E-COMMERCE USER MANUAL

For Customers

bartlegibson.com

Web Order Fulfillment

1. After placing your order, you will receive a confirmation email notification.
2. Our branch team and your sales representative will be notified.
3. The team will review your order. If everything is correct, your order will be picked.
4. We may contact you to confirm and prevent accidental ordering.
5. Once your order has been picked, you will be notified that your order is ready for pick-up. If your order is being delivered through your customer carrier, they will provide you with the shipping details.

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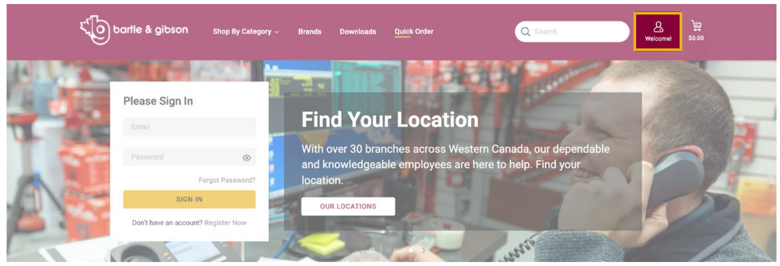
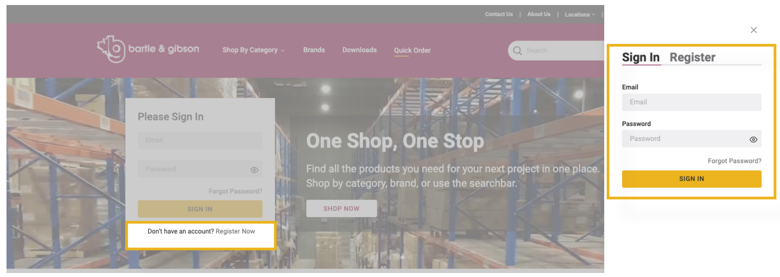
Account Management

Creating An Account

Register:

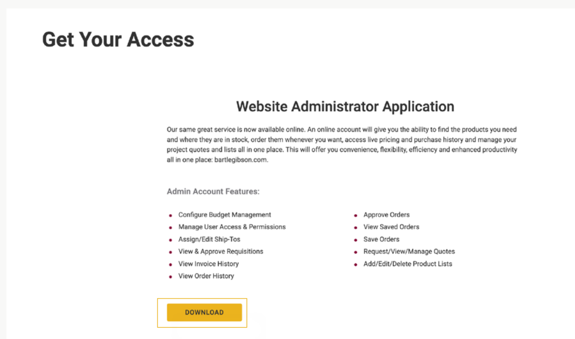
- From the homepage, create a new account by selecting the "Register Now" button. Start by selecting the user icon in the top right of your screen.





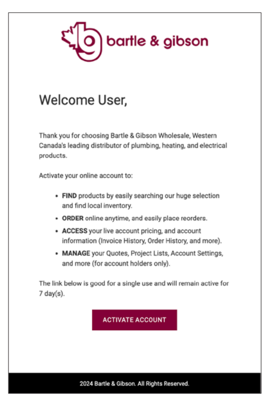
Download the Application:

- After selecting "Register Now", select the "Download" button to download the Website Administrator Application.
- Fill out the application and return it to the Bartle & Gibson credit department at credit-apps@bartlegibson.com.



Activate Your Account:

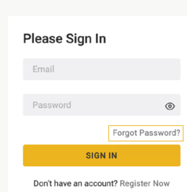
- Once your account has been set up by our team, you will receive an email notification to activate your web account.

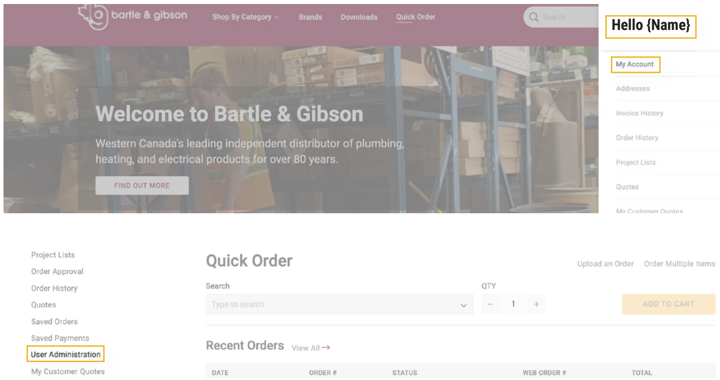


Sample email

Recover or Change Password:

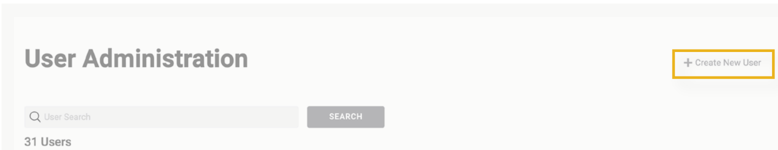
- If you have forgotten or need to change your password, select "Forgot Password?" to update your password. (you cannot recover your password, but only update it).



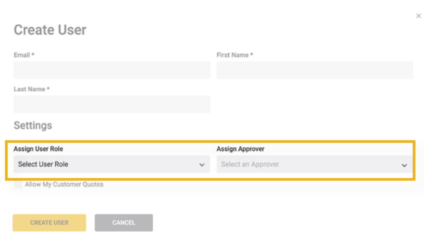


Creating Additional User Accounts

1. **Access User Administration:**
   - Administrators can create or assign different user accounts by selecting “Hello, [Your_ Name” or “My Account” in the account section.
   - From the left menu options, select “User Administration”.



2. **Create a New User:**
   - Select “Create New User” to add an additional user account.

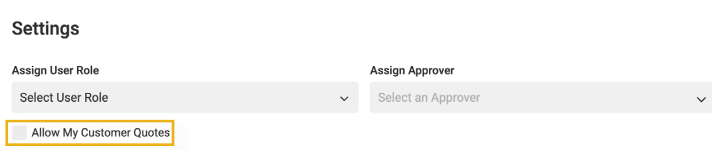


3. **Assign Roles and Approvals*:**
   - Assign a role to the new user using the dropdown menu.
   - Assign who approves their purchases using the dropdown menu.

**Refer to the User Permissions Table below for details on roles and permissions.*

User Permissions Table

PERMISSIONS	ADMINISTRATOR	BUYER 3	BUYER 2	BUYER 1
General Capabilities for Approving & Ordering	User Admin & Approver by Default	Able to Place Orders Without Approval & Can Act As Approver	Able to Place Orders Without Approval Within A Specified Budget	All Orders Placed Must Be Approved
Access/Configure Budget	✓			
Create New Users				
Edit/Deactivate Users	✓			
Assign/Edit Ship To	✓			
View & Approve Requisitions	✓			
View Invoice History	✓	✓		
All Orders Require Approval				✓
Orders Over x Require Approval			✓	
Approve Orders	✓	✓		✓
Save & View Saved Orders	✓	✓	✓	✓
View Order History	✓	✓	✓	✓
Request/View Quotes	✓	✓	✓	✓
Add/Edit/Delete Project List	✓	✓	✓	✓

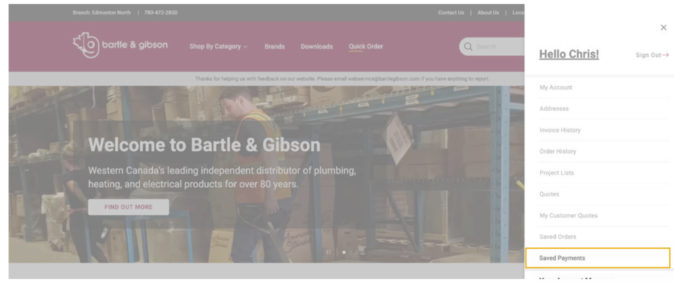


Select box if user is allowed to send out quotes to your customers using the My Customer Quotes tool.

When satisfied, click “Create User” to complete.

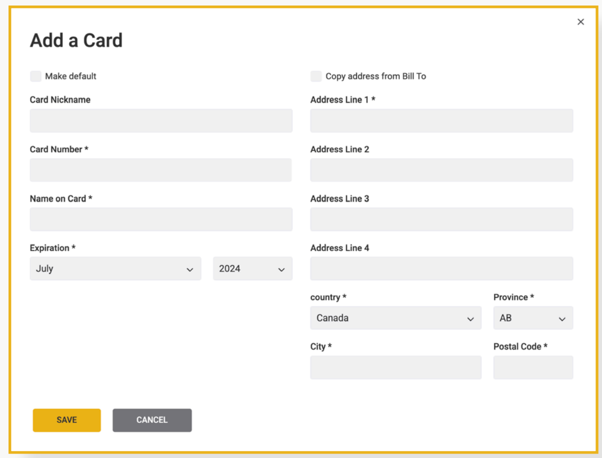
Adding or Updating A Payment Method

1. **Navigate to Saved Payments:**
   From your account dashboard, select "Saved Payments".



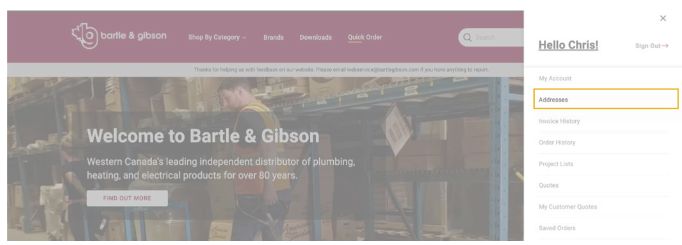
2. **Add a New Card:**
- Select "Add Card".
- Enter your card details.
- If you want to make this your default card, check the box labeled "Make default".

3. **Enter Billing Address:**
- Enter your billing address.
- To auto-fill your billing address, select "Copy address from Bill To".
- Save Your Details:
- Once you're satisfied with the information, select "Save".

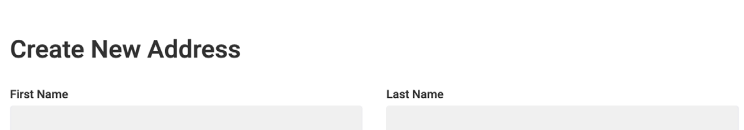


Adding or Updating Shipping Address

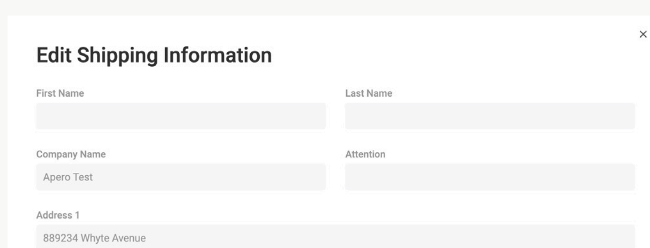
1. **Navigate to Addresses:**
   From your account dashboard, select "Addresses".



2. **Add a New Address:**
- Select "Create New Address".
- Enter the required details.
- Once you're satisfied with the information, select "Save".



3. **Update an Existing Address:**
- Find the address you want to update and select "Edit" below it.
- Update the necessary details.
- Once you're done, select "Save".

