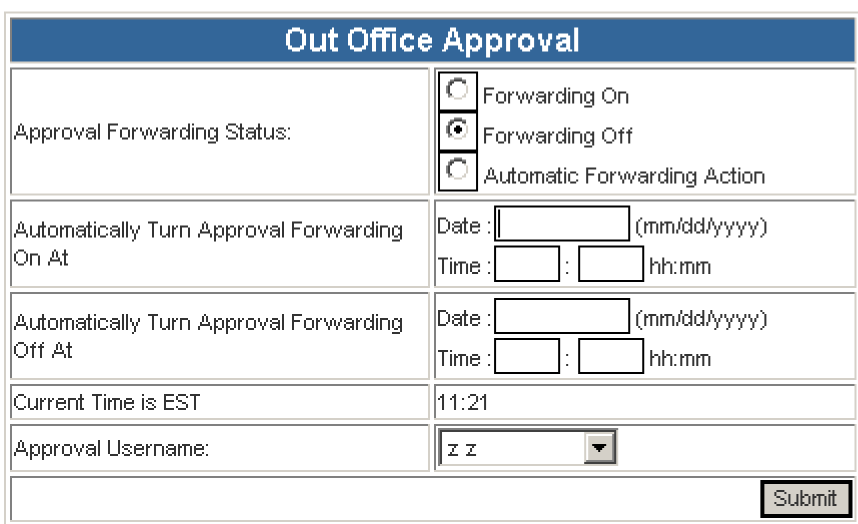
Note: You cannot change the current month's budget. You can only change the months following. For example, if it is July 2, you can change the budgets for August or any month after that, but July is closed.

1. From the Home page, click Edit Budget in the My Account portion of the web page. The Edit Budget page opens.
2. If you need to change the department, enter the four-digit department code in the Direct Department Entry box. If available, you can also click the down arrow in the Change Department list box, and click the department you want to use for this order. Click Change Department.
3. After you retrieve the correct department, you can set up or change budgets.
   - To set up or change a monthly budget, click the box for the month you want to change and type the new information.
   - To set up or change a P/O budget, click Switch to P/O Budget. Click the box for the month you want to change and type the new information.
4. When you finish adding or changing information, click the Save Monthly Budget or Save P/O Budget options. The information is immediately updated.

Approval Forwarding

This feature allows you to specify a date and time when an approver will be out of the office. You can also specify the name of another individual who can approve orders while this approver is unavailable. Use the following instructions.

Figure 5-2: The Out of Office Approval Page



1 From the Home page, click Approval Forwarding in the My Account portion of the web page. The Out of Office Approval page opens, as shown in Figure 5-2.

2 To set up out of office approval information, click each box and enter the information.

- **Forwarding On:** All orders sent to this user for approval will be sent to the user specified for approval.
- **Forwarding Off:** All orders sent to this user for approval will have to be approved by this user.
- **Automatic Forwarding Action:** Allows the forwarding of orders sent to this user for approval to be automatically turned on and off. This feature requires the date and time to be specified in the following boxes.
  - **Automatically Turn Approval Forwarding On At:** Enter the date and time when you want the forwarding of orders for approval to begin. Enter the time in military format. For example, if you want the approval forwarding to begin at 1:00 pm, enter 13:00 in the Time box. (The Current Time is EST box displays the eastern standard time.)
  - **Automatically Turn Approval Forwarding Off At:** The forwarding action will be turned off according to the date and time you enter in these boxes. Enter the time in military format. For example, if you want the approval forwarding to end at 5:00 pm, enter 17:00 in the Time box. (The Current Time is EST box displays the eastern standard time.)
- **Approval Username:** Click the down arrow in this box to select the user who will be in charge of approving orders while the regular approver is out.

3 When you finish specifying information, click Submit. The information is immediately updated.

Update My Info

This page allows you to update your account information. You can change your name, email address and password.

1 From the Home page, click Update My Info in the My Account portion of the web page. The Update My Info page opens.

2 To change the information, click the box and type the new information.

Note: The boxes requiring completion are shown in bold type and highlighted.

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3 When you finish making changes, click Finished.

User Editor

The User Editor page allows you to add or search for users. You can view a whole list of users, or a specific user.

1 Click User Editor. The User Editor page opens.

2 In the name boxes, type the first name and last name of the user for whom you are adding or searching. You can also type the user name.

3 You can choose among active users, inactive or both. Click the option button of the status you want.

4 If you are adding a user, see **Adding a User** . If you want to search for the user, click the Submit Search button. If you want to display a complete list of users, click Display All.

