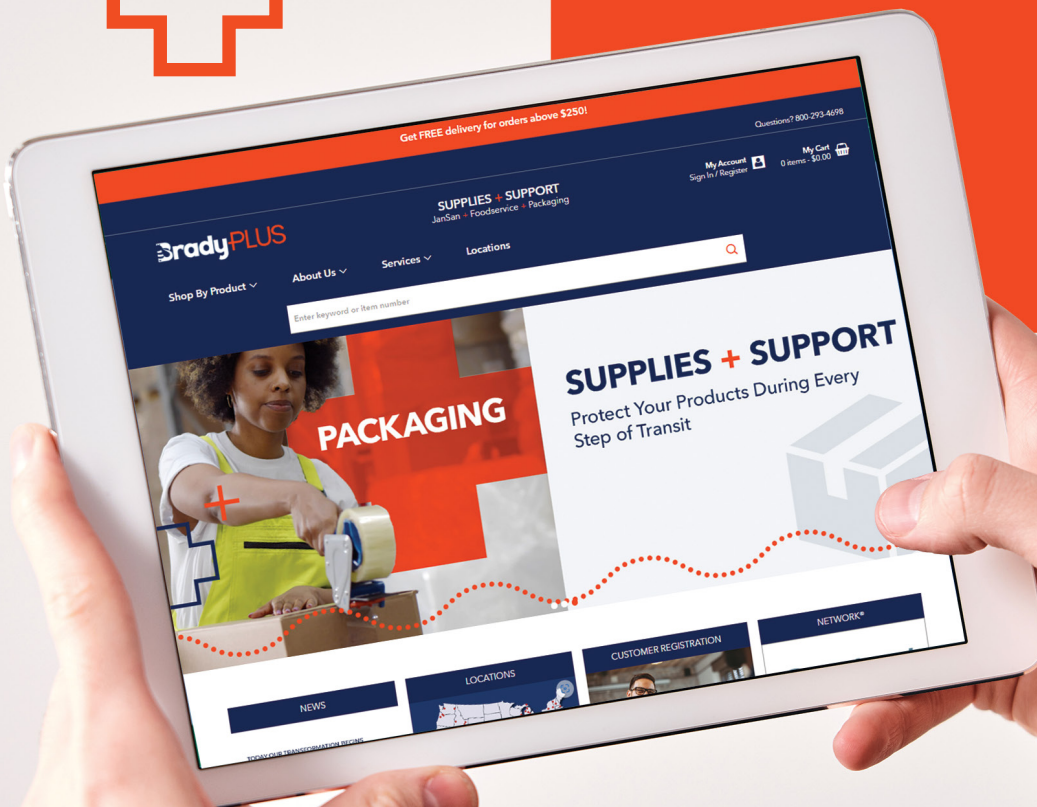


BradyPLUS



OPT-EXT-0001-21-2025

E-COMMERCE Quick Reference Guide

[SUPPLIES.BRADYINDUSTRIES.COM](https://supplies.bradypackaging.com)

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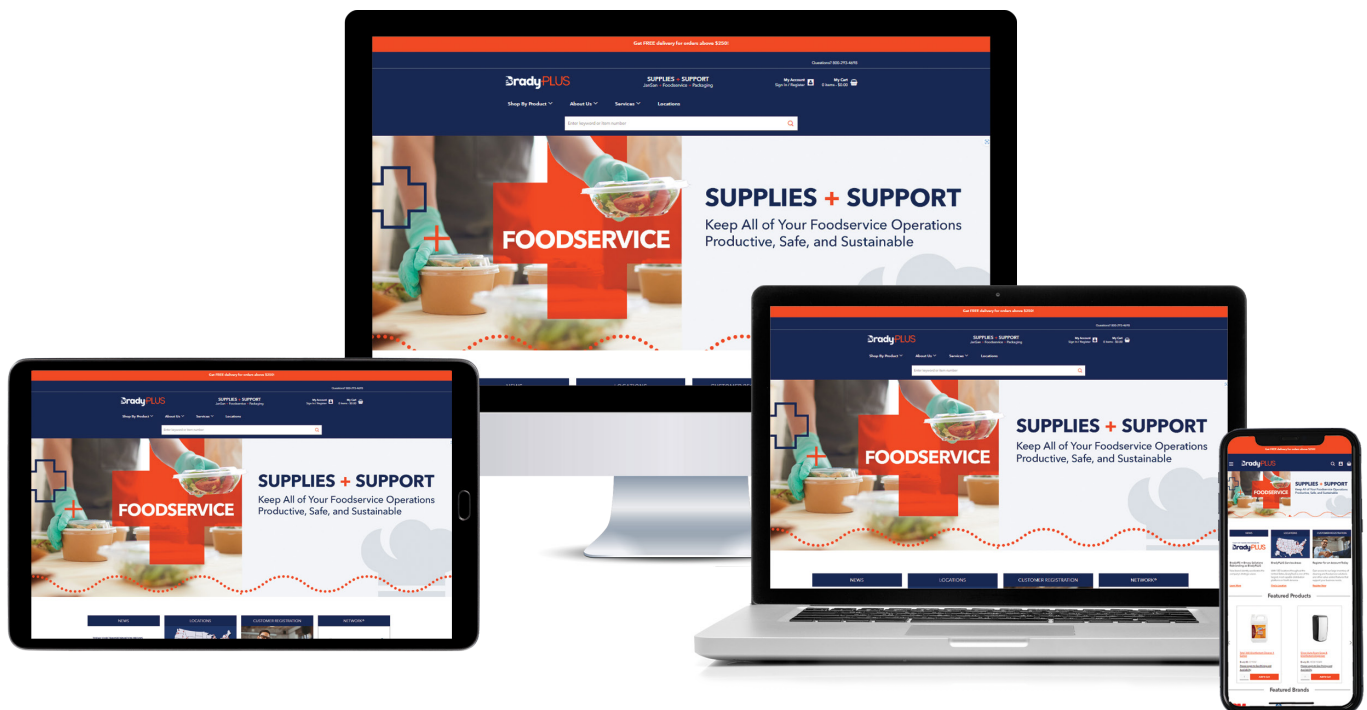
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Connecting to BradyPLUS Online for Faster, Easier Ordering

You can access all the information you need to stay connected with BradyPLUS through our easy-to-use eCommerce platform. Browse the BradyPLUS product catalog, access safety data sheets, look up prices, create your own custom order guide, manage your employees and budgets, place orders and receive confirmation – all via a convenient and quick interface.

Reduce transaction costs. Start ordering online today with these simple steps!



supplies.bradyyindustries.com



+ Details of User Roles & Features +

These are the BradyPLUS user roles and functions that are available for users. Each account must have an Administrator setup first before you can set up additional roles and approve orders.

FEATURES COMPARISON	ADMIN (Administrator)	BUYER LEVEL 3	BUYER LEVEL 2	BUYER LEVEL 1	REQ (Requisitioner)
Access to view order history	+	+	+	+	
Ability to request a quote	+	+	+	+	
Ability to place orders	+	+	+		
Ability to order over budget without approval	+	+			
Access to view invoice history	+	+			
Can approve requisitions	+	+			
Ability to approve orders	+	+			
Can be assigned as an approver	+	+			
Access to user administration	+				
Can access budget management	+				
Ability to submit requisition requests					+



USER INSTRUCTIONS

To successfully follow the instructions outlined in this user manual, please ensure to log in to your **BradyPLUS** account at supplies.bradypius.com. If you and your team are interested in a “Virtual Website Demonstration,” kindly reach out to your BradyPLUS sales representative to schedule a session.

Section 1: Accessing Your Account

+ Logging Into an Account

[Steps: 1 - 8] Hover over “My Account,” then enter your email and password in the appropriate fields. Once you have entered your user information associated with the account, click the “Sign In” button. On the “Select Billing & Shipping” page, click the “search icons” to choose your preferred account information for both billing and shipping. If you would like to change the “Fulfillment Method” you may do so by selecting “Ship” or “Pick Up” and then click “Continue” to sign in to your account.

+ Resetting Your Password

[Steps: 9 - 12] Click “My Account,” then click the “Forgot Password?” Then the “Reset Password” pop-up will appear. Enter your email associated with your BradyPLUS eCommerce account in the “Username” field, then click “Send Email” button. If an account matches the username entered, an email will be sent to the associated email address with instructions on how to reset your password. If you do not receive an email, please contact customer service.

+ Signing Out of an Account

[Steps: 13 - 14] Hover over “My Account,” then click the “Sign Out” button.

