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# INTRODUCTION TO SHOIBT

## BECOME A SHOIBT CUSTOMER

**ShopIBT.com is available for current (existing) IBT customers. If you have an existing account with IBT and are interested in utilizing our e-commerce platform to create and manage online orders, please follow these steps:**

- Search for ShopIBT.com
- Click "Become A User" on the ShopIBT.com homepage
- Complete the new user form
- An activation email will be sent to the email address provided during registration

## ACCOUNT ACTIVATION

**You have a new account on IBT's e-commerce site, ShopIBT.com. The first step to easy shopping for all your industrial needs is to activate your account.**

- An email will be sent to the email that you registered with
- Click the "Activate Account" button in the email
- Create a new password (must contain at least 7 characters and 1 number)
- Click "Activate Account" button
- Sign into the site with your newly created password
- Select billing and shipping address, click the "Set as default" checkbox to save your defaults

## MY DASHBOARD OVERVIEW

**On the "My Dashboard" page access the main pages of the ShopIBT site and preview your most recent orders. Click the "Make Dashboard my homepage" checkmark to set the "My Dashboard" as your default homepage.**

- **Tiles:** Use the tiles at the top of the page to open the page.
- **Quick Order:** Use the quickorder feature directly from the "My Dashboard" page
- **Recent Orders:** preview your five most recent orders made from your personal login
- **Recent Quotes:** preview your five most recent quotes made from your personal login
- **Recently Purchased:** view items recently purchased, click add to cart to reorder

## **SITE OVERVIEW & NAVIGATION**

**This is a quick overview of the main navigation in the ShopIBT platform.**

- **Header:** In the upper left header section access the “About Us” | “Contact Us” | “Locations” pages
- **My Account Menu:** Use the “My Account” dropdown in the upper right corner to access:
  - **Account Settings:** update password, email, subscriptions, and default shipping addresses
  - **Addresses:** review billing addresses and shipping addresses
  - **User Administration:** only available to administrators on the customer account
  - **Saved Orders:** access saved orders made from your personal login
  - **Invoice History:** access invoice history for the entire customer account
  - **Order History:** access orders made both through the ShopIBT and directly with the branch
  - **My Quotes:** access quote requests made from your personal login
  - **My Lists:** access, create, and share saved shopping lists
- **Red Navigation Bar:** Use the tabs in the navigation bar at the top of any page to access pages:
  - **Products:** shop by item category
  - **Brands:** shop by brand, IBT featured brands are at the top, search all with the A-Z menu
  - **My Dashboard:** quickly access key features, optionally, set this page as your homepage
  - **My Lists:** access, create, and share saved shopping lists
  - **My Quotes:** access quote requests made from your personal login
  - **Order History:** access orders made both through the ShopIBT and directly with the branch
  - **Saved Orders:** access saved orders made from your personal login
  - **Quick Order:** add multiple items to an order, save the order as a list or move to your cart
  - **Special Quote / Request A Quote:** request a quote for an item not listed on ShopIBT
- **Search Bar:** Use the search bar on the top right of any page to search by item name or number.
- **Cart:** Access your cart from any page by clicking on the cart icon.
- **Footer:** Access additional resources at the bottom of any page.

# MANAGING MY ACCOUNT

## UPDATE YOUR EMAIL ADDRESS

To update your email address follow the steps below:

- From the "My Account" drop down menu, select "Account Settings"
- On the "Account Settings" page click the "Change Email" link
- Enter the new email address in the pop-up window and click the "Save" button
- The new email will appear as your email on the "Account Settings" page

## SET DEFAULT SHIPPING ADDRESS

To update your default shipping and billing address:

- From the "My Account" drop down menu, select "Account Settings"
- Under the "Default Billing & Shipping" section choose the "Use Defaults" button
- Select the billing and shipping address from the drop down menu

## RESET PASSWORD

To update your password while you are logged into the ShopIBT platform, follow these steps:

