direct components

INCORPORATED

DIRECT COMPONENTS

Customer Portal Instructions

Contents

Accessing the Portal

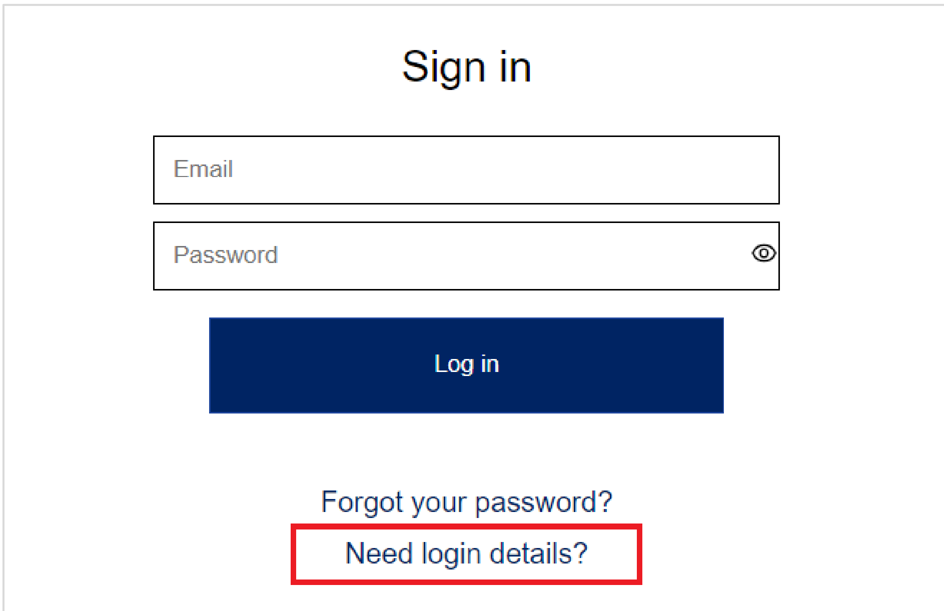
To access the portal, either query to customers.directics.com, or click the navigation button on directics.com.

If you're visiting for the first time, you'll have to request for an account. If you are a returning user, use your login credentials to sign into the application.