The screenshots illustrate the following steps:

- Step 1:** Hover over the "My Account" link in the top right navigation bar.
- Step 2:** On the "Sign In / Register" page, enter your email in the "Email" field.
- Step 3:** Enter your password in the "Password" field.
- Step 4:** Click the "Sign In" button.
- Step 5:** On the "Select Billing & Shipping" page, click the search icon for "Select Bill To".
- Step 6:** Click the search icon for "Select Ship To".
- Step 7:** Select the "Ship" radio button for the fulfillment method.
- Step 8:** Click the "Continue" button.
- Step 9:** Click the "Forgot Password?" link.
- Step 10:** The "Reset Password" pop-up appears. Enter your email in the "Username" field.
- Step 11:** Click the "Send Email" button in the pop-up.
- Step 12:** The "Reset Password" pop-up disappears.
- Step 13:** Hover over the "My Account" link in the top right navigation bar.
- Step 14:** Click the "Sign Out" button in the "My Account" dropdown menu.



Click to Watch How to Video

Video URL: vimeo.com/1003746477

Section 1: Selecting an Account

+ [Steps: 1 - 6] Hover over "My Account," then click the "Change Account" button. Next on the "Select Billing & Shipping" page, click the "search icons" to choose your preferred account information for both the "Bill To" and "Ship To" fields. Select "Ship" or "Pick Up" as your preferred "Fulfillment Method." To set the selected Bill To and Ship To as default, click the "Set these as default and skip this step when I sign in" check box, and then click "Continue" to save settings.

The screenshot shows the BradyPLUS website interface. The top navigation bar includes links for 'SUPPLIES + SUPPORT', 'My Account', 'My Lists', and 'My Cart'. A dropdown menu for 'My Account' is open, showing options like 'Account Management', 'Order Management', and 'Change Account'. The 'Change Account' button is highlighted. Below the navigation bar, there is a banner for 'It's Cater Time.' with a 'SHOP NOW' button. The main content area is titled 'Select Billing & Shipping' and contains three sections: 'Select Bill To', 'Select Ship To', and 'Fulfillment Method'. Each section has a search icon and a 'Continue' button. The 'Fulfillment Method' section has radio buttons for 'Ship' and 'Pick Up'. A checkbox labeled 'Set as default and skip this step when I sign in' is also present.



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Video URL: vimeo.com/1003744998

Section 2: Adding A Credit Card to Saved Payments

+ [Steps: 1 - 6] Hover over "My Account" and select "My Saved Payments." Then, click the "Add a Card" button and input the card details.

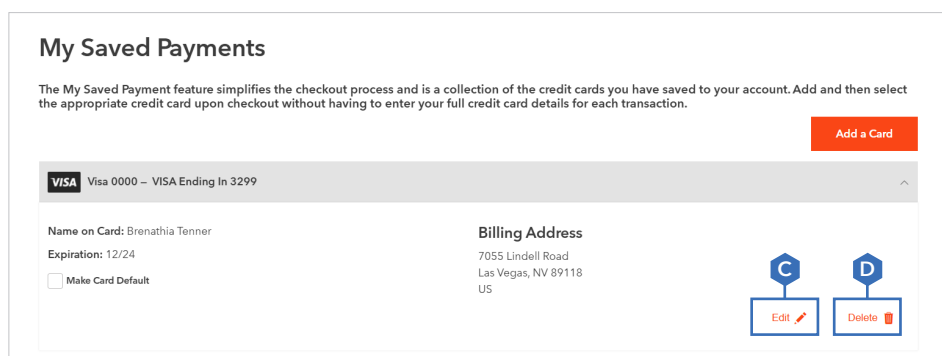
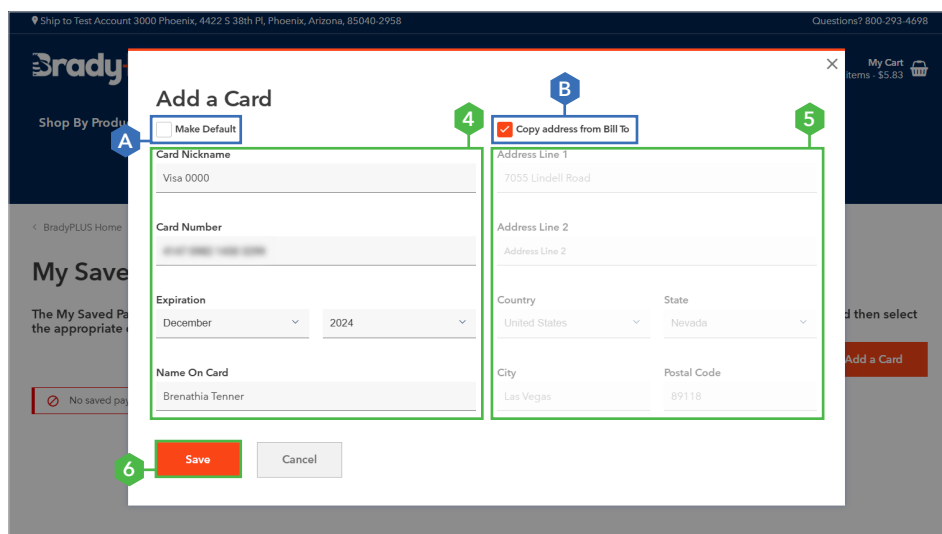
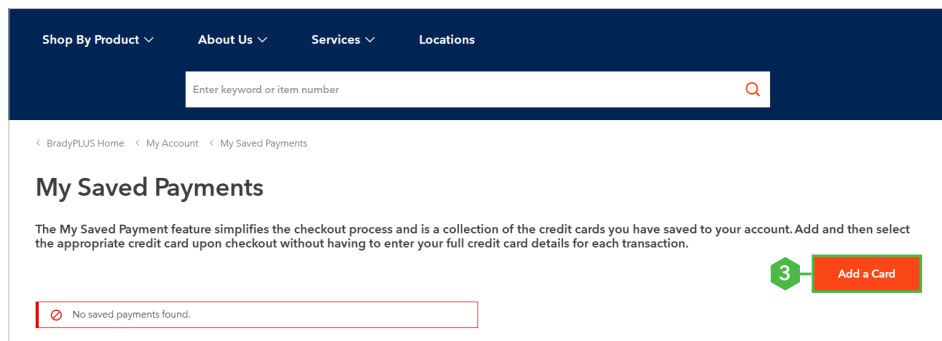
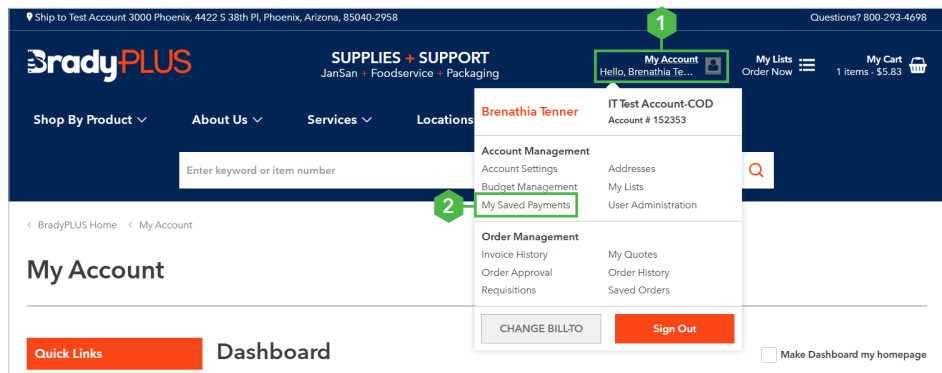
- Card Nickname
- Card Number
- Expiration
- Name On Card

You can designate this credit card as your default payment option by selecting the "Make Default" check box, as shown in example A. If the card billing address is the same as the Bill To account, select "Copy address from Bill To," as shown in example B. If the credit card billing address is different, enter the card's billing address manually in the fields shown in step 5, and then click "Save."

Note: When you are ready to place an order using this saved payment method, ensure you select the correct "Card Nickname." Additionally, you will need to enter the card's "Security Code" each time you use it.

+ Edit Saved Payments

[Steps: C - D] To edit a credit card, follow steps 1 and 2, then click "Edit" as shown in example C for the credit card you wish to modify. Make your changes and then click the "Save" button. If you prefer to remove a credit card, click "Delete" as shown in example D for the card you wish to delete.



