ENVOY SOLUTIONS

shop.envoysolutions.com

E-COMMERCE
Quick Reference Guide

CONNECT TO ENVOY SOLUTIONS ONLINE FOR FASTER, EASIER ORDERING!

You can access all the information you need to stay connected with Envoy Solutions through our easy-to-use eCommerce platform. Browse the Envoy Solutions 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.
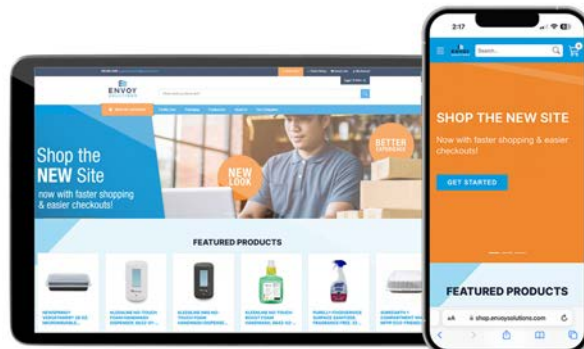
Reduce transaction costs. Start ordering online today with these simple steps!

SELECT YOUR SHOPPING EXPERIENCE

DESKTOP QUICK REFERENCE GUIDE

MOBILE QUICK REFERENCE GUIDE

DESKTOP
Quick Reference Guide

1

Logging In & Selecting a Ship-To Address

» Launch your web browser and type in the address:
https://shop.envoysolutions.com

» Every customer will already have an account setup; however, you will need to reset your password. Click on 'Forgot Password' and enter the email address you used in the previous eCommerce platform to reset and create a new password.

» Once you are logged in, you will see at the top of your screen which company you are logged in as, and the ability to change the ship-to via drop down (if your company has multiple ship-to locations). You can also search within this field if there are more ship-to locations than are shown in the initial drop down.

TIP

Add this page to your browser Favorites or Bookmarks for quick access.

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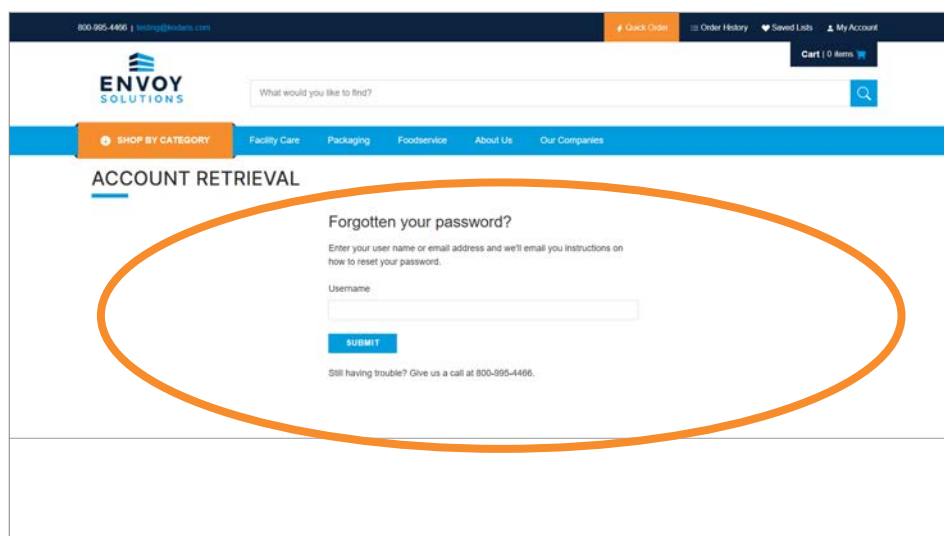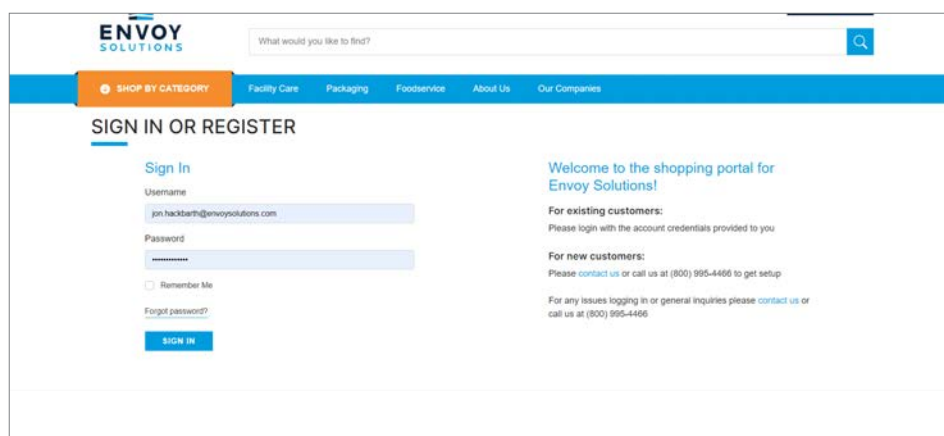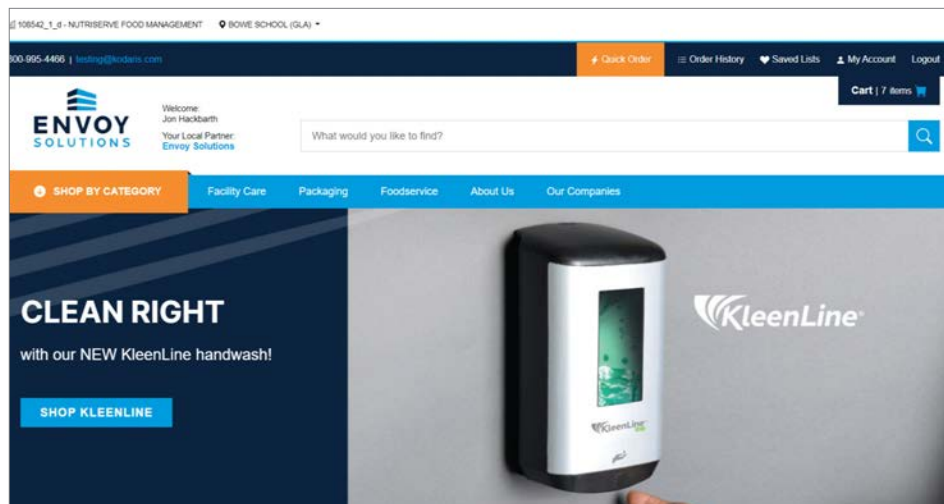
Browsing Categories

Envoy Solution's Online Catalog contains thousands of items. These items are grouped into categories and subcategories to help narrow your search based on the type of product or its application.