- From the "My Account" drop down menu, select "Account Settings"
- On the "Account Settings" page click the "Change Password" link
- Enter the your current and new passwords in the pop-up window and click the "Save" button
- Passwords must contain at least eight characters, 1 uppercase letter, 1 number, and at least one special character

## FORGOT PASSWORD

If you have forgotten your password, you can reset it from the ShopIBT sign in page using the following steps:

- From the ShopIBT.com sign in page, click the "Forgot Password" link
- Enter your username, for most people this is your email address
- An email with the reset password link will be sent to your registered email address.
- Click the "Reset Password" button in the email and follow the prompts to reset your password.

# SHOPPING EXPERIENCE

## SEARCH FOR ITEMS

**Search for Items: Search, Filters, List Views & Compare**

- **Search Bar:** Use the search bar by IBT Item#, Manufacturer#, or Customer# if the customer numbers have been loaded into A+.
- **Filters:** When reviewing a list of items, use the toolbar on the left side to filter your results by keyword or by category.
- **Views:** Use the tiles at the top of the list of items to change how you view items (column, row, tiles).
- **Compare List:** Click the compare checkbox on an item to add to a compare list, in the pop-up on the bottom click "Compare" to view.

## COMPLETE ORDER

**Complete Order: Cart, Checkout, & Confirmation**

- Click the cart icon in the red navigation bar to open your cart, click checkout when you are ready to complete the checkout process.
- Review the shipping and billing information, order details, enter P.O. number, and add optional notes. Click the "Place Order" button.
- Click "Yes, Request a Quote" if you have an item that requires a quote in your cart. Your local branch will contact you with a quote.
- Review your submitted order, from this screen you can print, add items to a list or continue shopping with the buttons at the bottom.

## ORDER HISTORY

**Order History: Search, Filter, Email & Print**

- Access Order History by clicking the "Order History" tab in the red navigation bar.
- Click the "Search Order History" button to filter your previous orders. Enter your criteria and click search to return relevant orders.
- To open the order click the date or the order number. Once open, you can print or email the order.

## INVOICE HISTORY

**Invoice History: Search, Email & Print**

- Access Invoice History by selecting the "Invoice History" link under the "My Account" menu in the upper right corner.
- Click the "Search Invoices" button to filter your previous invoices. Enter your criteria and click search to return relevant invoices.
- To open the order click the date or the order number. Once open, you can print or email the invoice.

## REQUEST SPECIAL QUOTE

**Request Special Quote**

- Click "Request A Quote" in the red navigation bar, complete the form and send. Your local branch will contact you with quote details.

# QUICK ORDER, UPLOAD ORDER, & REORDER

## QUICK ORDER

### Quick Order: Create Quick Order by Item Search

- Quick order allows you to add several items to an order then move them to a saved list or directly into your cart to checkout.
- Click on the "Quick Order" tab in the red navigation bar or use the "Quick Order" section on the "My Dashboard" page.
- Use the search bar to find the item, update quantity / unit of measure and click "Add to Order" to add the item to the order.
- The order will appear at the bottom of the page, use the "Add All to Cart & Checkout" button to move the order to your cart, use the "Add All to List" button to save the order as a list and use the list to easily reorder items in the future.

## UPLOAD ORDER OR LIST

### Upload Order: Order Template & Upload Instructions

- Upload an order from the "Quick Order" tab in the red navigation bar, click the "Upload An Order" link on the Quick Order page.
- Review the instructions for uploading an order and click the "Order Upload Template" link to download the template.
- Order numbers within the template must retain the leading zero(s), if using copy and paste, use paste special to paste as text.
- Click the "Browse" button to find the edited upload file saved on your computer, use the "First row is column headings" if the first row in your spreadsheet has the column headers. Click the "Upload Order" button.
- Any upload errors will appear in a list, click the "Continue" button or click "Cancel" to make changes to the file and re-upload.
- You will receive a notification to confirm uploaded items, click "Return to List" to open the list.

