

USI SALES & MARKETING RESOURCE CENTER

Online Store Tutorial

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Log In

- Go to the following:
<http://members.printable.com/spc/unitedsub/>

- Login

Enter your User ID:

Your User ID is your email address

Example: 'SSample@unitedsub.com' would be the User ID for Susan Sample

Enter Password:

(Note: enter 'unitedsub' on first login. You will then be prompted to change your password.)

USI SALES & MARKETING RESOURCE CENTER

Sign In

User Id

Password

[Forgot My Password](#)

- Click on the 'Login' button

- You will be prompted after first login to change your password

- Click on the 'Submit' button

Please enter your new password

New Password:

Confirm New Password:

Log In (cont.)

The first time you log in, you will be asked to select and answer a *Security Question*

- Click 'Save & Continue'

Susan Sample

Password: *
Please re-type your password

Confirm Password: *

! For future account verification, specify a security question and answer below to proceed.

Select a Security Question: *

Security Question Answer: *

Confirm Security Question Answer: *

Adding New Users

- To **add new users** submit your request to:
Alicia Gilbert
Phone 952.925.6763
Email: agilbert@unitedsub.com

Checking Profile Information

- **My Profile**
Click on the 'My Profile' link at the top of the menu to add/ or edit your profile information.

Providing this information automates form filling for versioned products, such as business cards etc.

(Note: if your contact information changes, you can always update your information here in the future.)

- Click on the 'Save & Continue' button when complete.

The screenshot shows the 'My Profile' page for Susan Sample. The page header includes the USI logo and the text 'SALES & MARKETING RESOURCE CENTER'. The user's name 'Susan Sample' is displayed at the top right, along with a 'My Profile' link and a 'Log Out' button. The page contains several form fields for profile information:

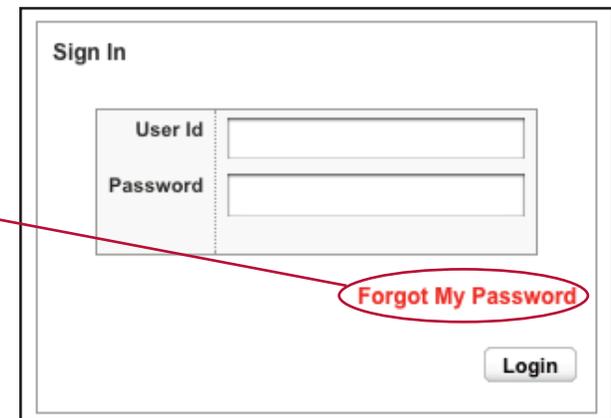
- Home Catalog Shopping Cart Order Manager Search Catalog... Search
- Home » My Profile
- Susan Sample
- Password: [masked] (Please re-type your password)
- Confirm Password: [masked]
- Select a Security Question: [What city were you born in?]
- Security Question Answer: [masked]
- Confirm Security Question Answer: [masked]
- First Name: Susan
- Last Name: Sample
- Company Name: United Subcontractors, Inc.
- Email Address: ssample@unitedsub.com
- Address 1: 5201 Eden Avenue
- Address 2: [empty]
- Suite: Suite 220
- City: Edina
- State: MN
- Zip Code: 55436
- Country: USA
- Toll Free Number: [empty]
- Phone Number: 800-000-0000
- Website: www.unitedsub.com
- Save & Continue [button]
- Apply Changes [button]

Resetting Your Login Password

- **Forgot My Password**

Should you forget your password in the future you may

- Click on the '*Forgot My Password*' Button
- Enter your User ID and click on continue
- Answer the security question
- You then can type in a new password
- Click the '*Submit*' button

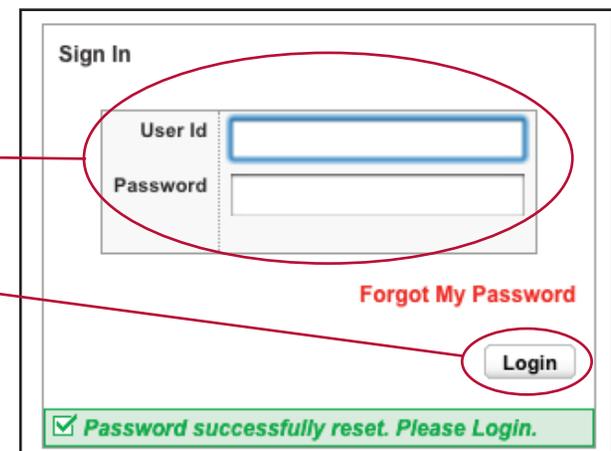


The screenshot shows a 'Sign In' form with two input fields: 'User Id' and 'Password'. A 'Login' button is located at the bottom right. A red oval highlights the text 'Forgot My Password' in red, which is positioned to the right of the password field. A red line connects this oval to the first bullet point in the list above.