Video URL:
vimeo.com/1036826261/e120e6973a

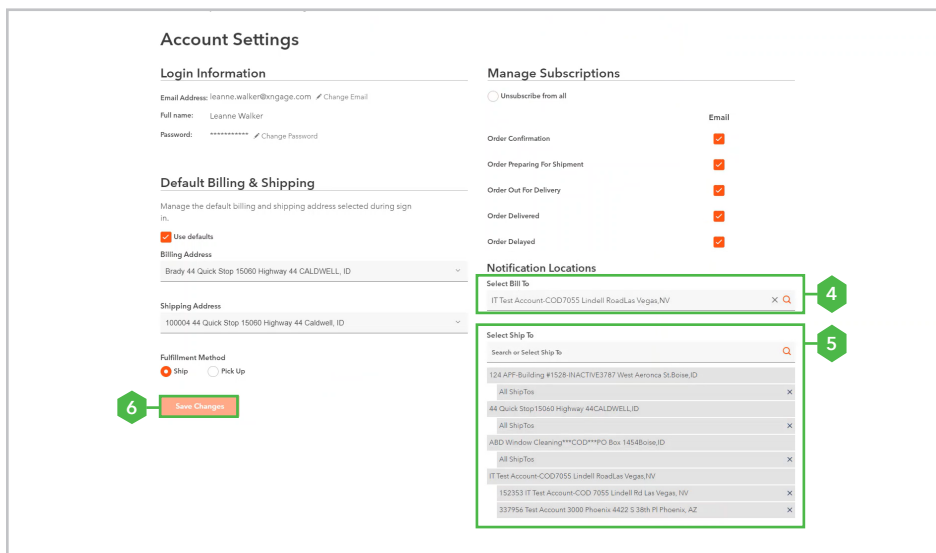
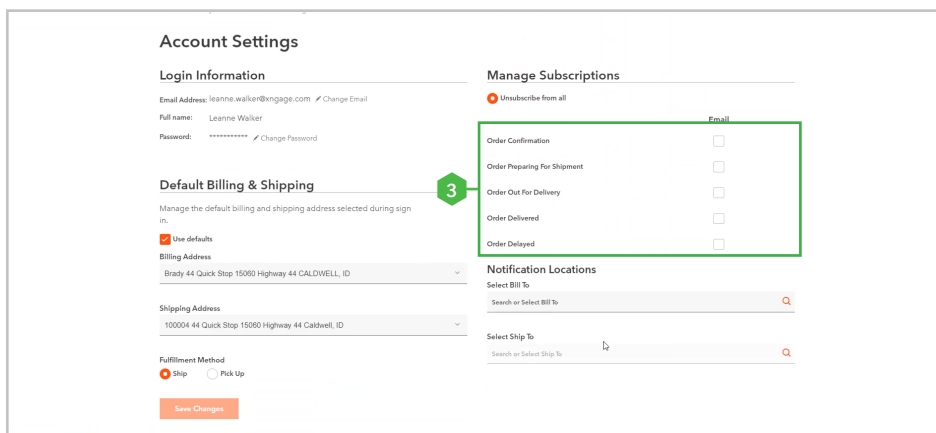
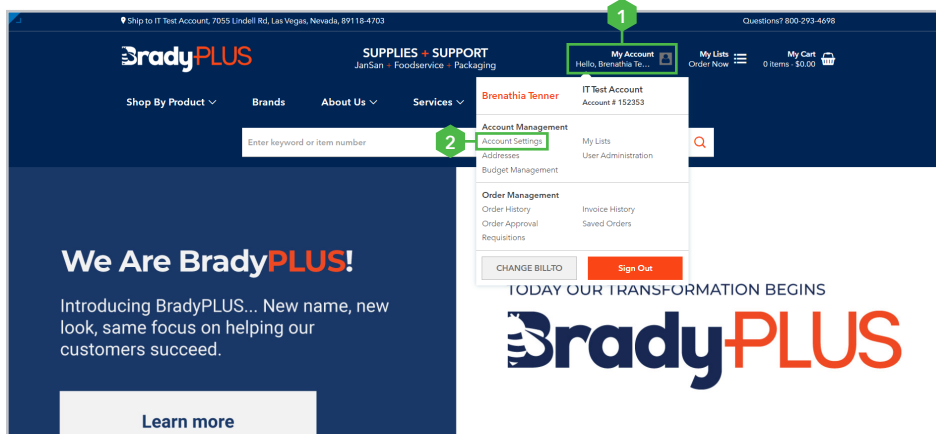
Section 2: Managing Delivery Notification Subscriptions

- + [Steps: 1 - 6] Hover over "My Account," then click "Account Settings." Select the check box(es) for the notification(s) you wish to receive.

Important Note: The selected enhanced order notifications will apply to all chosen "Notification Locations." You can apply these notifications to all locations or to specific ones if multiple options are available. View the steps below for details.

- + **Subscribe to All Locations**
Select "All Bill Tos" for the "Select Bill To" field, and then click the "Save Changes" button.

- + **Subscribe to Selected Only Locations**
Click the "Select Bill To" field to choose a Bill To account. Then, click the "Select Ship To" field to pick a shipping location or select "All Ship To" to choose all locations. To select multiple Bill To and Ship To locations, repeat these steps and click the 'Save Changes' button.



Video URL: vimeo.com/1018440847

Section 2: Managing Delivery Notification Subscriptions

+ Unsubscribe from All Notification

To unsubscribe from all notifications, choose “Unsubscribe from all” as shown in example A, then click the “Save Changes” button in step 6.

+ Removing Specific Subscriptions

To remove specific subscriptions, select the subscription(s) you want to unsubscribe from and click the “Save Changes” button in step 6.

+ Removing Notification Locations

To remove notification locations, click the “x” next to the desired Bill To account or Ship To location, then click the “Save Changes” button in step 6.

Account Settings

Login Information

Email Address: leanne.walker@bradyplus.com [Change Email](#)

Full name: Leanne Walker

Password: ***** [Change Password](#)

Default Billing & Shipping

Manage the default billing and shipping address selected during sign in.

☒ Use defaults

Billing Address

Brady 44 Quick Stop 15060 Highway 44 CALDWELL, ID

Shipping Address

100004 44 Quick Stop 15060 Highway 44 Caldwell, ID

Fulfillment Method

☒ Ship ☐ Pick Up

6 [Save Changes](#)

Manage Subscriptions

A [Unsubscribe from all](#)

B

C

Notification Locations

Select Bill To

IT Test Account-COD7055 Lindell RoadLas Vegas,NV X Q

Select Ship To

Search or Select Ship To

124 APF-Building #1528-RIACTIVE3787 West Aeronca St.Boise,ID X

All ShipTo X

44 Quick Stop15060 Highway 44CALDWELL,ID X

All ShipTo X

ABD Window Cleaning**COD**PO Box 14548Boise,ID X

All ShipTo X

IT Test Account-COD7055 Lindell RoadLas Vegas,NV X

152353 IT Test Account-COD 7055 Lindell Rd Las Vegas, NV X

337956 Test Account 3000 Phoenix 4422 S 38th Pl Phoenix, AZ X **C**

Section 3: Creating a New Website User

+ [Steps: 1 - 12] Hover over "My Account," and then select "User Administration." Next, click the "Create New User" button to proceed. Enter the needed information for the new website user's email address, first name, and last name. Click on the "Select Bill To" search icon to choose the preferred billing account information. Next, click the "search icon" for the "Ship To" field and select the desired Ship To location. You may also select multiple locations if desired. If access to all Ship To locations is required, select "All Ship To" from the "Select Ship To" list. Next, click the "Send Activation Email" check box. Then, click the "Assign User Role" drop-down arrow and select a user role. Based on the user's role selected, an approver may be required. To assign an approver, click the "Assign Approver" drop-down arrow and select an approver. Next, click the "Create User" button to finish the process.

The screenshots illustrate the process of creating a new user in the BradyPLUS system. The first screenshot shows the 'My Account' dropdown menu with 'User Administration' highlighted. The second screenshot shows the 'User Administration' page with the 'Create New User' button. The third screenshot shows the 'User Setup' form with fields for user information, account information, and activation settings.

User Setup

Return to User Administration

User Information

4 Email Address: mconry@sigmasupply.com

5 First Name: Missy

6 Last Name: Conry

Account Information

Select Bill To: IT Test Account 7055 Lindell Road Las Vegas, NV (7)

Select Ship To: Brady IT Test Account 7055 Lindell Road Las Vegas, NV (8)

Account Activation

9 ☒ Send Activation Email

Settings

☐ No Pricing

10 Assign User Role: Buyer2

11 Assign Approver: btenner@sigmasupply.com

12



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Video URL: vimeo.com/1003748028

Section 3: Deactivating/Reactivating Website Users

+ Deactivating a Website User

[Steps: 1 - 9] Hover over "My Account," and then select "User Administration." Next, click the "Search Users" drop-down tab. Enter the username and then click the "Search" button. Once the website user's information displays, click the website user's username. In the "User Information" screen, scroll down to "Account Status" and uncheck the "Active" check box, and then click the "Save Changes" button to complete.

