# 36 Strategies

# CUSTOMER PORTAL USER GUIDE

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# 36S CUSTOMER PORTAL

## PORTAL FEATURES

- *Quick and easy order placement*

- *Easy reorders*

- *Order templates*

- *Order status visibility*

## ABOUT THIS GUIDE

This guide will provide you with an introduction and overview of the 36S Customer Portal. It will also provide you with instruction and guidelines on how to use the different options and features, enabling you to achieve the greatest benefits and user experience from using the portal.

# CHAPTER 1: GETTING STARTED

## A. BROWSER REQUIREMENTS

Use any of the following browsers that support JavaScript, image maps, graphics, forms and tables to access the 36S Portal.

- Internet Explorer 7+
- Mozilla Firefox
- Chrome
- Safari
- Opera 9+

For optimal usage, we suggest setting your monitor's screen resolution to a minimum of 1024 x 768 pixels.

## B. MOBILE COMPATIBILITY

The 36S Portal is compatible with the following mobile devices.

- iPad,
- iPad mini
- Android tablets (minimum resolution of 1024 x 768)

## C. ACCESSING THE PORTAL

To access the 36S Portal, you must first have a user account provided for you. Once an account has been setup for you, you will receive a welcome email containing your login credentials and access information.

### To Log In
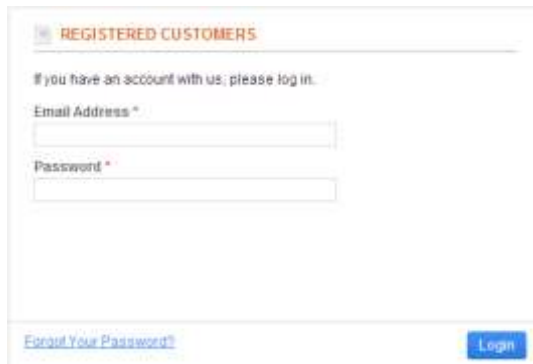
1. Click the Login link found in the top-right corner of the page.



2. Type your *Email Address*.

3.   Type your *Password.*

4.   Then, click the **Login** button.
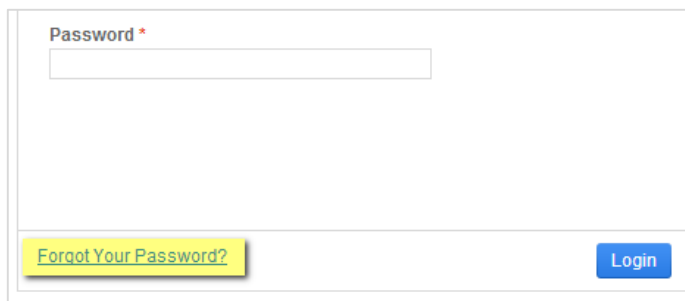


## D. LOST OR FORGOTTEN PASSWORD

If you forget your password, you can have it reset automatically and have a temporary password sent to the email address associated with your account.

### To Reset Your Password

1.   From the login page, click **Forgot Your Password?**



2.   At the next screen, enter the email address associated with your account, then click the Submit button.

3. You will receive an email containing a link to reset your password. Click the link provided to take you to the password reset page.

4. Enter in a new password, and then click Reset.
   **Note:** *(password must be at least 6 characters long)*

Reset a Password

New Password *

Confirm New Password *

Reset a Password

# CHAPTER 2: PLACING ORDERS

The 36S Customer Portal function much like any online web shop you visit on the Internet. You can browse products by category, view detailed product information, add items to your cart, and checkout to complete your order.

## A. BROWSING AND SELECTING PRODUCTS

Products in the portal are made available on a project by project basis. Therefore, the first thing you must do in order to browse products is to select a project.

When you select a project, you will directed to a store configured with only those products relevant to the selected project. Additionally, all relevant information associated with that project will be setup automatically for you to simplify the order placing process.