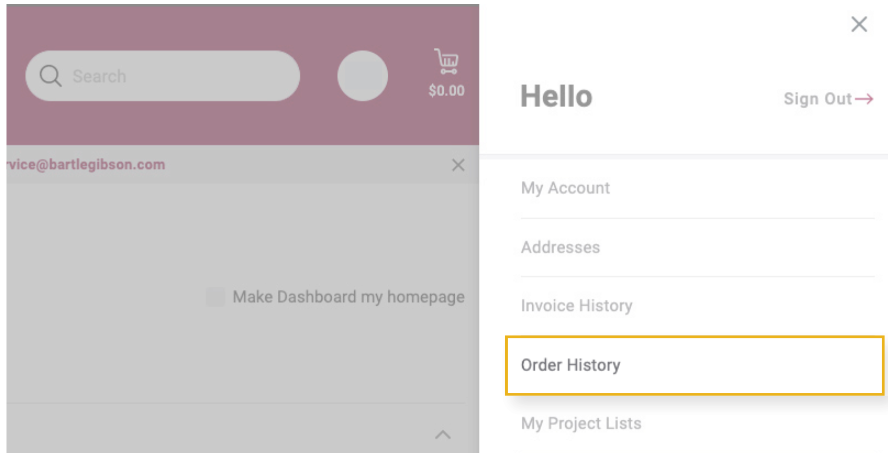


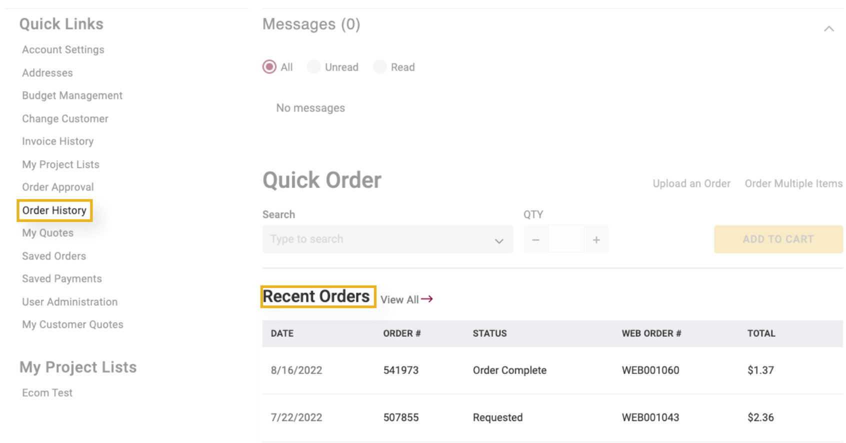
Note: to update your billing address, you will need to send an email to the credit department at credit-apps@bartlegibson.com with the updated address.

Order History

How To Access

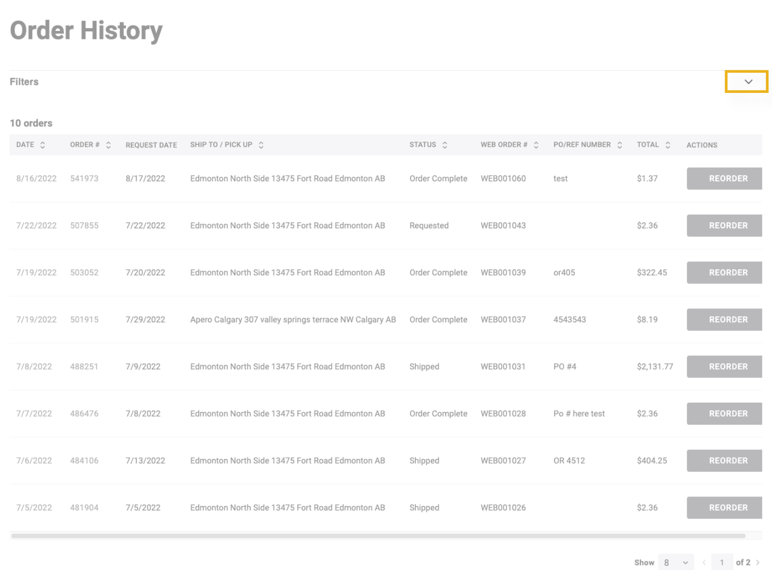
Once you are logged in, order history can be found on the "My Account" drawer and My Account page. You can also see your recent orders on your My Account page.



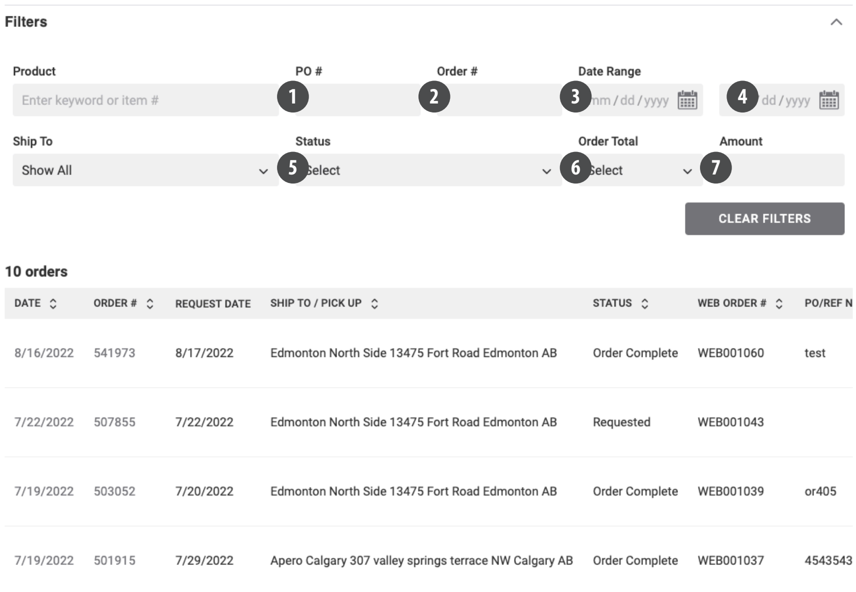


Find an Order

Once you are viewing the order history you can select the arrow beside "Filters" to show your filterable options and narrow down your order history list.



Order History

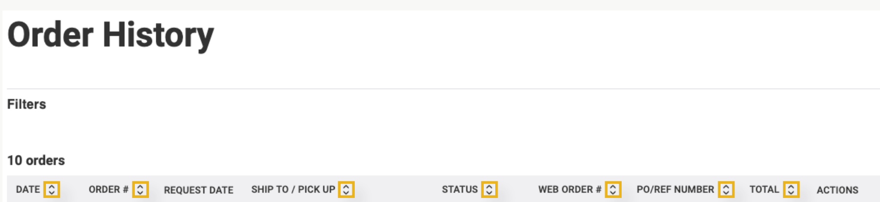


Finding an Order *Cont*

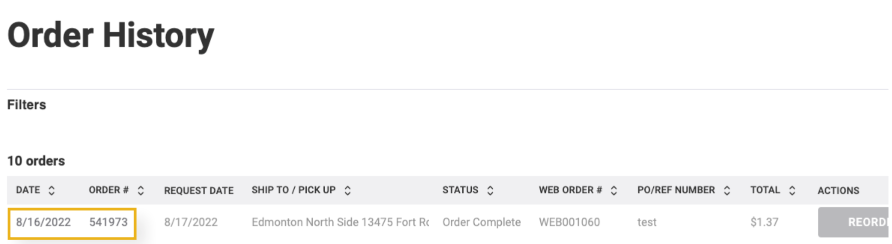
At the top of the Order History page you can efficiently locate specific orders using the following search criteria:

1. Product number or product keyword
2. Purchase Order Number
3. Order number
4. Date range when order was placed
5. The address the order was sent to
6. Order status
7. Order total

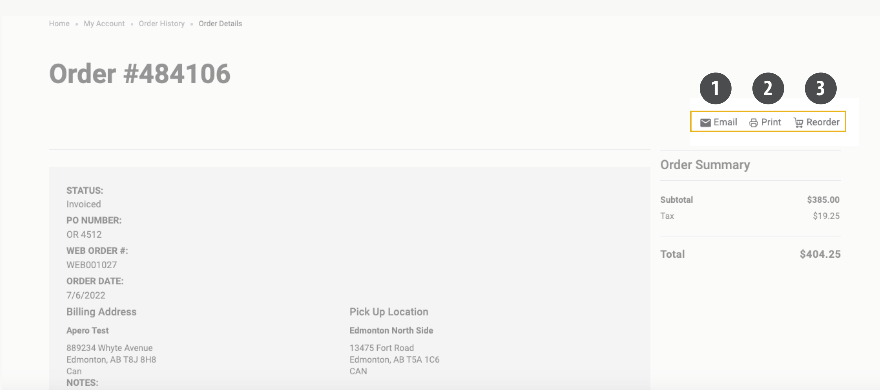
You can combine any of these criteria to refine their search and pinpoint the exact order(s) they are looking for.



The Order History table allows sorting of search results in ascending or descending order in any of the highlighted columns.



To view details of a specific order, simply select the hyperlinked date or order number. This view provides comprehensive information about the order, including the list of products, such as the shipping method, order notes, and order lines.



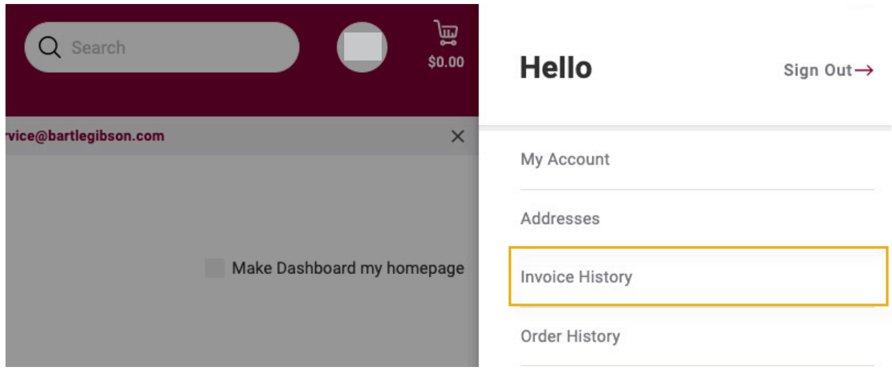
From the order details view, you can perform the following actions:

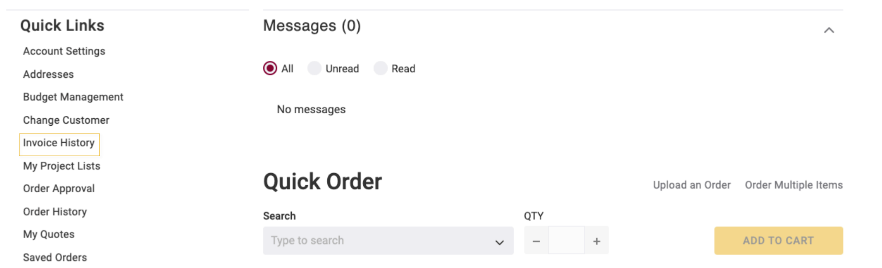
1. Email the order details
2. Print the order details
3. Reorder all items

Invoice History

How To Access

Once you are logged in, invoice history can be found on the "My Account" drawer and My Account page.



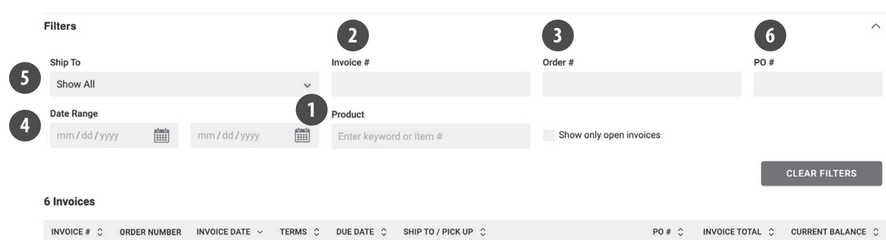


Finding an Invoice

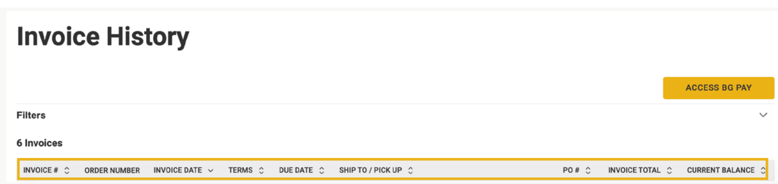
At the top of the Invoice History page you can efficiently locate specific invoices using the following search criteria:

1. Product number or product keyword
2. Invoice number
3. Order number
4. Date range when the invoice was created
5. The address the order was sent to
6. Purchase order number

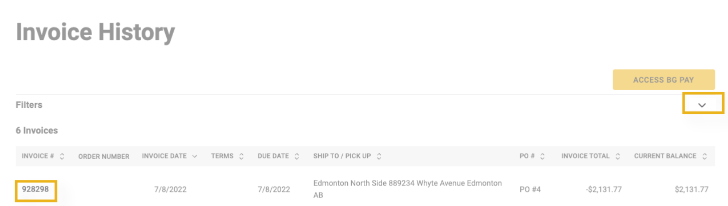
You can combine any of these criteria to refine their search and pinpoint the



The Invoice History table allows sorting of search results in ascending or descending order by any column.