+ Reactivating a Website User

[Steps: 1 - 9] Hover over "My Account," and then select "User Administration." Next, click the "Search Users" drop-down tab. Enter the username and then click the "Search" button. Once the website user's information displays, click the website user's username. In the "User Information" screen scroll down to "Account Status" and select the "Active" check box, and then click the "Save Changes" button to complete.

This screenshot shows the top navigation bar of the BradyPLUS website. The 'My Account' dropdown menu is open, displaying options such as 'Account Management', 'Order Management', and 'Sign Out'. A green box highlights the 'My Account' link in the top bar, and another green box highlights the 'User Administration' option within the dropdown menu. The main content area shows the 'My Account' dashboard with various links and a 'Sign Out' button.

This screenshot shows the 'User Administration' screen. A green box highlights the 'Create New User' button. Another green box highlights the 'Search Users' dropdown menu. A third green box highlights the search input field containing the email address 'mconry@sigmasupply.com'. A fourth green box highlights the 'Search' button. Below the search bar, a table lists users, with the first row highlighted by a green box. The table has columns for USERNAME, NAME, STATUS, ROLE, and LAST SIGN IN.

USERNAME	NAME	STATUS	ROLE	LAST SIGN IN
mconry@sigmasupply.com	Conry, Missy	Email sent	Buyer3	

This screenshot shows the 'User Setup' screen for the user 'mconry@sigmasupply.com'. The 'Account Status' section shows the 'Active' checkbox checked. A green box highlights the 'Active' checkbox. The 'Account Information' section shows the 'Select Bill To' and 'Select Ship To' dropdown menus. The 'Settings' section shows the 'Assign User Role' dropdown menu set to 'Buyer3'. A green box highlights the 'Save Changes' button at the bottom of the page.



Video URL: vimeo.com/1003748269

Section 4: Creating a New Shopping List

+ [Steps: 1 - 5] Click on "My Lists" and then select "Create List." Enter the customer's number followed by the company's name as the list name (e.g. 152353 - Sigma Supply). Provide a brief description in the "Description" field, and then click the "Create List" button.

Note: Proceed to page 16 for instructions on how to add items to a shopping list (order guide).

The first screenshot shows the BradyPLUS website with the 'My Lists' link in the top navigation bar highlighted with a green box and a green circle with the number 1. The second screenshot shows the 'My Lists' page with the 'Create List' button highlighted with a green box and a green circle with the number 2. A 'Create List' modal window is open, showing the 'List Name' field with the text '152353 - Sigma Supply of North America - Breakroom Supplies' and a 'Description' field with the text 'For buildings 824 and 301.' The 'Create List' button in the modal is highlighted with a green box and a green circle with the number 3. The third screenshot shows the 'My Lists' page with the newly created list, '152353 - Sigma Supply Of North America - Breakroom Supplies', highlighted with a green box and a green circle with the number 4. The list is shown with its description and a 'Delete List' button.



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Video URL: vimeo.com/1003747898

Section 4: Adding an Item to a Shopping List

+ [Steps: 1 - 7] Click on "My List," and then choose the name of the list to which you want to add items. Next, click the "Add Items" button. Enter the item number, manufacturer number, or the item keyword in the search field. Once the item appears, select it. Enter the quantity needed and choose a unit of measure (U/M), if required. Next, click the "Add to List" button to add the item.

Note: To add additional items to the selected list repeat steps 4 through 7.

Get FREE delivery for orders above \$250!

Ship to Test Account 3000 Phoenix, 4422 S 38th Pl, Phoenix, Arizona, 85040-2958

Questions? 800-293-4698

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My Account Hello, Brenathia Te... My Lists Order Now My Cart 1 Items - \$112.59

Shop By Product ▾ About Us ▾ Services ▾ Locations

Enter keyword or item number

SUPPLIES + SUPPORT
Keep All of Your Foodservice Operations Productive, Safe, and Sustainable

Shop By Product ▾ About Us ▾ Services ▾ Locations

Enter keyword or item number

BradyPLUS Home > My Account > My Lists

My Lists

Search
Search lists by name

Sort By
Last Updated

Create List

Recently Purchased
Updated 7/17/2024 by Brenathia Tenner
This list is auto-generated. It cannot be edited.

152353 - Sigma Supply Of North America - Breakroom Supplies
Updated 7/17/2024 by Brenathia Tenner
For buildings 824 and 301.

Total 0 Items

Delete List
List is set to Private.

152353 - Sigma Supply of North America - Breakroom Supplies
List is set to Private.
Updated 7/17/2024 by Brenathia Tenner
For buildings 824 and 301.

Schedule Email Reminder Print Export Copy

Share Delete Edit

Items 0

Add Items

Search By Keyword Or Item # 55050

QTY 1

U/M

CUTLERY FORK XXVY BLACK, 55050IFS

Add To List

Start adding items to your list.

Product Recommendations



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Video URL: vimeo.com/1003747381

Section 4: Importing Items Into a Shopping List

+ [Steps: 1 - 8] Click "My List," then select the name of the list you wish to import items into. Click the "Add Items" button, and then click "Upload Items." Next, click "Upload Template" to download the Excel template. Remove the placeholder examples in the Excel document, and then enter all the required item numbers. You can also enter the quantity and unit of measure for each item, but this is not required. Save the Excel file in XLS, XLSX, or CSV format after adding all items. Then go back to the "Upload Item To List" function. Click the browser button to select the Excel file you saved, and then click the "First row is column headings" check box. Next, click the "Upload List" button to upload the list.

The first screenshot shows the BradyPLUS website's 'My Lists' page. A green box labeled '1' highlights the 'My Lists' link in the top navigation bar. Below, a list of shopping lists is shown, with the second list, '152353 - Sigma Supply Of North America - Breakroom Supplies', highlighted by a green box labeled '2'. The second screenshot shows the details of the selected list. A green box labeled '3' highlights the 'Add Items' button. A green box labeled '4' highlights the 'Upload Items' button. The third screenshot shows the 'Upload Items To List' dialog box. A green box labeled '5' highlights the 'Upload Template' button. A green box labeled '6' highlights the 'Browse' button. A green box labeled '7' highlights the 'First row is column headings' checkbox. A green box labeled '8' highlights the 'Upload List' button. The dialog box also contains instructions for creating a spreadsheet.

Upload Items To List

Upload an Excel (.xls or .xlsx) or CSV (Comma-Separated Values) file according to the instructions.

Instructions

1. Create a spreadsheet (or start with our [Upload Template](#) with the following:
 - First column - add item #s or customer part #s.
 - Second column - add quantities (optional).
 - Third column - add unit of measure (optional).
2. Column headings can be added in the first row (optional).
3. Save the file in XLS, XLSX or CSV format.
4. Select the file to upload and click Upload Order.
5. **There is a file maximum of 499 rows.**



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Video URL: vimeo.com/1003744570

Section 4: Adding a Item to an Shopping List While Browsing Products

+ [Steps: 1 - 4] When you're exploring products on the website, click on the "Add to List" text that is associated with the item you would like to include in your "shopping list" (order guide). The "Add to List" pop-up will appear. Click the "Select List" search icon to select the name of the list you wish to add the item to, and then click the "Add to List" button.

The screenshot displays the BradyPLUS website interface. At the top, the navigation bar includes the BradyPLUS logo, a search bar, and links for 'SUPPLIES + SUPPORT', 'My Account', 'My Lists', and 'My Cart'. A green box labeled '1' highlights the 'Shop By Product' dropdown menu. Below the navigation bar, the main content area shows search results for 'cups'. A green box labeled '2' highlights the 'Add to List' button for the first product, 'FILTER COFFEE 12 CUP 9.75X4.25 2/500'. A green box labeled '3' highlights the 'Select List' search icon in the 'Add to List' pop-up. A green box labeled '4' highlights the 'Add to List' button in the pop-up. The pop-up also includes a 'Create A New List' section and a 'Schedule or modify email reminders to reorder this list' checkbox.