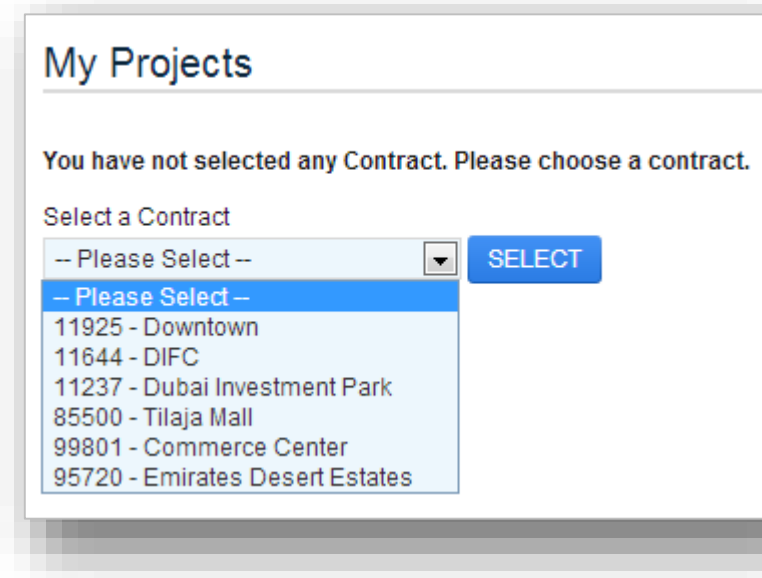### To Select/Re-Select a Project

1. Click the Please Select a Project found in the top-right corner of the page.

Welcome, John Daniels! Please Select a Project
My Account | My Product Lists | My Cart | Checkout | Log Out

Search entire store here...

2. Choose a Project from the dropdown menu, then click SELECT.



3. You will then be directed to the relevant store configured specifically for the selected project, the selected project will now be visible at the top of the page.
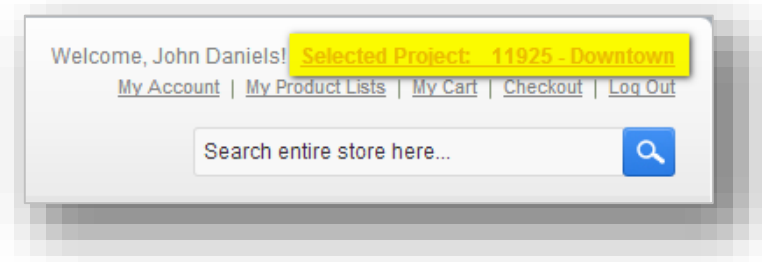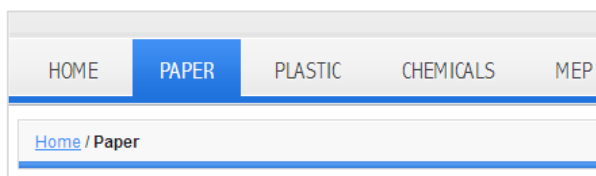


## To Browse For Products

As with any online web shop, the process of purchasing products begins with the selection of products. You can browse products by the primary category, or by conducting a search based on specific criteria.

1. Begin by selecting a primary product category from the Main Menu Bar.

2. The product category page will then be displayed, listing all products of that category.
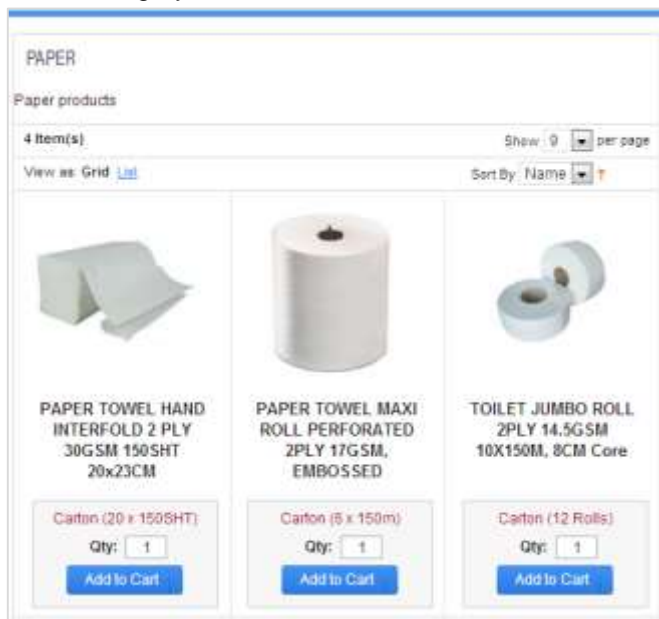