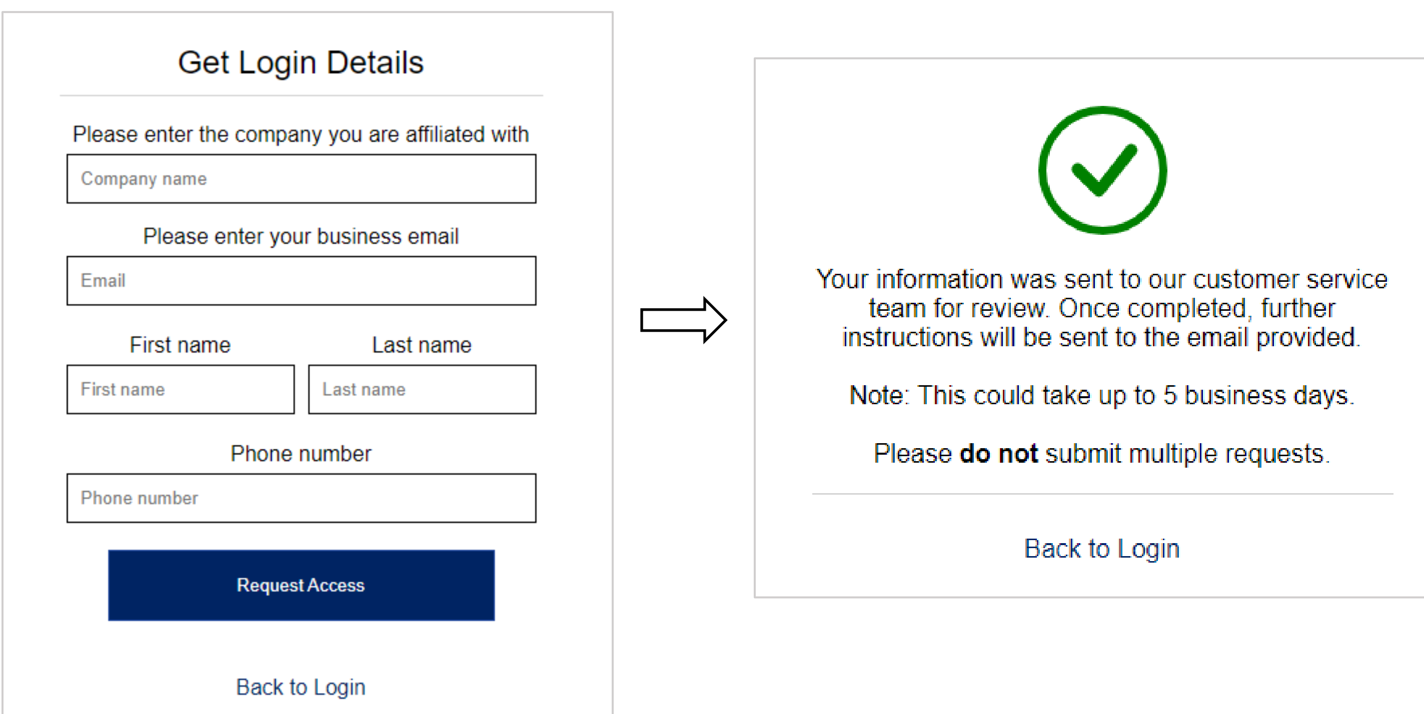
Register for an account

To register for an account, you will need to be a listed contact of your organization through Direct Components.

Click *Need login details?*



Fill out the form *fully* and click 'Request Access'.

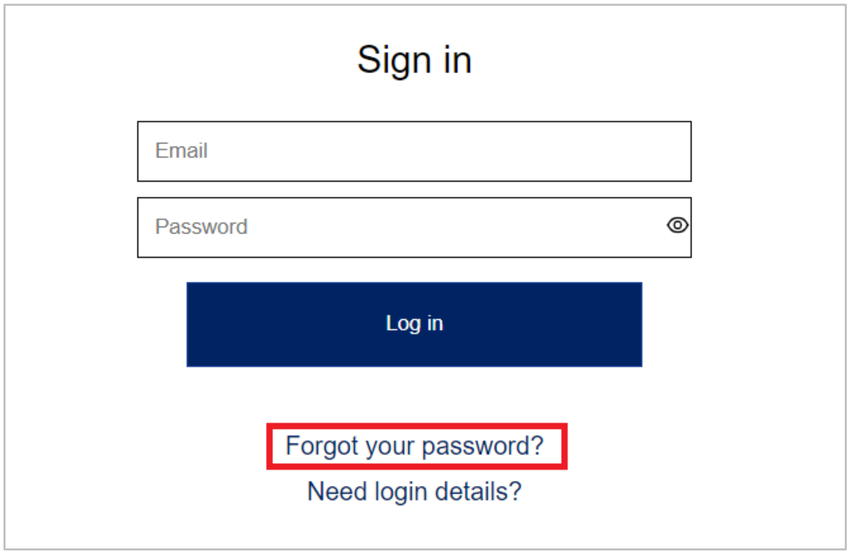


This will send your request to our customer service team, who will review and allow access if you are an authorized user. Be on the lookout for an email with further instructions.

Note! If you already have an account, you will receive an email shortly after sending the request and your information will not be forwarded to customer service.

Forgot Password

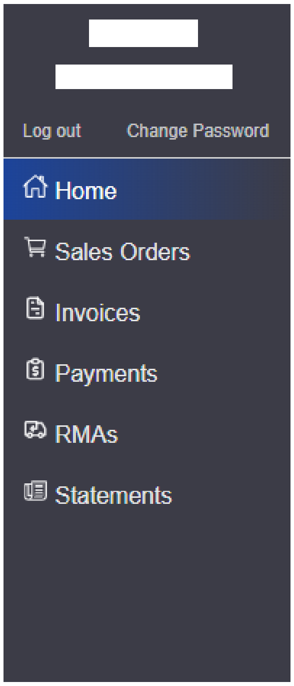
Already have an account but cannot access it? Try the 'Forgot your Password?' link under the login prompt.

