

# Hosted Website

## Quick Start Guide

*Please use this Quick Start Guide to help you fully utilize the Hosted Website.*

**Log-On** – Although not required to view product, you must log-on with your unique User Name and Password for the site to allow you to view pricing and make an order. This must be set up by the site owner or your salesperson.

**User Name** – In the *User Name* field, type in your unique User Name. Multiple user logons are allowed for the same customer account. (i.e. Paint Shop, Body Shop, Parts Dept., etc...) Please discuss this option with the site owner.

**Password** – In the *Password* field, type in your password. Passwords are case sensitive. If you have forgotten your password, click the “Forgot your password?” link below the *Password* field box. Your password will be emailed to you if your password is setup in Account – Personal Info.

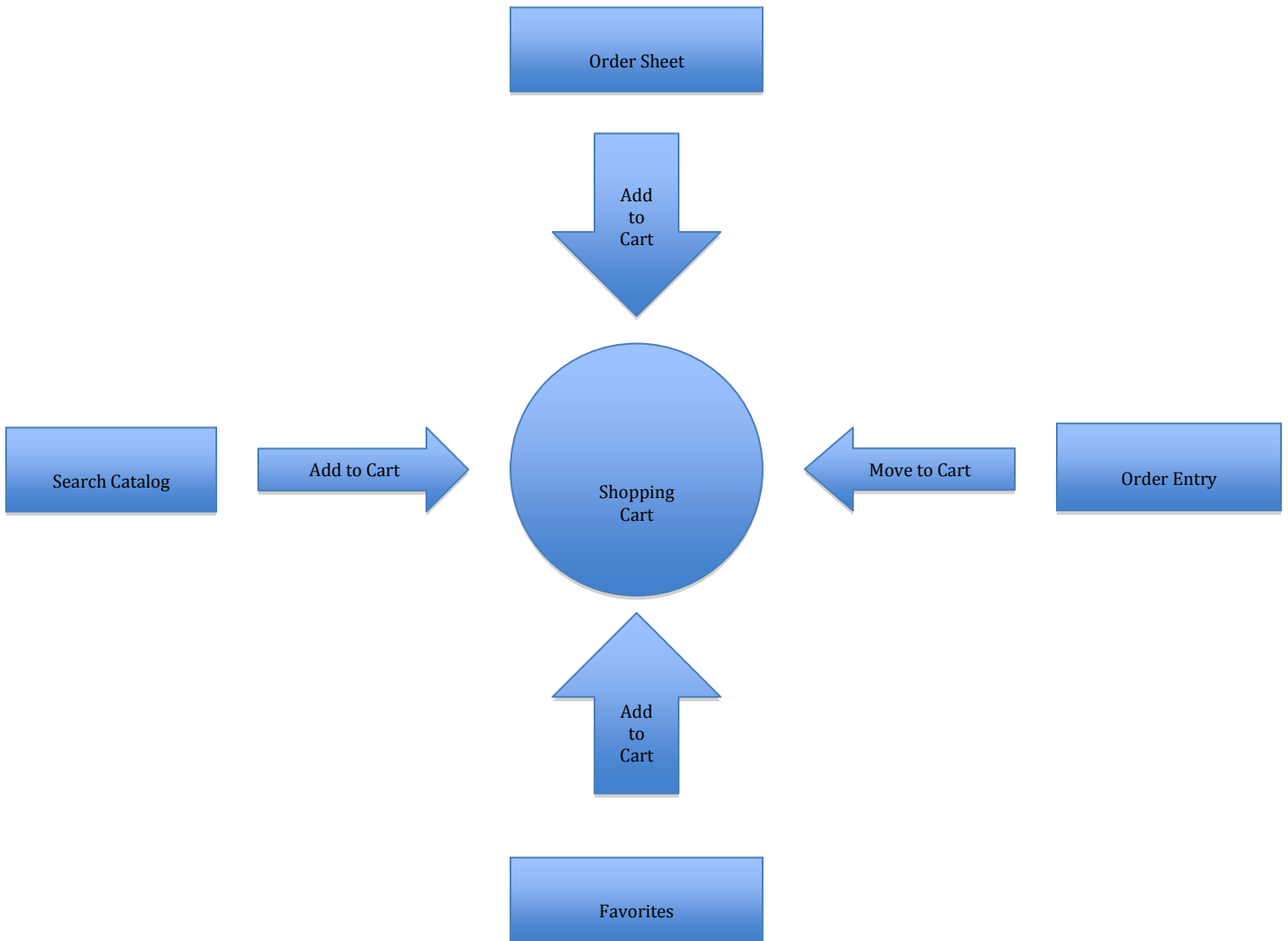
**Search Catalog** – There are 3 options for locating product:

**Search Entire Catalog** – This is the broadest search option. Type in a portion of the Part Number, Description, Manufacturer, Bar Code or Key Word and select “Go”. The next page will show all the items that match.

**Shop by Category** – This section will more quickly locate an item and show comparable items across product lines. Select the category that best describes the item you seek. The next page will display all items under that category.

**Shop by Brand** – If you know the manufacturer, simply select from the list. You will then be taken to a page that will list all the items for that manufacturer.

**Shopping Cart (View Cart)** – Once the desired product is found, simply click “Add to Cart” and the product will be stored in the shopping cart until the order has been submitted.



**Review Items** – After you have completed adding all the items to your shopping cart select “View Cart” to review your order.

