



# eCommerce2 Reference Guide

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## Logging In

You can browse products and add them to your shopping cart prior to logging in, but you will be required to log in before placing your order. Once you have logged in, each product will display your pricing and you can view order and invoice history, as well as any saved shopping lists.

To log in, click on the **My Account** button in the upper right corner of the site. Enter your **Username** and **Password** in the appropriate fields. Keep in mind that these fields are case-sensitive.

Click on the **Log In** button.

A screenshot of the "Account Login" form. It has a dark grey header with the text "Account Login". Below the header are two input fields: "User Name" and "Password". The "User Name" field contains the text "User Name" and the "Password" field contains the text "Password". Below the input fields is a dark blue button with the text "Log In". Underneath the button are two lines of text: "Forgot your password?" and "Please contact us if you need to create an account." The entire form is enclosed in a light grey border.

This will take you to the **My Account** landing page, which you use to select your next page. You can also click on the **My Account** button at any time for a drop down list of these options.

If you receive an error message stating **Invalid login**, try entering your username and password again, or click on the **Forgot your Password?** link below the button. Enter your email address and click the **Send Email** button to have your username and password emailed to you. If you do not receive the information, contact GORM to verify that you are using the correct email address.

If you are unsure of your username or password, please click on the **Contact Us** link shown below the **Forgot your Password?** link and contact GORM for this information.

If you do not have an account, click on the **Contact Us** link below the **Login** button to fill out a contact form and send it to GORM.

## Placing an Order

Placing an order can be broken down into three easy steps:

- Searching for products using Categories, the search function, and/or the Order Pad
- Reviewing your Shopping Cart
- Checking out

You must log in to place your order.

## Searching for Products

Browse for products by category, search for them by name or product number, or use your Order Pad to browse products that you have purchased previously.

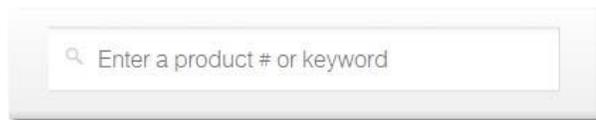


On the left hand side of the screen, you will see a **Shop by Category** section (shown to the left). Click on the name of the category to browse for products. Some categories may have products organized into subcategories; these sub categories will display when you hover your mouse over the main category

For categories with a large number of products, the footer at the bottom of the product area will tell you how many pages of products are available. Use the arrows at the bottom of the window to scroll through pages of products, or click on a number to jump to that page.

Products are listed by Product Number.

Above the **Categories** section, you will see a **Quick Search** field (shown below) that can be used to find specific products. Simply type in a descriptive word or product number and press the Enter key on your keyboard to search for products. For example, if you type in "towel", the site will display all of the products that contain the word "towel" in the description. You can also enter the product number or, if you are logged in, your part number for the product with GORM.



Once you have identified the product that you would like to order, click on the product image. This will open the Product Details (shown below) and allow you to enter a quantity, select a unit of measure



(where applicable), and click the **Add to Cart** button to add the product to your shopping cart.

Once you have added the product to your cart, you can browse for additional items.



## Using the Order Pad

The Order Pad tab displays products that you have previously purchased or been quoted for from GORM.

Navigate to your Order Pad by hovering your mouse over the **My Account** button and clicking on **Order Pad** in the drop down list. You can also click on the **My Account** button and click on the **Order Pad** option from the landing page.

Filter your Order Pad by selecting one of the options shown below and then clicking the **Refresh** button. Sort the Order Pad by clicking on any column header that is displayed in blue. Any products that are on a Price Quote, but have never been purchased will appear highlighted in green.

The screenshot shows the 'Order Pad' header. Below it, there are filter options: 'Filter/Search By:', 'Web Category' (set to ALL), 'Product #' (with an empty search box), and 'Ship To:'. At the bottom right, there are two buttons: 'Refresh' and 'Add to Cart »'. The 'Refresh' button is circled in red.