From the Home Page:
» Go to the home page by selecting the Envoy Solutions banner in the top left-hand corner of the screen or by simply going to **https://shop.envoysolutions.com**

» Select the desired category by choosing one the 3 main categories in the header.

From the Shop by Category Menu:
» Clicking on 'Shop by Category' will open a drop down that shows the same 3 main categories; clicking each will expand further down the category tree to select from.

» You can also scroll down the home page to the 'Featured Categories' section, which will show a visual representation of our main categories.
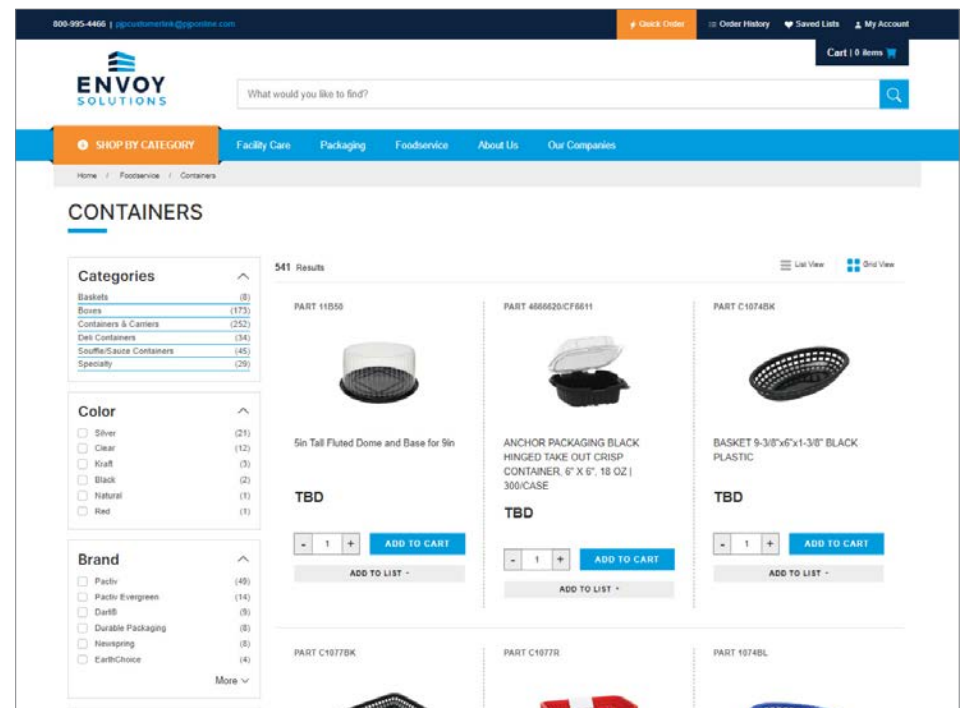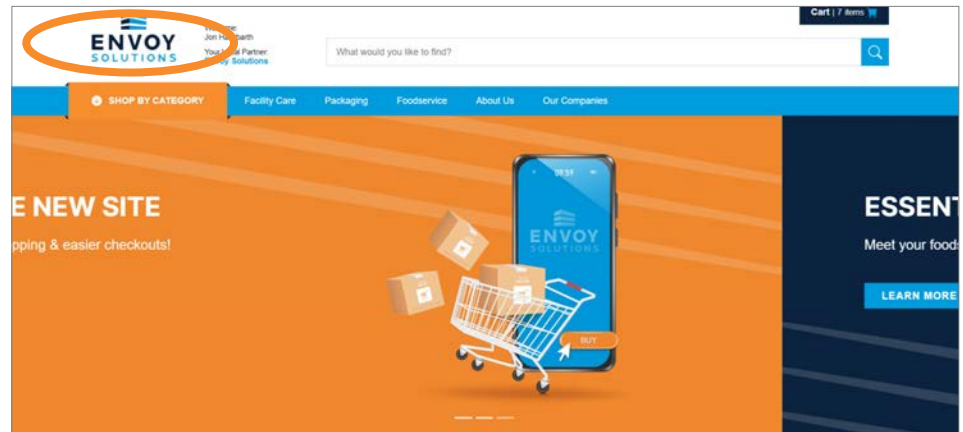

TIP

You can also select category title above the subcategory list to view all items that are in a category.

3

Searching for Items

» Enter the phrase, product type, product category, manufacturer item number, or existing item number in the 'What would you like to find?' box at the top of every page.

» If your search returns results, you will be able to filter them further by selecting a more specific category or a filterable attribute (size, brand, etc.) from the left-hand menu.

» While viewing products in the results, you will be able to quickly add quantities and items to your cart, to a list, or create a new list to add it to.
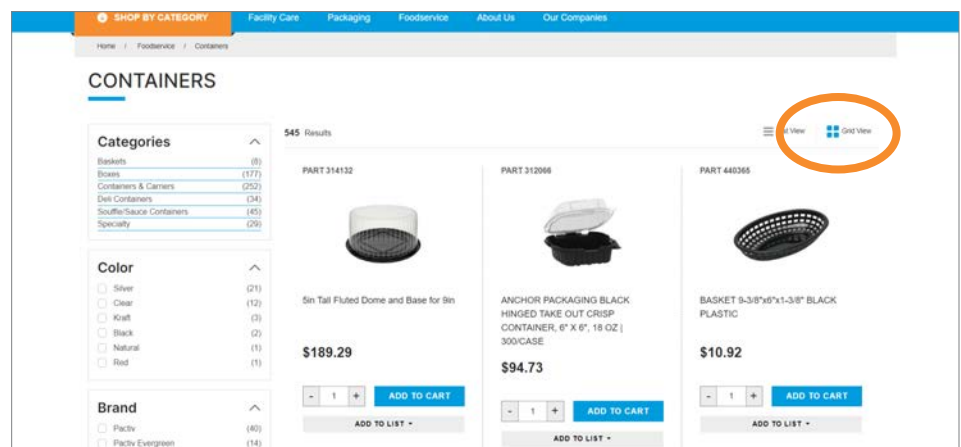
4

Product Details Page

» Find the desired item by navigating through categories, searching, or viewing featured products on the home page.

» Click on the product to be taken to the product details page.