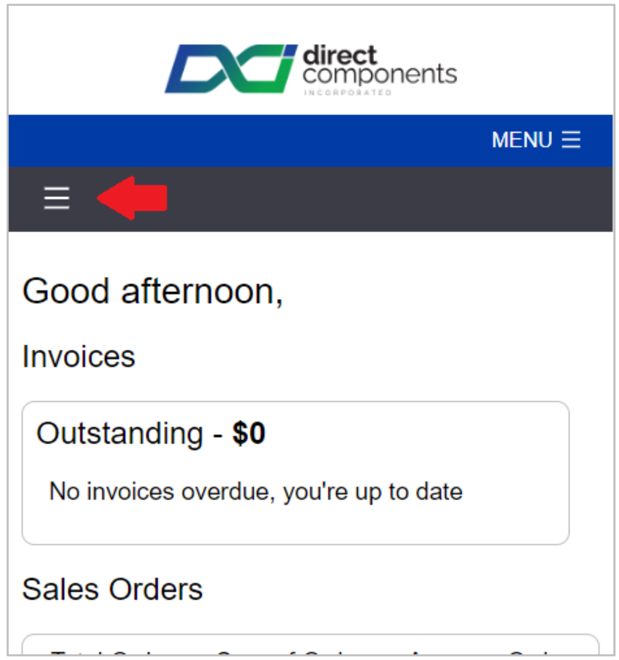


Enter your email (usually your business one) and await an automatic email return. If you do not receive one and you know you have an account, reach out to your sales representative or customer service for further help.

Navigation

Use the side navigation bar to move throughout the application. If you are on a small/mobile device, click the menu expand button towards the top to access the navigation panel.





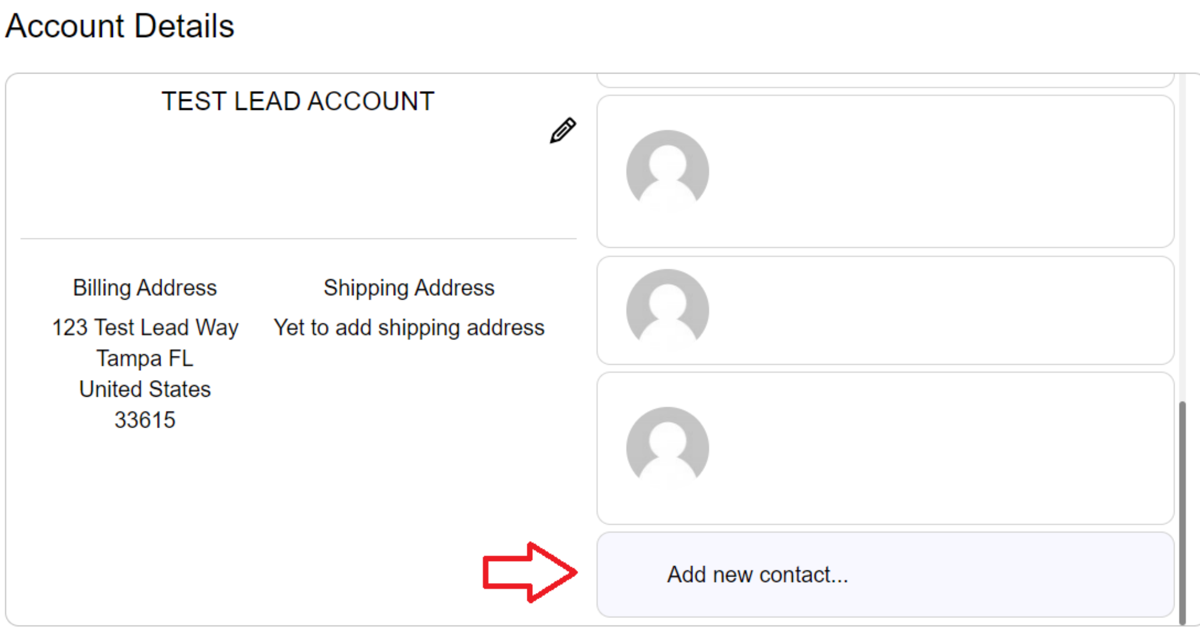
Home

The home tab allows you to view any invoices that are overdue, some statistics of your orders, and information about other members of your organization.

