Placing an Order from the Orders Tab:

An account customer can start an order without logging into their account. When not logged on however, the customer will be considered a guest user. If they enter items – while not logged in, the price they will see will be default pricing setup for guest users. They will only see their pricing when they log in, this will also adjust the prices for items already entered.

Buttons Available:

a) Add To
b) Add
c) Delete
d) Parked Orders
e) Commit
f) Park Current Order
g) Discard and Start New Order
h) Text Entry Mode
i) Order History
j) Apply Coupon (If available by Dealer)
k) Click here for Printable Order
l) Add Order Notes

Fields to Fill In:

a) Item
b) Comment
c) Quantity
d) Coupon (If available by Dealer)
e) Order Notes

Links to Choose:

a) Quick Orders – takes you to an area that allows you to place items on an order.
b) Opens Orders – shows you a list of all previously parked orders.

Adding Items to a List:

While in Order Entry, an item can be added to one of the my lists/company lists

1. Click on the box to the right of the item(s) that is already on the order
2. Click on the drop down menu of which List the item(s) will be added to
3. Click on the Add To button

Adding an item(s), to an order:

1. Enter an item number in the item field. The drop down will not work until you enter either a complete or partial item number in that field. After you enter the complete or partial item number, the drop down arrow will be activated and will allow you to scroll to find the item, if required
2. Enter a comment if needed in the comment field
3. Enter the quantity to order
4. Click on the Add button. This will add the item to the order

Adding a Comment to an Order:

The ability to add a comment to an order (not attached to a specific line item) has been added for account users. An Order Note can be added to an order in Quick Order by clicking on the check box next to 'Order Notes'. A text box then opens which allows a comment of up to 500 characters to be entered. To save the Order Note and close the text entry box, click on the check box again. Orders with just an Order Note cannot be completed; the order must contain at least one line item.

Edit an Item:

Click on the item(s) description, change the quantity or add a comment. After the edit is complete click on the update button.

Delete an Item(s), from the order:

Choose the item(s) you would like to delete by checking the box that is to the right of the item(s). Then click on the delete button. This will remove the item(s) from the order.

Parked Orders (Store Orders):

1. To park an order, click on the parked orders button

To get a parked order back:

1. Log in using Account Code and Password
2. Click on the Orders tab
3. Click on the Open Order at the top of the page under the tabs
4. A list of all open orders will be displayed.
    a) If you would like to start a new order, click on Create New Order
    b) If you would like to view the order just parked, click on My Current Order
5. Click on the appropriate Order ID number
6. This will display the items on the order
7. Click on Load Order
8. This will open the order in the Order Entry screen
9. At this time you can make edits or commit the order

The Address Key will now display for each order that is waiting for approval on the Approver tab. This will make it easier for an Approver to verify which Ship To has submitted the order when reviewing the list of orders waiting for approval.

Commit / Submit for Approval:

To complete an order click on the Commit/Submit for Approval button, the next prompt will be for a PO/Authorization Code – This is optional. If you do not have one, enter your name, click Pay by Credit Card or Apply to My Account. The order will be displayed in a new window.

Park Current Order:

This will park the order that is on the screen, display a new window with the option to Create New Order. To create a new order, click on the Create New Order button.

Discard and Start New Order:

This will discard the order that is on the screen and take you to a new window. To create a new order, click on the Create New Order button.

Text Entry Mode:

Text entry mode is a feature that allows a user to copy and paste information from a list directly into the web site. The information that is placed into this section will need to be formatted based upon instructions found under the Text entry tab. The BritLink system will not recognize a person entering in information into this section; therefore the user will be logged out of the system based upon inactivity.

Working with Lists:

My Lists and Company Lists will sort alphabetically in their respective pull down menus.

Company List:

Company List – A central company managed catalog or shopping list. This will be available to all departments/ship to addresses. There are currently no limits to how many items can be added. Only the accounts customer administrator can create a company list.

My Items List:

This is a list of items that are local to the delivery address (logon). There is no limit to how many items can be added to this list. Anyone can create a my list.

Recent List:

This is a listing of the last 100 items ordered. This is specific for each log in.