You will receive a message:

'Password successfully reset'

- Enter your User ID and your new password
- Click the '*Login*' button



The screenshot shows the same 'Sign In' form. The 'User Id' field is highlighted with a blue border. A red oval highlights the 'Forgot My Password' text in red, and another red oval highlights the 'Login' button. A green message bar at the bottom of the form contains a checkmark and the text 'Password successfully reset. Please Login.'. A red line connects the 'Forgot My Password' oval to the second bullet point in the list above, and another red line connects the 'Login' oval to the second bullet point.

Catalog Navigation

- **Catalog Page**

Click on the 'Catalog' tab

There are 3 options to navigate the Catalog:

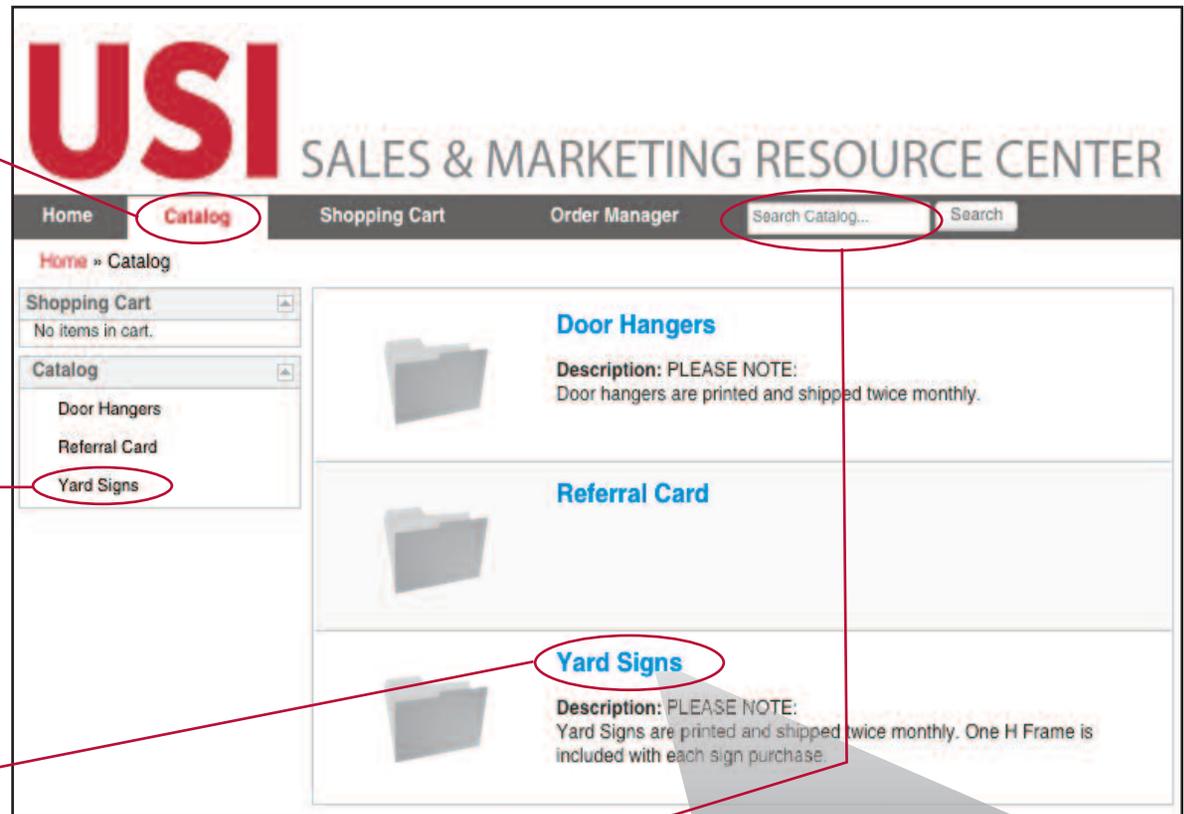
1. Clicking on an item name in the catalog tree

or

2. Clicking on a folder

or

3. Searching Catalog by entering in an item name and clicking on the search button



Versioned Collateral

- **Ordering a Versioned Product**

Fill in the form with your information.

Note: your profile information will automatically pre-populate applicable fields if you entered your information in 'My Profile' (page 5).

- **Ordering a Versioned Product for Someone Else**

Enter the form information and save it using the 'Save Form for Quick Fill' instructions on page 9.