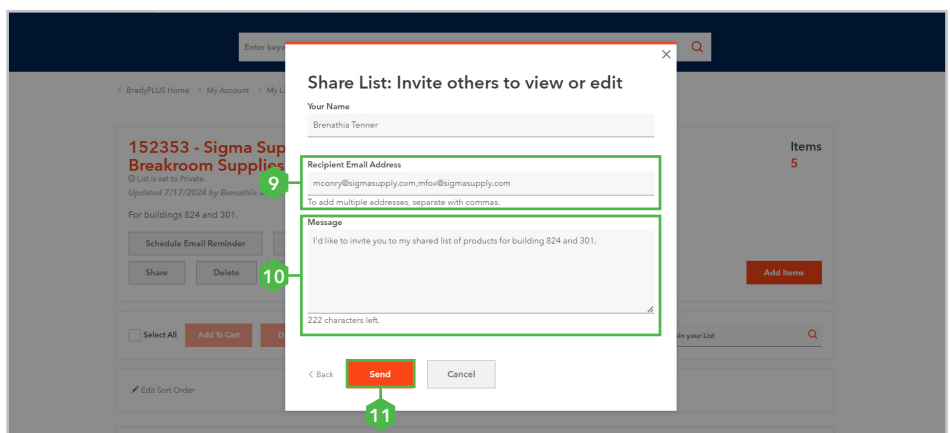
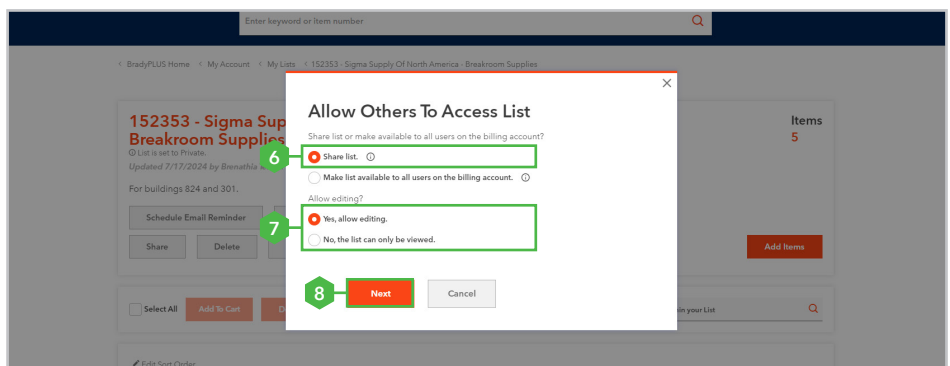
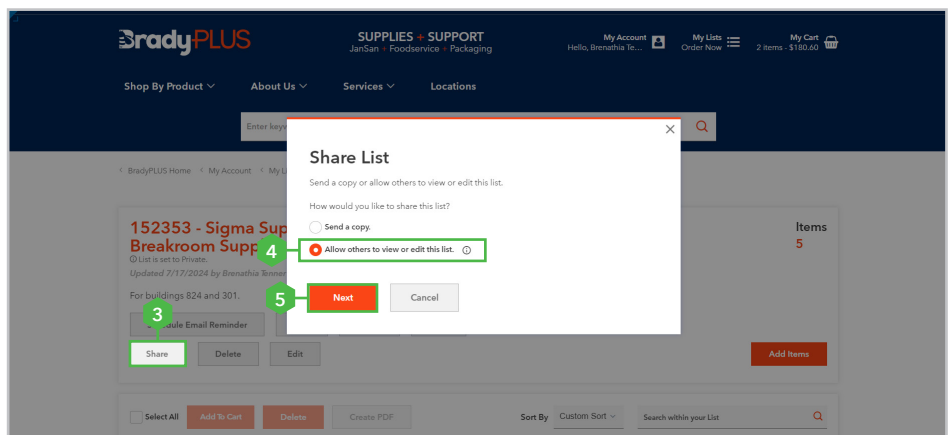
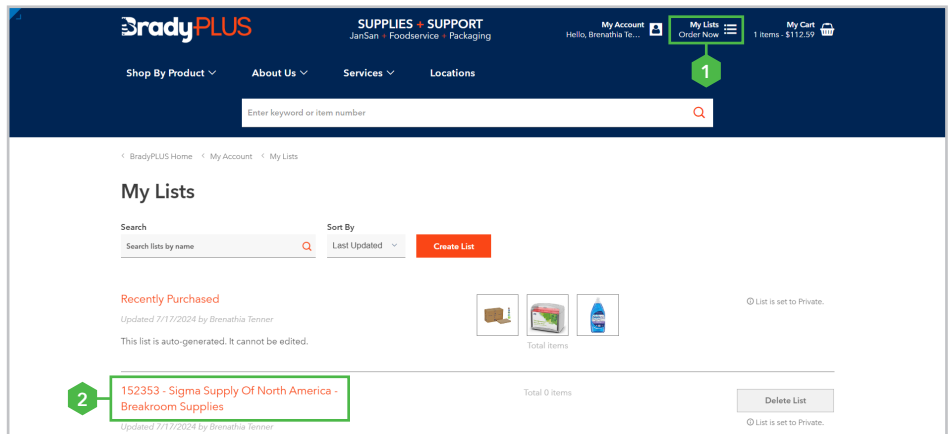


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Video URL: vimeo.com/1003746916

Section 4: Sharing a Shopping List with Individual Users

+ [Steps: 1 - 11] Click "My Lists," then select the name of the list you wish to share. Next, click the "Share" button, and then select "Allow others to view or edit this list." Then, click the "Next" button to proceed, and then select "Share list." If you would like to allow other users the ability to edit the list, select, "Yes allow editing." If NOT, select "No, the list can only be viewed." Then click the "Next" button to proceed. Enter the email address of the user you will be sending the list to in the "Recipient Email Address" field. If you would like to add multiple addresses, separate the email address with a comma and no spaces, then add a message if desired, then click the "Send" button to send.



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Video URL: vimeo.com/1003745528

Section 4: Sharing a Shopping List with All Users On the Bill To Account

+ [Steps: 1 - 10] Click "My List," then select the name of the list you wish to share. Next, click the "Share" button. Then select, "Allow others to view or edit this list" and then click the "Next" button to proceed. Select "Make list available to all users on the billing account." If you would like to allow other users the ability to edit the list, select, "Yes, allow editing." If not, select "No, the list can only be viewed." Then click the "Next" button to proceed. Click on the "search icon" to select a different Bill To account, if desired. To notify the other website users, check the "Send an email notification to users" check box, add a message if desired (refer to example A), and then click the "Finish" button to send.

The screenshots illustrate the process of sharing a shopping list on the BradyPLUS website. The first screenshot shows the 'My Lists' page with a list titled '152353 - Sigma Supply Of North America - Breakroom Supplies' highlighted. The second screenshot shows the 'Share List' dialog box where the option 'Allow others to view or edit this list.' is selected. The third screenshot shows the 'Allow Others To Access List' dialog box where the option 'Make list available to all users on the billing account.' is selected, and 'Yes, allow editing.' is chosen. The fourth screenshot shows the 'Share With Billing Account' dialog box where a Bill To account is selected, and the option to 'Send an email notification to users.' is checked. A message is entered in the text area, and the 'Finish' button is highlighted.



Click to Watch How to Video

Video URL: vimeo.com/1003745313

Section 5: Adding Items From a Shopping List To the Cart

+ [Steps: 1 - 6] Click on “My List” and then choose the list you want to add to the cart. Make any necessary adjustments to the unit of measure and item quantity. To add all the items from the shopping list to the cart, select “Select All” and then click the “Add to Cart” button. If you prefer to add individual items from the shopping list, simply click the check box next to the desired item(s), as shown in example A. Once you have selected the item or items, click the “Add to Cart” button.

The screenshot shows the BradyPLUS website interface. At the top, there's a navigation bar with 'BradyPLUS' logo, 'SUPPLIES + SUPPORT' links, and user account information. Below the navigation bar is a search bar. The main content area is titled 'My Lists'. It shows a list of shopping lists. The first list, '152353 - Sigma Supply Of North America - Breakroom Supplies', is highlighted with a green box and a green circle with the number 2. The second list, '123585 - Sigma Supply - Jansan', is expanded, showing its details. In this expanded view, the 'Select All' button is highlighted with a green box and a green circle with the number 5. The 'Add to Cart' button is highlighted with a green box and a green circle with the number 6. The 'SmartColor Microfiber Mop' item is highlighted with a green box and a green circle with the number 3. The quantity '1' is entered in the quantity field, and the 'Add Items' button is highlighted with a green box and a green circle with the number 4. The 'Add Items' button is also highlighted with a green box and a green circle with the number 1. The 'Add Items' button is also highlighted with a green box and a green circle with the number 1.



Click to Watch How to Video

Video URL: vimeo.com/1003747109

Section 5: Adding an Item To the Cart

- + [Steps: 1 - 4] Click on "Shop by Product" or enter the product keyword, item number, or manufacturer number in the "Product Search" field. Once you've selected a product, choose a "Unit of Measure" if necessary, and then input your preferred quantity. Then, click on the "Add To Cart" button for the selected product to add to cart.