» Here you can view all of the product information, including images, descriptions, specifications, and SDS or related documents

» From this page, you can also add the quantity and item to the cart or add the item to a shopping list.
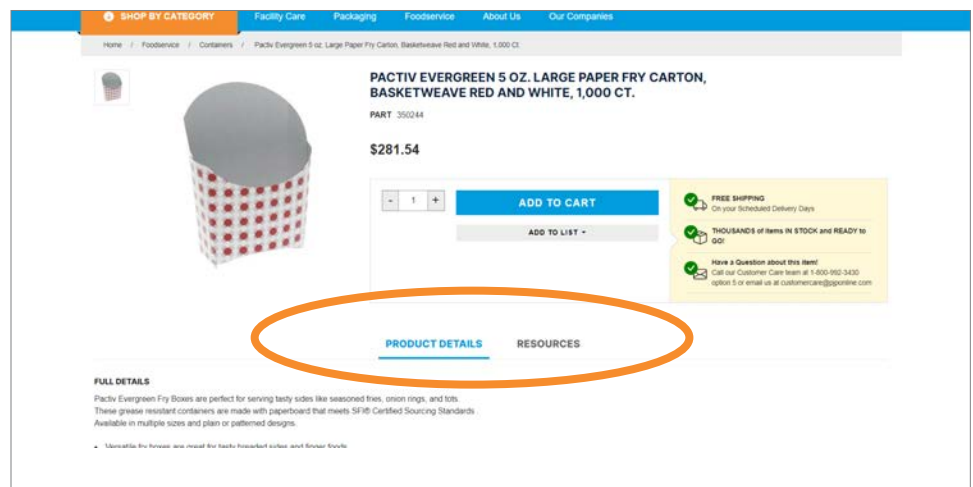
5

Quick Order

» At the top of the site in the header, there is an orange button titled 'Quick Order', if you click this you will be able to quickly add items on the next screen.

» You will be able to enter the phrase, manufacturer item number, or existing item number and the autocomplete will pull up the item.

» You will be able to select the quantity for each line item.

» You will be able to enter in as many quick order items on this page and then add all to cart.


6

Employee Management

» To manage your employees, you can click into 'My Account' in the header of the page, and be taken to the customer portal.

» From here, you will be able to click into 'Employees' on the left-hand side menu.

» From this screen you can manage existing employees by clicking the right arrow next to their name, including their budgets, purchasing power, and roles (if accessing from a manager account).

» You can also deactivate an employee from within this menu if you choose.

7

Shopping Lists

» Select 'Saved Lists' from the top of the header to be taken to your shopping list.

» Clicking this will take you to the customer portal with the default view looking at your company shopping lists.

» From this screen, you are able to view all the lists that are assigned to your account.

» To view items within a list, click the arrow on the far right associated to the list you wish to view.

» From here, you can select all or some of the products you wish to order. You can select quantity, and after selecting items, you can click 'Start Order' in the top right corner of the screen, and you will be taken to the cart page.
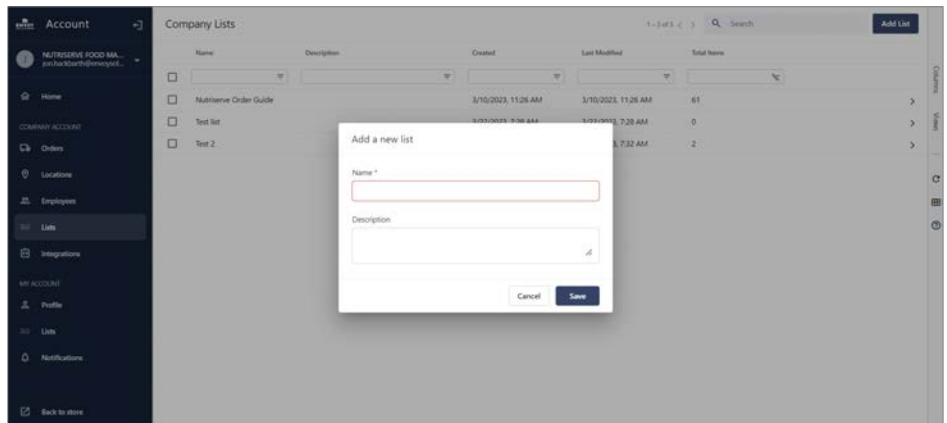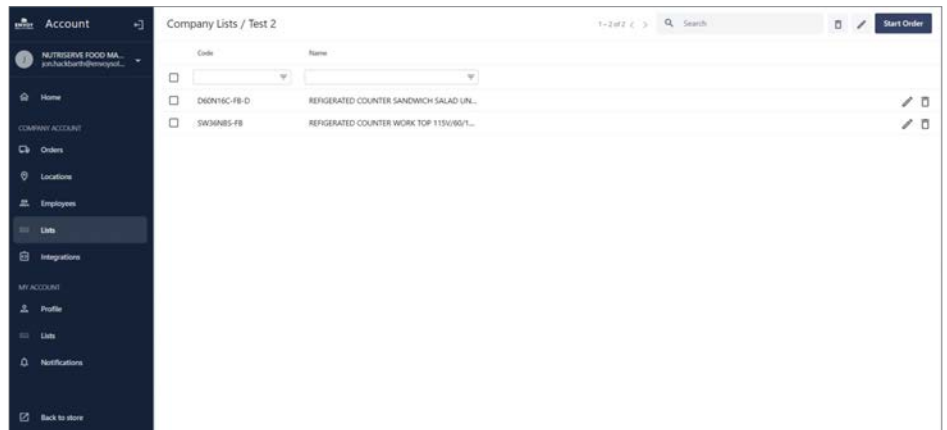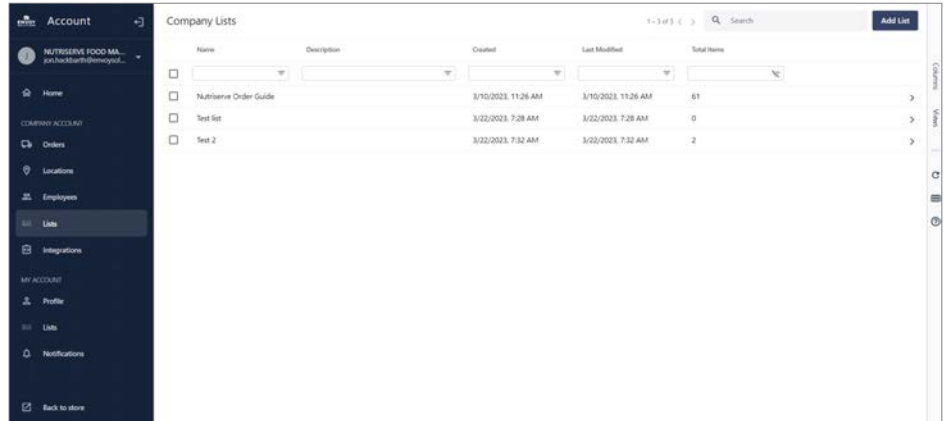
8

Creating New Shopping Lists

» While browsing the website, you will be able to add to and create new shopping lists.