**Delete Unwanted Items** – Upon review of the items, if there was an item added by mistake, simply click “Del” to delete the item.

**Change Quantities** – If the quantity of an item is incorrect, you can easily update it while viewing your cart. Be sure to click “Update” after changing any quantity.

### **Shopping Cart Continued**

**Add Comment** – This is where you can put in line item comments such as year, make and code for mixed paint. You must click “Submit Comment” after each comment is made.

**Checkout** – Once all desired products have been added to the cart, click “Checkout Now” and you will be taken to the “Order Summary” page.

**Order Summary (Checkout)** – Before submitting the order, you will be given an opportunity to view your order once again. If you discover an error in your order, there is an option to go back and “edit shopping cart”.

**Purchase Order** – This field may be required or optional.

**Add Comments** – Before submitting the order, if there are any order comments or specific instructions to be communicated put them in this field.

**Place Order** – Click “Place Order” to send the order; further changes will not be permitted.

**Email Confirmation** – If your email address is setup in Personal Info, once the order has been successfully submitted you will receive an email confirmation. Click on “Email Order” to resend the email confirmation and a copy will be sent to the email address(es) listed in your Personal Information.

**Order Entry** – Use this page to manually enter part numbers into an order. NOTE: Any items entered during the Order Entry process will not be added to the Shopping Cart until you click “Move to Cart”.

**Full Site** – There are a variety of entry options available on the Full Site that are not available on the Mobile Site. Before beginning any of these options, you may find it helpful to check the “Auto Add Part Number to grid if Bar Code is Entered” box. By selecting this box you have enabled a feature that will automatically add each part to the grid if a bar code is entered.

**Partial Part No. Entry** – By entering part of the part number or description and pressing enter, a list of part numbers will be displayed for you. Select your desired item.

**Manufacturer** – As you click on the “Select Mfr” field a drop down menu will appear. Once the desired manufacturer is selected it will be inserted in the part number field.

**Barcode Scanning** – By connecting your barcode scanner to your computer by either USB or Bluetooth you can scan barcodes and the product will be displayed.

**Auto Add Part Number to grid if Bar Code is Entered** – When this box is checked, and a barcode is entered into the part number field, the item will automatically be added to the grid.

**File Upload** – Use the Motorola CS3070, Excel or any other method you choose to create a file to upload into Order Entry. Click “Browse” and find the file that contains the items you want to add. Click “Start upload!” and all items will appear on the page. Check for errors. Remember to click “Move to Cart” when complete.

*Barcode Scanning Batch Mode* – Batch Mode allows you to use the Motorola CS3070 scanner to scan each item and store it until you are able to connect to your computer. Once connected to your computer, you can upload your scanned items into Order Entry. NOTE: Once your scanned items have been successfully uploaded, clear the items stored in the scanner.

Make sure “Ignore parts with Blank Quantity” is not checked so a quantity of 1 will be used.

*Excel File* – If you are creating your order in Excel, you can upload that file as long as it is saved as a “Tab Delimited” text file.

## *Text File Format*

### Column 1

Part number or Barcode is required. If only providing the Barcode (like Batch Mode above) then columns 2 and 3 are not required.

### Column 2

Unit of Measure (only required if Part number is used)

### Column 3

Quantity. Only required if “Ignore parts with Blank Quantity” is checked. Otherwise, quantity of 1 is used.

**Ignore Parts with Blank Quantity** – When this box is checked, only items with quantities will be added to the grid. If this box is not checked, all items in the file will be added and if the quantity field is blank a quantity of 1 will be used.

**Order Entry - Mobile Site** – On the order entry page, use your Motorola CS3070 Barcode Scanner to scan the barcode on the desired product. Once the barcode appears in the display box it will send automatically and a quantity of 1 will be used. Items will be consolidated when moved to cart.

**Add a Comment** – Use this section to include special instructions or other information that needs to be communicated before the order is processed and delivered.

**Move to Cart** – Click “Move to Cart” to move all items on the Order Entry page into your Shopping Cart.

**Delete All** – Click “Delete All” to remove all items on your Order Entry page. It will not delete items that have already been sent to the Shopping Cart.

**Order Sheet** – This is setup in *Perfection Software* “Customer Stock Quantity” program and acts as a pre-stored list of items. A unique feature in this section is the “Bin Location” field. When included in setup, you will be able to sort by bin location and find items on the Order Sheet quickly.

**Favorites** – This section is setup by the customer and allows them to create their own personal list of “favorite” items.

**Adding Items** - To add items to this Favorites list, in the Product Detail page click “Add to Favorites” located underneath the Quantity field.

## **Account**

**Account Status** – This section allows you to see the most recent account information including Aging Amount and Total Due. There is a “Show Detail” option that allows you to see your outstanding open items on account.

**Order History** – If looking for details on a specific order, this section will allow you to view past orders. By narrowing the search parameters by date, finding previous invoices is simple and quick.

**Personal Info** – As information changes, especially email address(es), you can keep your orders coming in without disruption by updating personal information on this page.

**Setup Email Addresses** – You can include up to three email addresses that will receive email confirmation for all orders placed.

**Setup Name to Appear in Order Summary** – The name that appears in the “placed by” field in the order summary at checkout.

**Setup Default Language** – Select the default language for online content like MSDS, TDS and product data sheets.

**Save** – Be sure to click “Save” after making any changes.