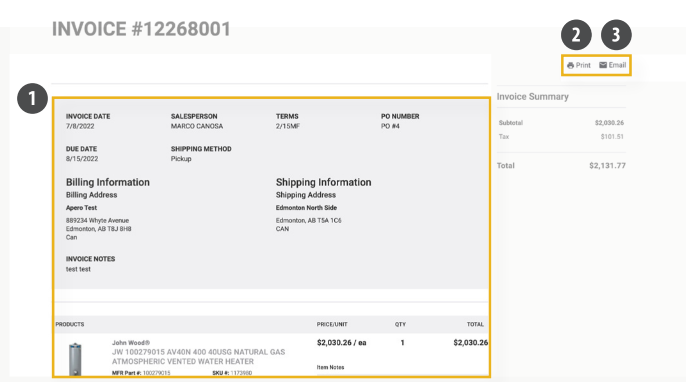


To view details of a invoice, simply select the hyperlinked invoice number. (Select the Order Number, to view the order details page, where you can reorder products from that invoice and order). This view provides comprehensive information about the invoice including the list of products, the shipping method, order notes, and order lines.

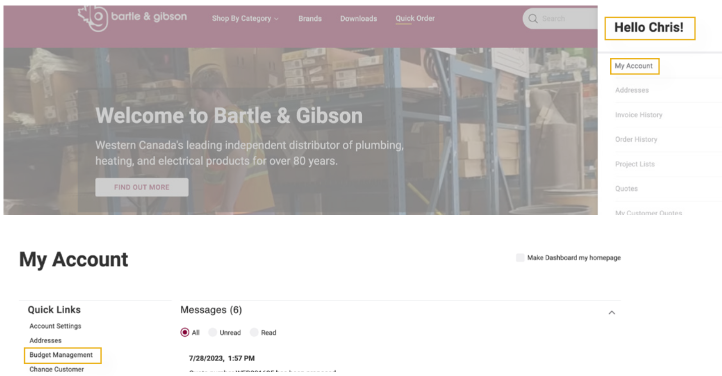


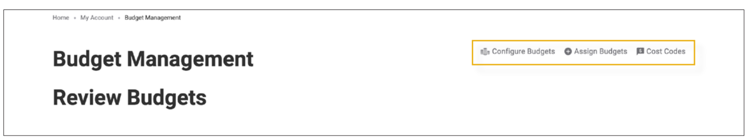
From the invoice details view, you can perform the following actions:

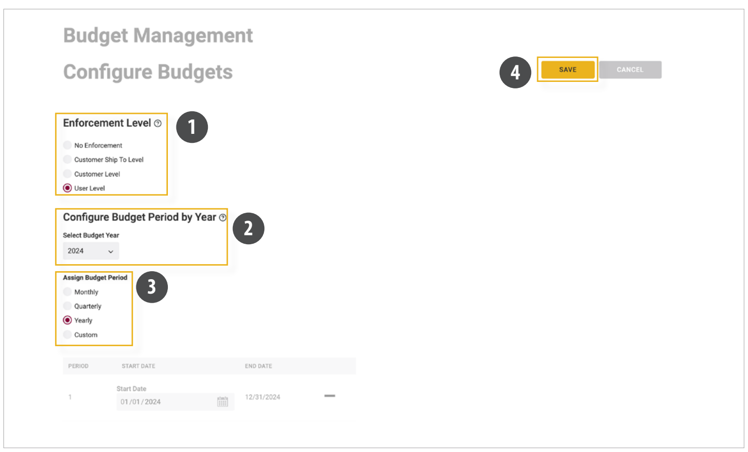
1. View the details of an order
2. Print order details
3. Email the order details

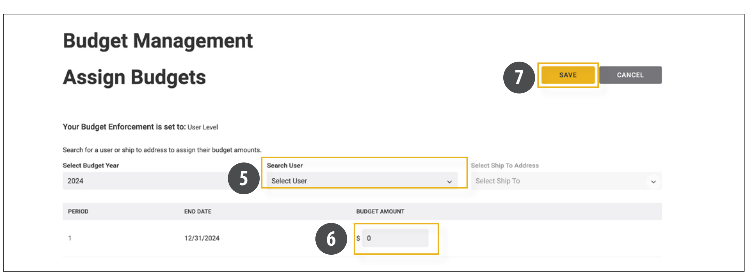


Budget Management









How to Access:

- Administrators can create or assign different user accounts by selecting “Hello, [Your_Name]” or “My Account” in the account section.
- From the left menu options, select “Budget Management”.

Purpose:

Budget Management is a tool that allows administrators to set budgets based on different criteria such as time frames, or fixed dollar amounts for various users in your company. It helps manage your team’s budget effectively to ensure they stay within limits.

Page Overview:

Set parameters for budget:

- Enforcement level
- Year
- Budget period

Configure

1. Set enforcement level
2. Configure the budget based on year
3. Assign budget period
4. Save budget

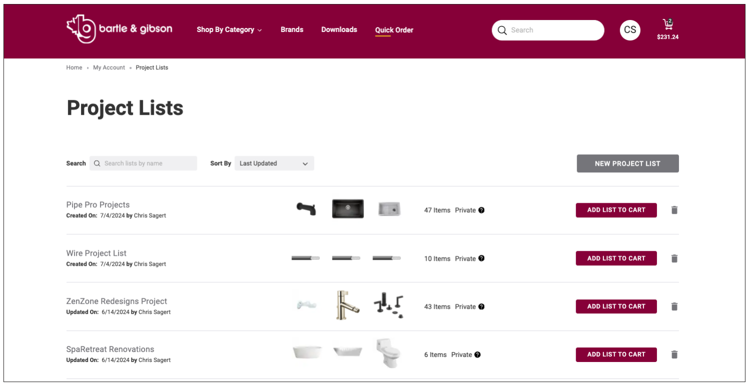
Assign

5. Assign the configured budget to a user

Note: you will need to have created the user account before assigning them a budget.

6. Configure the budget for the user for that budget year
7. Save the assigned budgets

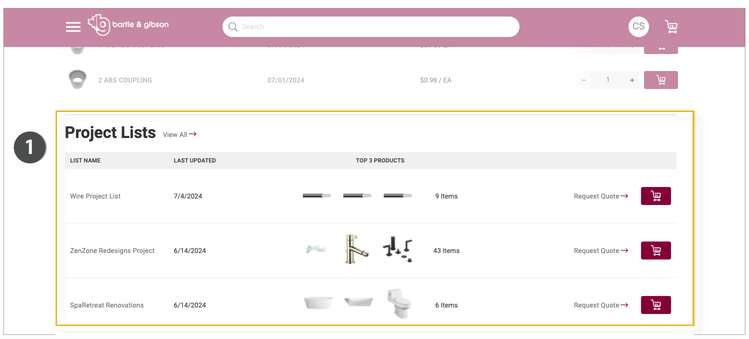
Project Lists

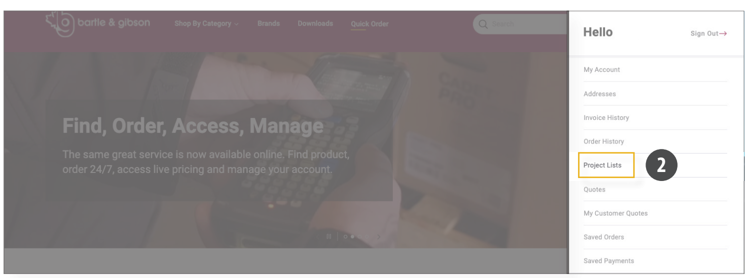


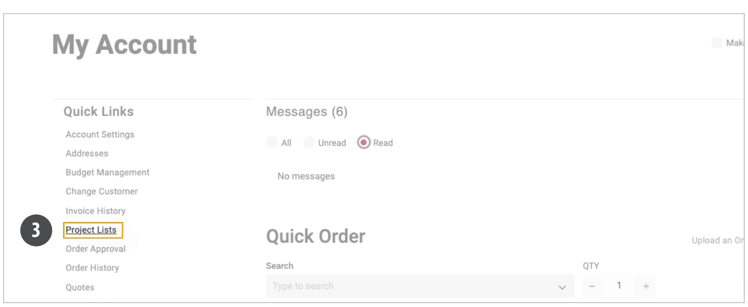
Purpose

Project Lists is a tool that helps you organize and save products into individual projects that you plan to purchase in the future or products you purchase frequently for a certain type of job.

This saves time from having to find individual projects each time you need to order them for a job. Once a Project List is created, you can directly turn it into an order or a request for quote. You can even share lists to collaborate on Project Lists with others within your organization.





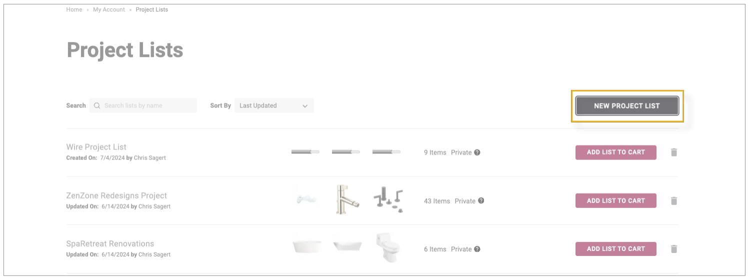


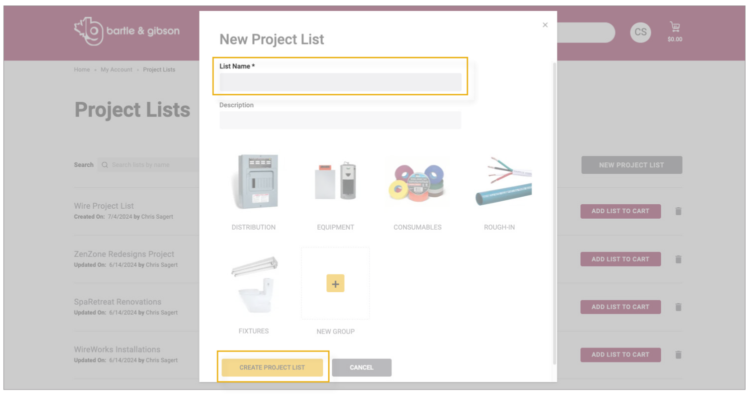
How to Access

There are three ways to access Project Lists:

1. **Homepage:**
   Once logged in, scroll down on the home screen until you see a section titled "Project Lists". You can access your individual project lists by selecting the name, or you can view all of your lists by selecting "view all".
2. **Account Drawer Menu:**
   Once logged in, select your initials in the upper right of bartlegibson.com (this will be a user icon when browsing web from phone) and a drawer menu will appear. Select "Project Lists" to be taken to your Project Lists page.
3. **My Account:**
   Once logged in, select your initials in the top right of your screen and select "My Account" or your name. This will bring you to the My Account page where the Project Lists option will be.

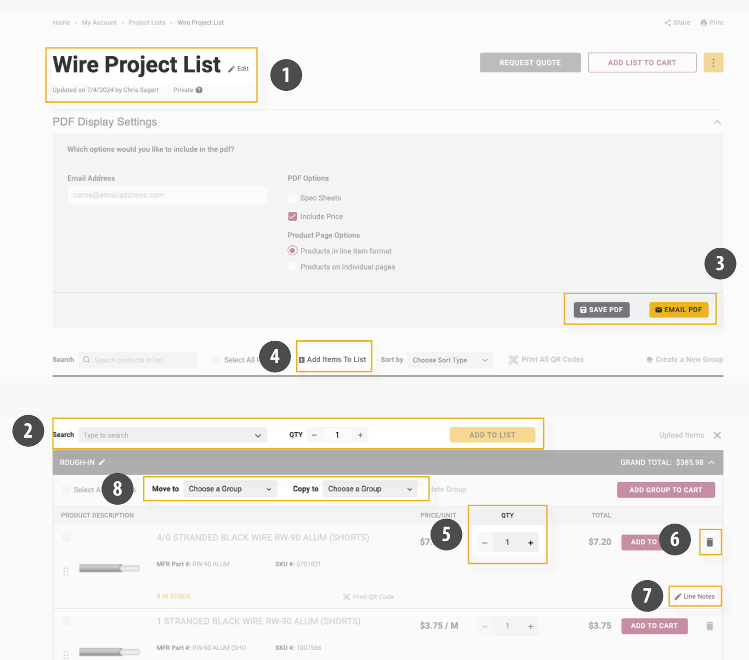
Project Lists





Creating A New Project List

1. Go to the project lists section.
2. Select "New Project List."
3. You will be prompted to name your Project List.
4. Provide a name and description (optional) for your Project List.
5. Choose an existing group name or create a new group to categorize the products in your Project List.
6. Select "Create Project List" to finalize.



