

## Online Ordering Training Sheet (V3)

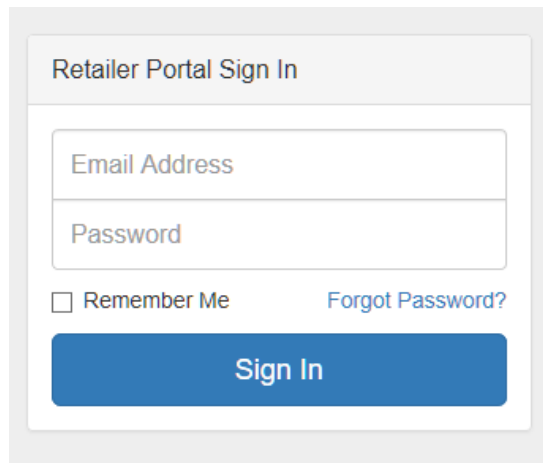
Wilsbach Distributors' latest version (V3) of online ordering offers many new great features from our older version (V2). This training sheet reviews the new changes to the application, plus explains a few general rules/practices of online ordering.

### **How Do I Add/Modify an Account on Online Ordering?**

Send our Support Team an email ([support@wilsbach.com](mailto:support@wilsbach.com)) stating your request to be added to our online ordering site along with the account name/number, persons first and last name and email address. More than one user can be added for a specific account. If a change, deletion or addition of users is necessary, please include that in your email. Once a user is added, he/she will receive a password and a follow-up email with some quick training tips to get started.

### **How Do You Log into Online Ordering?**

We have two great options to get to our online ordering site. You can visit our website (<http://wilsbach.com>) and click on the **Retail Online Ordering** button in the upper left-hand corner of the site. The other option is to go directly to the site (<http://retail.wilsbach.com>). Using either option, you will be prompted for the email address and password to login to your account. If you lose/forget your password, click on the **Forgot Password?** link to update your password from this site. Note: When accessing the site from a computer, we recommend using the **Chrome** browser.



The image shows a screenshot of the 'Retailer Portal Sign In' form. It features a title 'Retailer Portal Sign In' at the top. Below the title are two input fields: 'Email Address' and 'Password'. Under the 'Password' field, there is a checkbox labeled 'Remember Me' and a blue link labeled 'Forgot Password?'. At the bottom of the form is a large blue button labeled 'Sign In'.

### **Can You Choose/Pick a Delivery Date?**

Delivery dates are currently assigned based on the account's next delivery day. **Orders cannot be created for same day deliveries**, but you may place an order **up until 10:00PM** for the following day delivery. You will be made aware of the account's delivery day throughout the process. If you would like to change the assigned delivery day, please call Wilsbach stating you would like to change the delivery day to for an order you placed online.




## Can You Place an Online Order Using a Phone?

Great news ... Our latest version (V3) was designed specifically to allow this!

## Is there an iPhone/Android App?

Currently there is **not** an app for this, but adding a shortcut to your home screen is simple.

### IOS iPhone/iPad

- Launch the Safari browser and navigate to <http://retail.wilsbach.com>
- Tap on the share button on the bottom of the page 
- Scroll until you see the **Add to Home Screen** option and tap on this.
- You will then have the option to rename the shortcut or just select **Add** to add it to your home screen.


### Android Phone/Tablet

- Launch the **Google Chrome** browser and navigate to <http://retail.wilsbach.com>
- Tap on the **Menu** in the top-right corner (represented by 3 vertical dots).
- Tap the **Add to Home Screen** option.

## Do You Need an Internet Connection to Place an Order?

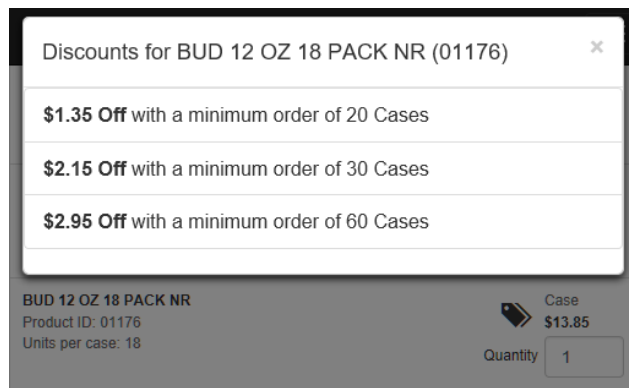
Yes, you **will need** an internet connection throughout the entire ordering process to use the website.