To add products on the Order Pad to your Shopping Cart, enter the quantity that you wish to order in the **Unit Qty** field for each product (see the example below). Pay attention to the **Unit** field, as items that you purchased in multiple units of measure will be displayed multiple times. For more information on a particular product, click on the Product Number (shown in blue), or on the product image.

Product #	Description	Unit	Unit Qty	Current Price	Web Category	Last Date	Last Qty	Your Part #
 987654	SAMPLE PRODUCT 4"X4"	CS	<input type="text" value="2"/>	\$17.48	PAPER	5/25/2010	101 CS	
 BRM24M1	MEDIUM SWEEPING BROOM 24"/EA	EA	<input type="text" value="3"/>	\$13.87	JANITORIAL SUPPLIES	5/20/2011	1 EA	
 BRMCORN1	MAID CORN BROOM/EA	EA	<input type="text"/>	\$6.30	JANITORIAL SUPPLIES	8/20/2010	10 EA	
 BRMWARE1	HEAVY DUTY CORN BROOM/EA	EA	<input type="text"/>	\$9.58	JANITORIAL SUPPLIES	5/27/2011	3 EA	
 BRMWARE1	HEAVY DUTY CORN BROOM/EA	EA	<input type="text"/>	\$9.58	JANITORIAL SUPPLIES	5/27/2011	3 EA	
 BRMWARE1	HEAVY DUTY CORN BROOM/EA	EA	<input type="text"/>	\$9.58	JANITORIAL SUPPLIES	5/27/2011	3 EA	
 BRMWARE1	HEAVY DUTY CORN BROOM/EA	EA	<input type="text"/>	\$9.58	JANITORIAL SUPPLIES	5/27/2011	3 EA	
 BRMWARE1	HEAVY DUTY CORN BROOM/EA	EA	<input type="text"/>	\$9.58	JANITORIAL SUPPLIES	5/27/2011	3 EA	
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 BRMWARE1	HEAVY DUTY CORN BROOM/EA	EA	<input type="text"/>	\$9.58	JANITORIAL SUPPLIES	5/27/2011	3 EA	
 BRMWARE1	HEAVY DUTY CORN BROOM/EA	EA	<input type="text"/>	\$9.58	JANITORIAL SUPPLIES	5/27/2011	3 EA	
 BRMWARE1	HEAVY DUTY CORN BROOM/EA	EA	<input type="text"/>	\$9.58	JANITORIAL SUPPLIES	5/27/2011	3 EA	
 BRMWARE1	HEAVY DUTY CORN BROOM/EA	EA	<input type="text"/>	\$9.58	JANITORIAL SUPPLIES	5/27/2011	3 EA	

Once you have entered quantities for all of the products that you want to order from the Order Pad, click the **Add to Cart** button at the top or bottom of the products listed. This will add the items to your Shopping Cart, which you can then review before checking out.

## Reviewing your Shopping Cart

Review your shopping cart at any time by holding your mouse over the **Cart** in the upper right corner of the screen. This will display the items and quantities currently in your cart.



Click the **Checkout** button to begin the checkout process, or click the **View Cart** button to make changes to the products and quantities.

### To change the quantity of a product in your shopping cart

Click in the **Qty** field, delete the original amount and enter the new quantity. Then, click the **Update Cart** button to update the quantity of the product in your Shopping Cart.

### To remove an item from your shopping cart

Click the red X button to the right of the Product Number, then click the **Update Cart** button. This will remove the entire quantity of the product from your Shopping Cart.