Adding a Contact to your Organization

You may add new contacts to your organization, for Direct Components to be kept up to date. Adding in additional contacts also allows them to request for an account to the portal, if needed.

Scroll to Account Details and scroll to the bottom of the list of contacts in your organization on the right.

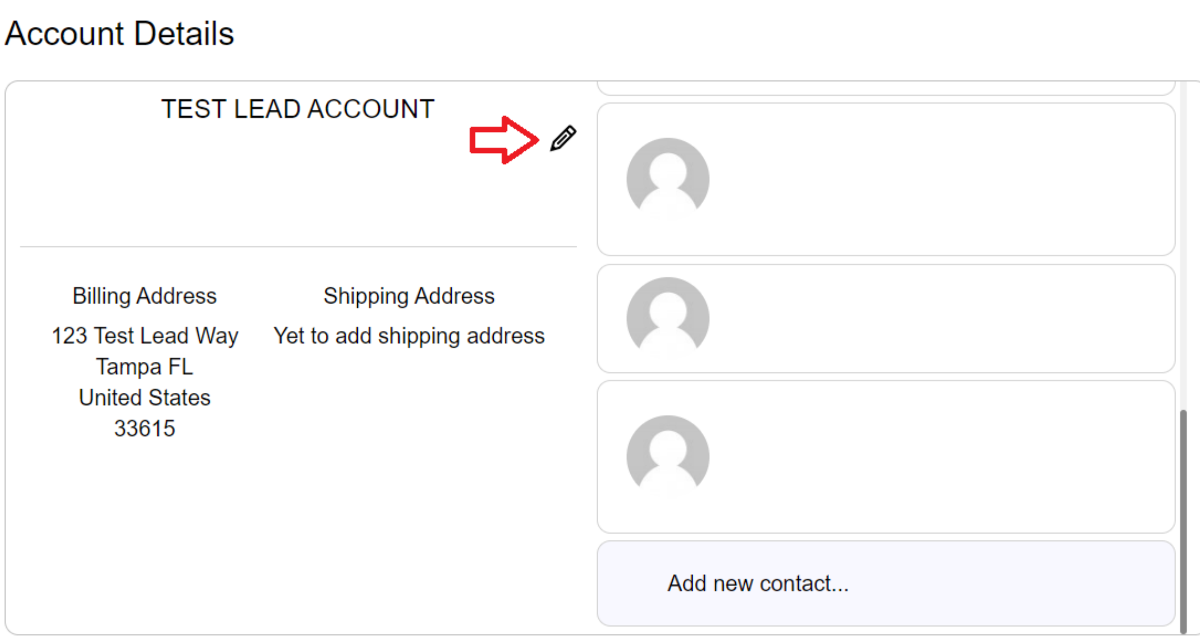


Enter the desired information and submit. The contact will now be listed in our organization and added to the list.

Note: At this time, users may not remove other contacts.

Editing your Information

To edit your own information, select the pencil icon next to your information under Account Details.



Sales Orders

View all orders from your organization from a glance or select an individual one for more information. You may click anywhere on the row to go into the single order view.