## Will You See Inventory, Pricing and Discounts?

**Inventory** – Currently you will not see inventory, but will see an **Out of Stock** notification when reviewing the Shopping Cart.  **Item out of stock**

**Pricing** – You will see the correct pricing based on that specific account.

**Discounts** – New to V3, an account will see a discount tag next to product prices. When clicked, it will display the discount that is available.



Discounts for BUD 12 OZ 18 PACK NR (01176)

- \$1.35 Off with a minimum order of 20 Cases
- \$2.15 Off with a minimum order of 30 Cases
- \$2.95 Off with a minimum order of 60 Cases

BUD 12 OZ 18 PACK NR  
Product ID: 01176  
Units per case: 18

Case \$13.85  
Quantity 1



### **Will Wilsbach's Salesman be Notified of the Order?**

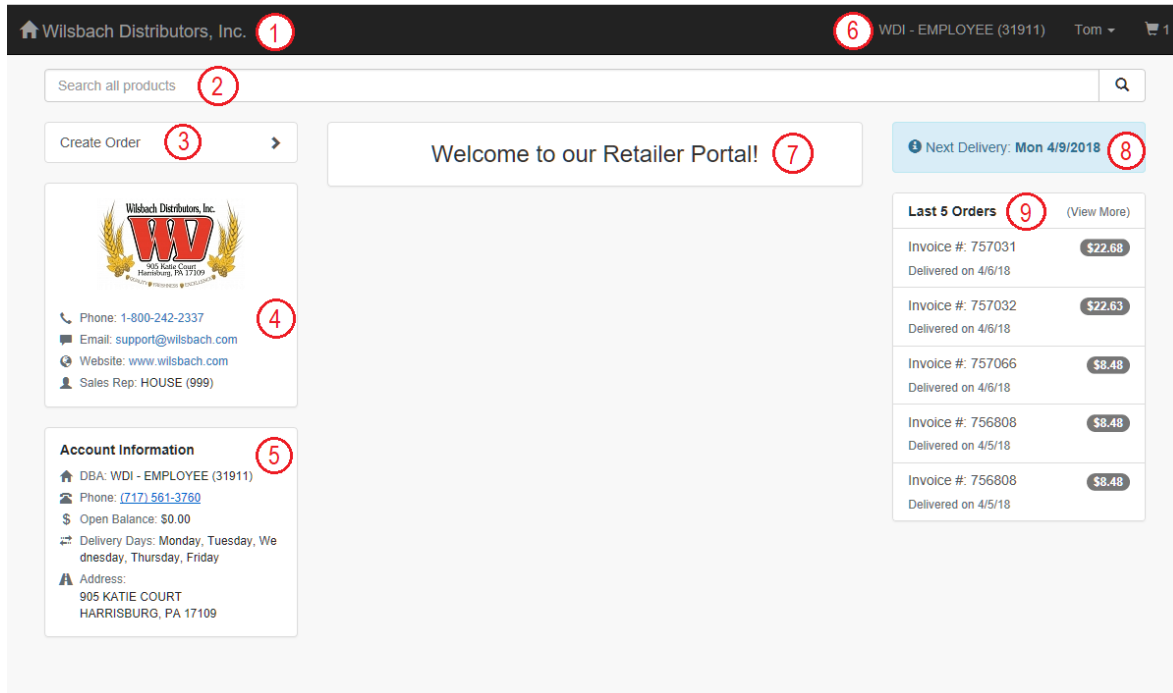
Yes. New to our online ordering, once the user places the order, you **and** the account's corresponding salesman will receive an email detailing the orders.

### **Can the User Leave a Message on the Order?**

Yes. When viewing the Shopping Cart, prior to placing the order, a comment box is available to enter a message.

## Full-Screen Layout

A user will see this layout when connecting from a computer or a large tablet.



