

marcone.com startup guide

This is a basic reference for the Marcone website. Please sign up for a webinar for an in depth look at our site.

FAQ

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Account Basics

Logging into MyMarcone.

Go to beta.marcone.com and enter your username and password.

Email notifications and paper invoices

Click on notification setting under invoice and you can change settings such as email addresses for electronic invoices and even set if paper invoices are added to your shipment.

Order History Invoice Invoices Notification Settings Account Bill Pay Marcone News Reports

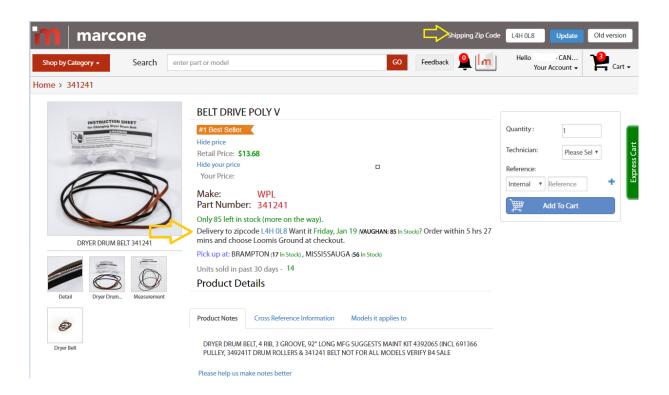
Navigating and Ordering

Shipping ETA

There are two spots on the parts detail page to enter a postal code for delivery ETA.

One is in the top right corner <u>"Shipping Zip Code (Postal Code)"</u> Use this one and the postal code will stay for all the part numbers you enter until you change it back to your postal code. You must click <u>Update</u> after entering a postal code.

The other is right below the part number <u>"Delivery to Zip Code (Postal Code)"</u> Use this one for just entering one part number, it will revert back to your postal code before you enter the next part number.



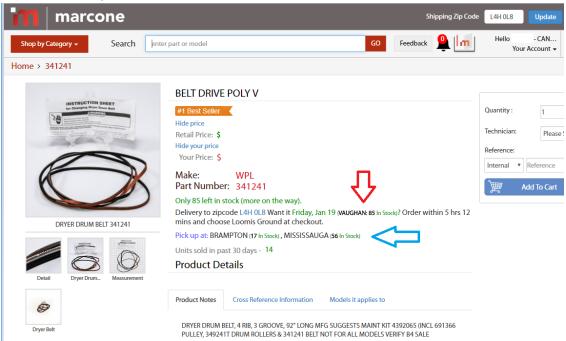
Branch Pickup

If you are within 80 kilometers of a branch you have the option to pick up at that branch. At checkout the parts available at that branch will show that option in addition to the shipping option.



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Part Availability



The # in stock on the delivery line is the inventory at the shipping warehouse.

The # in stock on the pick up line is the number at the branch if you are within 50 miles.

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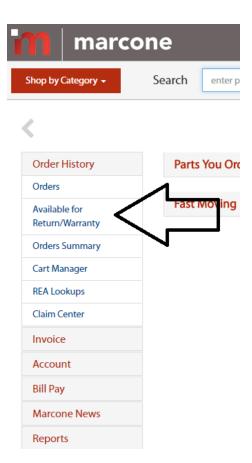
Available for Return/Warranty

Available for Return/Warranty give you two features.

One is to let you do return of new parts and the other is to give you open invoices for when you do warranties.

The most important thing to remember when returning new parts if keeping an eye on the field that says Restock Fee.

After you put in a part number and enter a quantity, if the same amount that is in the Unit Price comes up in the Restock Fee don't return the part. It is past your return policy.



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Fastest Delivery vs. Least Packages

From the Shipping Options there are two selections you can make.