Adding a User

1 From the User Editor page, click Add User.

2 The Adding a User page opens. Complete the following boxes:

- **Status:** Specify whether to allow this end-user to log into the home page. When adding new users, you usually want to allow the customer access to the home page. However, if the customer is no longer active on your system, you may want to set this option to Inactive. Click Inactive to deny this user access. Click Active to allow this user the ability to log in. This option defaults to Active.
- **First Name:** Enter this user's first name.
- **Last Name:** Enter this user's last name.
- **User Email Address:** Enter this user's email address.
- **Phone Number:** Enter the user's phone number.
- **Phone Ext:** Enter the user's phone number extension, if applicable.
- **Username:** Enter a unique name for this user. This is the name that the user enters in the User Name box when logging into the home page.
- **Password:** Enter this user's password. This is the password that the user enters in the User Password box when logging into the home page.
- **Account Number:** Enter this user's account number.
- **Create Department List:** This button allows you to set up and remove customer departments. Once the departments are set up, users can select the appropriate department when placing orders. (Users can access available departments by using the Change Dept/Attn option shown on the end-user web page.)

To set up a department using this option, click Departments List. The Add/Remove Department window opens, allowing you to add or remove existing departments. To add a department, click the Dept ID box and enter the department identification code you want to add. To remove an existing department, click the department you want to remove and click Remove. To remove all departments, click Remove All. All the departments will be deleted. When you finish adding and removing departments, click Finished.

- **Default Department Name:** Click the down arrow to select the department. If the Default Department Name box displays the word “None”, you can click the Or Code box and enter the four digit customer department. To use this feature, this user must be set up with departments.
- **Allow Department Changes:** If this user has customer departments, specify whether the user can place orders for different departments. To use this feature, this user must be set up with departments. Click Yes to allow this customer to place orders for different departments. To deny this user the ability to place orders for different departments, click No.
- **Department Display Format:** Specify the method by which the user can select departments when placing orders, if this user has more than one department. Click the option that you want to allow this user.
    - **Both Drop Down and Direct Entry:** This option gives the user two methods. He can select the department from a drop down list, or he can enter the department code himself. When using the drop down list, the system will display all departments.
    - **Drop Down Entry Only:** This option gives the user the ability to choose from a drop down list, but he cannot enter a department code. When using the drop down list, the system will display all departments.
    - **Direct Entry Only:** This option requires that the user enter the department code himself. The drop down list box does not appear.
- **Default Attention:** Click the down arrow and select the default attention that you want this customer to use when placing orders, if this user has more than one attention. If the Default Attention list box displays the word “None”, you can also click the Or Code box and enter the Attention identification code. To use this feature, this user must be set up with attentions.
- **Allow Attention Changes:** If this user has more than one attention, use this option to specify whether the user can place orders for different attentions. To use this feature, this user must be set up with attentions. Click Yes to allow this customer to place orders for different attentions. To deny this user the ability to place orders for different attentions, click No.

- **Attention Display Format :** Specify the method by which the user can select attentions when placing orders, if this user has more than one attention.
    - **Both Drop Down and Direct Entry:** This option gives the user two methods. He can select the attention from a drop down list, or he can enter the attention identification code himself.
    - **Drop Down Entry Only:** This option gives the user the ability to choose from a drop down list, but he cannot enter an attention identification code.
    - **Direct Entry Only:** This option requires that the user enter the attention identification code himself. The drop down list box does not appear. Click the option that you want to allow this user.
- **Send Email Confirmation to This User:** Indicate if you want to send an email confirming this user's order. Click Yes to send an email.
- **Send Email Confirmation of Order to Addresses Below**: This feature allows you to send email confirmations for orders. In the Send Email Confirmation of Order to Addresses Below option boxes, click Yes to send a confirmation. Click No if you do not want to send a confirmation.
- **Email Addresses:** Enter the email address you want to send an email confirmation to. Separate multiple addresses with a semicolon (;). If you clicked No in the box above, leave this box blank.
- **Authorized Order Dollar Limit :** *This box only applies if you are going through the Order Approval process. If you are not, enter Ø*. Enter a maximum (pre-tax) dollar limit for each order this user places. To use this feature, enter the maximum dollar limit all in one string. For example, to place the maximum order limit at $20,000, enter 20000 in this box. The default for this box is $0. You must enter an amount if you want this user to be able to place orders.
- **Authorized Line Item Limit Ext Dollar Limit:** Enter a maximum number of items a user can order.
- **Maximum Line Item Unit Price:** Enter a maximum total quantity on a line item.
- **Non-Contract Items Require Approval:** Indicate whether orders containing non-contract items need approval before submitting them.
- **Over Monthly Budget Requires Approval:** Indicate whether orders that exceed the monthly budget need approval before submitting them.
- **Current User Level:** Select this user's order level. The user can only view orders at the level that you set here. Select Level Ø through 9 by clicking the option button.