3. You can further narrow your search by choosing any of the product attributes in the Shop By menu bar in the left.



4. Click the product name or product photo to view detailed product information.

5.  Click the Product specifications tab to view more information.



## Adding Products To Your Cart

1.  From the Product Details page, enter the quantity you wish to purchase in the <u>Qty</u> box, and then click **Add to Cart**.
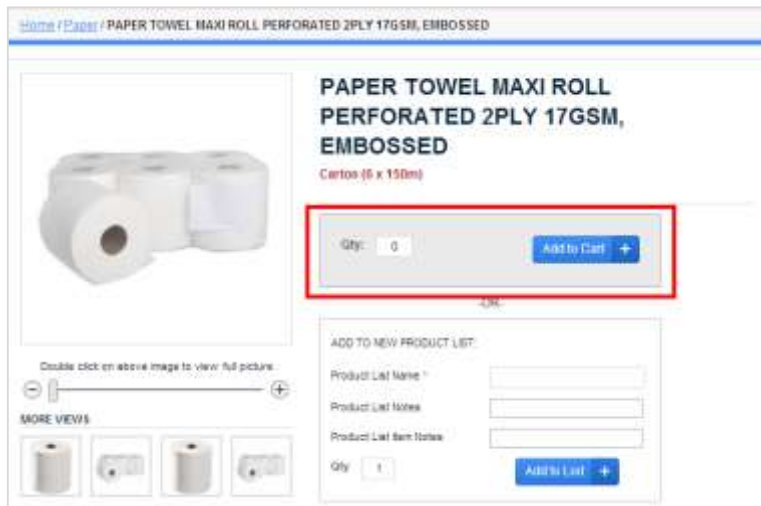
2.  Your cart will then be updated with the newly added quantities.



## B. VIEWING YOUR CART

You can view and edit your cart at any time before completing the checkout process.

### Viewing And Editing Your Cart

1.  To view your cart, click **My Cart** from the top menu.

2.  You can then edit quantities or delete items as needed.



3.  To change a product quantity, enter a new amount in the Qty box, and then click **Update Cart**.



4.  To remove a product entirely from your cart, click the X at the far right hand side of the product you wish to remove.



5.  To completely clear your cart of all selections, click the **Clear Shopping Cart**.

6. Click **Proceed to Checkout** once you are finished editing your cart.



## C. CHECKING OUT AND COMPLETING YOUR ORDER

The checkout process guides you through the necessary steps to successfully place an order.
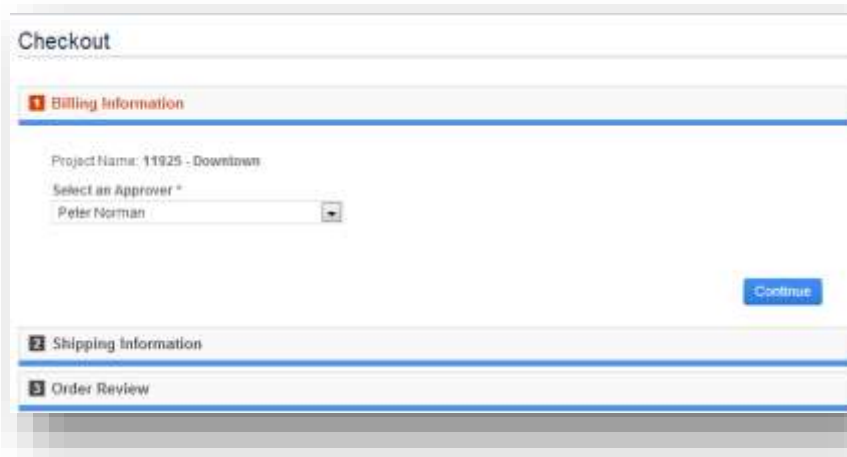
### To Check Out And Complete Your Order