The system defaults to Fastest Delivery (system will get from the closest RDC, TNT time in transit)

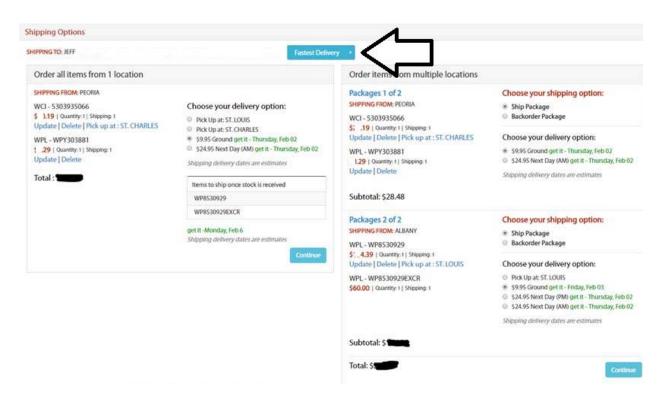
If you are next day from only 1 RDC's your order will ship from that RDC each day.

If you are next day from 2 RDC's the system will check to see which RDC has the most of the order and ship from that RDC.

That is if you order from the left side of the screen "Order all items from 1 location"

You can still order from the right side "Order items from multiple locations" but will have additional shipping.

Scroll down more to see <u>Least Packages</u>.



Click on Fastest Delivery and you will get a drop down that says Least Packages.

Select Least Packages and the system will look to see who has the most of the whole order placed.

Total:

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Choose your delivery option:

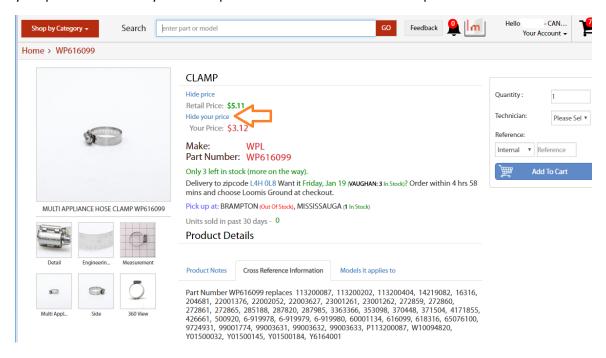
- \$9.95 Outlaw
- \$9.95 Loomis Ground get it Tuesday, Mar 13
- \$9.95 Cardinal
- \$9.95 Purolator Ground
- Pick Up at: BRAMPTON
- Pick Up at: MISSISSAUGA

Shipping delivery dates are estimates

Continue

Hide your price

If you would like to show a customer a part but don't want them to see your price, you can click 'Hide your price' to show only the retail price. You can also hide the retail price.

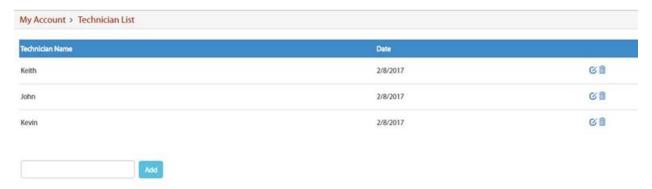


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Add Technician Reference

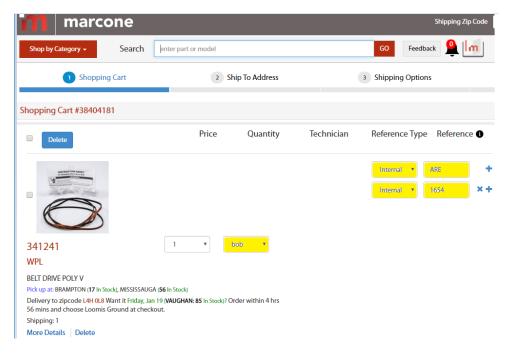
There is a feature on mymarcone to add a Technician's name to the part.

From the main screen click on <u>Account</u> then click on <u>Technician List</u>. Add your tech's name to the list. At any time you will be able to add more, edit or delete.



You will be able to add a Technician's name at the part detail section or in the cart.

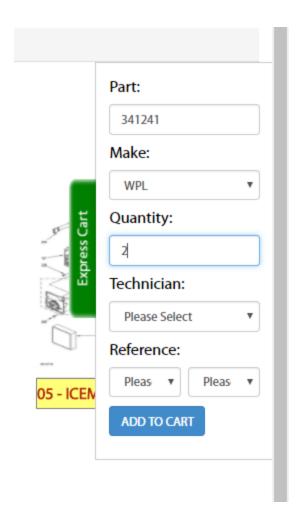
So you can have a tech's name and also a reference name to each part.