- **Proof**

- Click on the 'Refresh' button

- **Then click on the PDF icon to download a pdf for reviewing**

Please review the PDF proof thoroughly before finishing the order.
This is the only proof that will be provided.

Versioned Collateral (cont.)

- **Save Form for Quick Fill:**
 - You may save your information, or information entered for others, using the 'Save Form for Quick Fill' option
 - Enter in a 'Name' and click the 'Save' button
- **After reviewing & approving the proof, enter quantity and click 'Add to Cart'**

The screenshot shows a web form for 'Insulation - Yard Sign'. The form is divided into several sections:

- Product Information:** 'Insulation - Yard Sign'
- Version This Product:** A section for managing different versions of the product.
- Form:** A section for entering details. It includes a 'Quick Fill' search bar, a 'Select Logo' dropdown menu (currently set to 'Hastings Garage Doors'), and input fields for 'Phone Number*' (800-000-0000) and 'Website*' (www.webaddress.com). At the bottom of this section, there is a 'Save Form for Quick Fill:' label, a text input field containing 'Ben Smith Yard Sign', and a 'Save' button. A red circle highlights the 'Save' button, and a red line points from the text 'click the 'Save' button' in the list to this button.
- Proof:** A preview of the final yard sign. It features a background image of a person insulating a roof, the text 'Insulate your savings!', 'Call the insulation experts', and the phone number '800-000-0000'. Below the sign, it says 'FRONT' and 'Enhanced View'.
- Order Information:** A section showing pricing. It includes a table with columns for 'Qty', '10-99', and '100+'. The 'Unit Price' is listed as '\$18.75' and '\$17.00'. Below the table, it states 'Price does not include tax'. At the bottom, there is a 'Qty:' input field with a 'Minimum: 10' label and a green 'Add to Cart' button. A red circle highlights the 'Add to Cart' button.

Versioning - Using Saved Quick Fills

- **Using Existing Saved Quick Fills:**

- Go 'Saved Quick Fills'
enter a saved name
and click 'Search'

or

- Click 'Search' and a dropdown list of saved names will be available in the dropdown.

(The dropdown list will show 10 names at one time. Click on the arrow at the bottom of the list to show more names.)

- Click in 'Fill Form' and information saved will prepopulate. Click on the refresh button and view pdf.

- **After reviewing & approving the proof, enter quantity and click 'Add to Cart'**

The screenshot displays a web application interface for 'Insulation - Yard Sign'. The interface is divided into several sections:

- Product Information:** 'Insulation - Yard Sign'
- Version This Product:** A section for managing product versions.
- Form:** A section for creating or editing a form. It includes a search bar for 'Saved Quick Fills', a dropdown menu showing 'Ben Smith Yard Sign', and a 'Fill Form' button. Below this are fields for 'Select Logo*' (Hastings Garage Doors), 'Phone Number*' (800-000-0000), and 'Website*' (www.webaddress.com). There is also a 'Save Form for Quick Fill' section with a 'Name' field and a 'Save' button.
- Proof:** A section for reviewing a proof. It shows a preview of the sign with the text 'Insulate Call the' and a 'Select a Logo' button.
- Order Information:** A section for adding the product to a cart. It includes a quantity selector (Qty: 10-99, 100+), unit price (\$18.75, \$17.00), and an 'Add to Cart' button. The quantity is currently set to 100.

Red circles and arrows highlight key elements: the search bar, the dropdown menu, the 'Fill Form' button, and the 'Add to Cart' button.

Shopping Cart - Continue Shopping

- To continue shopping, click the 'Back To Catalog' link or 'Catalog'

- Multiple products can be ordered at the same time

- You can delete items from the shopping cart that may not be needed by clicking on the 'trash can' icon, to remove, or by clicking in the box next to the item and clicking on the remove button.

The screenshot shows the USI Shopping Cart page. The header includes the USI logo and the text "SALES & MARKETING RESOURCE CENTER". The navigation bar contains links for Home, Catalog, Shopping Cart, and Order Manager, along with a search bar. The main content area shows the cart with one item: "Installation Neighbor Door Hanger - Version A | SKU: InNgh-verA-DH_d-". The quantity is set to 500, and the price is \$118.00. The subtotal is \$118.00, and the total is \$121.00. A "Back To Catalog" link is circled in red at the bottom left of the cart area.

The screenshot shows the USI Shopping Cart page with two items. The first item is "Installation Neighbor Door Hanger - Version A | SKU: InNgh-verA-DH_d-" with a quantity of 500 and a price of \$118.00. The second item is "Referral Card | SKU: Ref-Card_d-Susan_Sample" with a quantity of 500 and a price of \$55.00. The subtotal is \$173.00, and the total is \$179.00. A "Back To Catalog" link is circled in red at the bottom left of the cart area.