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My Account
Hello, Brenathia Te...

My Lists
Order Now

My Cart
4 Items \$219.92

1 Shop By Product ▾ Brands About Us ▾ Services ▾ Locations

Enter keyword or item number

We Are BradyPLUS!
Introducing BradyPLUS... New name, new look, same focus on helping our customers succeed.

Learn more

TODAY OUR TRANSFORMATION BEGINS
BradyPLUS

Home > Chemicals > All Purpose Cleaners

Filter

Search Within Category
Enter keywords

Stocked Items
☐ Stocked Items Only

Brand
☐ 3M (1)
☐ Basic Coatings (1)
☐ Betco (17)
☐ Brady (4)
☐ Clean-X (1)
☐ Clorox (3)
☐ CLR PRO (1)

Sort By Best Match View Items Per Page 6 Page 1 of 29

Brady
Pine All-Purpose Cleaner Deodorizer 1 Gallon
Brady ID: CD0510 MFG #: 141904BRDY Primary Warehouse: On Backorder - Additional Lead Time May Apply Substitute Items Available \$38.99 / CASE (4) 2 Add To Cart

PortionPac
102 ScrubPac Heavy Duty Detergent
Brady ID: CD9102 MFG #: 102 Primary Warehouse: On Backorder - Additional Lead Time May Apply \$145.24 / BOX 1 Add To Cart

PortionPac
1802 MopPacLite pH Neutral Floor Cleaner
Brady ID: CD9802 MFG #: 1802 My Part #: 12345 Primary Warehouse: 21 In Stock. Select UOM 1 Add To Cart

Lysol Select UOM




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Video URL: vimeo.com/1003747572

Section 6: Order Approval

- + **Reviewing a Pending Order**
[Steps: 1 - 3] Hover over "My Account" and select "Order Approval." Select the "Order #" or "Date" for the desired order you wish to review, modify, approve, or decline.

Important Note: If you encounter this notification,  it indicates one of the following:

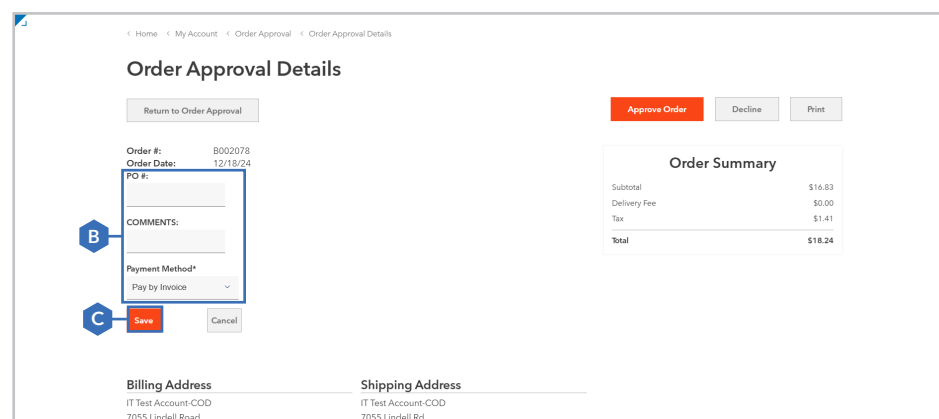
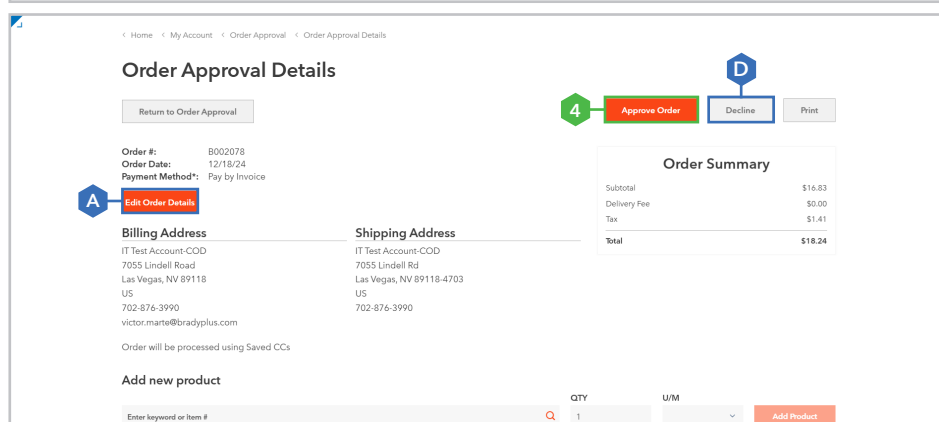
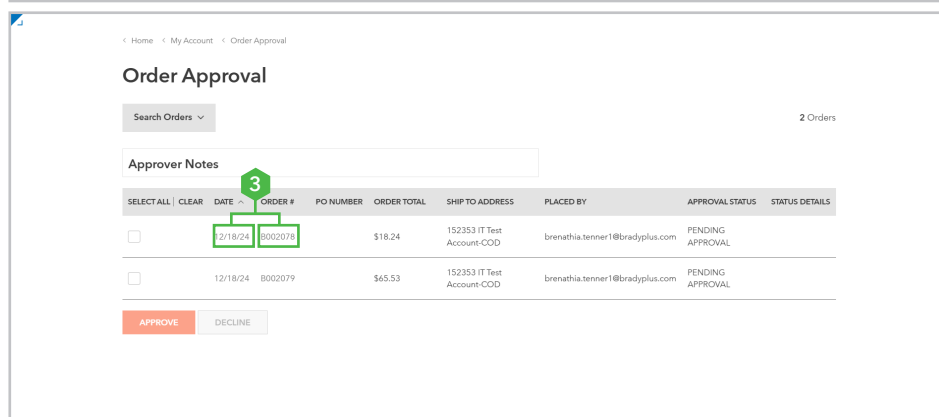
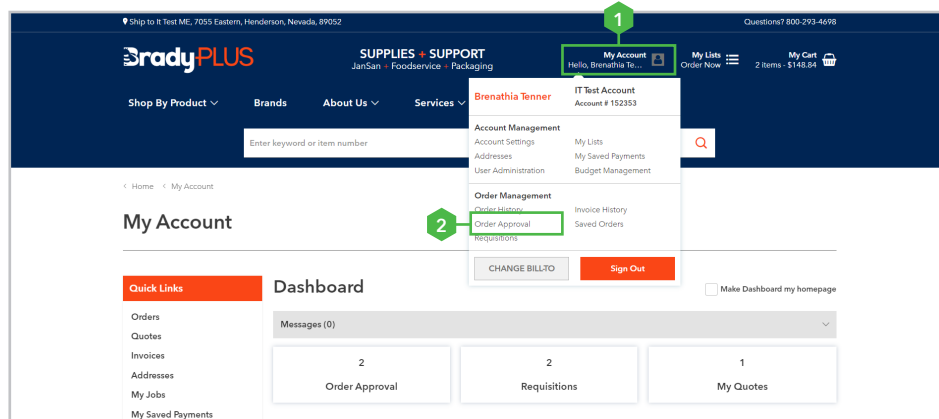
- PO number is required.
- Your current payment method is invalid.

- + **Edit Order Details**
[Example: A - C] To add the required information, click the "Edit Order Details" button, enter the necessary information in the appropriate field, and then click the "Save" button.

- + **Approving an Order**
[Step: 4] If no modifications are needed, click the "Approve Order" button.

Note: If you wish to add additional items, refer to page 24 and follow steps 5 through 8.

- + **Declining an Order**
If you wish to decline the submitted order, click the "Decline" button, as shown in Example D.



Video URL:
vimeo.com/1036826833/ebbfbccef1

Section 6: Order Approval

+ Adding an Additional Item to a Pending Order

[Steps: 5 - 8] To add an item to a pending order, enter the item number, manufacturer number, or item keywords into the "Enter keyword or item #" field and select the desired item. Next, enter the desired quantity, choose the desired unit of measure, and click the "Add Product" button.

+ Edit, Delete, or Add a Note to a Product

To edit or delete a note, select the "Delete" or "Edit" option associated with the line comment, as shown in Example E. To add a note to an item, enter the note in the "Add line note" field associated with the item, as shown in Example F.