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Express Cart

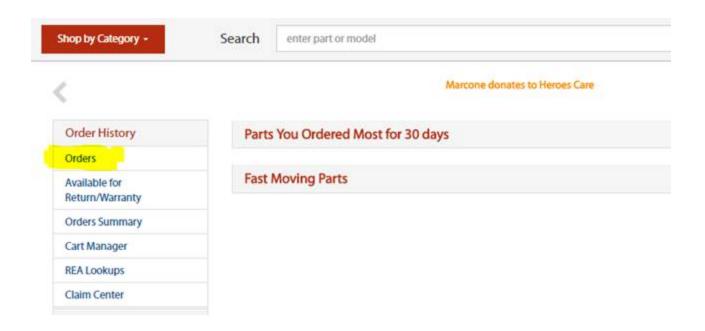
For parts that don't require research you can click on the green 'Express Cart' tab on the right of the screen and you can quickly add parts straight to the cart.



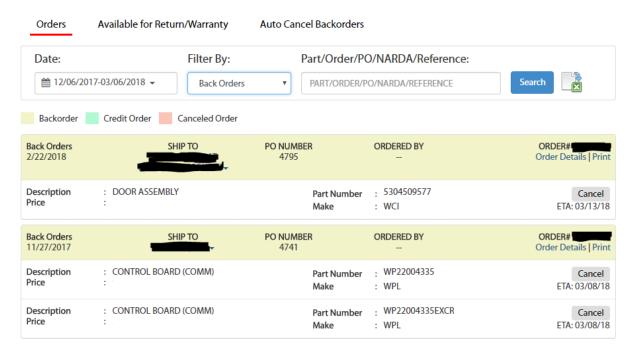
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Cancel Backorder

Click on Orders

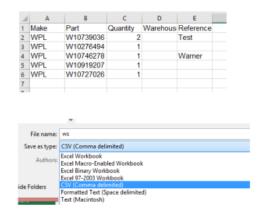


From the Filter By, select Back Orders, your backorders will come up. Click on Cancel, it will ask you to confirm that you want it cancelled.



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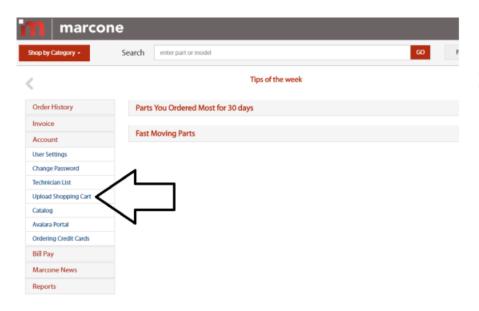
Uploading a shopping cart to MyMarcone



Create a .csv of the parts you wish to order.

The 5 columns must be named: Make, Part, Quantity, Warehouse, Reference. Warehouse will always be blank. Reference is optional.

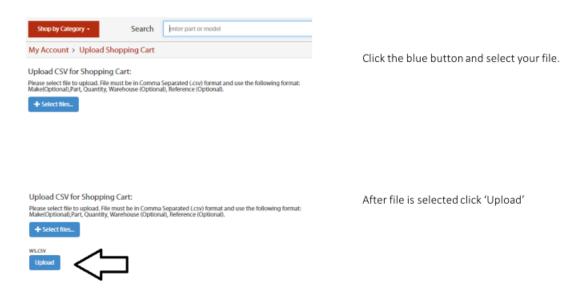
File must be saved as a .csv for it to upload correctly.

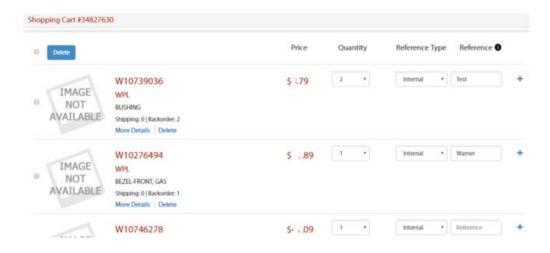


From the mymarcone homepage click on account and then 'Upload Shopping Cart'



If the part you are ordering is discontinued or subs to a new part this message will pop up. The system will not automatically sub. It is best to do all research before uploading to make sure part numbers are current.