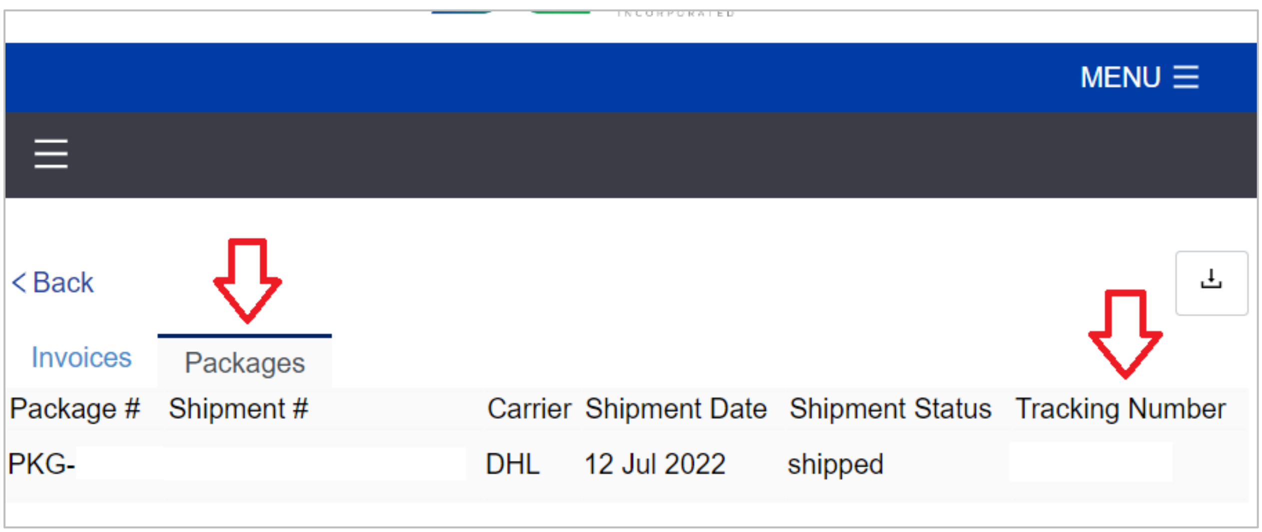
Downloading/Printing

Under a single order, select the download button from the top right.

After the order has been downloaded via PDF, you may print.

Tracking Information

To view tracking information (if available), query to an order through the order list, then click the Packages tab. If there is any information, it will be displayed here.



If you believe there is an error with the information, please contact your sales representative.