» On search and navigation results pages, there will be a button to 'Add to List' and upon clicking, you can add items to an existing list or create and add to a new list.

» On the Product Details Page, there will be a button to 'Add to List' and upon clicking, you can add items to an existing list or create and add to a new list.
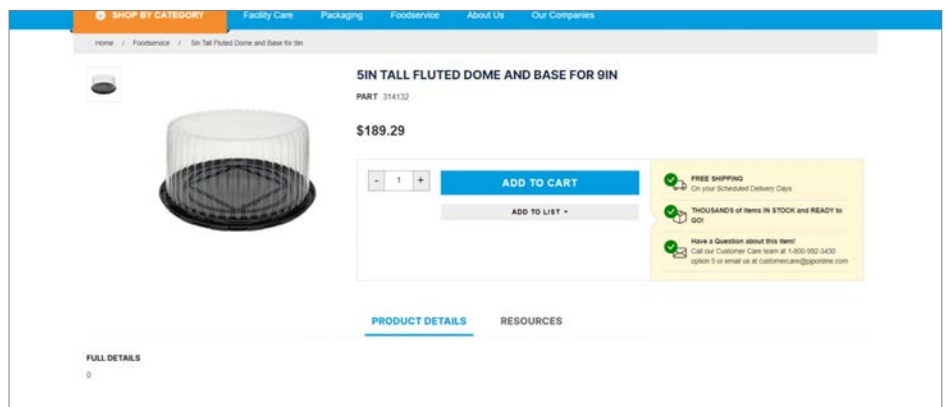
9

Viewing Your NPL/ Order Guides

» Find by hovering over 'Order Guide' in the header menu and clicking on the corresponding guide.

» Once clicked only the items on this guide will show up.

» If you are on a restricted NPL/guide, you will only be able to order items that are shown on these list(s).

» When browsing the general catalog, anything that is restricted will display a restricted message on the product (see screen shot).

» If you want to add or remove items from your NPL/Guide please reach out to your sales rep.
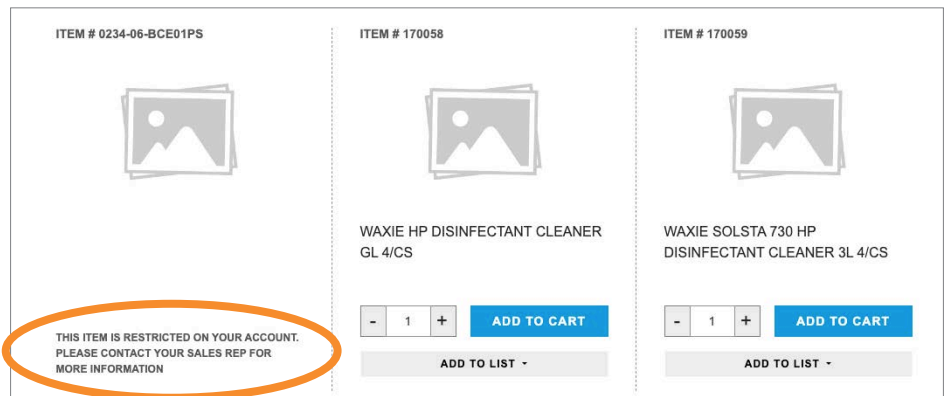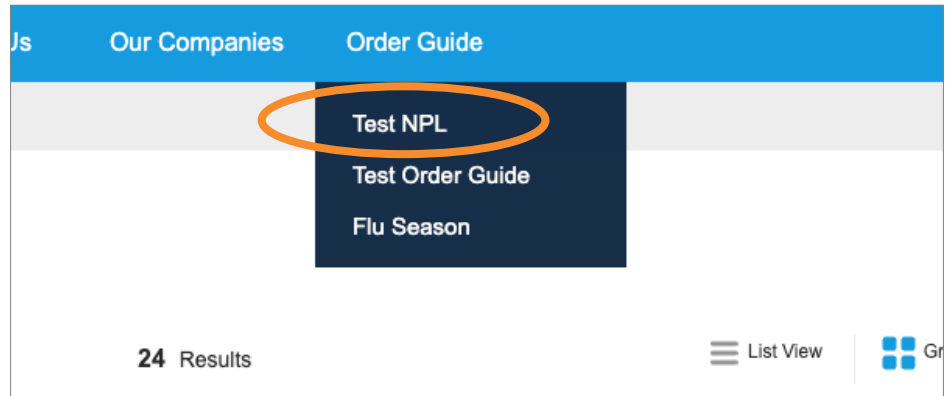

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Spend Management

» If your account is setup to use Spend Management/Budgets, you will see this at the top of every page.

» You will see your current limit based on the time period it is set for, and the amount you have purchased against it in that period.

» If you have multiple ship-to locations, and they each have different budgets, these will change as you select different locations from the top menu.

» This budget will update regardless of where the order was placed (online, offline, etc.).