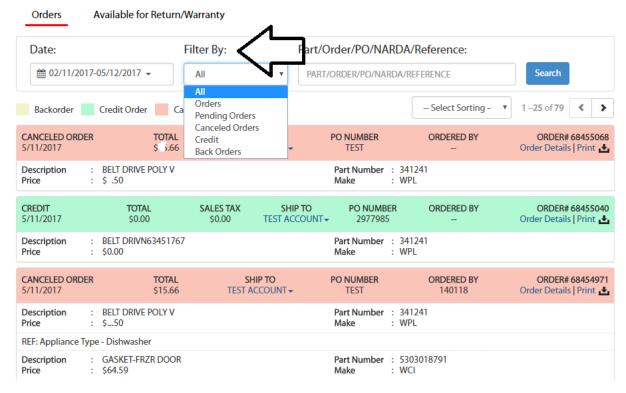


Your cart is now uploaded and ready for the rest of the checkout process. If you entered reference information you will see it here.

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Filter type of Orders

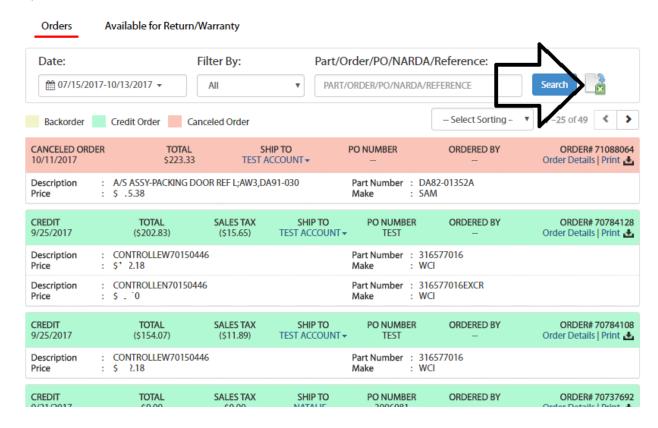
The 'Filter By:' dropdown allows orders to be filtered by pending, canceled, credit ect.



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Exporting Orders Report

From the orders screen, click on a date range to export. Hit search. Now, click on the export button to export as a CSV file.

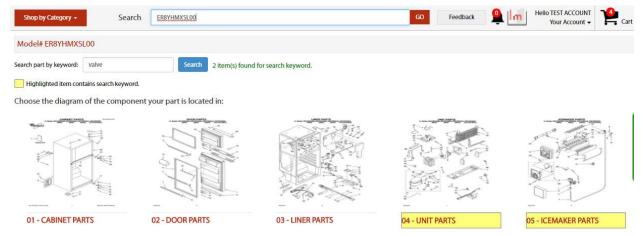


It may take a minute to export and then a file will show at the bottom of the screen. Click to download.



The report will show a breakdown of every order by part.

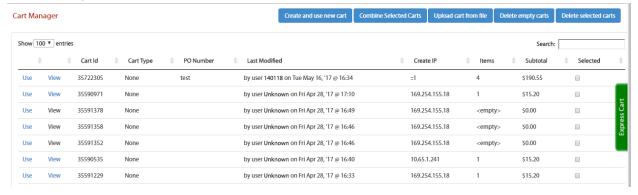
Research



You can search for a model number from the main search. The schematic is searchable and pages when be highlighted when they contain the keyword from the search. This example shows the results for a search for 'valve'.

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Cart Manager



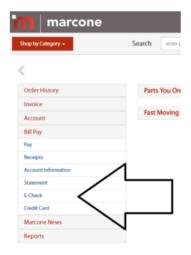
Cart manager can be accessed from the Order History menu. This allows the use of multiple carts. From this screen you can select, manage, delete and combine carts.

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Billing, Statements and Payments

Setup E-Cheque payment option

Setup is fast, secure and easy.



There are two ways to set up E-Check

- 1. Click the Bill Pay dropdown from the menu and select 'E-Check'
- 2. Or set up E-Check when you make a payment.