How to set up a Company/My list:

1. Logon
2. Click on the "My List" Tab
3. Click on words "Manage List" at the bottom left hand corner of the page
4. Click on "Create"
5. Choose to create either a my list or a company list by clicking the drop down box
6. Next type in the name you wish to give the new list
7. Click on "Save"
8. Click on "Quit"

The customer can add items to the Company/My List:

1 Through the order entry tab
2 Through search
3 Through browse
4 Through machine matching
5 Text Entry Mode

How to add items to a list using the following methods:

Order Entry Tab:

1 Logon
2 Click on the "Order" tab
3 Enter the item(s) that you would like to order
4 Click on the box (at the right hand side of the page), this will place a check mark in the box
5 Click on the drop down box (above the check mark), if it does not show "company list"
6 Select desired list
7 Click on Add To

Search Feature:

1 Logon
2 Click on the "Search" tab
3 Type in the Part Number, Prefix + Part Number or Keywords
4 Click on search
5 Click on the correct category
6 Click on the appropriate item
7 Put a quantity in the box to the right
8 Click on the drop down box above or below the quantity box
9 Select desired list
10 Click on Add To

Browse Feature:

1 Logon
2 Click on the "Browse" tab
3 Click on the appropriate category to browse
4 Narrow the browse down until you get pictures of the item(s)
5 Click on the item(s) that you would like to add
6 Place a quantity in the box to the right
7 Click on the drop down box above or below the quantity box
8 Select desired list
9 Click on Add To

Machine Matching Feature:

1 Logon
2 Click on the "Machine Matching" tab
3 Click on the appropriate category to browse
4 Narrow the machine matching down until you get pictures of the item(s)

5 Click on the item(s) that you would like to add
6 Place a quantity in the box to the right
7 Click on the drop down box above or below the quantity box
8 Select desired list
9 Click on Add To

Text Entry Mode:

1. Logon
2. Click on "Quick Orders" Tab
3. Click on the "Text Entry Mode" button
4. Enter the desired part numbers into the text entry box
5. Next choose which list you wish to place the item on at the bottom of the page
6. Click the add items button
7. Click return to order

Adding Item(s) to an Order from Company/My List and Recent Items:

1 Logon using account code and password
2 Click on the desired list
3 There is a quantity box and a select box on the right hand side
4 Enter a quantity on the correct line item(s)
5 Click on the select box, this will place a check mark in the box
6 Click on Add To and make sure that cart is showing as a selection
7 Once added, there will be a message displayed at the top of the page "1 Item Added to Order"

Filter the List by Keyword:

1. Type in a keyword in the field next to the filter button
2. Click on the filter button
3. This will display the items that are associated with the keyword entered
4. To view the complete Company List, click on the All Items button at the right top

Manage List Sequence-This will allow you to change the order of the list:

1 At the bottom of the list, in the middle of the page, click on Manage List Sequence
2 This will display a box with arrows on the top and bottom
3 Place a check mark in the box or boxes under the select header, do this by clicking on it
4 In the box off to the right, this is where you would put the number of line items you would like the item(s) to move up/down. Then click on the appropriate arrow
5 When done, click on the save button
6 If this is correct, click on the quit button
7 This will display the new company list

Save List sequence after clicking on column header to re-sort a list:

There is a button at the top right of each list named "Save Current List Sequence as Default". After you click on a column heading to re-sort the list, if you'd like to keep the list in the current sequence, click on "Save Current List Sequence as Default".

Showing Images:

There is check box that says "Show Images" located at the top and bottom of the list. Checking the box will display the images if available. If there isn't an image available it will display "No Picture Available". To remove the images, just uncheck the box.

User's last setting for "Show Images". The setting for "Show Images" will be remembered. This will work per computer. So, if two end user's are sharing a computer… the setting for "Show Images" will be whatever is set at the time the last user logged out.

Printing a List:

You can print a list in two formats, HTML or Excel. Simply click on the statement that states, "Print this list in HTML" or "Print this list in Excel".

Approver:

(Approvers reserve the right to edit the PO# and Authorization Info.)

The Internal Address Key will display for each order that is waiting for approval on the Approver tab. This will make it easier for an Approver to verify which Ship To has submitted the order when reviewing the list of orders waiting for approval. Order approvers will use this tab to view or manipulate orders waiting to be placed with the dealer. Approvers will receive an email when an end user commits an order. When the approver approves an order, rejects an order, or makes changes to an order the person who placed the order will receive an email. Emails will only be received if the dealer has logged the email address in their BritNet systems.