## CREATE LISTS

### Manage Lists: Create a list on the "My Lists" page (by item and upload)

- Click "My Lists" from the red navigation bar and click the "Create List" button to create a new list.
- In the create list pop-up and a name and description for your new list, click the "Create List" button.
- The new list will show on the "My Lists" page, click the list name to open the list, and click "Add Items" to add items to the list.
- Type the item number in the search bar and select from the drop down, add the quantity and unit of measure, click "Add to List"
- Complete the step above for each item that you would like to add to the list.
- To add multiple items, you can use the "Upload Items" link for instructions on downloading the template and uploading your items.

## SHARE LISTS

### Manage Lists: Share Lists

- On the "My Lists" page, click the list name to open it, click the "Share" button, share the list via email or to users on the account.

# USER ADMINISTRATION

## CREATE NEW USER

**If you are an administrator on the account, you will have access to create new users.**

- Select "User Administration" from the "My Account" drop down, on the User Administration page click the "Create New User" button.
- Enter the username, email address, first name, and last name (recommended that username matches email address).
- Click the send activation email to send an email to the new user with their login information.
- Under settings assign the user a role and an existing approver (an approver is required for the Requisitioner and the Buyer 1,2,3 roles)
- Click the (?) next to "Assign User Role" for a full definition of the role access. Click the "Create User" button to create the new user.

## MANAGE EXISTING USERS

**If you are an administrator on the account, you will have access to manage existing users.**

- Select "User Administration" from the "My Account" drop down, on the User Administration page click username to manage the user.
- On the "User Setup" page you can update the user's name and email address, use the "Assign User Role" dropdown to update the role.
- To deactivate the user, uncheck the "Active" checkbox. This will deactivate the user account but will not delete it.
- Use the "Assign Shop To" button to assign the location the user can ship to.
- Click the "Save Changes" button to save the changes on the user account.

## USER ROLES

**Each role on the user account has a different level of access.**

**User Administrator:** Full access to My Account. Can order over budget. Can see invoices and orders for users that the User Administrator is assigned to. Default approver if none is assigned to a user.

**Buyer Level 3:** Can order over budget without approval. Can see orders and invoices. Cannot access User Administration, Budget Management, or Requisition Approval.

**Buyer Level 2:** Over budget orders require approval. Can see orders. Cannot see invoices. Cannot access User Administration, Budget Management, or Requisition Approval.

**Buyer Level 1:** Cannot be assigned as an approver. All orders require approval. Can see orders. Cannot see invoices. Cannot access Order Approval, User Administration, Budget Management, or Requisition Approval.

**Requisitioner:** Can only place requisition requests. Cannot place orders. Cannot access Order History, Invoice History, Order Approval, User Administration, Budget Management, or Requisition Approval.

## **ADDITIONAL RESOURCES**

### **ACCESS FAQs & TRAINING MATERIALS**

**Add more information here**

- Click the “FAQ” link at the top upper left of any page to access additional training resources for ShopIBT.
- Click on the categories or training tiles to open content.

### **GIVE FEEDBACK**

**Give feedback to your Account Manager or local branch directly, or use the online form.**

- Click the “Feedback” link in the footer/bottom of any page on ShopIBT.
- Complete the form with your information, feedback category, urgency level, and feedback. Click the “Submit Feedback” button.
- An IBT representative will receive your information and contact you to resolve the issue.

### **NEED MORE HELP?**

**Contact your Account Manager or your local branch.**

#### **Find your local branch.**

- To find your local branch information, use the “Locations” link on the upper left of any ShopIBT page.
- Type in your zip code and click the search button.
- You will see a list of branches returned with the closest branch listed first, click on the branch location for contact information.

#### **Submit the “Contact Us” form.**

- Click the “Contact Us” link in the upper left corner of any ShopIBT page.
- Complete the form with your information and feedback and click the “Send” button.
- An IBT representative will receive your information and contact you to resolve the issue.