- **Approval Username:** Indicate whether this user must have approval to place an order above the set order dollar limit amount. All users with this account number who have a higher user level appear in the drop down menu.
- **Email CC Address on Approval Emails:** Select whether to include the email address on confirmation emails.
- **Quick Approve Orders:** Specify whether you want to allow the approver the ability to approve multiple orders.
- **Allow Out of Office Approval:** Specify whether you want to allow using the out of office approval feature. This feature allows approvers to specify when they will be out of the office as well as assign a different approver while they are out.
- **View Held Orders:** Specify the orders you allow this user to view. Click the appropriate option.
    - **View Orders Only for this Username:** This option lets you specify that this user only be allowed to view the orders he has placed. (Those orders created with his user name.)
    - **View All Orders for this User's Department:** This option lets you specify that this user be allowed to view all orders placed for his department within the company. (This includes orders this user has placed and any additional orders placed for his department by different company users.)
    - **View All Orders for this User's Account Number:** This option lets you specify that the end-user be allowed to view all orders placed for his company's account number. (This includes orders this user may have placed and any additional orders created by other company users. This also includes all orders placed for various departments within the company, if applicable.)
- **Order From Catalog:** Specify whether you want to give the ability to search for items using the online item catalog. If you set this option to Yes, the user can view and order items using the online item catalog. If you set this option to No, the user cannot use the catalog search feature when placing orders.
- **User Catalog Management:** This box allows you set up catalogs you want to make available to your users from which to search and other catalog options. Click User Catalog Management. A list of catalogs display. Select the ones from which you want your customers to search and also select which catalog to set as the default. Other options to select are limiting the user to items only in the catalogs you selected and selecting from a list or using a unified catalog. When you finish setting

up these options click Update to save and click Close to close the window.

- **Display Today's Specials:** Specify whether you want to display "Today's Specials" on the end user's site.
- **Order From Quick Order:** This turns off the quick search feature from an end user's web site.
- **Order From Contract (Laundry List):** Specify whether you allow this user to order laundry list items. A laundry list is used to display items that a customer purchases on a regular basis. The user can select items from the list and place them on the order. If you set this option to Yes, this user can order laundry list items. If you set this option to No, this user cannot order laundry list items.
- **Order History:** Specify whether you allow this user to inquire on order history. If you set this option to Yes, the user can view order history. If you set it to No, this user cannot view order history.
- **PO Required:** Specify whether or not this user requires a purchase order number on orders. If this user requires purchase order numbers, set this option to Yes. If this user does not require purchase order numbers, set this option to No.
- **Requisition # (Long PO) Required:** Indicate if you want to require the Requisition # (Long P/O) in order for the user to check out. If you select No, the Requisition # will not appear on the Checkout Page.
- **Allow Requisition # (Long PO) Edit:** Specify if you want to allow the user to make changes to the Requisition # (Long P/O) on the Checkout Page.
- **Allow User to Receive Promotions:** Specify whether the user is allowed to receive promotional items.
- **User is Eligible to Receive Coupons:** Specify whether the user is allowed to receive coupons to use when placing an order.
- **User is Eligible to Receive Discounts:** Specify whether the user is allowed to receive discounts to use when placing an order.
- **View List Prices:** Indicate whether you want to allow this user to view an item's list price from the (E) screen (Item Window). To allow this user to view item list pricing, click Yes. To deny this user to view item list pricing, click No.

Note: If you set the View List Prices option to No, none of your users are allowed to view item list pricing. In order for any users to be able to view item list pricing, the View List Prices option must be set to Yes.