Page Overview

The Project Lists page provides several features and actions:

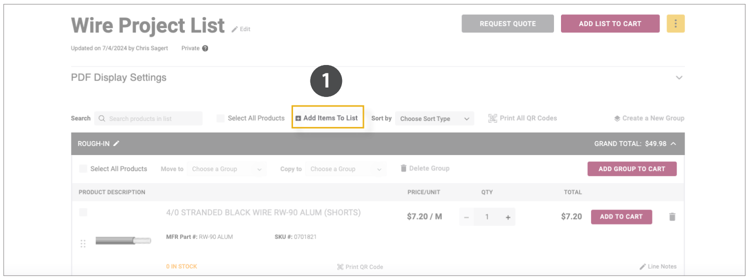
Project List Details:

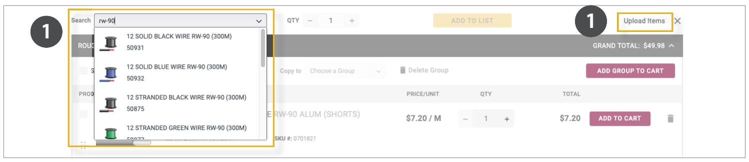
1. Displays the title, creation/modification date, and who it was shared with
2. Includes search options within the list
3. Allows saving the list as a PDF

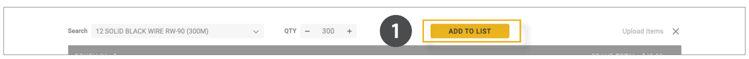
User Actions:

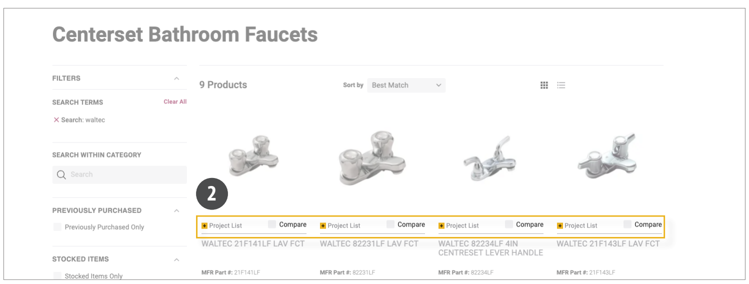
4. Add items
5. Edit quantities
6. Remove items
7. Enter line notes
8. Move or copy items to another group

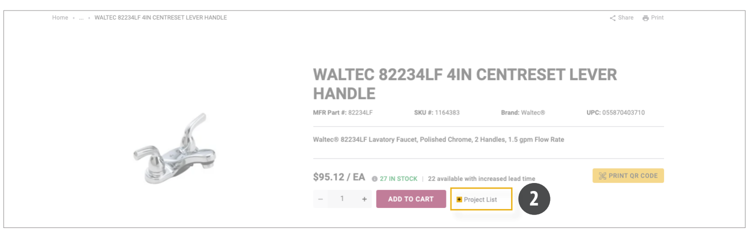
Project Lists

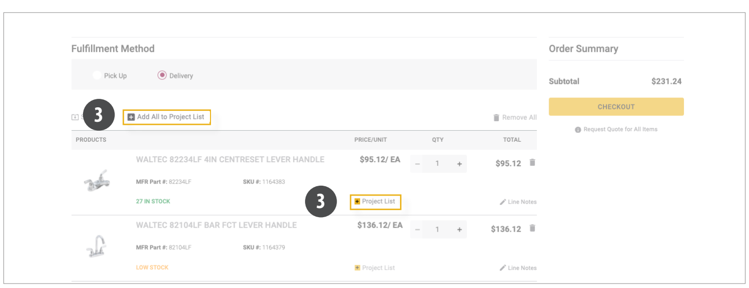












Adding items to a Project List

You can add items to a Project List in three ways:

1. **Adding Items Within Your Project List:**

- Once your Project List is created, you can add items by selecting “Add Items to List.”
- Search for your product by SKU, manufacturer part number, or a key phrase.
- Once found, select “Add Item to List.”
- You can also add items using the “Upload” function with an Excel file or a comma-separated values file (CSV, XLS). Please follow the upload requirements for necessary details.

2. **Adding Items From a Product List or Details Page:**

- Use the universal search tool on the web store (learn more about search on page 22) to search for the product by SKU, Manufacturer Part Number, or Key Phrase.
- If a list of products appears, find your desired product and select “+ Project List.”
- On the product details page, you can also add the product to a project list by selecting “+ Project List.”

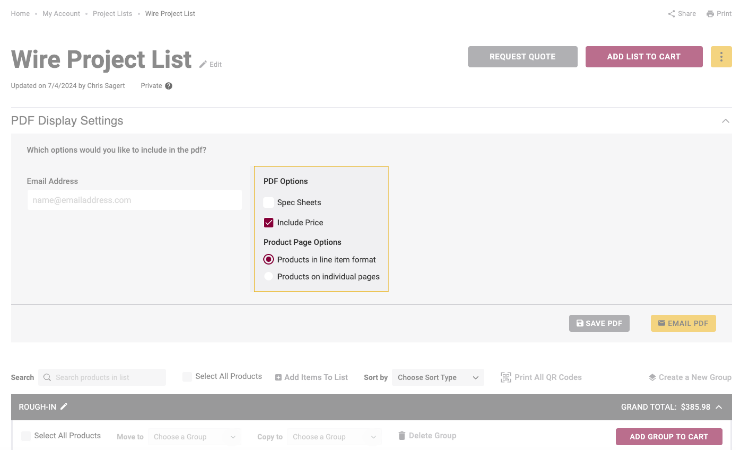
3. **Adding Items From Checkout Page:**

- Items can also be added to a list from your checkout screen if you are not ready to purchase and want to save them for later.
- Select your cart, then select “Checkout.”
- You can individually add items to your project list by selecting “+ Project List” next to each item.
- Alternatively, add all items in your cart to the project list by selecting “Add All to Project List.”

Exporting A Project List

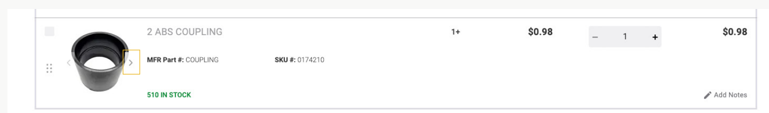
1. **Customize PDF Export Options:**

- At the top of the Project Lists page, choose whether to include spec sheets.
- Select whether to display multiple items per page or just one item per page.



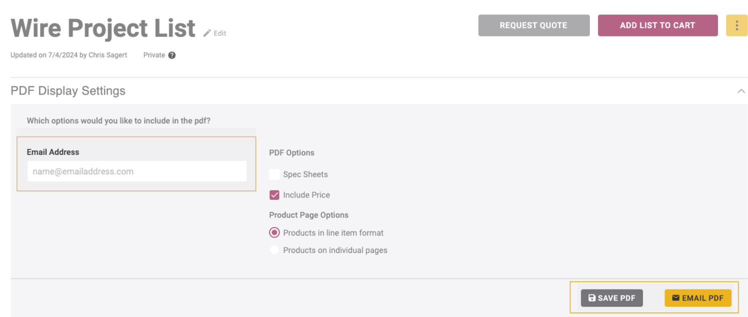
2. **Select Displayed Product Image:**

- For each product, select the side arrow next to the product image to choose which image to display in the exported list (if multiple images are available)



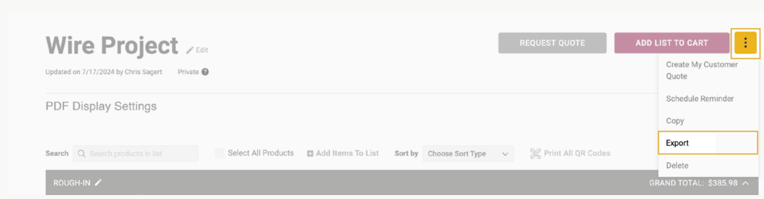
3. **Save (Exported as PDF) or Email Project List:**

- Enter an email address to share the list as a PDF.
- Choose to email the list or save it as a PDF (for printing or sending through another method).



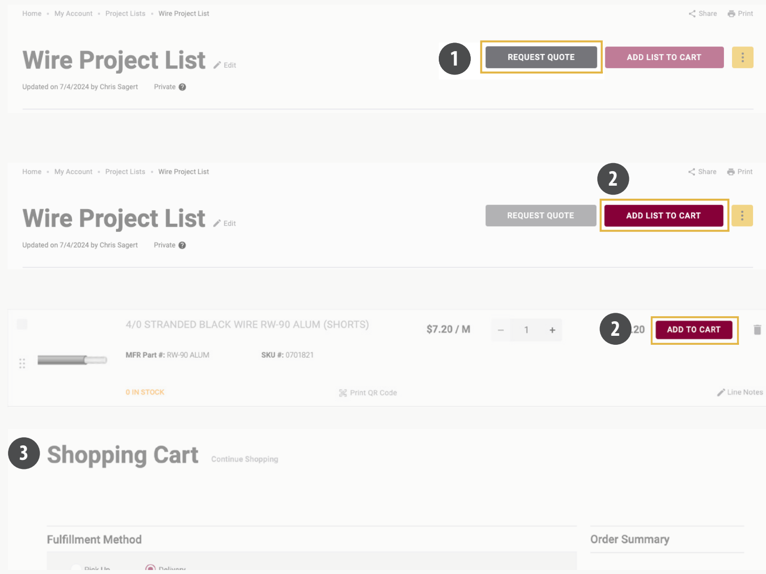
4. **Exporting as a CSV/Excel**

- At the top of the Project Lists page, select the three verticle dots to display more options.
- Select 'Export' to export your list as a CSV/ Excel file.