Shopping Cart - Checkout

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Home Catalog **Shopping Cart** Order Manager Search Catalog... Search

Shipping → Billing → Confirm Order

Home » Shopping Cart

Search Cart by: Product Name Search Cart... Search

Current (2) Saved

Products	Qty	Price
<input type="checkbox"/> Installation Neighbor Door Hanger - Version A SKU: InNgh-verA-DH_d- Description: Installation Neighbor Door Hanger - Version A - 614-749-9298	500	\$118.00
<input type="checkbox"/> Referral Card SKU: Ref-Card_d-Susan_Sample Description: Referral Card - Susan_Sample_614-749-9298	500	\$55.00

Subtotal:	\$173.00
Pick & Pack:	\$6.00
Total:	\$179.00

« Back To Catalog

- When the shopping cart order is complete, either click
 - 'Checkout' to finish the order

OR

- Save the shopping cart by clicking on the 'Save Cart' button
The saved shopping cart feature allows shopping cart items to be saved for future or repeat use.

Assign Shopping List

Select Cart: Create new cart...
Save Action: Copy
Name: SSampleOrder6-24-11

Shopping Cart - Shipping

- **Choose Shipping Address**
 - 'Use an Existing Address'

or

 - Change Address by clicking on the 'Change Address' button (Note: If you have more than one location, you will see other locations that you may select by clicking on the radio button.)

or

- 'Use a New Address' by entering your information into the form field
- **Choose shipping method** from dropdown list and click 'Recalculate' to update shipping (Note: You can choose different shipping methods for each item in your order if you want to receive certain items before others.)
- Click on 'Continue Order' button

Choose Shipping Address: (All Products)

Use an Existing Address: Use a New Address (This order only):

Attn:

Country:

Company:

Attn:

Addr1:

Addr2:

Addr3:

Addr4:

City:

State:

Zip: *Required Field

Choose Shipping Method: (All Products)

	Ship To	Ship Method	Instructions	Qty	Shipping Price
<input type="checkbox"/> FedEx Ground® <input type="checkbox"/> FedEx First Overnight® <input type="checkbox"/> FedEx Priority Overnight® <input type="checkbox"/> FedEx Standard Overnight® <input type="checkbox"/> FedEx 2Day®	Neighbor Door Hanger - Version A - 614-749-9298	Current: FedEx Ground®		500	\$8.33
<input type="checkbox"/> Referral Card Ref-Card_d-Susan_Sample	Referral Card - Susan_Sample_614-749-9298	Current: FedEx Ground®		500	\$8.33

Subtotal: \$173.00
Shipping: \$16.66
Pick & Pack: \$6.00
Total: \$195.66

Shopping Cart - Billing

- **Billing Information**

All Credit Card purchases must use the billing address of the credit card holder

- Use a New Address by entering your information into the form field

- Choose Credit Card Type and enter in all credit card information

- Click on the 'Continue Order' button

Choose Billing Address: (All Products)

Use an Existing Address: Attn:

Use Shipping Address

Use a New Address (This order only):

Country: United States

Company:

Attn:

Addr1:

Addr2:

Addr3:

Addr4:

City:

State: Alabama

Zip:

**Required Field*

Choose Payment Method:

Credit Card

Credit Card Type: Visa

Credit Card Number:

Expiration: 01 2010

Security Code:

First Name on Card:

Last Name on Card:

Phone Number:

<input type="checkbox"/> SKU	Description	Ship Method	Qty	Price
<input type="checkbox"/> InNgh-verA-DH_d-	Installation Neighbor Door Hanger - Version A - 614-749-9298	FedEx Ground®	500	118.00
<input type="checkbox"/> Ref-Card_d-Susan_Sample	Referral Card - Susan_Sample_614-749-9298	FedEx Ground®	500	55.00
			Subtotal:	\$173.00
			Shipping:	\$16.66
			Pick & Pack:	\$6.00
			Total:	\$195.66

Shopping Cart - Confirm/Complete Order

- **Confirm Order**
 - Review your order, checking that all information is correct.

Please note the Blue **'[Change]'** options available in multiple areas. Click this option if you need to make a change prior to completing order.