Wilsbach Distributors, Inc. 1 WDI - EMPLOYEE (31911) Tom 1

Search all products 2

Create Order 3

Welcome to our Retailer Portal! 7

Next Delivery: Mon 4/9/2018 8

Last 5 Orders 9 (View More)

Invoice #: 757031	\$22.68
Delivered on 4/6/18	
Invoice #: 757032	\$22.63
Delivered on 4/6/18	
Invoice #: 757066	\$8.48
Delivered on 4/6/18	
Invoice #: 756808	\$8.48
Delivered on 4/5/18	
Invoice #: 756808	\$8.48
Delivered on 4/5/18	

**Account Information** 5

DBA: WDI - EMPLOYEE (31911)

Phone: (717) 561-3760

Open Balance: \$0.00

Delivery Days: Monday, Tuesday, Wednesday, Thursday, Friday

Address: 905 KATIE COURT, HARRISBURG, PA 17109

Phone: 1-800-242-2337 4

Email: support@wilsbach.com

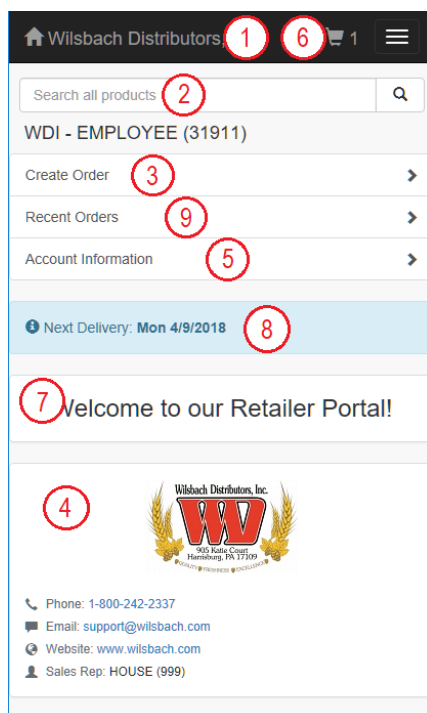
Website: www.wilsbach.com

Sales Rep: HOUSE (999)

## Small-Screen Layout

A user will see this layout when connecting from a phone or small tablet.

this layout when connecting from a phone or



Wilsbach Distributors, Inc. 1 WDI - EMPLOYEE (31911) 1

Search all products 2

WDI - EMPLOYEE (31911)

Create Order 3

Recent Orders 9

Account Information 5

Next Delivery: Mon 4/9/2018 8

Welcome to our Retailer Portal! 7

4

Wilsbach Distributors, Inc.

905 Katie Court  
Harrisburg, PA 17109

Phone: 1-800-242-2337

Email: support@wilsbach.com

Website: www.wilsbach.com

Sales Rep: HOUSE (999)



## Screen Layout Definition/Description

- 1: **Home** – Click on this area from any screen to take you back to the home screen
- 2: **Product Search** – Enter a name or number to pull up a list of products to pick from
- 3: **Create Order** – Although you can create an order from **Product Search** and **Recent Orders**, **Create Orders** allows account to view all the products they ordered over a selected number of days (filter by Past 30 Days, Past 60 Days, Past 90 Days or Past 13 Months), you can also see/search for items that may have never been purchased.
- 4: **WDI Information** – Provides phone number, email address, website and sales rep name for account
- 5: **Account Information** – Shows account name, phone number, A/R balance, delivery day and address
- 6: **Account Order Information** – Account information specific to this order
  - a. **Ordering Account** – If a user is setup to order for more than one account, click on this lets the user choose which account the order is for
  - b. **User** – Allows the user to change his/her password or sign out of the application
  - c. **Shopping Cart** – Allows user to view his/her shopping cart; will display number of units ordered next to cart
- 7: **Marketing/Communication Area** – Area for Wilsbach to market/communicate to all accounts
- 8: **Next Delivery Day/Date** – Displays the accounts next delivery day/date for any order placed today
- 9: **Recent Orders (Full-Screen Only)** – Lists the last FIVE orders; clicking on each order will allow them to see each the detail of each order with the option to **reorder** the entire order or **reorder** any specific product within that order; clicking on **(View More)** will show the last 25 orders
- 9: **Recent Orders (Small-Screen Only)** – Displays the last 25 orders; clicking on each order will allow them to see each the detail of each order with the option to **reorder** the entire order or **reorder** any specific product within that order