Invoices

Downloading/Printing

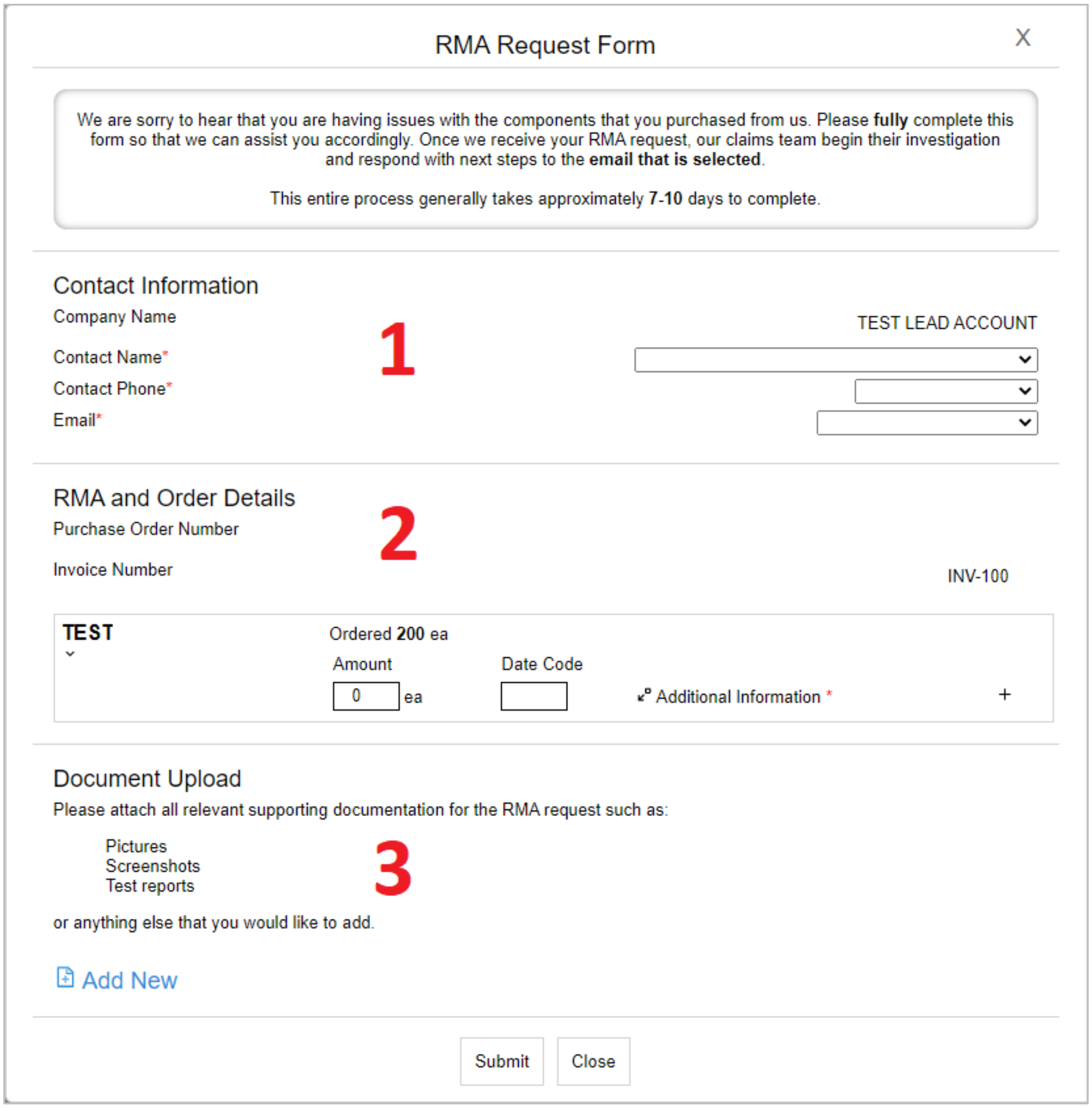
Under a single invoice, select the download button from the top right.

After the order has been downloaded via PDF, you may print.

Request an RMA

Once you select the invoice you would like to submit an RMA for, select the Request RMA button. If the button is grey, the proper information has yet to be loaded. Either wait for it to finish, or if it has been a while, refresh the page.

Once clicked, you will be prompted with the following window which will need to be completed for the RMA to be submitted.



1. Contact Information

Select the name, phone, and email of the contact for the RMA. This is the person who will be the primary contact for communications.