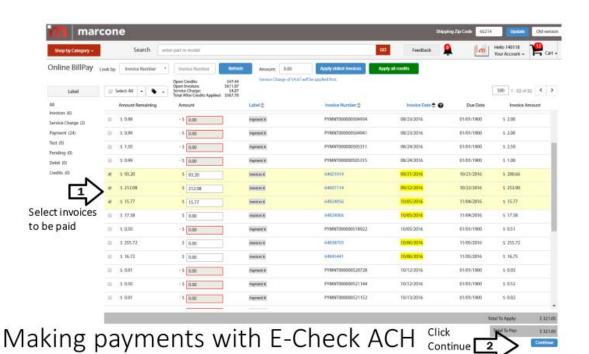
Simply fill in the account information for the bank account you would like to pay with and click add.



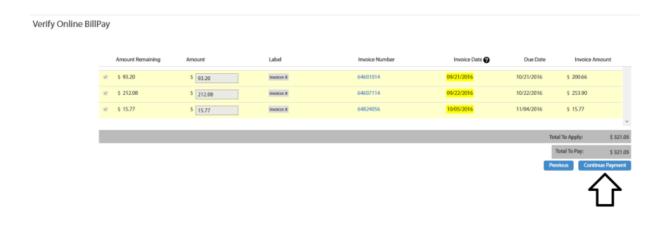
Using E-Cheque to pay your bill

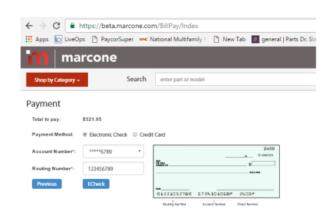
Now when you make a payment your saved E-Check account is available.





Click continue payment



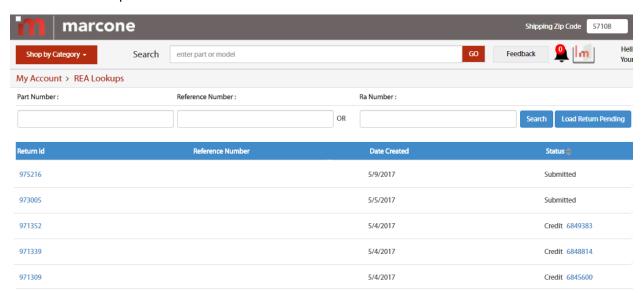


The total for the selected invoices is shown. Your E-Check is available in the dropdown.

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REA Lookups

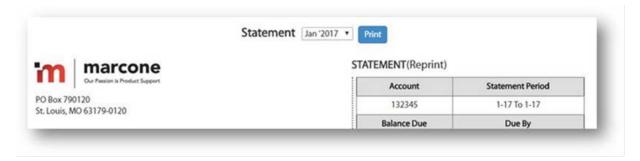
Use the REA lookup to check the status of an REA. When credit is issued it will the credit memo # here.



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Monthly Statement Reprint

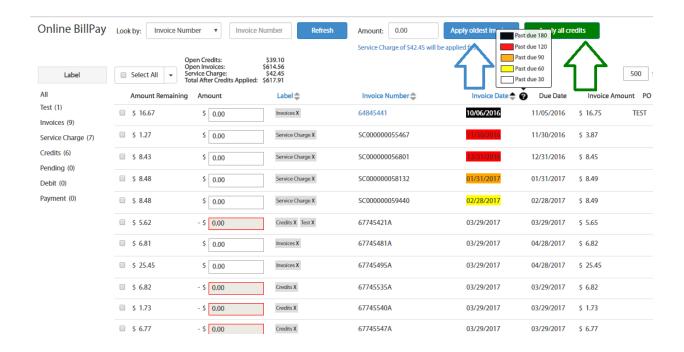
Select Bill Pay, then select Statement. You will then have the option to select the month and either print or download.



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Online Bill Pay

Bill pay allows individual invoices to be selected for payment. Or you can enter a payment amount and apply to the oldest invoices. The green button will automatically apply credits to your account. Past due is color coded.



Applying credit in two clicks

Click on 'Apply all Credits'

The next window will give you the option to apply to oldest or apply to original.