» If you want to update your current spend management amounts or time period, please reach out to your sales rep.
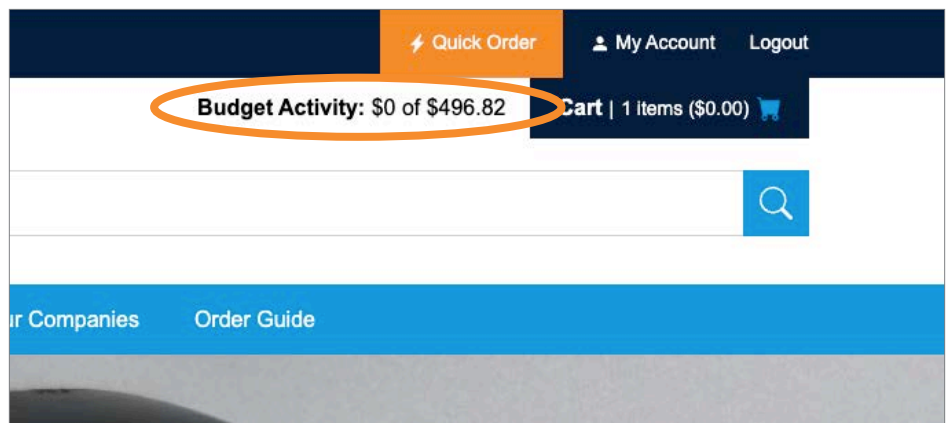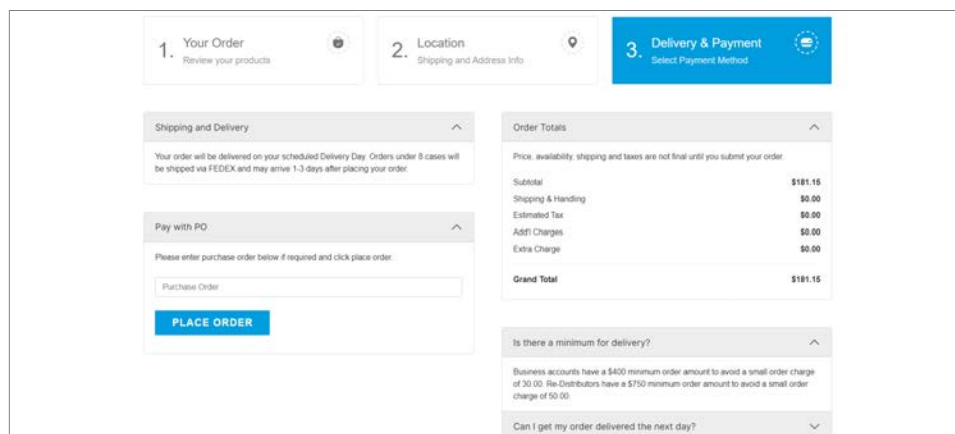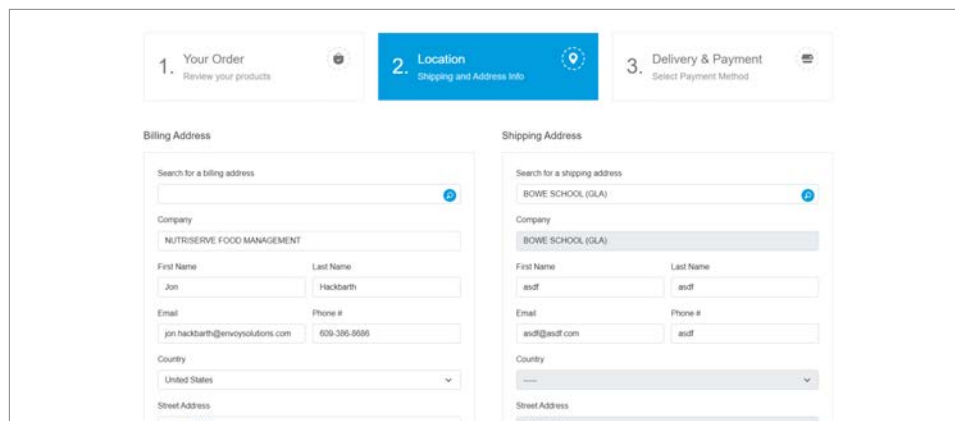
11

Cart

» View your cart by clicking on 'Cart' in the top of the screen.

» From here, you can view all items you currently have in your cart, including quantity, and price.

» You can change quantity, remove items, or clear the cart altogether from this screen.

» You can add line-item notes for each item within the cart, or you can add an order note at the very bottom of the screen.
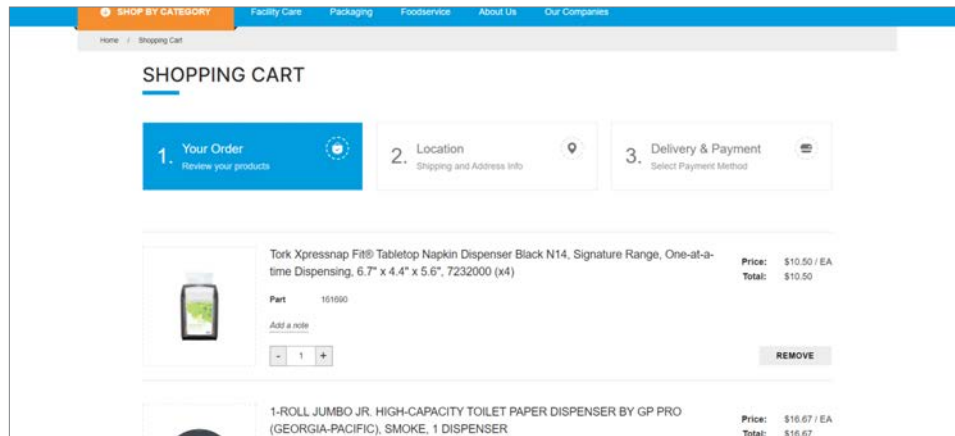
12

Checkout

» Billing information will be shown on the 2nd part of the checkout process.

» The billing information, most of the time, will be locked and not edited (this is information that is in our ERP and established when you become a customer with us).

» The shipping information can change if you have multiple ship-to locations. A ship-to can be changed by searching for a new location within the checkout page "search for a shipping address" function, or the information will pre-populate based on your selection chosen above the header.

» On the 3rd and final screen of the checkout process, you will see subtotals for your order, and information related to shipping and delivery, as well as the ability to enter a PO if you have one for that order.

» When you are ready to place the order, click 'Place Order' and you will be taken to an order confirmation screen andreceive a copy in your email for the account you are logged in as.

13

Order History

» To view order history, click into 'My Account' at the top of the screen or into 'Order History' at the top of the screen to view order history of up to 2 years (regardless if the orders were placed via ecommerce).

» From here you will be able to re-order or print prior orders.

14

Save Orders for Later

» If you are on the first step of the checkout process reviewing your cart, you can save all items for later.

» Do this by clicking 'Save for Later' at the bottom of the cart.

» Once clicked, the order will be saved within the customer portal within 'My Account' with a corresponding ID given.

» Go to 'My Account' or click directly into 'Order History' to view your orders, where you will see your saved order with corresponding ID listed.