To View Orders Waiting to be Approved:

1. Logon
2. Click on the "Approver" tab
3. You will see "Show Orders awaiting approval"
4. This screen will show you the Order ID, the Ship To, when the order was created, and the total of the order.

Message for Approvers:

When an approver logs on and has orders awaiting an approval, they will now see the message "There are Orders awaiting your approval. Please click Approver tab to approve them. This message displays in the following areas; Quick Order, Cart, Search, Browse, Machine Matching, Customer Admin, Approver and Master User.

To approve the order:

In this area you have the choice to "Approve Orders". If you choose to approve the order, place your mouse in the box at the far right and click. This will leave a check mark in the box and then if you click on the "Approve Orders" you will get the message that "The following Order was been Approved: then you will get the Order ID number that has been approved."

To view or change the order:

1 Click on the order number that you wish to view. This will allow you, the approver, to view the entire order.
2 To add items or to delete items click "Load Order". This will take you to the order entry screen. You will be ordering on behalf of the ship to address.
3 You will stay in this mode until you either approve the order, reject the order, or cancel approving the order.

To Reject an Order:

Reject Orders" In this area you have the choice of "Reject Orders". If you choose to reject the order, place your mouse in the box at the far right and click. This will leave a check mark in the box and then if you click on the "Reject Orders" you will get the message that reads "The following Orders were Rejected: then you will get the Order ID number that has been rejected."

If you enter this area and there are no orders, you will see the following message:

"No orders are awaiting approval currently."

Customer Admin:

(Description of each tab can be found below)

Customer Admin access allows for the manipulation of the site, and access to all areas. The default customer administrator will be the ship to address that is assigned as internal address key "000" in the customer record file. If the internal address key has been changed to something other than "000", the address that appears with a "=" sign to the right of the address key on the red shipping address window will be the default customer administrator. This will hold true until some other address is assigned as the customer administrator.

Areas that can be Accessed by the Customer Administrator Area:

1 Manage Approvers
2 Assign Approvers
3 Assign Order Limits
4 Manage Customer Admins/MasterUsers
5 Assign Restriction in Inventroy
6 Budget Set-up
7 Manage Cost Centers
8 Create List from Contract (optional)
9 Return to Current Order

The Customer Administrator has the option to view reports for all Ship To's. Master Users have option to view reports for all Ship To's assigned to them. If user is both a Customer Admin and Master User…they will see reports for all Ship To's. To view a 'combined' report the end user will need to place a checkmark in the box next to the report and then press the report button. If the end user is a Customer Administrator…the report will display/include data from ALL Ship To's. If the end user is a Master User…the report will display/including data from those Ship To's assigned to the Master User.

a. Order History Report will display last 200 orders total for the account. (NOT per Ship To)

b. When using the "Show Order Details" report you must place a checkmark in the box if the SO # you're attempting to view does not belong to your log in.

c. The Master User will now see the Ship To Expense report. NOTE: Only Ship To's assigned to the Master User will display on the report.

Manage Approvers:

1. Click on the "Manage Approvers" tab
2. Put in Approver Title and select the ship to address. Then click on the + sign.
3. The new approver will now appear in the "Approver Title Ship To"
4. Hi light the ship to that you want to approve Max Orders and then click on "Max Order" You may only have one person to approve the Max Orders.
5. Click on Assign Approvers

6. If you would like to **delete** an approver, hi light and click on the trash can. You will then be asked if "Are you sure you want to delete this Approver? All assignments involving this Approver will also be deleted" Select Ok or Cancel.
7. To Assign Approvers hi light one that will be the approver then select "Assign Approvers". In the next screen select the ship to. This will bring you to a screen to Pick the Approver. To select the Approver over this ship to, use your mouse to click in the box and this will select the approver. After selecting the approver, click on "Back To Customer Admin Menu"
8. To Edit an Approver, hi light line needed to edit.
9. Click on the pencil to the right. You now will have the title in the Approver Title Box. Hi light line and then change. To keep changes click on the floppy icon to the right of the ship to.