Placing Orders from a Project List

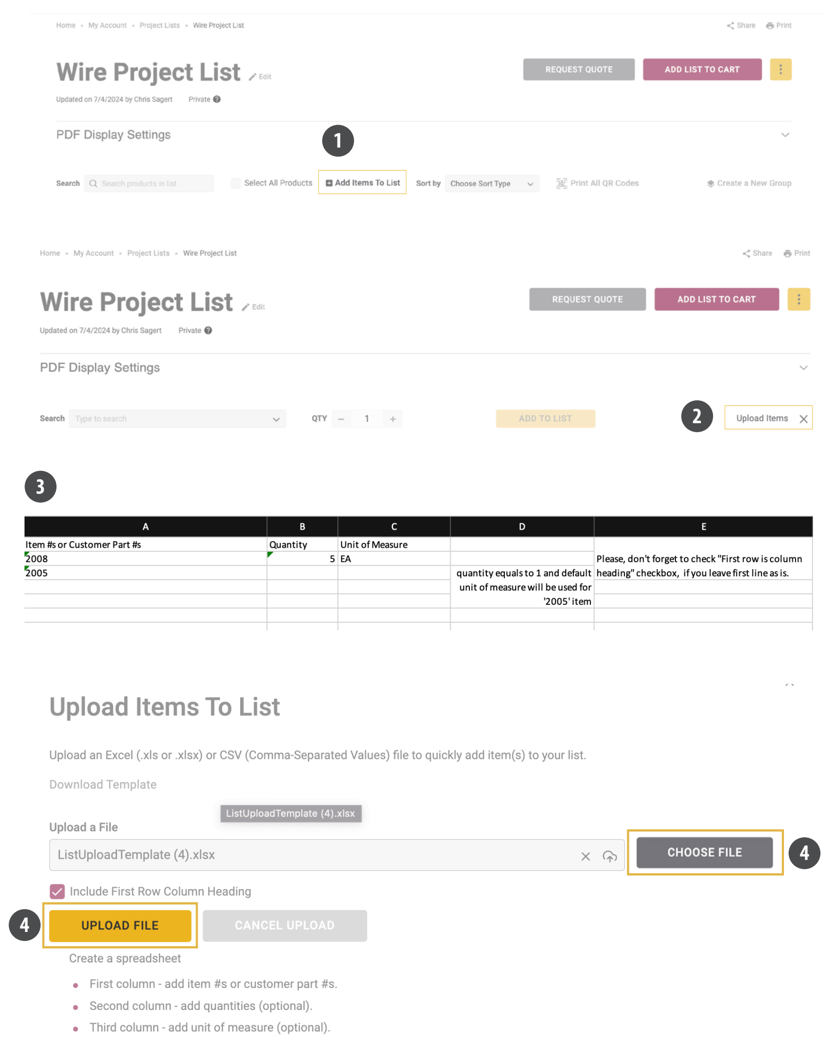
1. **Request Special Pricing (Quote):**
   - If you need special pricing, select “Request a Quote” at the top right of the Project List page. Your account manager will respond promptly.
2. **Add Items to Cart:**
   - When you’re ready to place an order, select “Add List to Cart” at the top right corner of the Project List page.
   - You can also add individual items to the cart by selecting the “Add to Cart” button next to each product.
3. **Proceed to Checkout:**
   - Follow the checkout process to order the items listed in your project list.



Importing Items Into a Project List

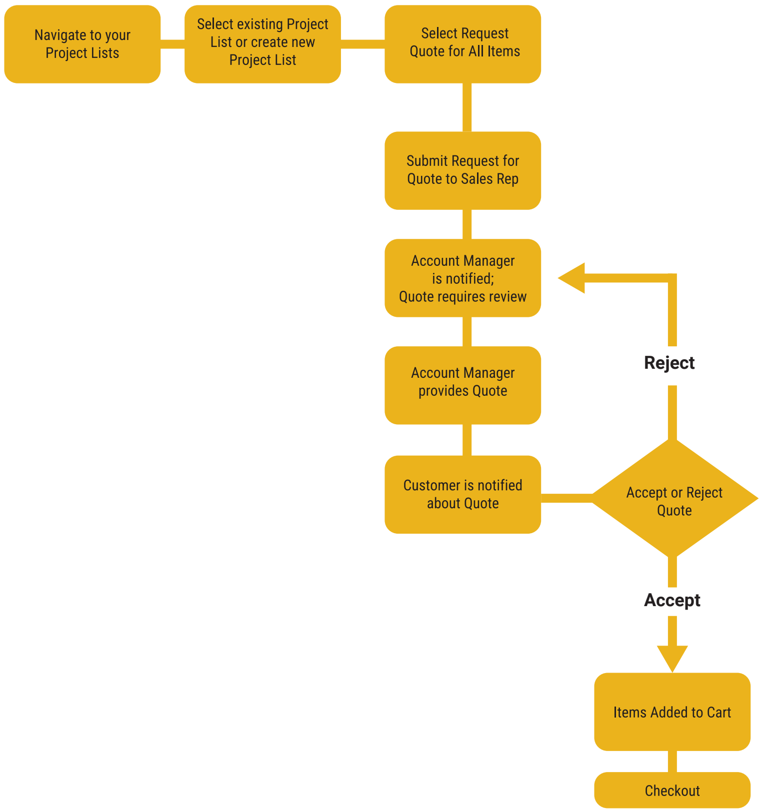
To save you time, You can use the import functionality to add multiple products to the list at one time.

1. In your project list select “Add Items To List”
2. Select “Upload Items” to add multiple products at once.
3. You can choose to download the template or create your own spreadsheet that includes the following fields: Product, Unit of Measure, and Qty Ordered. Fill in the details and then save the spreadsheet.
4. Select “Choose File” to search for your file, then select it, and then select “ Upload File”.

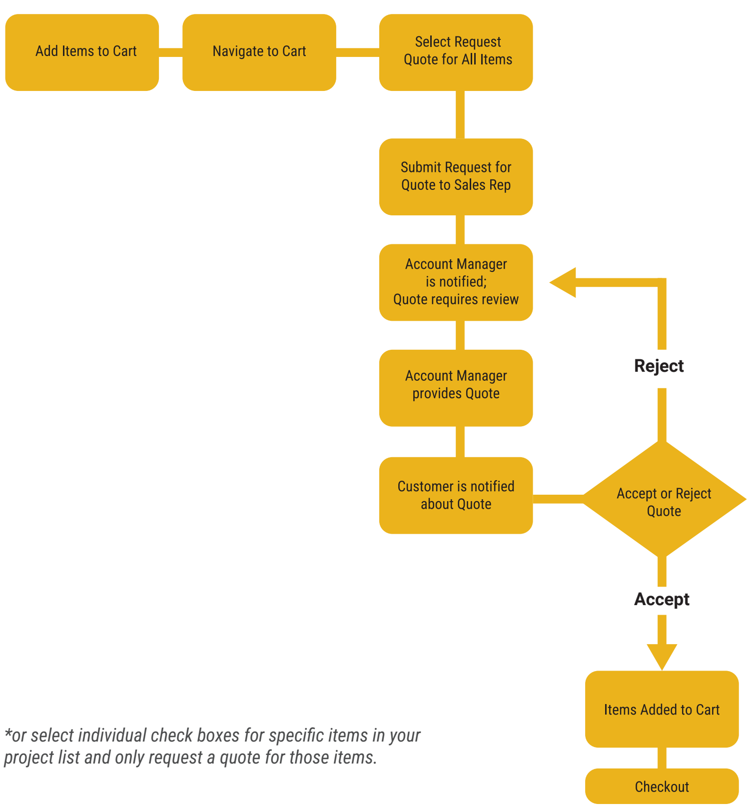


Quotes

Requesting a Quote from a Project List Workflow



Requesting a Quote from the Checkout Page Workflow



**or select individual check boxes for specific items in your project list and only request a quote for those items.*

Purpose

The Quote tool allows you to request pricing for a product or group of products from your Account Manager. Your Account Manager will then return the quote with the special pricing, and you can choose to accept or reject the quote.

Methods for Requesting a Quote

You can request quotes using two methods:

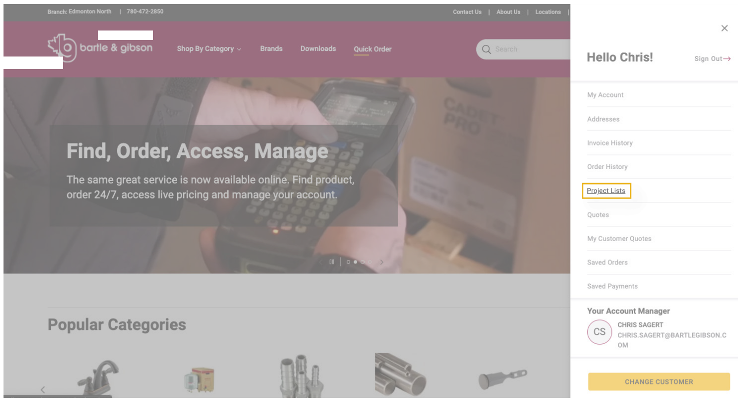
From a Project List:

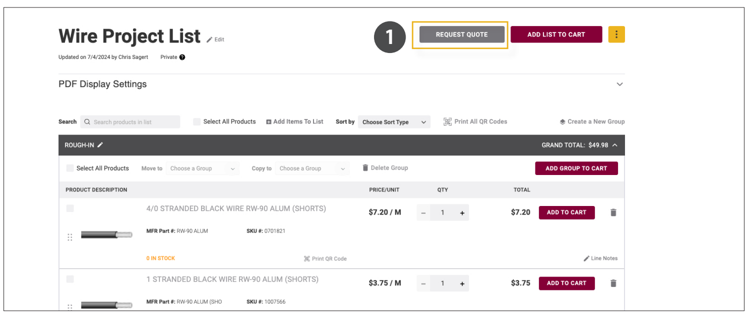
- Navigate to your project lists.
- Select or create a project list you would like to be quoted (follow the prompts on page 12 to generate a project list).
- Request Quote (Follow the instructions on page 16).

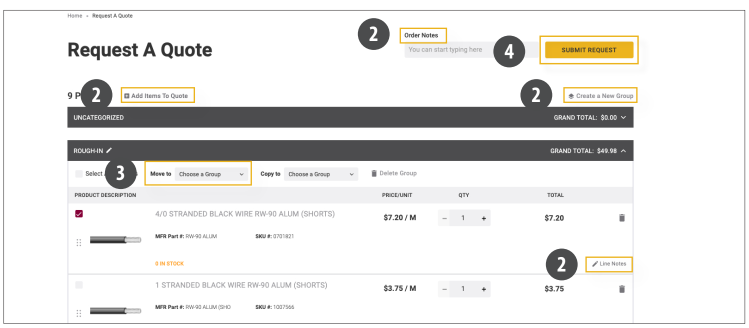
From the Checkout page:

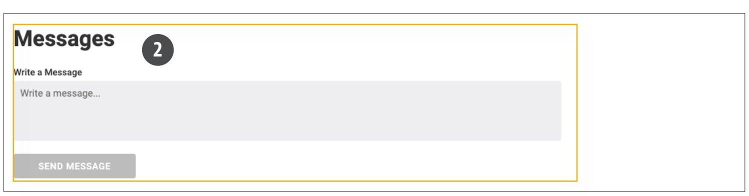
- Add items to your cart.
- Access the checkout page.
- Request Quote (follow the instructions on page 17 to request a quote from your entire cart or partial products from your cart).

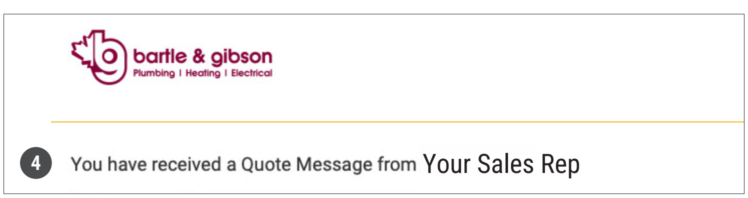
Quotes



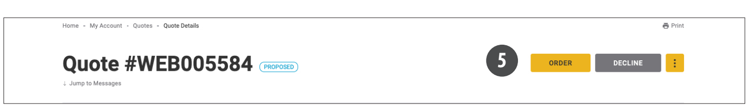








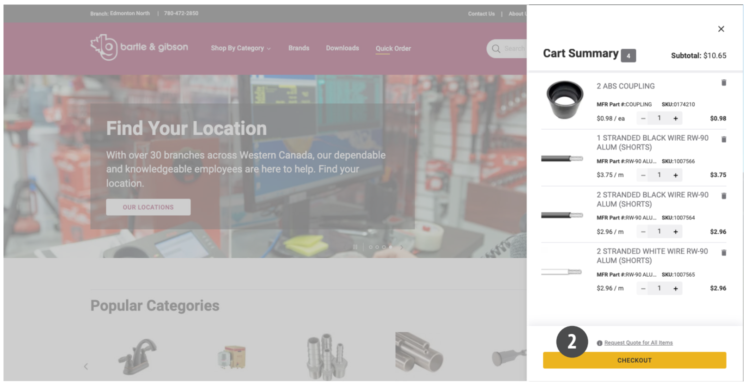
Sample email

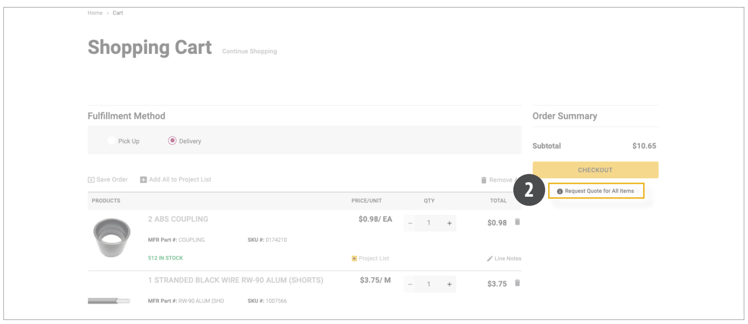


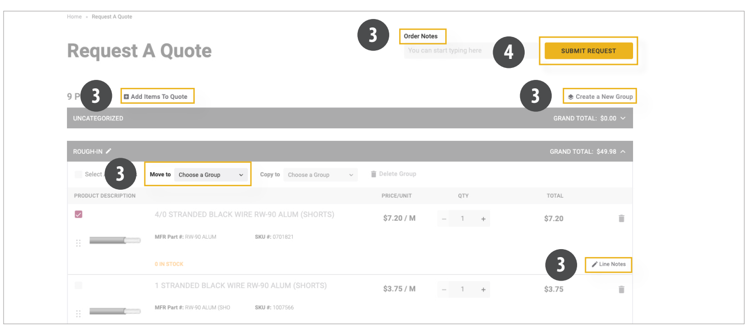
How-To Request a Quote from a Project List