- Click on 'Complete Order' button

Shipping → Billing → Confirm Order

Current Ship To Address	Insulation Co. Susan Sample 123 Sample Blvd Worcester, MA 01606 US [Change]	Purchase Order Number:	12345
		Current Bill To Address	Insulation Co Susan Sample 123 Sample Blvd Worcester, MA 01606 US [Change]

Items	Name	SKU	Qty	Price
1	Installation Neighbor Door Hanger - Version A	InNgh-verA-DH_d-	500	\$118.00
	Description Installation Neighbor Door Hanger - Version A - 614-749-9298	Ship Method FedEx Ground® [Change]	Est. Weight 14.0000 Pounds	Shipping Price \$8.33
	Ship To Susan Sample 123 Sample Blvd Worcester, MA 01606 US [Change]			
2	Referral Card	Ref-Card_d-Susan_Sample	500	\$55.00
	Description Referral Card - Susan_Sample_614-749-9298	Ship Method FedEx Ground® [Change]	Est. Weight 2.0000 Pounds	Shipping Price \$8.33
	Ship To Susan Sample 123 Sample Blvd Worcester, MA 01606 US [Change]			

Subtotal:	\$173.00
Shipping:	\$16.66
Pick & Pack:	\$6.00
Total:	\$195.66

[← Back](#) [Complete Order →](#)

Shopping Cart - Order Confirmation

- **Your order is now complete.**
You may either print or view your detailed summary.

Home » Manage Orders » Order Summary

Order Date: 8-24-11	Current Ship To Insulation Co. Susan Sample 123 Sample Blvd Worcester, MA 01606 US	Purchase Order Number: 12345	Current Bill To Insulation Co. Susan Sample 123 Sample Blvd Worcester, MA 01606 US
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[print this page](#)

<input type="checkbox"/>	Options	SKU	Description	Cost Center	Ship To	Ship Method	Qty	Price
<input type="checkbox"/>		INgh-verA-DH_d	Installation Neighbor Door Hanger - Version A		Current	FedEx Ground®	500	\$118.00
<input type="checkbox"/>		Ref-Card-d	Referral Card		Current	FedEx Ground®	500	\$55.00

Subtotal:	\$173.00
Shipping:	\$16.66
Pick & Pack:	\$6.00
Total:	\$195.66

[View Detail Summary](#)

Order Manager

- Click on the 'Order Manager' tab. The order manager lets you search all jobs that you have ordered.

- Search by 'Orders' and enter the date range (or click on the calendar icon).

- Click the 'Search' button.

- The order manager allows you to **reorder** an item that you have previously ordered. Simply click on the check box next to the item and click 'Reorder Selected Items'. Your item will be added to the shopping cart. Click on the shopping cart tab to reorder the item and proceed to checkout.

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Home Catalog Shopping Cart **Order Manager** Search Catalog... Search

Home » Manage Orders

Search For **Orders**

Order/Req #

Display by Order

From 6/20/2011

To 6/27/2011

Search

Records 1 to 2 of 2

<input type="checkbox"/>	Options	Items	Order Number	Ordered By	Impersonator	Created
<input type="checkbox"/>	🔑	5	USI-2	Susan Sample		6/21/11
<input type="checkbox"/>	🔑	2	USI-5	Susan Sample		6/25/11

Reorder Selected Items

Order Manager (cont.)

- To view the status of an order, select an option from the dropdown list.

To view the **tracking information** for an order that has shipped, select 'shipped' from the dropdown.

The screenshot displays the 'USI SALES & MARKETING RESOURCE CENTER' interface. The navigation bar includes 'Home', 'Catalog', 'Shopping Cart', and 'Order Manager'. Below the navigation bar, there is a search bar with the text 'Search Catalog...' and a 'Search' button. The main content area is titled 'Home » Manage Orders'. A search filter panel is visible, containing a 'Search For' dropdown menu with 'Orders' selected. The 'Order Status' dropdown menu is open, showing options: 'New Order', 'Order Accepted', 'Work In Progress', 'Shipped', 'Requisitioned', and 'Paid'. The 'Shipped' option is circled in red. Below the search filter panel, there are fields for 'From' (6/20/2011) and 'To' (6/27/2011), and a 'New Order' dropdown menu with a 'Search' button.

System Requirements

Windows Platform:

Microsoft® Internet Explorer® 7.0, 8.0
Mozilla® Firefox®

Macintosh Platform:

Mozilla® Firefox®
Safari™
Google Chrome™ browser

*****Pop-up Blocker must be turned off on your computer.***

Directions: Click on the tools button, and then click Pop-up Blocker, click on Turn Off Pop Up Blocker.

Questions

New user sign ups:

- Submit your request to:
Alicia Gilbert
Phone 952.925.6763
Email: agilbert@unitedsub.com

Technical Support:



Click on the 'Email Support' link
in Online Store - to send an email to our Technical Support Team
or
Call us Toll Free at 877.549.3950