» From here you can continue the order by clicking into the right arrow on the right of the order line and click 'Edit Order' if you wish to change quantities or remove items, or click 'Reorder' which will take you to the same screen.
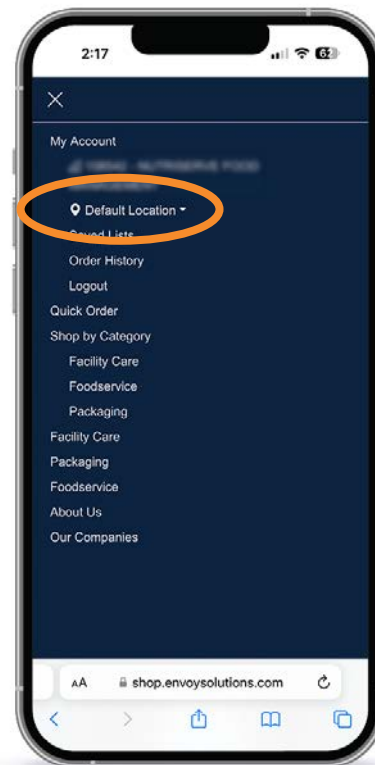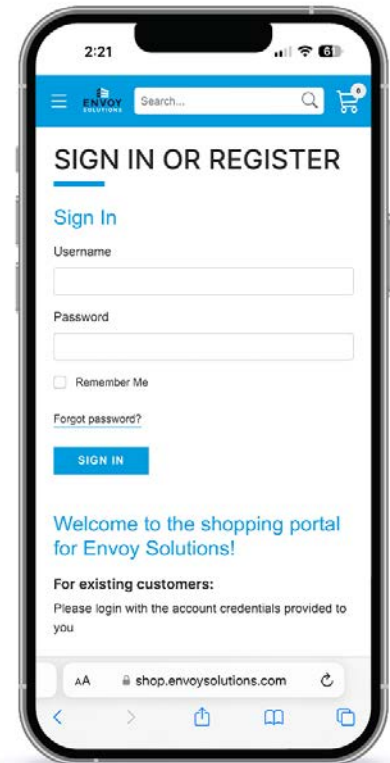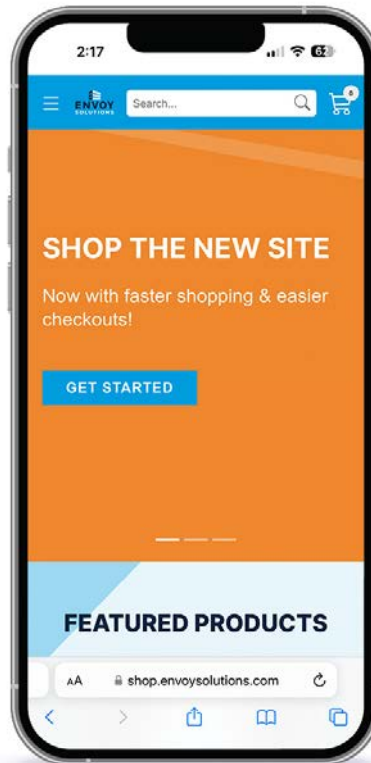
MOBILE
Quick Reference Guide

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» Once you are logged in, you can click the hamburger menu in the top left corner of the screen to see navigation options and the ability to change the ship-to via drop down (if your company has multiple ship-to locations). You can also search within this field if there are more ship-to locations than are shown in the initial drop down.

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Add this page to your browser Favorites or Bookmarks for quick access.

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Envoy Solution's Online Catalog contains thousands of items. These items are grouped into categories and subcategories to help narrow your search based on the type of product or its application.

From the Home Page:

» Go to the home page by selecting the Envoy Solutions banner in the top left corner of the screen or by simply going to: **https://shop.envoysolutions.com**

» Click into the hamburger menu in the top left corner of your screen to be shown the categories available underneath 'Shop by Category'.

» You can also scroll down the home page to the 'Featured Categories' section, which will show a visual representation of our main categories.

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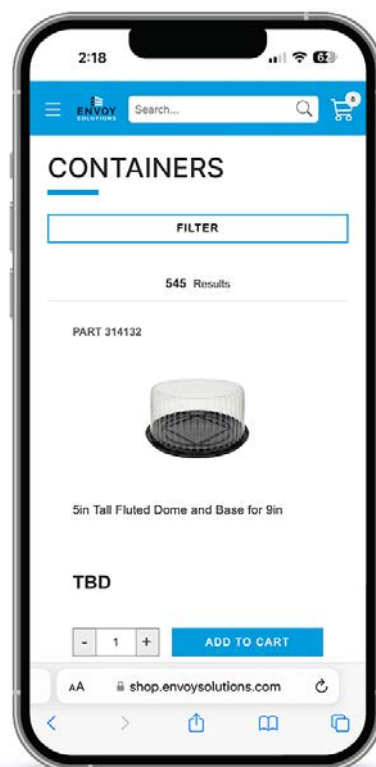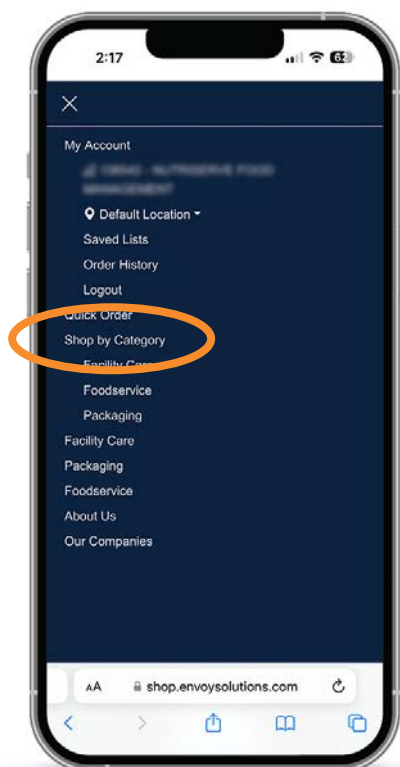
Searching for Items

» Enter the phrase, product type, product category, manufacturer item number, or existing item number in the 'Search' box at the top of every page.

» If your search returns results, you will be able to filter them further by selecting a more specific category or a filterable attribute (size, brand, etc.) from the 'Filter' menu at the top of the page

» While viewing products in the results, you will be able to quickly add quantity and items to your cart, to a list, or create a new list to add it to.