1. When you are finished selecting products and editing your cart, click **Checkout** in the top menu bar, or click **Proceed to Checkout** from within your Shopping Cart.
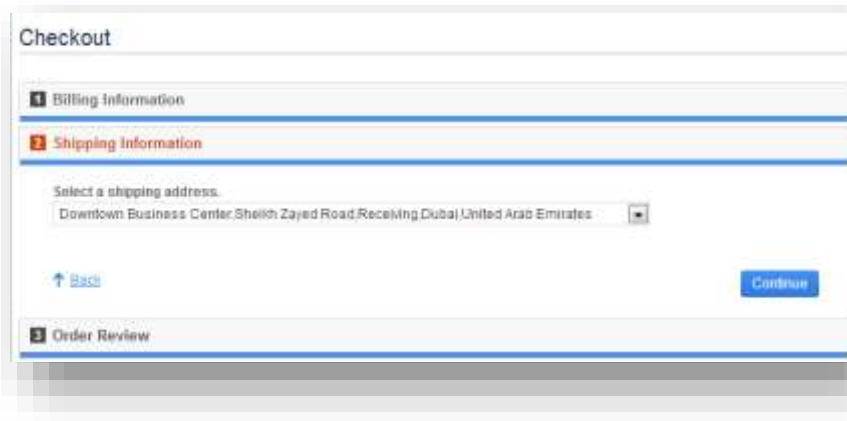


2. You will be directed to the Checkout page, where you specify the order approver and shipping information.

3.  Select an <u>Approver</u> to send this order to, then click **Continue**.



4.  Select a <u>Shipping Address</u>, and then click **Continue**.



5.  Review your order and enter an additional internal comment if desired.

6.  Click **Place Order** to complete your order. In a few seconds your order will complete, and you will see a confirmation message containing your order number.



# CHAPTER 3: MY ACCOUNT

The **My Account** section provides you with a central point for managing your account and orders.  You can access this section at any time by clicking the My Account link found at the top of the page.

On the sidebar on the left, you will find links to the following account sections

MY ACCOUNT

**Account Dashboard**
Account Information
Address Book
My Projects
My Orders
Order Approval
My Product Lists

**Account Dashboard**
Provides an overview of your account

**Account Information**
View account details and change your account password

**Address Book**
View billing and shipping addresses associated with your organization

**My Orders**
View your complete order history

**My Projects**
View Projects/Contracts that you are associated with

**Order Approvals**
View list of orders pending approval

**Product Lists**
View and manage product lists for quick and easy reordering

## A. ACCOUNT DASHBOARD

The **Account Dashboard** section provides you with an overview of your Recent Orders and Account Information.

**Recent Orders**
Lists your most recent orders and their associated orders statuses. View full order details, or easily reorder based on a previous order.

**Account Information**
Displays your contact information and default billing and shipping addresses.

## B. ACCOUNT INFORMATION

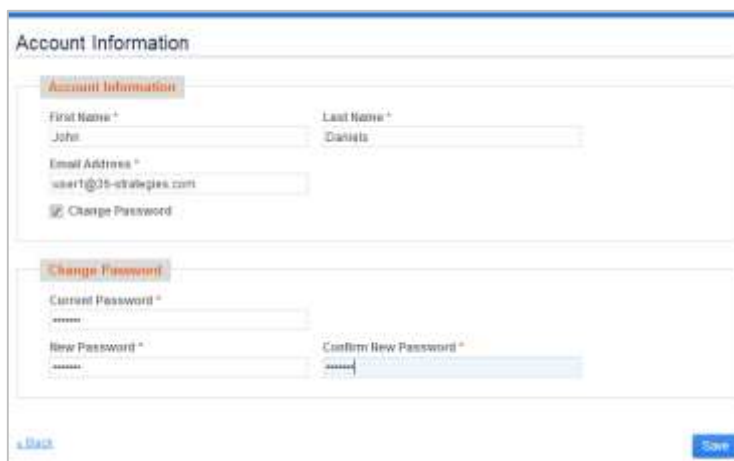The **Account Information** section allows you to view your account details and change your password.