The screenshot displays a web application for order management. At the top, there's a 'Payment Method' dropdown set to 'Pay by invoice' and an 'Edit Order Details' button. Below this are 'Billing Address' and 'Shipping Address' sections, both for 'IT Test Account-COD' at '7055 Lindell Road, Las Vegas, NV 89118, US'. A 'Total' summary shows Subtotal (\$16.83), Delivery Fee (\$0.00), Tax (\$1.41), and Total (\$18.24). The main section is 'Add new product'. It features a search bar (Step 5) with a magnifying glass icon, a quantity input field (Step 6) set to '1', a unit of measure dropdown (Step 7) set to 'GALL', and an 'Add Product' button (Step 8). Below this is a table with columns 'PRODUCT DESCRIPTION', 'PRICE/UNIT', and 'QTY'. The table lists 'Betco® CHAP12 Enzyme Odor Eliminator and Cleaner, 1 gal Net Content, Pour Bottle Container, Liquid Form, Blue INDIVIDUAL' at a price of '\$16.83 / EACH' with a quantity of '1'. A 'Brady ID: CHAP12' is also shown. At the bottom, there's a section for line comments (Step E) with 'Delete', 'Edit', and 'Line Comments' buttons, and a text area containing 'Please put in a bag to avoid leaks.' (Step F).



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Video URL:

vimeo.com/1036826833/ebfbcecf1

Section 6: How to Place an Order

+ [Steps: 1 - 8] Once all items have been successfully added to the cart, click "My Cart," then click the "Proceed to Checkout" button. To change billing information, click "Change" as shown in the example A, and make the necessary adjustments. To change shipping information, click "Change" as shown in the example B, and make the necessary adjustments. If all information is correct, click the "Continue" button to proceed. Select a delivery date for the "Shipping Method" if you wish. If there are notes for the order needed, enter the notes in the "Add Order Notes" field. For the "Payment Method" click the drop-down arrow to select "Pay by Invoice" or "Credit Card." Enter the order PO number for the order in the "PO Number" field, but it is not required. If you choose to pay by credit card, select a "Card Type" and enter the card holder's name in the "Name On Card" field. Then, enter the credit card number in the "Card Number" field and then enter the "Security Code." Next, select the credit card's "Expiration Month" and "Expiration Year." If the billing address is the same as the Bill To address, leave the "Use Billing Address" option checked. If not, uncheck "Use Billing Address" and fill in the billing address fields, then click "Place Order" to place the order.

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JanSan • Foodservice • Packaging
My Account Hello, Brenathia Te... My Lists Order Now My Cart 3 Items - \$299.20

Shop By Product ▾ Brands About Us ▾ Services ▾ Locations


Enter keyword or item number

Cart

[Continue Shopping](#)

Fulfillment Method
☒ Ship ☐ Pick Up

3 Items [Save Order](#) [Add All to List](#) [Remove All](#)

PRODUCT DESCRIPTION	PRICE/UNIT	QTY	
 Pink Foaming Skin Cleanser 1000mL INDIVIDUAL Brady ID: SCH504	\$63.94 / CASE Primary Warehouse: 320 In Stock.	1	\$63.94 + Add to List

Order Summary
Subtotal \$299.20

[Proceed to Checkout](#) [Request a Quote](#)

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My Account Hello, Brenathia Te... My Lists Order Now My Cart 4 Items - \$220.76

Shop By Product ▾ Brands About Us ▾ Services ▾ Locations

Enter keyword or item number

Checkout Billing & Shipping Payment Confirmation

Billing Information [Change](#) **A**

IT Test Account
7055 Lindell Road
Las Vegas, NV 89118 US
702-876-3990
victor.marte@bradyindustries.com
702-876-1580

Shipping Information [Change **B**](#)

Test Account 3000 Phoenix
4422 S 38th Pl
Phoenix, AZ, 85040-2958 US

[Continue](#) **3**

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My Account Hello, Brenathia Te... My Lists Order Now My Cart 4 Items - \$220.76

Shop By Product ▾ Brands About Us ▾ Services ▾ Locations

Enter keyword or item number

Checkout Billing & Shipping Payment Confirmation

Billing & Shipping

Billing Information [Edit](#)

IT Test Account
7055 Lindell Road
Las Vegas, NV 89118 US
702-876-3990
victor.marte@bradyindustries.com

Shipping Information [Edit](#)

Test Account 3000 Phoenix
4422 S 38th Pl
Phoenix, AZ, 85040-2958 US

Order Summary
Subtotal \$220.76
Delivery Fee \$25.00
Tax \$10.84
Total \$256.60

Shipping Method

Payment Details

Payment Method*
Pay by Invoice **6**

PO Number (Optional) **7**

Shipping Method




Request Delivery Date (optional) **4**

Add Order Notes (Optional) **5**

Place Order **8**

Have A Promotion Code? [Apply](#)

Order Summary

PRODUCT DESCRIPTION	PRICE/UNIT	QTY	
 Pink Foaming Skin Cleanser 1000mL INDIVIDUAL Brady ID: SCH504	\$63.94 / CASE	1	\$63.94
 MINTS STARLITE PEPPERMINT RED/WHIT Brady ID: G992IFS	\$94.69 / CASE	1	\$94.69
 SmartColor Microfiber Mop Unger Brady ID: MB9201	\$22.44 / EACH	2	\$44.88



Click to Watch How to Video

Video URL: vimeo.com/1003744533

Section 7: Viewing Order History

+ Viewing Order History

[Steps: 1 - 6] Hover over "My Account" and then click "Order History." You may search for an order by clicking the "Search Orders" tab. The filter drop-down will display all the available search options. Search options can be filtered by Ship To Address, PO Number, Order Number, Status, Order Total, Product Number, or Date Range. Once you've selected the preferred search method and entered the required information, click the "Search" button. The order history information will then be displayed. Click on the order number to view the needed information.

+ Printing an Order

To print the order, click the "Print" button (Example: A).

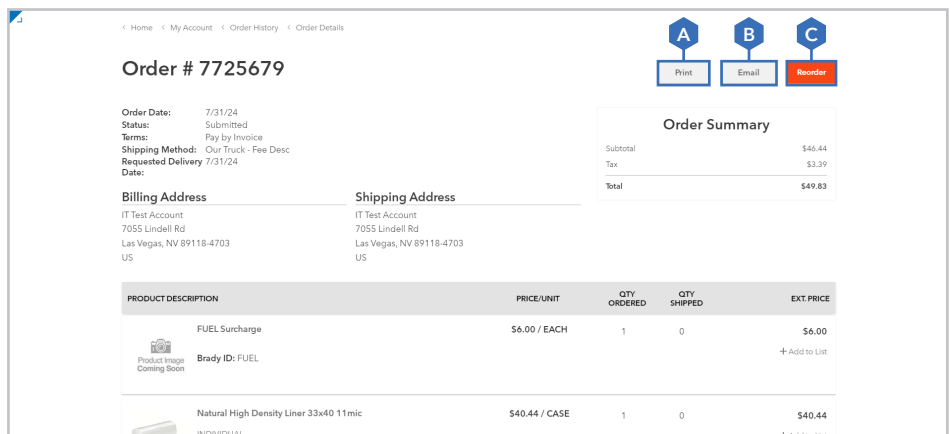
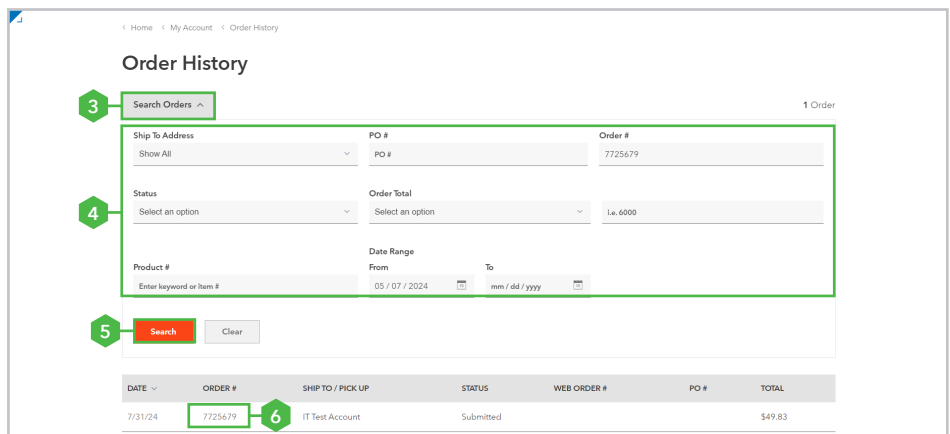
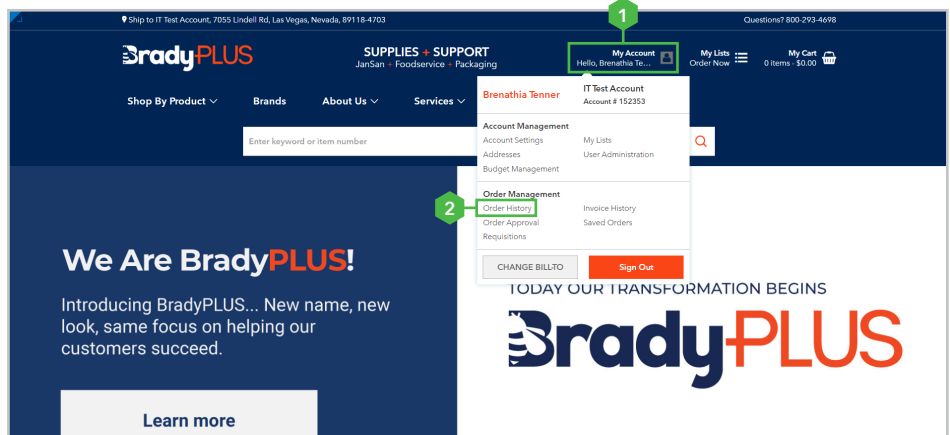
+ Email an Order

To email the order, click the "Email" button, then enter the recipient's email address in the "Email To" field, and then click the "Email Order" button (Example: B).