   To adjust the hierarchy of Approvers in the Approver Title Ship to, hi light the line to be moved and click on the up and down arrows as necessary. ***The hierarchy is from bottom to top***. This means that the last approver will be the first one to approve the order. After the bottom approver has approved the order the next approver will then have to approve the order.

<u>Assign Approvers:</u>

1. Click on the "Assign Approvers" tab
2. You will see "Ship To", "Manage Approvers" and "Back To Customer Admin Menu"
3. Select Ship To by clicking on the down arrow. Chose ship to address. To the right you will see a pick list of approvers for that ship to. To select one, click with your mouse to check mark an approver.
4. Select "Back To Customer Admin Menu". This ship to now will submit orders instead of committing orders.
5. Under the Pick Approvers, you will see the option of "Manager Approvers". This option will direct you back to the "Manage Approver" tab.

<u>Assign Order Limits:</u>

1. Click on the "Assign Order Limit" tab
2. This will bring you to the Maximun Order Limit.
3. Click in the box to the right of the ship to. This value must be at least $1.00. Over $1.00, you are allowed to add a cent amount.
4. Click on "Save"
5. You now have the option to "Create OverLimit Approver", "Back to Customer Admin Menu", "Return to Current Order"
6. "Create OverLimit Approver" will take you to the "Manage Approver" screen.
7. "Back To Customer Admin Menu" will take you to the "Customer Admin" menu.
8. "Return to Current Order" will take you to the "Orders" tab.

**** Note: The "Company Administrator's" address cannot****

<u>Manage Customer Admin / MasterUser:</u>

1. Click on the "Manage Customer Admins / MasterUsers"
2. This will give you the ship to's, Customer Admin / Master User.
3. To select, place mouse in box and click. This ship to will now have a green check mark. You have now selected who is going to be the Customer Administrator and also a Master User. You can select one ship to or multiple ship to's.
4. When you select Master User in this screen, you are giving the ship to the ability to order for any of these account's ship to's. Meaning, select a ship to here and when they log on, on the main page you will see the

Master User Tab. This gives them the ability to place orders for any of the ship to's listed.

5. Master Users can now be set up to order on behalf of certain Ship To's. (No longer ALL or NOTHING). When a Customer Administrator sets up a Master User, the default will be to allow a Master User to order on behalf of all Ship To's. However, the Customer Administrator now has the option to assign a Master User to order on behalf of some Ship To's but not others.

Master User:

The Master user can log on as any of the ship to's and place an order on behalf of that location.

How to use the Master User:

1. Logon
2. Click on "Master User"
3. Select the Ship to that you want to place orders for
4. Click on "Apply Changes"
5. You will now get the message that the "Changes applied"
6. You will also get the message that the "Master user logged in currently
7. Ordering on behalf of NAME OF BUSINESS, ADDRESS"
8. Now select "Return to Current Order"
9. You now can place an order for the ship to that you have selected.
10. After placing an order you will go back into "Master User" and select
11. "Exit Master Mode" now you will be placing orders for the original log on account.

Restricting Ship To's to a Company List or a Contract:

Note: Ship To's can only be restricted to either a contract or a company list, not both

Restrict Ship To's to a Company List:

End users will only be able to order items that are on the Company List.
The only items visible as Search results will be items on the Company List.
The only items visible as Browse results will be items on the Company List.

Regarding Alias Numbers and restrictions: "If a Ship To is restricted to a Company List, then only those items that are included in the Company List along with their aliases if any are available to the end user. The standard rules of aliases will apply, if a customer is allowed to access an alias then and only then can he access it."

User will not be able to add items from Specials into Cart if restricted to List or Contract.

Pre-existing parked orders may contain items not restricted.

How to restrict a Ship To to a Company List:

1 Logon as the customer administrator
2 Click on the customer admin tab
3 Choose the company list you wish to restrict the Ship To to.
4 Choose the Ship To's you wish to restrict by placing a check in the box to the right of the address
5 Finally click "Update List Restriction" to apply the restriction.

Restrict Ship To's to a Contract:

End users will only be able to order items that are on the specified Contract.

The only items visible as Search results will be items on the specified Contract.
The only items visible as Browse results will be items on the specified Contract.

Regarding Alias Numbers and restrictions: "If a Ship To is restricted to a Contract, then only those items that are included in the Contract along with their aliases if any are available to the end user. The standard rules of aliases will apply, if a customer is allowed to access an alias then and only then can he access it."