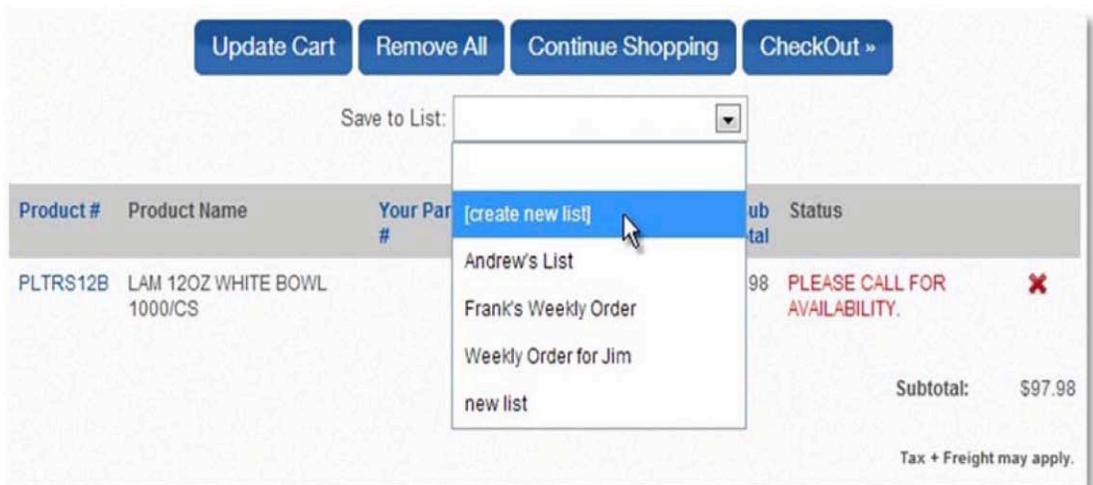
## Using Saved Shopping Lists

Each user can save shopping lists to use in reordering, or to build a large order over the course of a week or month. Saved shopping lists are user-specific so that each user will only have access to the lists that they have created. Lists maintain products and product quantities, and can be updated or deleted at any time. Shopping Lists can be sorted by clicking on any of the headings displayed.

### To Save a Shopping List

Creating a saved Shopping List is done through the Shopping Cart. Add products to your cart as you normally would if you were purchasing them. Saved lists can be modified at any time and are available in your user profile until you delete them.

1. First add the items and quantities to your shopping cart, as if you were going to purchase them.
2. Once you have added all of the products that you would like to include, click on the **Cart** button in the upper right corner of the screen and select **View Cart**.
3. At the top of the list of products you will see a **Save to List** field with a drop down menu. Choose the [create new list] option from the drop down menu (shown below).



4. A window will pop up asking you to name the list. Enter a name for the list and click the **OK** button. Saving a list does not place the order. Once the list is saved, you can then click the **Checkout** button in the Shopping Cart to place the order.



### Editing a Saved Shopping List

1. Click on the **My Account** button and select the **Saved Shopping List** option.
2. Select the list that you would like to edit from those listed.
3. Make changes to any product quantities and remove any items that you don't want to include.
4. When you have made all of the necessary changes, click the **Update List** button to save your changes to the list. Updating the list will not place the order. If you would also like to place the order, click the **Add to Cart** button to add the products to your shopping cart and begin the checkout process.

### Deleting a Saved Shopping List

1. Click on the **My Account** button and select the **Saved Shopping List** option.
2. Click the red **X** button to the right of the list that you would like to delete.
3. A message will display asking if you would like to delete the list. Click the **OK** button in this window to delete the list.

### Checking Out with a Saved Shopping List

1. Click on the **My Account** button and select the **Saved Shopping List** option.
2. Select the list that you would like to use from those listed.
3. Click the **Add to Cart** button to add the products to your shopping cart. This will remove any other products and quantities in your cart and replace them with the list as it appears. Click the **OK** button in this window.
4. Click the **Checkout** button in the Shopping Cart to begin the checkout process.

## Checking Out

When you have selected all of the products and quantities that you want to order, click the **Checkout** button to begin the checkout process.

### Shipping Information

First, choose a shipping address from the available list. If you do not see the appropriate address listed, you can add a new address by selecting the **Add New Shipping Address** to the right. If you plan to use this new shipping address in the future, check the **Save to Shipping List** box below the address fields. Enter any special instructions regarding the order. These instructions will be visible to those who fill and deliver your order, so you can include any notes regarding the products you have ordered, or how the order should be delivered.

Click the **Next** button in the bottom right corner to continue.