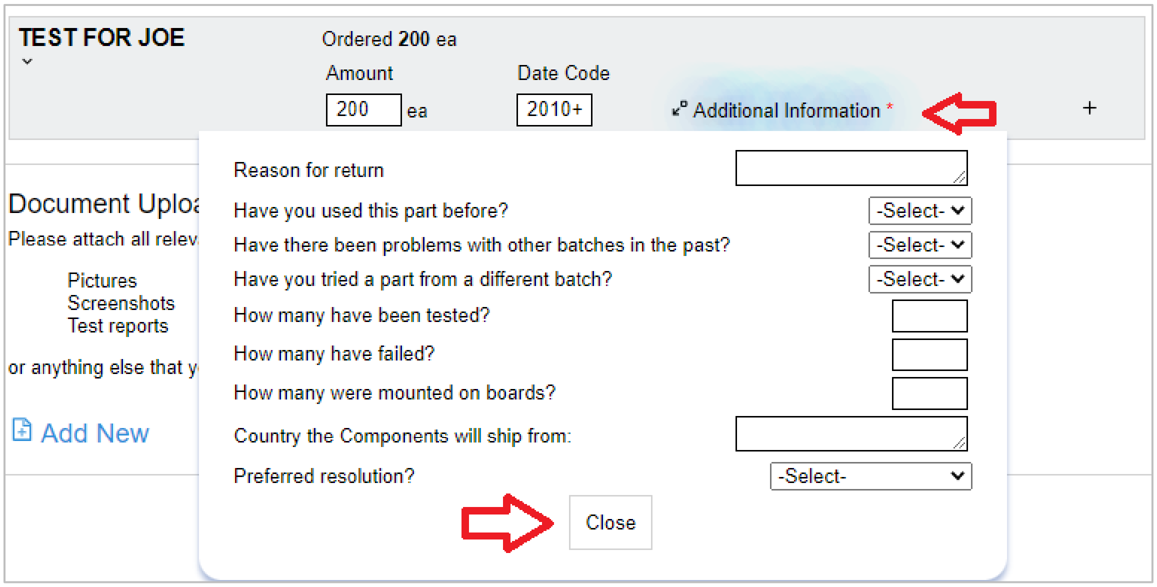
2. Part Information

Here will be listed each part of the invoice. From here you can add the amount and date code(s) for each part you would like to return.

Additional Information Tab

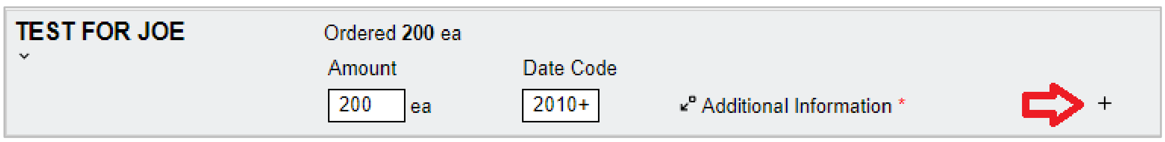
Clicking the additional information tab will bring a window with additional information that needs to be entered *per date lot* that is entered.

Once complete, you may either click out of the window, or the close button, as denoted.



Adding a New Date Lot

Click the + icon to the right of the part to add a new date lot for the part.



You may add as many date lots as needed for each part, each with their own amount.

Note: Each date lot will need the Additional Information filled out.

3. Document Upload

Select the documentation that you would like to add in support of the RMA.

Note: Attachments must be **under 5MB**.

Note: A minimum of **one** attachment must be on the RMA for it to be submitted, and a maximum of **5** are permitted.

Once the required information is filled out, click submit. If there are no errors, the RMA will be sent directly to our team for further review.

Payments

View payments that have been made by your organization. Each payment will have at least one reference invoice, which may be visited by clicking the link.

Note: There is no additional screens for payments.

Note: Payments **cannot** be made through the portal.

RMAs

View RMAs that have been submitted for your organization. Each RMA will have a reference invoice, which may be visited by clicking the link.

Note: There are no additional screens or information to be viewed for an RMA. If you need additional information or have questions, please contact your sales representative, or respond to the email you received after submitting.

Note: Once an RMA is submitted, it **cannot** be changed on the portal. Any changes need to be made by a member of our team.

Submitting an RMA

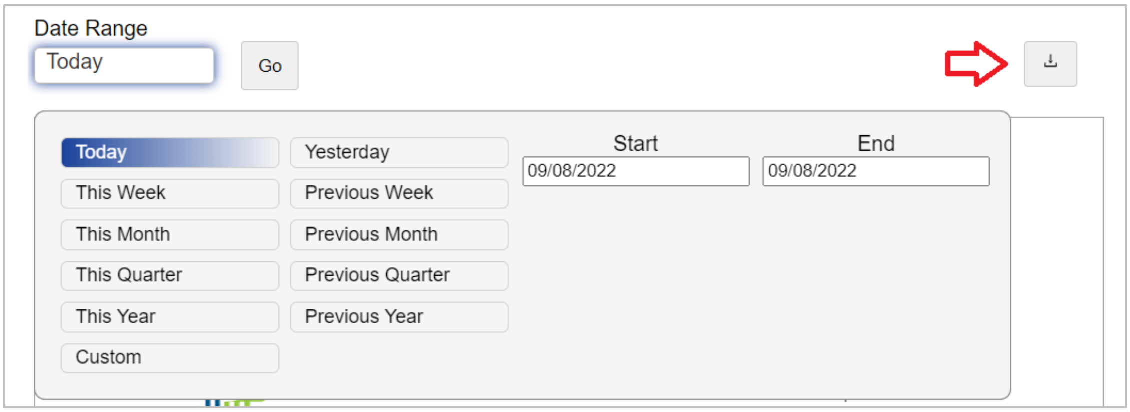
Please view Request An RMA section under invoices.