- **View Customer Prices:** Specify whether you allow this user to view customer pricing. If you want to allow this user the ability to view customer pricing, click Yes. If you want to deny this user the ability to view customer pricing, click No.
- **Identify Contract Items:** Specify whether the end-user can view contract information for your items. If you set this option to No, the price for contract items appear in red, along with all regular item prices. If you set this option to Yes, the price for contract items appears in blue, while regular item prices appear in red. This allows the end-users to see at a glance that they're receiving contract pricing for that line item. Click the appropriate option button.
- **Identify Promo Items:** This option works similarly to contract item pricing in that you can specify that promo item pricing appears in green, while regular item pricing appears in red. To specify that promo item pricing appears in green, set this option to Yes. If you want promo item pricing to appear in red, along with regular item pricing, set this option to No. This option defaults to show promo item pricing in green and regular item pricing in red.
- **Return Module:** Indicate whether to enable the Return Request module. If you select Yes, the user can enter items previously purchased for return / pick up. After you accept, you can process a credit against the purchase using the same payment type as the original purchase invoice.
- **View Quantity on Hand:** Specify whether you allow this user to view on hand item quantities from the (E) screen (Item Window). To let this user view item on hand quantities, click Yes. To deny this user the ability to view on hand quantities, click No.
- **Decimal Places in Pricing:** Specify whether you want the system to figure the pricing to two three or four decimal place. For example, if you want the system to figure the pricing to three decimal places (21.886), you would set this option to Yes. If you select 4, a zero is added to the end of the price to create the four decimal pricing.
- **Modify Shipping Address:** Specify whether this user can change the shipping address while placing orders.
- **Allow User to Choose Shipping Options:** Specify whether you want to allow the ability to select from different shipping options, UPS Ground, UPS Blue, FedEx and so on. If you click Yes, the user will be prompted on the checkout page to select a shipping method. (You select the shipping options using the Shipping Option List box, below.) If you click No, the end user will not have the ability to choose a shipping option.
- **Shipping Option List:** Click this box to select the list of shipping options you want to allow the end user. To select more than one option

from the list, hold the Ctrl key down and click each option you want to allow this user. If you want to allow this user to be able to choose from all shipping options, leave this box blank.

- **Shipping Option:** Click the down arrow in this box to set a default shipping option from the Shipping Management window.
- **User Able to View Reward Catalog:** Specify whether you want to allow this end user to view the reward catalog. To allow this user to view the catalog, click Yes. To deny the user the ability to view the reward catalog, click No.
- **Default Reward Identity:** Click the down arrow in this box to set the reward option from the Reward window.

3 When you finish setting or changing information, click Save.

My Orders

The My Orders section allows you to view order history and held orders. The instructions for these features are described below.

Viewing Order History

You can view previous orders using the Order History feature. This includes incomplete orders you have started, and orders which are currently on hold.

1 Log into the web site. If you need instructions, see **Chapter 1: Logging In.**

2 After the home page opens, click Order History in the My Orders portion of the web page.

3 The Order History web page opens. When this web page opens, you can click the down arrow in the Default Department Name box to select a specific department to view. Click the Apply Filter button. The page refreshes, displaying the information you specified.

4 After you select a department, you can use this page to view the following information:

- Order number
- Department number
- Department name
- Total
- Order status
- Purchase order number
- Long purchase order number (requisition number)

- Order date
- Invoice date
- Ordered by
- Attention’s name.

5 If there are more orders than can be viewed on a single page, the text Next Orders appears at the bottom of the page. To view the next page of orders, click Next Orders. The next page of orders opens.

6 If the order is on hold, the words On Hold appear under the status box.

If the order is open, the order number is listed as a link. You can click the order number to continue placing the order. When you do, the order opens, listing all the items currently on the order.

7 At this point, you can click the ReOrder button to re-order this order. If you do, the system opens the Check Out page. For details, see **Chapter 7: Checking Out**.

8 You can also add additional items to the order, view the shopping cart, and complete the order just as you would any other order. See **Chapter 3: Using the Order Center.**

Order Approval

If there are orders pending approval, these orders display on this page. You can view the order number, date the order was placed, person who placed the order with their department, attention name and the total cost of the order. You can approve the order, or you can add additional items to the order. For more information, see the topics below.

Approving Orders

There is a fast, convenient way to approve pending orders. You can submit all the orders to approve at one time.

1 Log into the website. If you need instructions, see **Chapter 1: Logging In.**

2 When the home page opens, click Order Approval in the My Orders portion of the web page.

3 The Orders Pending Approval page opens displaying the pending orders.

Note: The orders pending approval may display automatically when you log into the web site.

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4 Select the orders you want to approve by clicking the box next to each order.

5 When you finish selecting orders, click Quick Approve.

6 The orders are submitted and a status box displays. You can view the previously displayed information as well as the grand total of the order and the status.

Continuing an Order

You can add additional items to an order or make changes before submitting it for approval.

1 Log into the web site. If you need instructions, see **Chapter 1: Logging In.**

2 When the home page opens, click Order Approval in the My Orders portion of the web page.

3 The Orders Pending Approval page opens displaying the pending orders.

Note: The orders pending approval may display automatically when you log into the web site.

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4 Click the Order Number link of the order you are changing.

5 The order displays, item by item, similar to the shopping cart.

6 From this page, you can complete the same actions as mentioned in **Chapter 6: Using the Shopping Cart.**

7 The order must go through the checkout process before it can be approved.

Viewing Held Orders

This page allows you to view orders on hold. Use the following instructions to view orders on hold.