» While viewing the items in the search results page, you can quickly add items to cart by adjusting the Quantity (QTY) you would like to purchase and selecting the Add to Cart button underneath the product summary of each item.
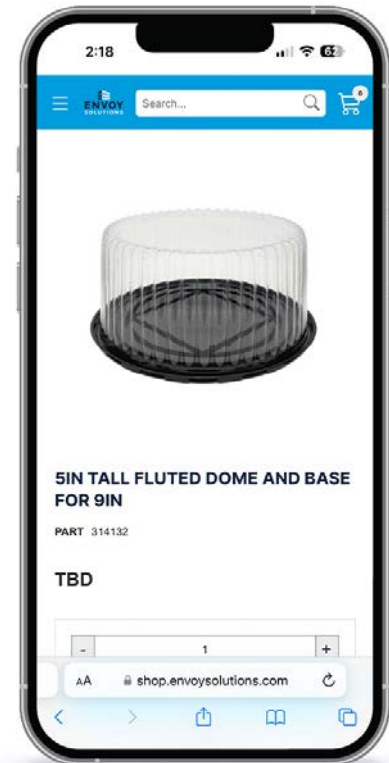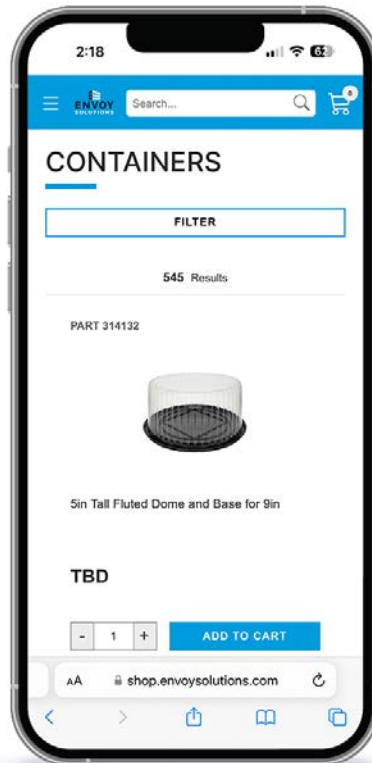
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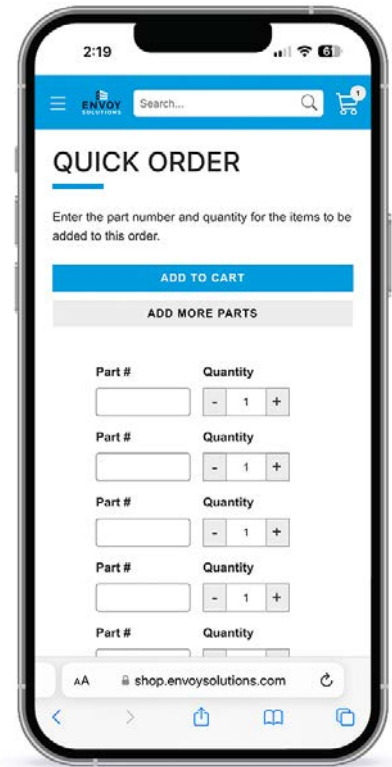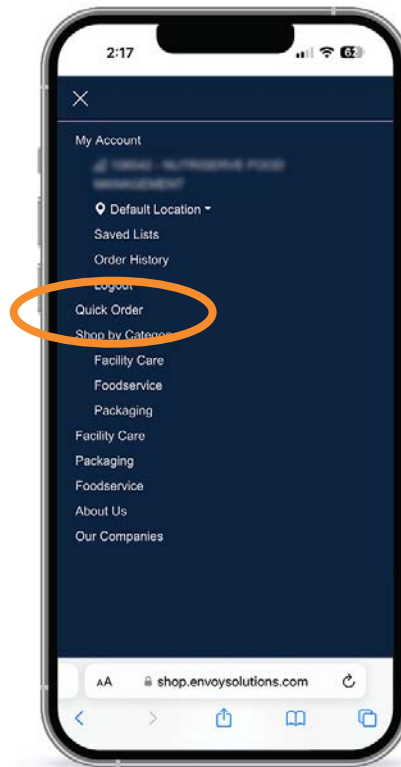
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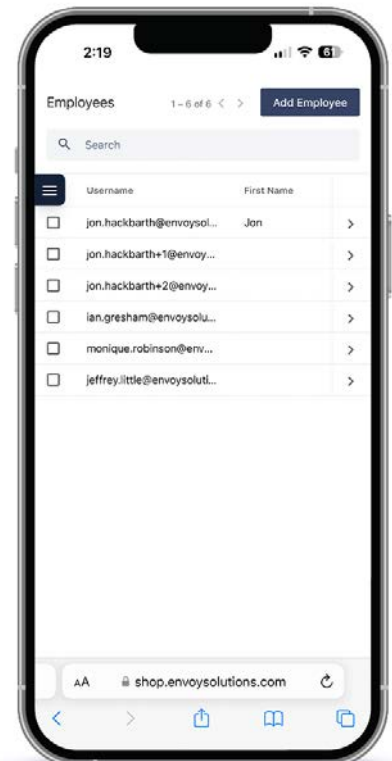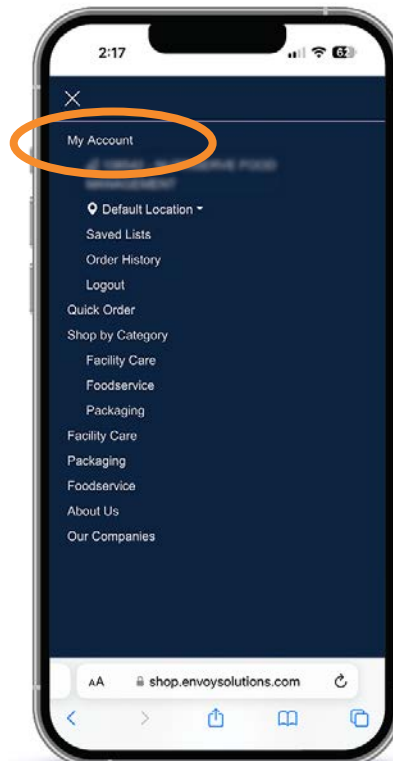
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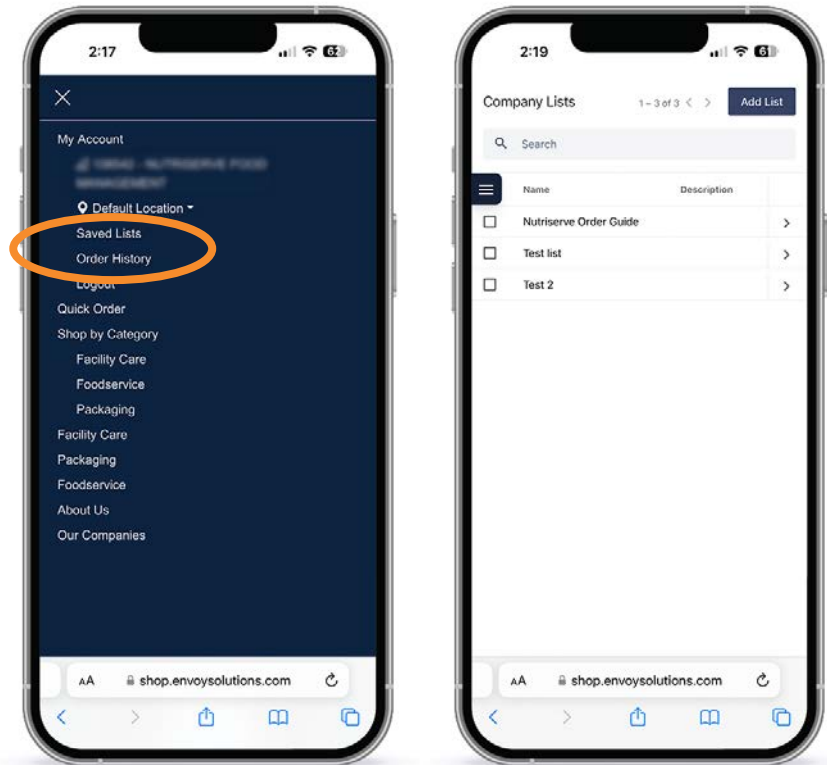
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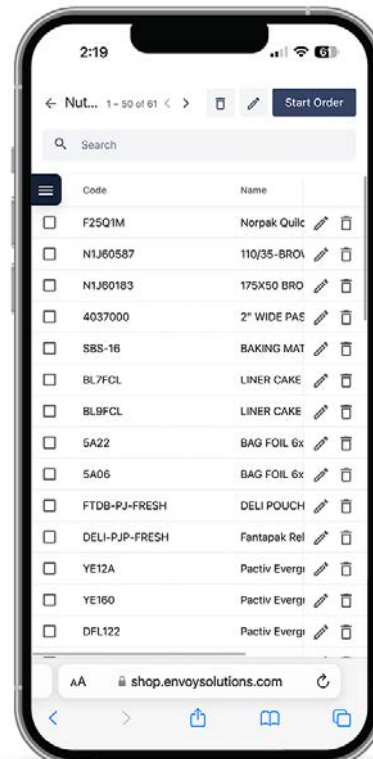
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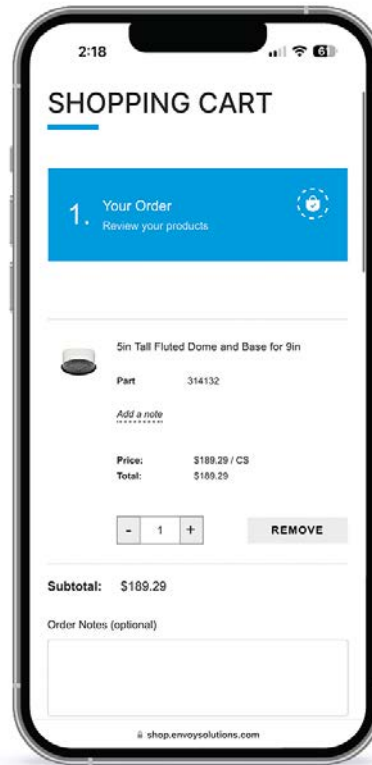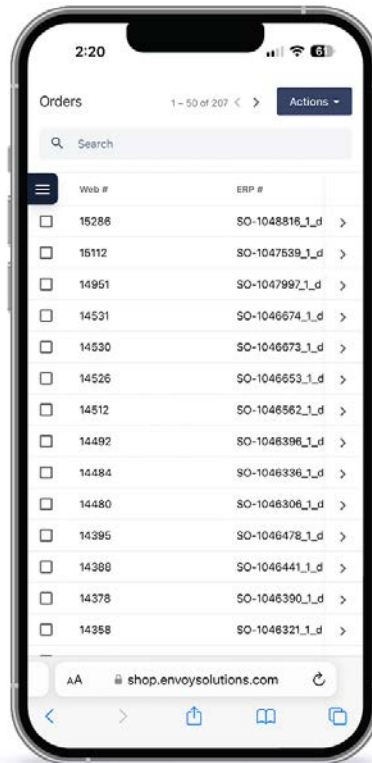