### Purchase Order Number

If you typically submit a Purchase Order number with your order, or if GORM requires a Purchase Order number, you can enter one in the **Purchase Order #** field. If you are required to enter a Purchase Order number it will notify you that the field is required and your order will not be processed without one.



Select a Shipping Method from the drop down menu.

Once you have entered the Purchase Order number, verify the products on your order, quantities, shipping and billing addresses, and subtotal. When you are sure all of this information is correct, click the **Place Order** button. You will receive an email confirmation of your order shortly.

Monitor the status of your order by selecting the **Open Order Status** option under the **My Account** button.

If you only have permission to submit orders, you will see a **Request Approval** button instead. Click this button to submit the order for approval by your company administrator. You can view the status of this pending order by selecting the **Pending Orders** option under the **My Account** button.

## Managing Pending Sales Orders

Company administrators can review, edit and approve orders submitted by other users. When users place orders that are awaiting approval, they are listed in a **Pending Orders** page (under the **My Account** menu) for review. Users without permission to approve orders can still check order status under this tab, but it will only display the pending orders that they have entered (shown below). The deletion date is the date that the order will automatically be deleted if it is not approved.

A screenshot of a web application interface titled "Pending Orders". The page has a light gray header with the title. Below the header, there is a table with columns: Order #, Order Date, P/O Number, Order Total, Submitted By, and Deletion Date. A single row of data is visible. At the bottom of the table, there is a summary row that says "TOTAL OUTSTANDING PENDING ORDERS: 1". To the right of the table, there is a "View # of Rows:" label and a dropdown menu set to "10". Above the table, there is a note: "\*Click column headers to sort."/>

Order #	Order Date	P/O Number	Order Total	Submitted By	Deletion Date
0000000026	11/07/2013	1234	\$1,306.80	Pen Pender	12/07/2013
TOTAL OUTSTANDING PENDING ORDERS: 1					

### To approve a pending order

Click on the **Order #** to open the order details. At the bottom of the screen, click on the **Approve Order** button. Confirm that the order is correct, then click the **Place this Order** button to place the order. You will receive an order confirmation email shortly.

### To edit a pending order

Click on the **Order #** to open the order details. At the bottom of the screen, click on the **Edit Order** button. Make any necessary changes to the order, then click on the **Checkout** button to begin the checkout process.

### To delete a pending order

Click on the **Order #** to open the order details. At the bottom of the screen, click on the **Delete Order** button. A window will pop up asking if you are sure you want to delete this order; click the **Yes** button in this window to delete the order.



## Viewing Orders

The **Open Order Status** page (under the **My Account** menu) allows you to view current orders for your company. This includes orders that were called or emailed in, rather than placed online. An order is considered "Open" up until all of the merchandise on the order has been received or cancelled and you have been given an invoice. Once you receive an invoice for the order, you can review it under the **Invoice Info** tab.

The **Order History** page (under the **My Account** menu) displays completed Sales Orders for a selected date range. Orders are considered "Completed" when all of the merchandise on the order has been received or cancelled and you have received an invoice.

## Open Orders

Open Sales Orders can be reviewed by clicking on the **My Account** button and selecting the **Open Order Status** option. This will display all Sales Orders that are currently open. You can filter this to display a single order, by entering the order number in the **Order #** field and clicking the **Refresh** button, or to display all open orders entered during a date range, by entering a **Start Date** and an **End Date** and clicking the **Refresh** button.

To view order details click on the blue **Order #**. This will display the products on the order, shipping method, address, and pricing.

To email a copy of an order check the box to the left of the order(s), then click the **Email** option in the top right corner. The email window will allow you to enter multiple recipients, as well as subject and body text. Click the **Send Email** button in the bottom left corner to send the order. The orders that you selected to send will be received as pdf attachments to the email. They can then be printed or faxed if necessary.

## Completed Orders

Completed Sales Orders can be reviewed by clicking on the **My Account** button and selecting the **Order History** option. This will display all completed Sales Orders. You can filter this to display a single order, by entering the order number in the **Order #** field and clicking the **Refresh** button, or to display all completed orders entered during a date range, by entering a **Start Date** and an **End Date** and clicking the **Refresh** button.