You may change your login password at any time by going to the password change page. Passwords must be at least <u>6 characters</u> long.

## To Change Your Password

1. From the Account Information page, click **Change Password**

2. Enter your current password, then your new password in the fields provided.
   **Note:**  *(password must be at least 6 characters long)*

3. Click **Save**.



4. If successful, a confirmation message will be displayed on screen, and you will be redirected back to your account dashboard.

## C. MY ORDERS
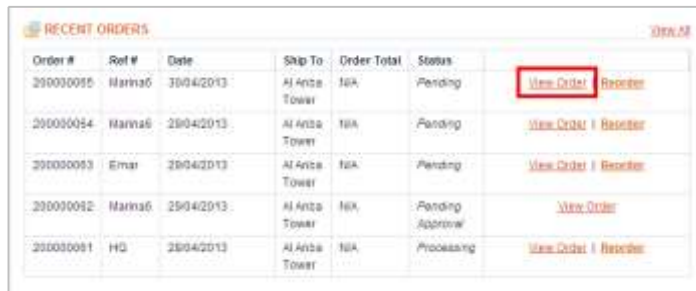
From the **My Orders** section you can view your complete order history, as well as drill into any order to view the full order details.

## To View An Order

1. From the **My Orders** section, click the **View Order** link next to the order you wish to view. The full order details will then be displayed.
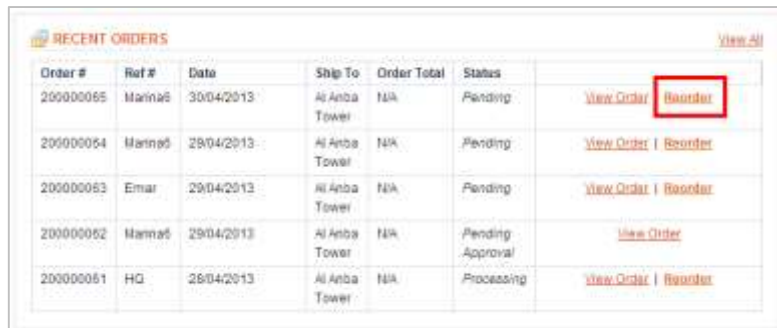
2.  From the order details page, you can print the order, view any related shipments or invoices, or save the order as a product list template.

## D. REORDERING

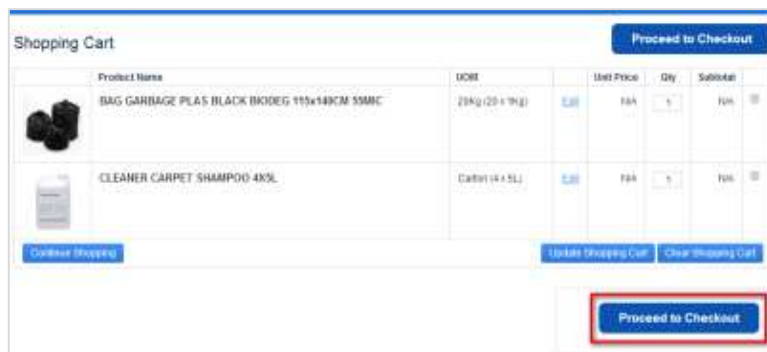The 36S portal allows you to easily reorder products based on a previous order.