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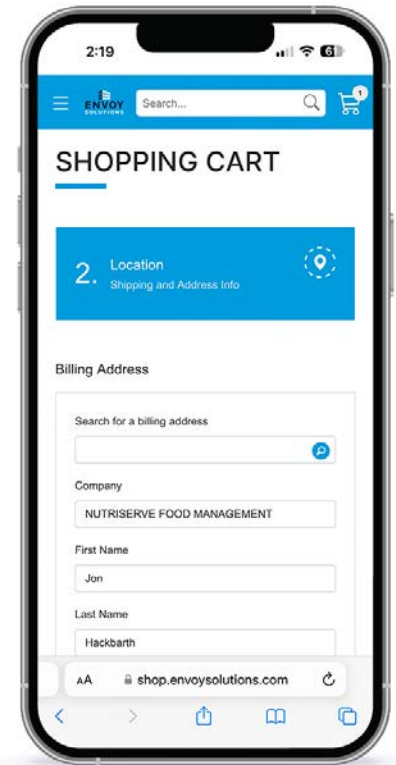
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Unleashing the Strength of a National Platform

Envoy Solutions is a specialized distributor and solution provider serving the US market through a family of the nation's best regional distributors. We specialize in facility care, foodservice, packaging, and marketing execution. We're way more than a catalog or website—we're people who listen, roll up our sleeves, and do the heavy lifting. We offer a broad catalog of top brands and products, along with deep expertise and advice, to help our client-partners succeed. We are driven to make facilities cleaner and more sustainable, people safer, and operations more productive, every day.

For more information on Envoy Solutions, visit www.envoysolutions.com