Note: This option is available only if you have orders on hold.

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1 Click Held Orders in the My Account portion of the web page.

2 When the Held Orders page opens, you see a list of orders on hold. If there are no orders on hold, the message No Hold Orders at This Time appears.

3 To retrieve an order on hold, click its order number.

4 The order displays. You can add to the order or check out. Refer to **Chapter 3: Using the Order Center**.

6 Using the Shopping Cart

You can view the items you have placed on an order using the View Cart feature. Before you complete the order, you can add or remove items from the order.

1. To view items in the cart, you must already be logged into the web site and have an order started. Click View.
2. The Shopping Cart web page opens, listing all the items on this order. This includes the item number and description; the unit of measure, the price, the quantity, and the item sub-total amount. At this point, you can add additional items to the order using the Quick Order feature, change the quantity of this item on the order, delete the item from the order, add item comments, add an item to a favorites list, delete the entire order, print the order, hold the order, return to catalog, or proceed to the check out.
    - **Add an Item to the Order:** You can use the Prefix and Item # boxes to add an additional item to the order. In the Prefix box, enter the item manufacturer's prefix, MMM or SEL, for example. In the Item # box, enter the number of the item you want to place on the order. In the Quantity box, enter the quantity of this item you want to purchase. For example, if you want to place two items on the order, type **2**. Enter any item comments in the Comments box. The comments you enter print on the order below the item. Click Add to Cart. The item is added to the order.
    - **Change the Quantity:** To the right of each item is the list price and the Qty box. This box lets you enter the quantity of this item you want to place on the order. To change the quantity, click the cursor in the Qty box and enter the quantity you want to order. For example, to order two, type **2**. After you enter the new quantity, click Update.

Note: The unit of measure for each item is shown below the Add to Favorite button. For instance, "Each," so you would enter the number of individual items you want. If the unit of measure is Box or Package, the product is sold in boxes or packages of more than one item. For these products, enter the number of boxes or packages you want, not the number of individual items.

- **Add an Item to a Favorites List**: You can add any of the items in your cart to a Favorites list. Before you add the item, make sure the correct favorites list is selected. The list displayed in the Favorites drop down list box is the list to which the items are added. To change the list, click the down arrow and select the new list. Click Go.

After you select a favorites list you can add the item. Click the check box next to the item(s) you want to add. Select Add Selected Items to Favorite List from the drop down list at the top and bottom of the window. Click Go. The items are added to your favorites list.

- **Delete an Item:** You have two options for deleting an item. You can click the check box next to the item(s) you want to delete then from the drop down list box at the top and bottom of the screen, select Remove Selected Items From Cart. Click Go. The items are deleted from the cart. Another method you can use is click the Delete button in the bottom right-hand corner of the line item box.
- **Add Item Comments:** To add comments for an item, click the Comments box and enter the comments you want to attach to this item. The comments you enter print on the order below the item. Click Update.
- **Return to Catalog:** To return to the catalog and search for another item, click Return to Catalog. This takes you to the Browse Catalog web page. For more information on browsing the catalog, refer to **Chapter 3: Using the Order Center**.
- **Hold Order:** If you want to place this order on hold so you can complete it at another time, click Hold Order. The order is placed on hold. To access this order once it has been put on hold, click Held Orders in the Customer Center.
- **Delete Order:** To delete an entire order, click Delete Order. The order is deleted. To return to the Home page, click Home.
- **Check Out:** Complete the order, click Check Out. The Check Out web page opens. Go to **Chapter 7: Checking Out**.
- **Print this Order:** Before you print a copy of the order, make sure your printer is turned on and is online. To retain a copy of the order for your records, click Print This Order. A dialog box opens so you can select the correct printer and the number of copies you want to print. When all your printer settings are correct, click OK. The invoice prints and lists all items. Any comment lines, special instructions, and other information you specified are included.

7 Checking Out

When you finish placing items on the order, you can complete the order. You do this by proceeding to the checkout. Use the following instructions to complete the order:

You cannot change the billing address information. The cursor does not move to these boxes. They are for display purposes only. If you need to change the billing address, notify your dealer.

1 Click Order or Check Out in the Shopping Cart portion of the web page.

2 Depending on the security settings of your web browser, a security message may appear, notifying you that you're entering a secure web site. If this security message appears, click OK.

3 The Check Out web page opens, as shown in Figure 7-1. This page shows all the items you've placed on the order, along with the billing, shipping, and payment information.