To view order details click on the blue **Order #**. This will display the products on the order, shipping method, address, and pricing. You can place this order as a new order by clicking the **Place As New Order** button in the lower left corner of the page.

To email a copy of an order click on the blue **Order #**. Then, click on the **Email** option in the top right corner. The email window will allow you to enter multiple recipients, as well as subject and body text. Click the **Send Email** button in the bottom left corner to send the order.

## Viewing Invoices

Invoices can be reviewed under the **Invoice Info** tab. If you receive an error message when trying to access this information, you may not have the proper permission required. Contact your sales rep or distributor for more information.



## Open Invoices

Open Invoices can be reviewed by clicking on the **My Account** button and selecting the **Invoice Summary** option. This will display all of your current invoices and credits, along with the total open account balance for your organization.

You can search for a specific invoice by entering the invoice number in the **Invoice #** field and clicking the **Search** button.

To view invoice details click on the blue **Invoice #**. This will display the products on the invoice, quantities, shipping method, address, and pricing.

To email a copy of an invoice check the box to the left of the invoice(s), then click the **Email** option in the top right corner. The email window will allow you to enter multiple recipients, as well as subject and body text. Click the **Send Email** button in the bottom left corner to send the invoice. The invoices that you selected to send will be received as pdf attachments to the email. They can then be printed or faxed if necessary.

## Paid Invoices

Fully or partially paid invoices can be reviewed by clicking on the **My Account** button and selecting the **Invoice History** option. Choose a year of invoice history to view from the drop down menu, then click the **Search** button. The window will list all invoices dated from that year. You can also search for a specific invoice by entering the invoice number in the **Invoice #** field and clicking the **Search** button.

To view invoice details click on the blue **Invoice #**. This will display the products, quantities, shipping information and total.

To place a previous order as a new order click on the blue **Order #**. This will display the products, quantities and prices for the order. In the bottom left corner, click the **Place as New Order** button. You will be redirected to the Shopping Cart to review the products and make any necessary changes to products or quantities. Place the order by completing the checkout process.

To email a copy of an invoice check the box to the left of the invoice(s), then click the **Email** option in the top right corner. The email window will allow you to enter multiple recipients, as well as subject and body text. Click the **Send Email** button in the bottom left corner to send the invoice. The invoices that you selected to send will be received as pdf attachments to the email. They can then be printed or faxed if necessary.

## Logging Out

To log out, click on the **My Account** button, then click on the **Logout** option. This will log you out of the site.



## Troubleshooting

### [I clicked the Place this Order button and received an error message and no confirmation email - what can I do?](#)

First, double-check to be sure that you included all of the necessary information for the order. If your distributor requires a Purchase Order Number and you did not enter one, the order will not go through.

Second, be sure that your login did not time out. When you have been logged into the site and inactive for an extended period of time, the site automatically logs you out to protect your sensitive information. You can log back in under the My Account tab and still access the Shopping Cart that you just created to complete your order.

If you are having trouble navigating the site or placing orders, it could be due to the browser that you are using. We recommend using the latest version of Internet Explorer or Mozilla Firefox for online ordering. Using an older version of Internet Explorer, especially Internet Explorer 6 or earlier, may cause issues.

[Can I add products to my order, even if they aren't on my Order Pad?](#) Yes. Your Order Pad only displays products that you have purchased in the past. Once you have added products to your Shopping Cart from the Order Pad, you can use the Web Categories and Search functions to add additional products.

### [Why doesn't the My Account tab display any information after I log in?](#)

The My Account tab is only used to log in. After logging in, you can use the Order Info, Invoice Info, Reporting and Order Pad, tabs to view your account information.

### [Why does my Reporting tab display an error message when I try to access it?](#)

There are two possible reasons for an error message on this tab; you may not have permission to run reports or your distributor may not have purchased the Reporting module. Contact your salesperson to resolve this.