Pre-existing parked orders may contain items not restricted.

User will not be able to add items from Specials into Cart if restricted to List or Contract.

Creating a list from a Contract:

1. Logon as the customer administrator
2. Click on the customer admin tab
3. Click on the Create List from Contract tab
4. Select the desired Contract from the drop down box
5. Next choose the type of list that you would like to create
6. Then name the list that you are creating
7. To make the change take affect click on create list
8. Return to customer admin

The ability to create a company list from a contract is limited to importing 2500 items from any given contract. Therefore, if you are creating a company list from a contract with 2501 items on it you will not be able to use the contract to create your new company list. The contract must be 2500 items or less in order to be used for this feature.

How to restrict a Ship To to a Contract:

1. Logon as the customer administrator
2. Click on the customer admin tab
3. Choose the company list you wish to restrict the Ship To to.
4. Choose the Ship To's you wish to restrict by placing a check in the box to the right of the address
5. Finally click "Update Contract Restriction" to apply the restriction.

Setting up Budgets:

1. Logon as the customer administrator
2. Click on the customer admin tab
3. Click on the Budget Set up tab
4. Place a check mark next to the Ship To(s) that you would like to establish a budget for
5. Be sure to save changes that you have made
6. You will also be able to set budgets for all Ship Tos or reset balances for all Ship Tos
7. You will need to decide if you will have balances reset automatically annually, monthly, quarterly, weekly, daily, or manually
8. After changes have been made return to customer admin

Budgets can be set up by the Customer Administrator and they can be set up on a Ship To by Ship To basis.
Budget amounts and balance amounts can be set up for all Ship To's at once or individually. The balance amount can be set up to match the budget amount or the Customer Administrator can edit the balance amount.
*The balance amount can be edited to be higher than the budget amount to allow for "carry over" dollar amounts

from previous budget periods.
The budget amount and remaining balance amount display in order entry. The dollar amount of an order will be subtracted from the remaining balance when an order is COMMITTED or SUBMITTED. In cases where the Approver rejects the order…the dollar amount of the rejected order will be added back to the remaining balance.

If a user tries to COMMIT or SUBMIT an order and the budget amount is exceeded they will not be able to place the order until the order is brought under the budget dollar amount or they contact the Customer Administrator and the budget amount is increased. If an Approver adds/subtracts items from an order the balance is updated appropriately. (Subtract from remaining balance if items added and add to remaining balance if items subtracted).

Setting up Cost Centers:

1. In the Customer Admin area creation of COST CENTERS is available.
2. Cost Centers area will allow Ship To's to be assigned to COST CENTERS.
3. When checking out...if Cost Center is assigned to the Ship To, the end user will see a drop down menu of all 'allowed' cost centers. End user must choose one Cost Center for the order.
4. If end user is subject to approval, the approver can change the Cost Center. (The approver will see the same drop down menu of Cost Centers that are allowed for the Ship To).
5. The Cost Center "name" or "title" will appear in BL processing reports and throughout BN instead of Authorization/PO #/Name.

Reports:

Reports can be viewed in either HTML or Excel formats.

User Reports available on the Order Entry screen:

1. View Order History of last 500 orders per Ship To
2. Monthly Details
3. Item Distribution Report
4. Order Distribution Report
5. Monthly Summary
6. View detail of one order (End user can input SO #)
7. Cost Center Expense Summary Report

   This report will display the sub-total, tax and total per Cost Center of all orders that have been sent to the dealer. (Committed orders and submitted orders that have been approved). This report will be visible to Customer Administrators only.
8. Ship to Expense Summary Report

   This report will display the sub-total, tax and total per Ship To of all orders that have been sent to the dealer. (Committed orders and submitted orders that have been approved). This report will be visible to Customer Administrators only.
9. Order Status Report

   This report lists all orders that are currently parked or awaiting approval along with those orders that failed to dispatch and orders for which approval was rejected.

***Note the date/time stamp on the report is when the order is actually sent forward to the dealer.**

1 Time originally committed (if no approval needed)

2 Time the last approver approves the order and sends to dealer

The date/time stamp on the SO # AFTER it's been approved by last approver is updated…..so will not match the original print out of the SO # if end user printed at time they submitted the order to their approver(s).