At this point, you can change the following information for this order:

- **Shipping Information:** The Shipping Information boxes already contain an address. If you need to change the shipping address for this order, click the cursor in the Shipping Address boxes (the Company through Zip boxes) and enter the new shipping address over the existing address.
- **Phone Number:** To change the phone number assigned to this order, click the cursor in the Phone box and enter the new phone number. Enter an extension in the Ext box.
- **Purchase Order Number:** To change the purchase order number, click the cursor in the PO # box, and enter the purchase order number you want to use.
- **Requisition Number:** To change the requisition number, (long purchase order number), click the cursor in the Requisition # (Long PO #) box, and enter the requisition number you want to use.
- **Attention Name:** To change the attention's name for this order, click the cursor in the Attn Name box and enter the new attention's name over the existing attention's name. The attention indicates to whom you want the order to be directed.
- **Payment Information:** The Payment/Credit Card Type through Name on Credit Card boxes let you specify how you plan to pay

for this order. In the Payment/Credit Card Type list box, click the down arrow and click the payment method, Open Account or

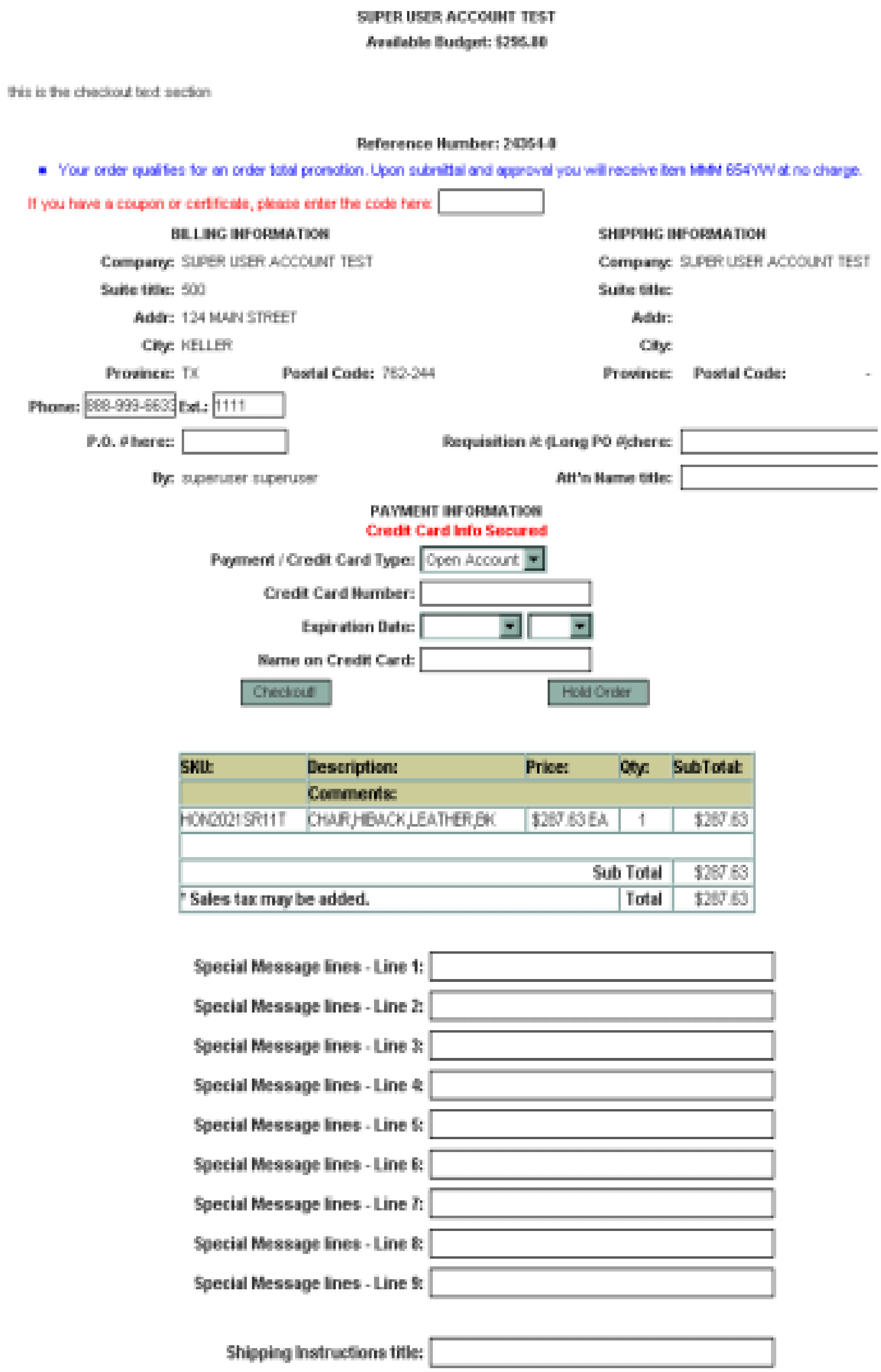

Figure 7-1: The Checkout Web Page

Visa, for example. If you're paying for this order by credit card, enter the credit card number in the Credit Card Number box. You do not need to include the spaces. Select the month and the year the credit card expires in the Expiration Date boxes. For example, if the credit card expires January 2006, use the drop down Month menu and click January. In the drop down Year menu click 2006. In the Name on Credit Card box, enter the name listed on the credit card. You must enter the name exactly as it appears.

- **Special Message Line 1 – Line 5:** You can use these lines to enter any message you want to attach to this order. The text you enter prints on the bottom of the invoice. For example, you could enter the text **These Items Are Needed Before Friday**. If you run out of room on one line, click the cursor in the next line and continue the message. You can enter up to five lines of text.
- **Shipping Instructions:** You can use this box to enter any shipping information you want to print on the order. For example, you could enter the text **Deliver the Items to the Back Door** or **Receiving Closes From 12:00 pm to 1:00 pm**.