### To Place a Reorder

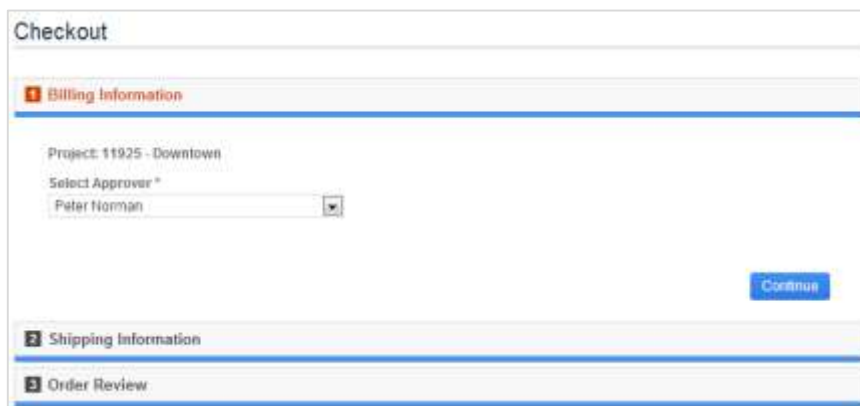1.  From either the Recent Orders or My Orders list, click the **Reorder** link next to the order you wish.



2.   You will then be redirected to you shopping cart, and you will see that the items and associated quantities from the base order will be added.

Click the **Checkout** button to complete the checkout process as normal.



## E. ORDER APPROVALS

If you are designated as an order approver for your organization, you will find a link labeled **Order Approvals** in the My Account menu. In this section, you can view, make comments to, and approve or Reject any orders which require your approval.
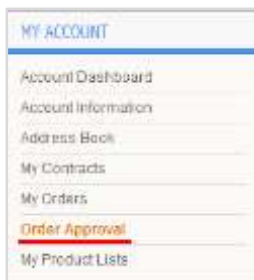
Depending on how the business rules have been configured for your organization, as well as how your profile is positioned in the approval chain, you may presented with several approval options.

### To View Orders Pending Approval By Others

1. From the My Account section, click **Order Approval** in the sidebar on the left.

2.  Any orders currently <u>Pending Approval</u> will be listed. Click **View Order** to view approval status and comments.



3.  Current approval status will be displayed at the top.



## To View Orders Pending Your Approval

1.  From the <u>My Account</u> section, click **Order Approval** in the sidebar on the left.

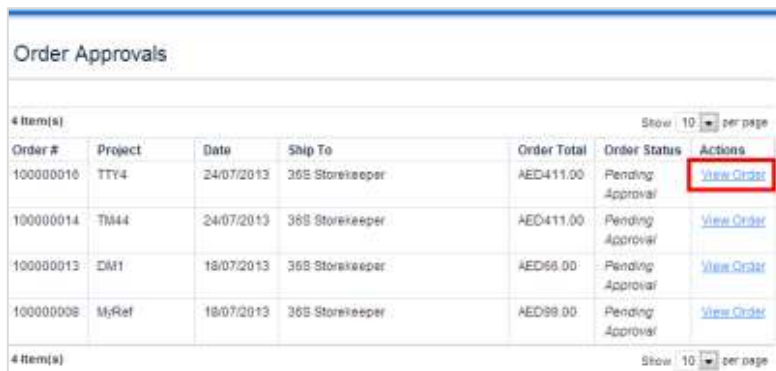2.  Any orders requiring your approval will be listed.

## To Approve An Order

1.  From the **Order Approval** section, click the **View Order** link for the relevant order. The order details will then be displayed.



2.  If the order requires additional approvals, you will prompted to select the next approver to send the order to.
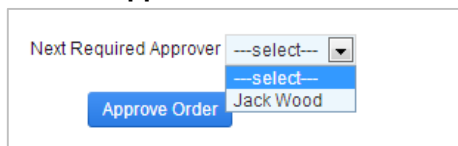


3.  Select either a <u>Required Approver</u>, or an <u>Optional Approver</u>, then click the **Approve Order** button.



4.  If you are the last required approver, you will now see a button labeled **Give Final Approval** button. Clicking this button completes the approval process and signifies to 36S that the order is now approved and ready for processing and delivery.

5.  **{OPTIONAL}** You can assign the order to another user for subsequent approval. *(If optional approvers are available/configured)*



6.  **{OPTIONAL}** Select an optional approver from the dropdown list. The Give Final Approval button will then change back to Approve Order. Click the Approve Order button to assign the order to the selected approver.