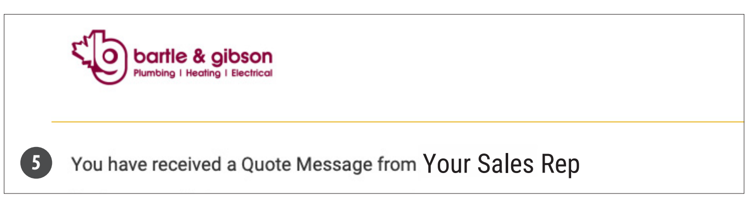
1. **Add Items to a Project List:**
   - Once you have created a project list with the desired products, select “Request Quote” at the top of the project list.
   - (You may also select the individual check boxes for specific items in your project list and only request a quote for those items).
   - You can add, remove, or change products in the quote at any time.
2. **Request a Quote:**
   - This action will take you to the “Request a Quote” page. Here, you can:
   - Verify the products you want to be quoted on.
   - Add additional items to the quote.
   - Create and organize products into groups.
   - Add notes to individual products or to the entire quote for your sales representative to see.
   - Any step throughout the quote process you can send a message to your account manager. This feature can be found at the bottom of any created quote. Once a message is submitted (by selecting the “Send Message” button), the account manager will receive a notice about the message. They can then choose to reply to the message, where you will receive a notification about their reply.
3. **Finalize Your Quote:**
   - When you are satisfied with your quote, select “Submit Request” to finalize it.
4. **Wait for Notification:**
   - Wait for an email notification that your Sales Rep has reviewed and provided a quote (you will also be notified when you login if your quote has been proposed).
5. **Review the Quote:**
   - If you are satisfied with the quoted price, select “Order” to add the items to your cart.
   - If you reject the quote, provide notes explaining why. The quote will be sent back to your Sales Rep for review, and you will be notified again once the new quote is ready.

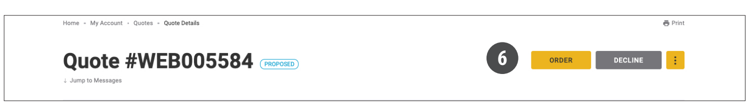
Quotes

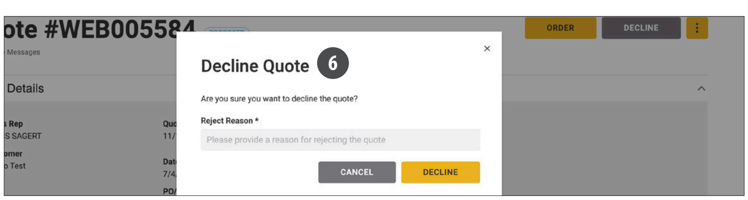










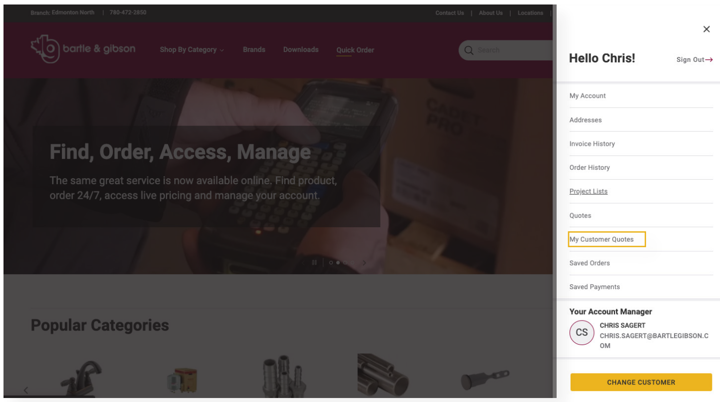


Request a Quote from the Checkout Page

Once you have added all of the items to their checkout you would like to be quoted on then you can follow the steps below:

1. **Add Items to Checkout:**
   - Ensure all items you want to be quoted on are added to your checkout.
2. **Request a Quote:**
   - Select "Request Quote for All Items" from either:
   - The bottom of the cart summary dropdown.
   - The shopping cart window (visible once you select "Checkout").
3. **Request a Quote Page:**
   - You will be taken to the "Request a Quote" page. Here, you can:
   - Verify the products you want to be quoted on.
   - Add additional items to the quote.
   - Create and organize products into groups.
   - Add notes to individual products or the entire quote for your sales representative.
   - Any step throughout the quote process you can send a message to your account manager. This feature can be found at the bottom of any created quote.
4. **Finalize Your Quote:**
   - When you are satisfied with your quote, select "Submit Request" to finalize it.
5. **Wait for Notification:**
   - Wait for an email notification that your Sales Rep has reviewed and provided a quote (you will also be notified when you login if your quote has been proposed).
6. **Review the Quote:**
   - If you are satisfied with the quoted price, select "Order" to add the items to your cart
   - If you decline the quote, provide notes explaining why. The quote will be sent back to your Sales Rep for review, and you will be notified again once the new quote is ready.

My Customer Quote

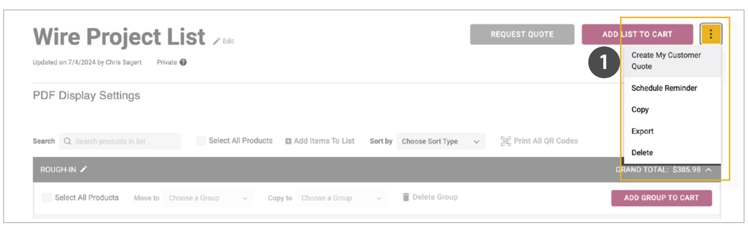


Purpose

My Customer Quotes is a tool that helps you create professionally branded (your branding) quotes for your customers and if your customer agrees to the quote, you can then purchase all of the items directly from the tool. The tool also helps you simplify margin calculations and other costs, and creates a quoted PDF document that you can send to your customer.

How to Access

1. Select your initials at the top right of the screen, to show your account drawer menu.
2. Select "My Customer Quotes".



Creating a My Customer Quote

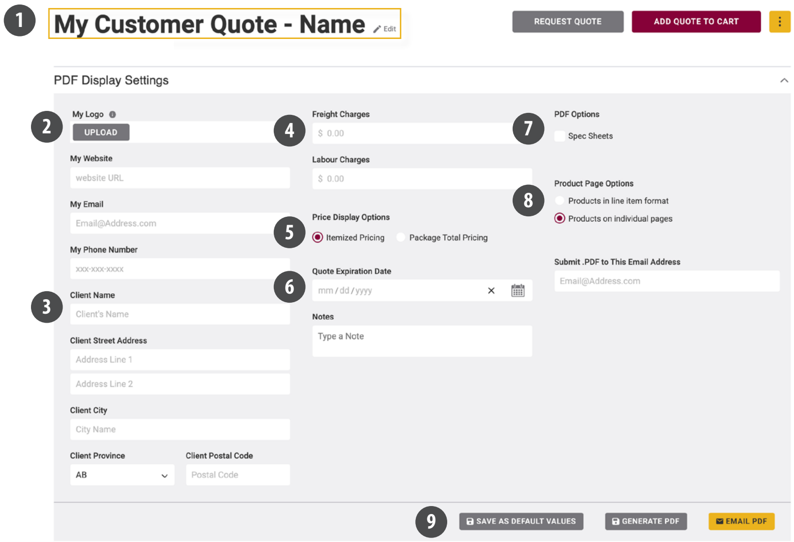
1. **From a Project List:**

- Create a Project List (refer to page 11 for instructions).
- Select the three vertical dots next to your project list.
- Select "Create My Customer Quote".

2. **Directly in My Customer Quotes:**

- Access My Customer Quotes through the account drawer by selecting your initials and selecting My Customer Quotes.
- Select "New Quote".

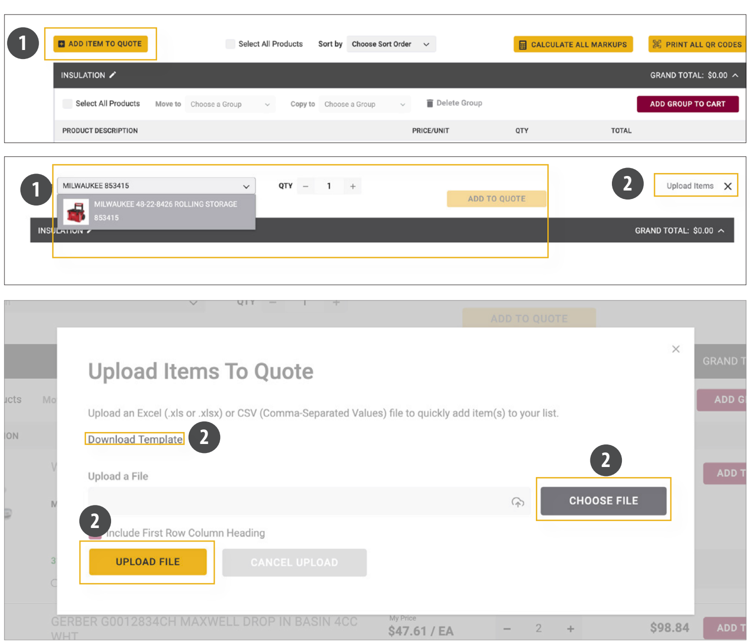
My Customer Quote



Editing Your Customer Quote PDF

Once in My Customer Quote, you can customize it for your customer's project.

1. Edit quote name
2. Upload your company logo, enter your website URL, email, and phone number
3. Add client's name and address
4. Add freight or labor charges
5. Show pricing for each item, or just for the entire quote.
6. Your quote expiration date
7. Include spec sheets
8. Display products as line items or on individual pages
9. After editing, you can save or print it as a PDF.



Adding Items to a My Customer Quote:

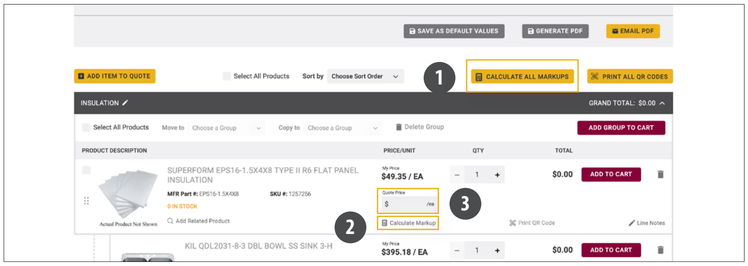
1. **One-by-One:**

- Select "Add Item to Quote".
- Search for products by SKU, manufacturer part number, or a general description.
- Select "Add to Quote".