+ Reorder from Order History

To reorder an order, click the "Reorder" button to add items from the order history to the cart and place a new order (Example: C).

Note: Only Admins, Buyer 3, Buyer 2, and Buyer 1 user roles can view order history.



Click to Watch How to Video

Video URL: vimeo.com/1003745969

Section 8: Viewing Invoice History

+ Viewing Invoice History

[Steps: 1 - 6] Hover over "My Account" and then click "Invoice History." You may search for an invoice by clicking the "Search Invoices" tab. The filter drop-down will display all the available search options. Search options can be filtered by Ship To Address, Invoice Number, PO Number, Order Number, or the Date Range. Once you've selected the preferred search method and entered the required information, click the "Search" button. The invoice history information will be displayed. Click on the invoice number to view the needed information.

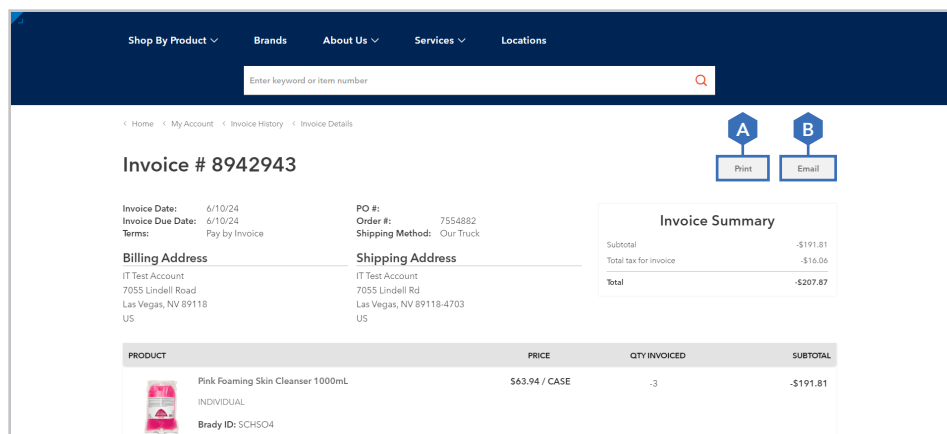
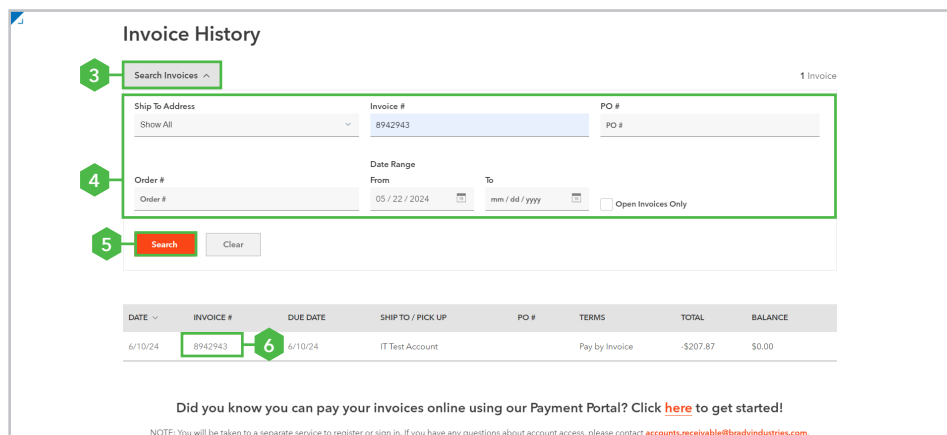
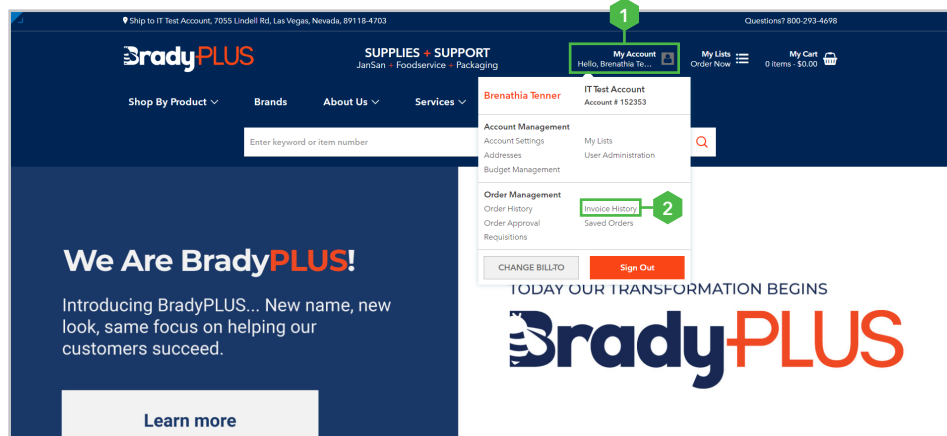
+ Printing an Invoice

To print the invoice, click the "Print" button (Example: A).

+ Email an Invoice

To email the invoice, click the "Email" button, then enter the recipient's email address in the "Email To" field, and then click the "Email Invoice" button (Example: B).

Note: Only Admins and Buyer 3 user roles can view invoice history.



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Video URL: vimeo.com/1003745718

Section 9: Budget Management

Note: Only Administrators roles have access to Budget Management.

+ [Steps: 1 - 16] Click "My Account," then click "Budget Management," select a "Budget Enforcement Level," then click "Save." Next, choose a year for the "Budget Periods Setup," then select an "Assign Budget Period." Input the budget period(s) and start date(s), and then click "Save." Next, input a "Cost Code Title" and click the "Save" button. Click the "Budget Maintenance" tab, then select a "User" or "Ship To Address" to apply to the budget. Select a year from the "Budget Year" drop-down menu. By clicking the "Budget Review" tab, you can track the budget's spending and generate budget reports.

Budget Management

Budget Setup | Budget Maintenance | Budget Review

Budget Enforcement Level

Selecting an enforcement level for your Budgets will have an impact on the users shopping experience. Only one level may be active.

☐ No Enforcement ☐ Customer ship to level ☐ Customer level ☒ User level

Save

Budget Periods Setup

Budget Year: 2024

Assign Budget Period

☐ Monthly ☐ Quarterly ☒ Yearly ☐ Custom

PERIOD	START DATE	END DATE	ACTIONS
1	1/1/2025	12/31/2025	

Save

Cost Code Setup

Cost codes are assigned to users during User Administration. Cost codes are used on orders placed by the user and can be associated to a budget for enforcement or for reporting purposes.

Cost Code Title

Cost Code Title

COST CODE	DESCRIPTION	STATUS
-----------	-------------	--------

Save

Budget Management

Budget Setup | **Budget Maintenance** | Budget Review

Your Budget Enforcement is set to: No Enforcement

No budget configured. Please configure a budget to continue.

Select User: [dropdown] Or Select Ship To Address: [dropdown]

Budget Year: 2024

View Budget

PERIOD	END DATE	BUDGET \$ (NO DECIMALS)
--------	----------	-------------------------

Budget Management

Budget Setup | Budget Maintenance | **Budget Review**

Your Budget Enforcement is set to: No Enforcement

No budget configured. Please configure a budget to continue.

Select User: [dropdown] Or Select Ship To Address: [dropdown]

Budget Year: 2024

View Budget

PERIOD	START DATE	BUDGET	CURRENT FISCAL YEAR	VARIANCE	LAST FISCAL YEAR	VARIANCE
--------	------------	--------	---------------------	----------	------------------	----------



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