## To Reject An Order

1.  From the **Order Approval** section, click the **View Order** link for the relevant order. The order details will then be displayed.
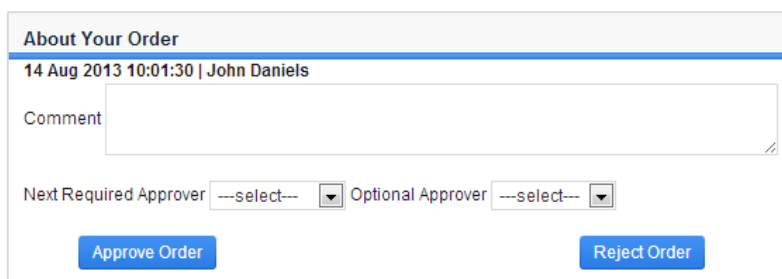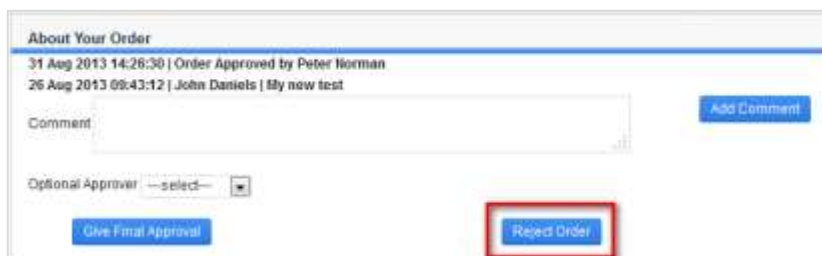


2.  At the bottom of the Order Details page, enter your rejection comments and click **Add Comment**. This step is important in order to explain to the requestor why the order was rejected.

3. After making your comment, click the **Reject Order** link at the top of the Order Details page to reject the order.



4. You will be redirected to the Order Approval list, and the order you just rejected will no longer be listed.

## F. PRODUCT LISTS

Products Lists allow you to create and manage lists of items for quick and easy re-ordering. The following are some of the features of using products lists



- Create and manage product lists for recurring purchases
- Duplicate product lists for easy list creation
- Add notes to the whole product list, or to just to a specific item
- Add products to an existing list or a new one
- Create new list from product page

### To Create A Product List

1. Click **My Product Lists** in the sidebar on the left.

2. Click **Create New List**.

3. Give you list a Name. Optionally, you can also provide a note for your reference.

4.  Click **Save**. You will now be redirected to you Product Lists overview page.



## To Add Items To A Product List

1.  Navigate to a product page of the item that you wish to add to a Product List.

2.  Select an existing Product List to add the item to from the dropdown list. Alternatively, you can create a new Product List as well.

3.  Enter the desired quantity in the Qty box.

4.  Click Add to List.



5.  You item will be added to the selected Product List, and you will be re-directed to the Product List details page to review your list.

6. If desired, enter and additional Item Note next to the item.

7. Click Save. The list will be saved and you will be re-directed to the Product List overview page.



## To View And Edit An Existing Product List

1. Click **My Product Lists** in the sidebar on the left.

2. Click View List to view your Product List for editing.



3. To edit a product, you can edit or delete any products as desired.

4. Click **Save** when finished.

## To Update Product List Item Quantities

1. While viewing a <u>Product List</u>, click **Edit** next to the item you wish to update.



2. You will then be redirected back to the product page. Update the quantity in the <u>Qty</u> box, and then click **Update List**.



## Removing Items From A Product List

1. While viewing a <u>Product List</u>, click the **checkbox** next to the item you wish to update.

2. From the <u>Actions</u> dropdown button, select **Remove**, and then click **Submit**.

## Using Product Lists To Quickly Place Orders

1.  Click **My Product Lists** in the top menu bar, or from the left sidebar within the My Account section.

2.  From your list of Products Lists, click **Add to Cart** next to the list you wish to purchase.



3.  The item and quantities associated with the Product List will be added to your shopping cart, and you will redirected to your cart where you can make final edits before checkout.



4.  Update any products and quantities as desired, and then click **Proceed to Checkout** when ready to complete your order.