2. **Using an Upload:**

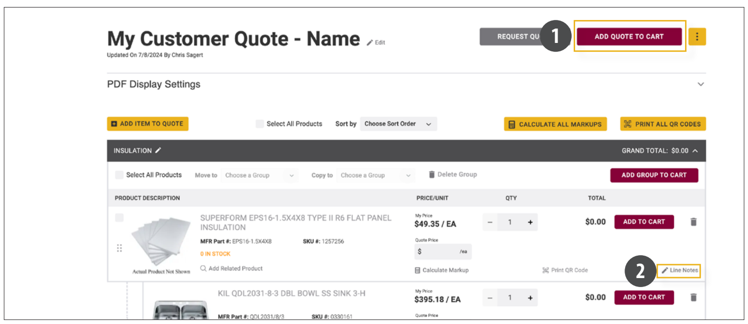
- Use the Upload function to add items via an Excel or CSV file.
- To save you time, You can use the import functionality to add multiple products to the list at one time.
- In your Customer Quote select "Add Items To List"
- Select "Upload Items" to add multiple products at once.
- You can choose to download the template or create your own spreadsheet that includes the following fields: Product, Unit of Measure, and Qty Ordered. Fill in the details and then save the spreadsheet.
- Select "Choose File" to search for your file, then select it, and then select " Upload File".

My Customer Quote



Adding Margins:

1. Select "Calculate All Margins" to apply a percentage markup to all items in the quote.
2. To add markups individually, select "Calculate Markup" under each product's quote price.
3. You can also input the price directly into the quote price field to add a margin by dollar value.



Page Overview:

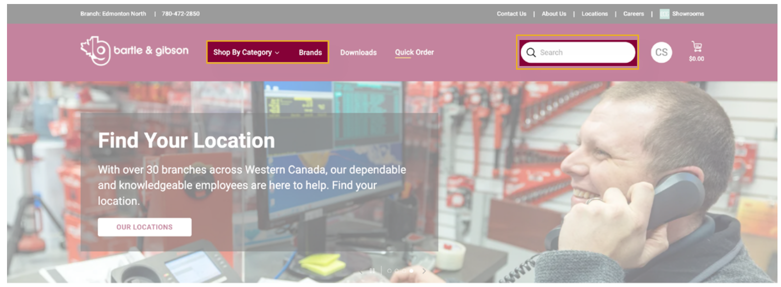
On this page, you can also:

1. Add all products or selected products to your cart.
2. Add line notes to each product.

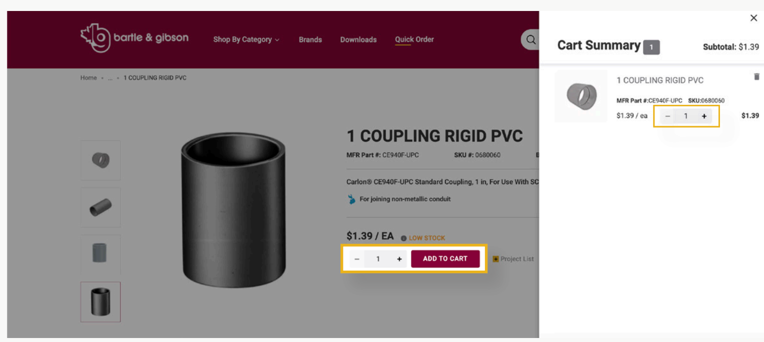
Placing Orders

Finding Products

You can search for products by utilizing the search bar, accessing the Brands page, or selecting from the available options in the Product Categories drop-down menu.

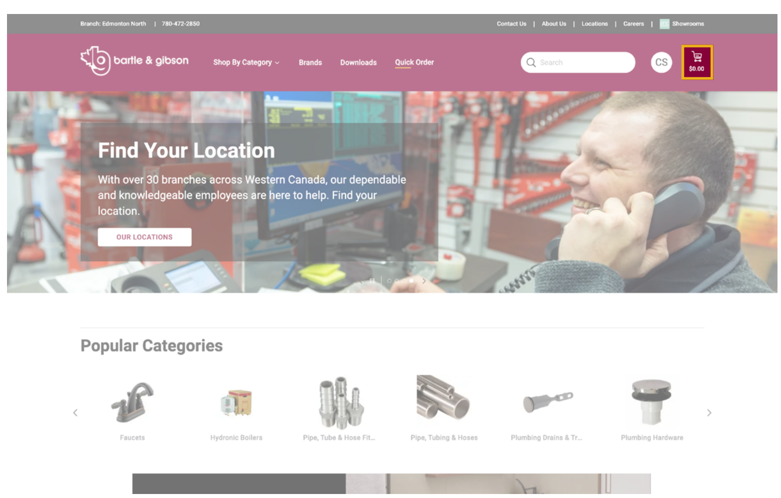


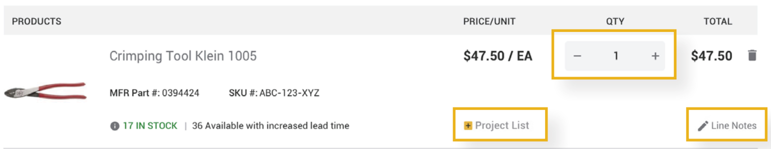
After selecting the product, they can choose the desired quantity and select "Add To Cart" when satisfied. It is important to note that the you can adjust the quantity of the product in their cart even after it has been added.



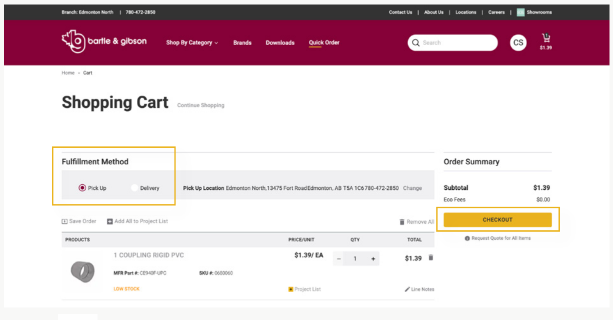
Placing Order For Pick Up

To access the shopping cart page, you will need to select the cart icon located in the top right corner of the screen.

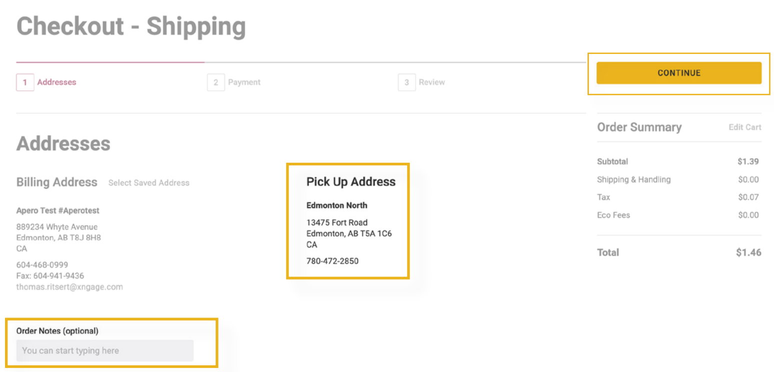




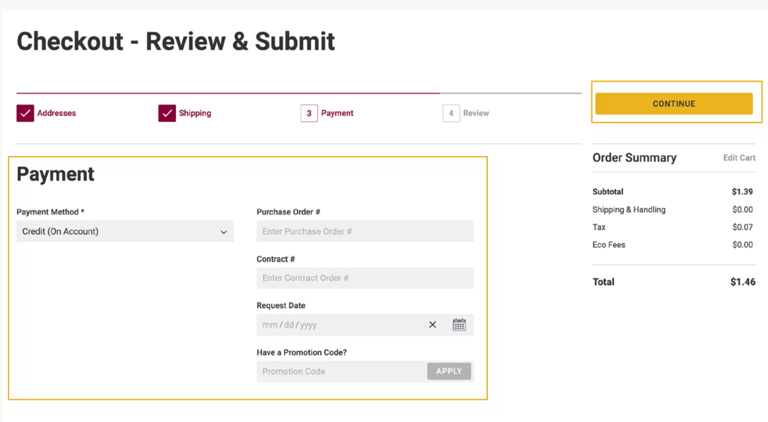
Once on the shopping cart page, you can review the items in your cart, adjust the quantity of each item using the provided field, add or remove items using the corresponding buttons, and even add notes or items to a list for future reordering.



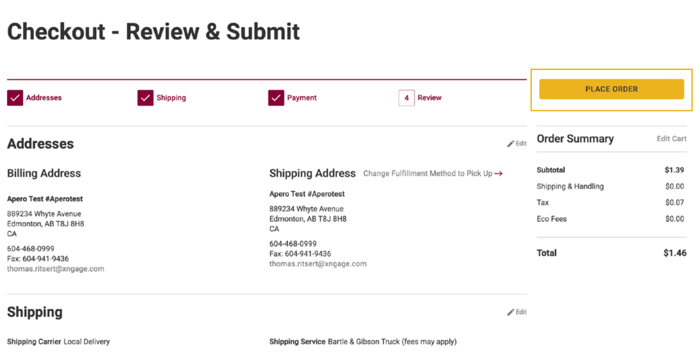
To proceed with the checkout process, you can select the “Pick Up” option under the “Fulfillment Method” section, and then select the “Checkout” button.



Afterward, you should verify your pick-up location, which will be displayed by default as your assigned branch. You should also verify the billing address, add any necessary order notes using the provided field, and then select “Continue” to proceed.



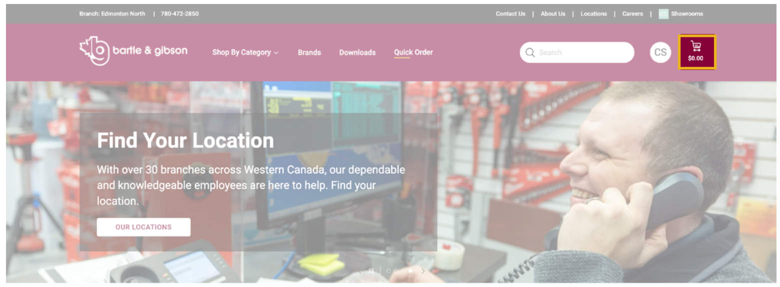
At this point, you can choose your preferred payment method using the provided options. If paying by credit card, the you should enter the card details and have the option to save them for future orders. If you are an account customer, you can place the order on your account. Additionally, you can include your PO# or Contract# as necessary. Once everything is confirmed, you can select “Continue” to proceed.



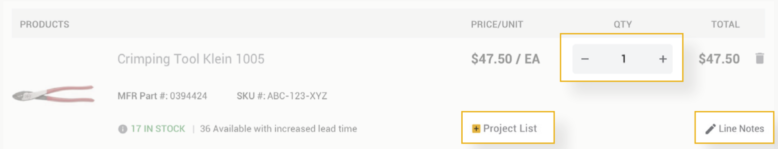
Before submitting the order, you should review the order summary to ensure that all information is accurate. Once you confirmed that everything is correct, select “Place Order”. After the order has been submitted, the branch will contact you once your order is ready for pick up.

Placing Order For Delivery

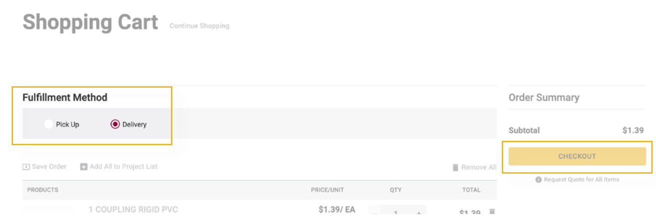
To access the shopping cart page, select the cart icon located in the top right corner of the screen.



Once on the shopping cart page, review the items in your cart, adjust the quantity of each item using the provided field, add or remove items using the corresponding buttons, and even add notes or items to a list for future reordering.

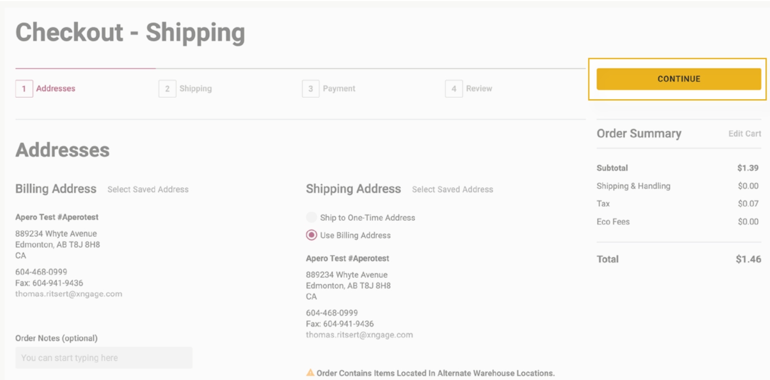


To proceed with the checkout process, select the “Delivery” option under the “Fulfillment Method” section, and then select the “Checkout” button.