4 When you finish specifying the information for this order, you can submit the order for processing, or you can place the order on hold.

- To submit the order, click Submit Order. The Submit web page opens. At this point, you can print a copy of this order for your records. Before you print a copy of the invoice, make sure your printer is turned on and is online. To print the invoice, click Print This Order. A new browser window opens containing the order. The invoice begins printing and lists all the items you ordered. Any comment lines, special instructions, and other information you specified are included on the invoice as well as a credit card approval code. After you print the order, close the window or click Return to Catalog to begin a new order.
- To place the order on hold so you can submit later, click Hold Order.
- To return to the Search Catalog and begin a new order, click the Continue Shopping link at the bottom of the page. To return to the Home page, click Home.

Note: Your order will be time stamped when it is transmitted for order placement accuracy.

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8 Using the Contact Us Feature

You can use the Contact Us feature as an email tool to send information to your dealer. This feature lets you send comments, complaints and suggestions.

1 Log into the web site. If you need instructions, see **Chapter 1: Logging In.**

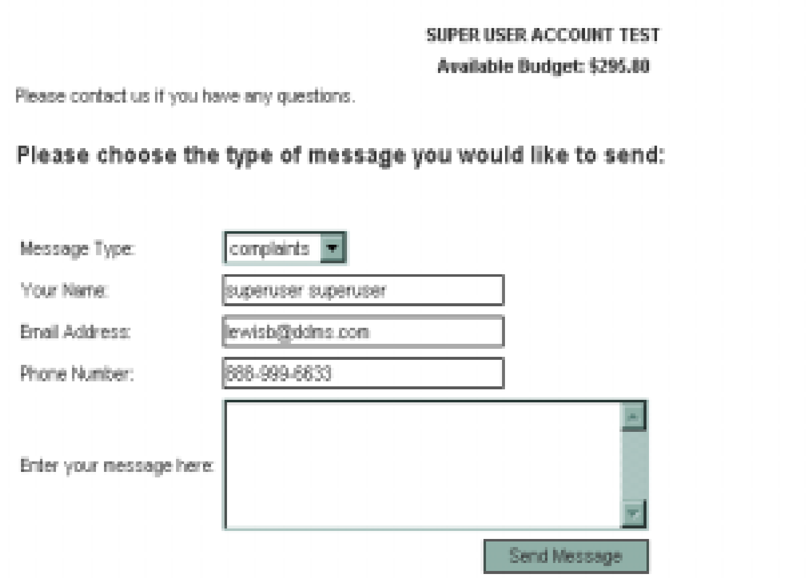

Figure 8-1: The Contact Us Web Page

2. After the Home page opens, click Contact Us.
3. The Contact Us web page opens, as show in Figure 8-1. In the Message Type box, click the down arrow and specify the type of comment you are sending. Click the appropriate option.
4. Type your name and email address in the Your Name and E-mail address boxes. The name you enter prints on the message, notifying your dealer who sent the message.
5. In the Phone Number box, enter your company's phone number, if desired.
6. In the Enter Your Message Here box, enter the text you want to send as the body of your message.
7. When you finish entering information, click Send Message. The message is sent to your dealer's e-mail address.
8. Click Home to return to the Home page.

9 *Viewing the About Us Page*

The About Us web page briefly describes how the web page has been designed and how it works. This page contains only text.