Statements

View a statement for your organization for a specified date range.

Downloading/Printing

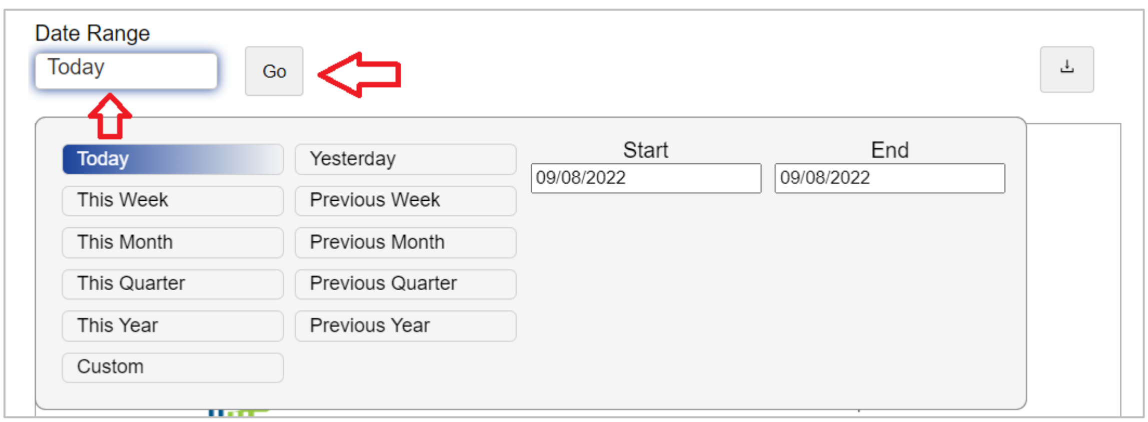
At the top right of the screen, click the download button to download a PDF of the statement.



Afterwards, you may print it from your operating system/program.

Changing Date Range

Click the date at the top left of the page.

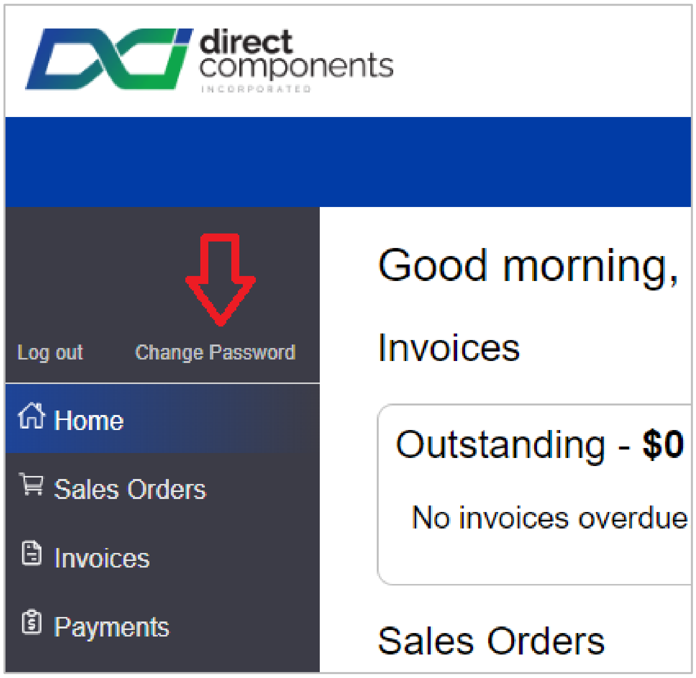


You may select a predetermined date or enter a custom date range.

Once selected, click the Go button. The page will refresh, and then the PDF may be downloaded.

Changing Password

Select Change Password from the top left navigation bar.



Fill out the required forms and submit. This will automatically take effect for your account.