To proceed with the checkout process, verify your billing address*. Then select the delivery address by choosing either your billing address or adding a new delivery address. If necessary, you can also include any order notes using the provided field. Once everything is confirmed, select “Continue” to proceed with the checkout process.

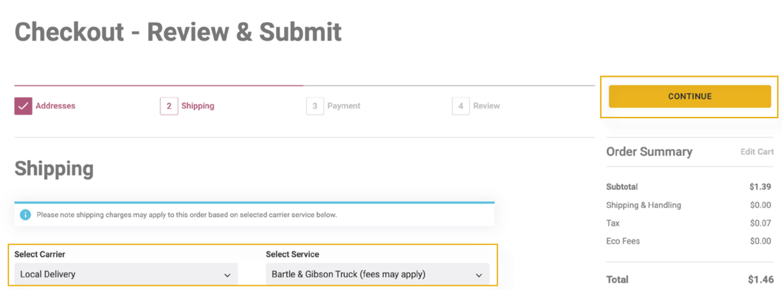
**You must contact our credit department to update your billing address.*

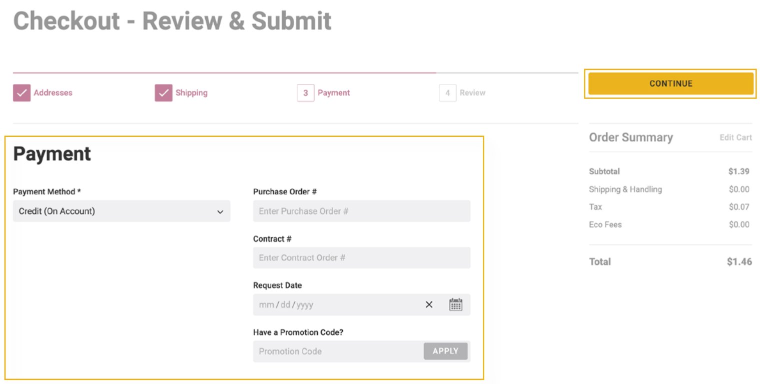


Choose a delivery carrier from the available options:

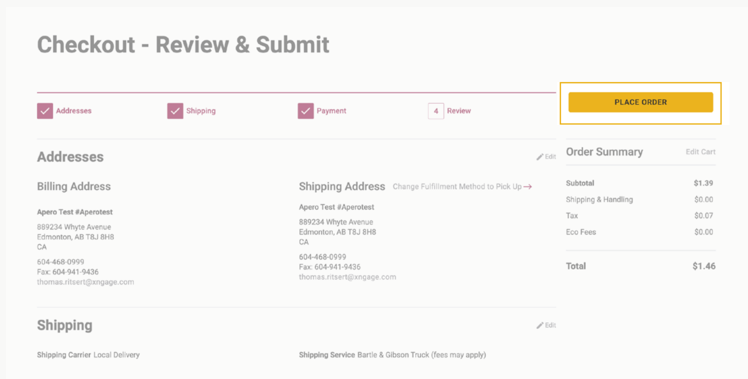
- Local Delivery (only available in some locations, charges may apply): Bartle & Gibson delivery trucks.
- My Own Carrier: enter your courier name & account number (you will need to include the carrier name and account number).

You can also add notes using the provided field and select whether to ship the entire order or a part of it. Once everything is confirmed, select “Continue” to proceed with the checkout process.

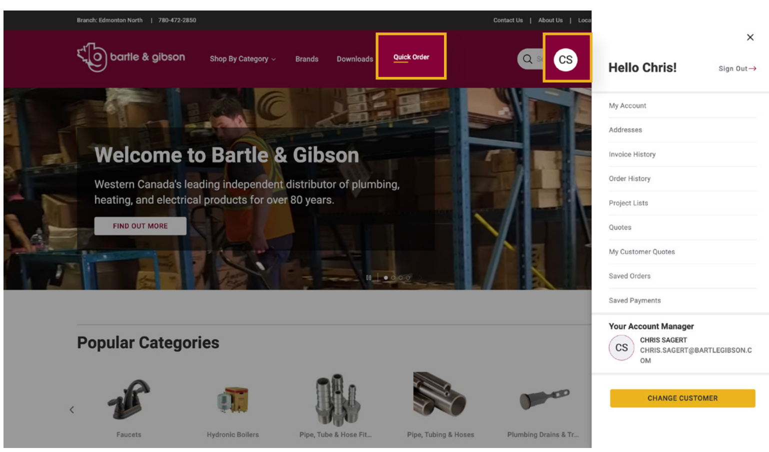




At this point, choose your preferred payment method using the provided options. If paying by credit card, enter the card details and you have the option to save them for future orders. If you are an account customer, you can place the order on your terms account. Additionally, you can include your PO# or Contract# as necessary. Once everything is confirmed, select "Continue" to proceed with the payment process.

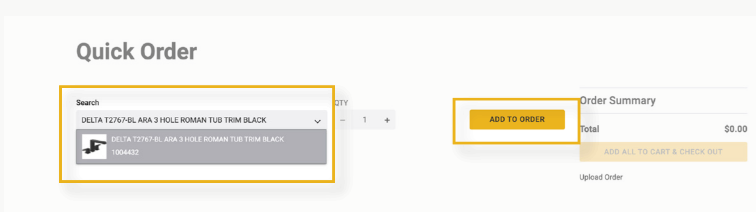


Before submitting the order, you should review the order summary to ensure that all information is accurate. Once confirmed that everything is correct, you can select "Place Order". After the order has been submitted, you will receive an email with the shipping information. Tracking info will only be provided by your carrier directly, wherever possible.



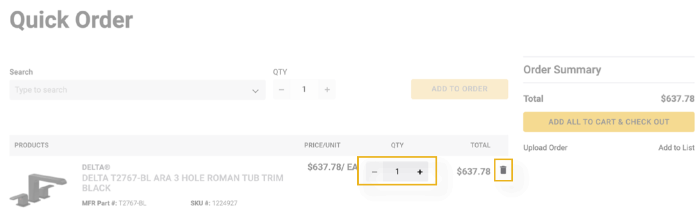
Using Quick Order

To access the quick order tool, select "Quick Order" from the top menu bar. Alternatively, you can select your account and then select "Hello [First Name}" to access your account information.

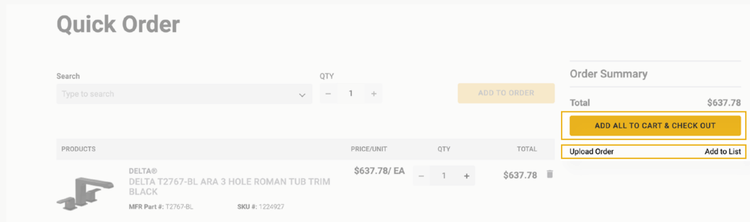


To add products to the quick order tool, you should begin by searching for the desired product, either by SKU, or manufacturer part number. Once the product is located, you should select the desired quantity and then select "Add to Order" to add the product to your order. This process can be repeated for each additional product that you wish to add.

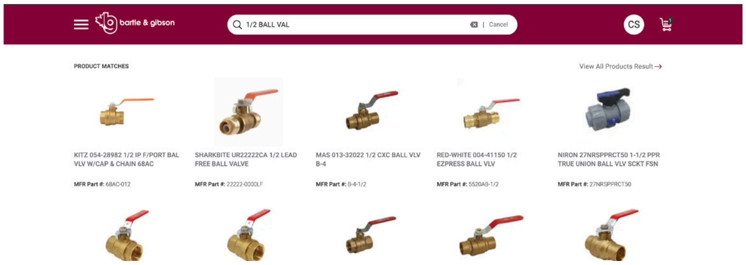
After adding products to your order, you have the ability to adjust the quantities or remove products as needed.



If you need to add a large number of items, you can use a spreadsheet to upload an order. Once the selection is finalized, you can add the Quick Order products to a Project List or select “Add All to Cart & Checkout” to proceed with the order.



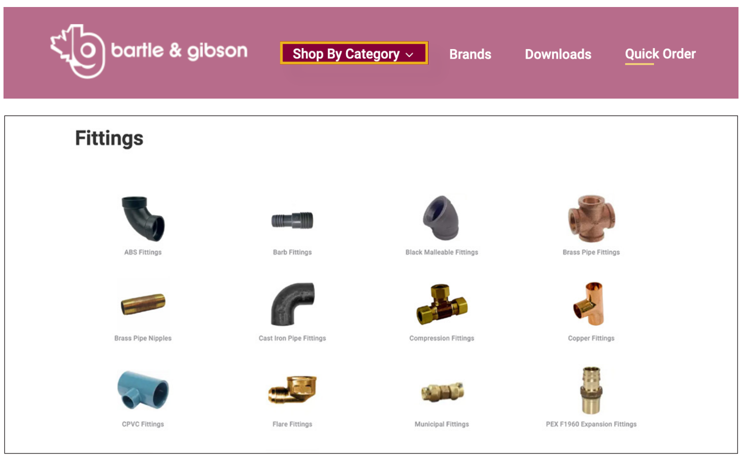
Search



How-To Use the Search Bar Tool

To quickly find a specific product on our web store, utilize our Global Search Tool located in the top header. You can search using various criteria including:

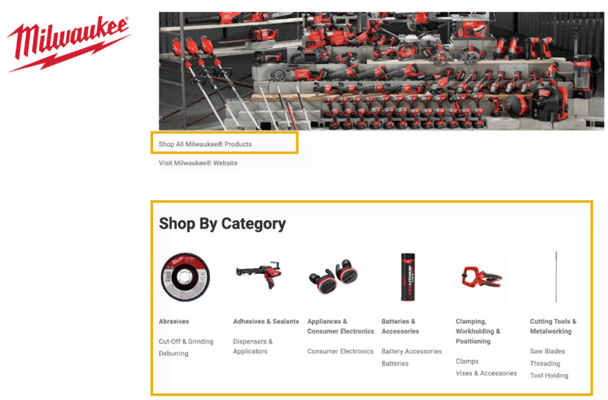
- Bartle & Gibson SKU
- Product Name
- Brand Name
- UPC Code
- Manufacturer Part Number
- Trade Slang
- General Description



How-To Search by Category

Use the "Shop by Category" feature located in the top header to browse products by category.

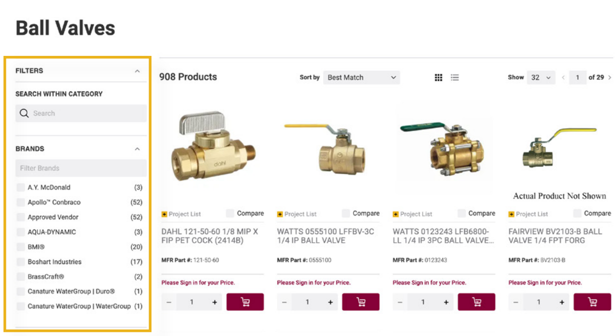
1. **Navigate to Shop by Category:** On the main menu, select "Shop by Category".
2. **Explore Categories:** You will see a list of product categories.
3. **Select a Category:** Select the category that best matches your search.



How-To Search by Brand

To find products by brand, use our "Brands" feature:

1. **Select Brands:** On the main menu, select "Brands".
2. **Search for a Brand:** Browse or search for the brand you are looking for.
3. **Explore Brand Products:** Once inside a brand, you can search for your product by the categories that brand carries or by viewing all their products.



How-To Use Search Filters

After performing a search, you can further refine your results on the product list page:

- Use Filters: Once a search is performed, use the filters on the left-hand side to narrow down your search. You can filter by brand, price range, specifications, and more, making it easier to find the exact product you need.