To learn more about the web site, use the following instructions:

1. Log into the web site. If you need instructions, see **Chapter 1: Logging In**.
2. After the home page opens, click About Us.
3. The web page opens, as shown in Figure 9-1. When you finish reviewing the company information, click Home to return to the Home page.

Figure 9-1: The About Us Web Page

10 Logging Out

When you finish placing or viewing orders, you can exit the web site. To do so, use the following steps:

1. From the Home page, click Logout in the Member Sign On portion of the web page.
2. The Login page opens. Close the Login page window.

Glossary

bandwidth the amount of information you can move through a connection. It's measured in *bps*. As a rule of thumb, you need 10–15 kbps (10–15 thousand bits per second) for each simultaneous user you expect to have on your e-commerce system.

bps abbreviation for bits per second. It's a measure of how much information can flow through a connection. A 56k modem, for example, can move 56,000 bps. A bit is the smallest piece of digital information: it represents a single digit, either a 1 or a Ø. A computer's capacity is usually listed in bytes. A byte is eight bits. If your computer has 64 megabytes of memory, for example, this is roughly 64 million bytes, or 512 million bits (64,000,000 X 8).

browser a software program that lets you view web pages. The most popular browsers are Microsoft's Internet Explorer, Netscape's Navigator, and America Online's proprietary browser. A web page that looks good in one browser may not look good in another.

baud rate the speed of a device in *bps* (bits per second), and is set according to the baud rate of the device.

dial up access a way to connect two computers using a regular telephone line. Each computer uses a modem. Dial-up access is inexpensive but offers limited *bandwidth*. You can normally achieve a bandwidth of 56,000 *bps* using *POTS*, or 128,000 bps using *ISDN*. If you need more bandwidth than this, you'll need a *leased line*.

frame relay a type of *leased line* that sends *packets* in high speed bursts. In the U.S., frame relay service generally provides transmission speeds between 56,000 *bps* and 1.54 million *bps* (the speed of a *T1 line*). Frame relays use a phone company's existing *T1* and *T3* lines, and are often a popular and inexpensive way to obtain high speed connections.

ftp abbreviation for File Transfer Protocol, the method used to transfer files on the Internet.

home page the first page a visitor sees when accessing a *web site*.

host a computer that provides services to other computers on a network. See also *server*.

ISDN abbreviation for Integrated Services Digital Network. It's a way of sending information over phone lines at high speed. ISDN lines often provide two lines together, which are called B channels. Each B channel can transfer information at up to 64,000 *bps*; together, the two lines offer up to 128,000 *bps*.

ISP abbreviation for Internet Service Provider. It's a company that provides access to the Internet. Your ISP may be a company dedicated to that purpose, or it may be a local or national phone company.

leased line a phone line that you lease for your exclusive use. It may also be called a dedicated line. Faster Internet connections, such as a *T1 line* or a *frame relay*, require leased lines.

local loop this is the physical phone line that runs between your office and the phone company. When obtaining quotes from phone companies, check to see if they include a local loop charge.

network a group of two or more computer systems that are linked together.

operating system the most basic software on your computer. It transforms individual computer components (terminals, printers, modems, and so on) into a working system.

packets a piece of information, along with an address indicating where the information should be sent. A message traveling over the Internet may consist of a number of packets.

physical number each peripheral (printer, terminal, or modem) has a unique number. If you have three terminals, for example, they may have physical numbers 1, 2, and 3.

port pathway into and out of the computer.

POTS this stands for Plain Old Telephone Service, the phone service that most of us use. It is slower and can carry less *bandwidth* than digital phone services like *ISDN* or *T1 lines.*

reboot to restart the computer without turning the power off.

router a device that moves information between two or more *networks.* Routers move *packets* from one network to another.

server a computer that provides a specific service to other computers on a *network.* A file server, for example, provides file storage for the network. The term server can also refer to the software that performs this function. An e-mail server, for example, can be the software package that handles e-mail functions on a network. A *web site* also requires a server. In this case, both meanings apply: a web site server requires a computer dedicated to this task, and it also requires software that performs this function.

T1 line a leased line that can move information at up to 1,544,000 bits per second (often abbreviated as 1.54Mbps). A T1 line has 64 channels that information can flow through.

T3 line a leased line that can move information at up to 43 million *bps*. A T3 line has 672 channels that information can flow through.

web page a page of information posted on a *web site*. A single web site may be comprised of several individual web pages. For example, this web site consists of the Home page, the Search Catalog web page, the Quick Order web page, the Check Out page, and so on.

web site a location on the World Wide Web. Each site has a *home page*, which is the first page a visitor sees. It may also have other pages, and may include files to download.