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www.rectorseal.com

December 23, 2020
Revision 2.0

Magento eCommerce User Guide

Overview

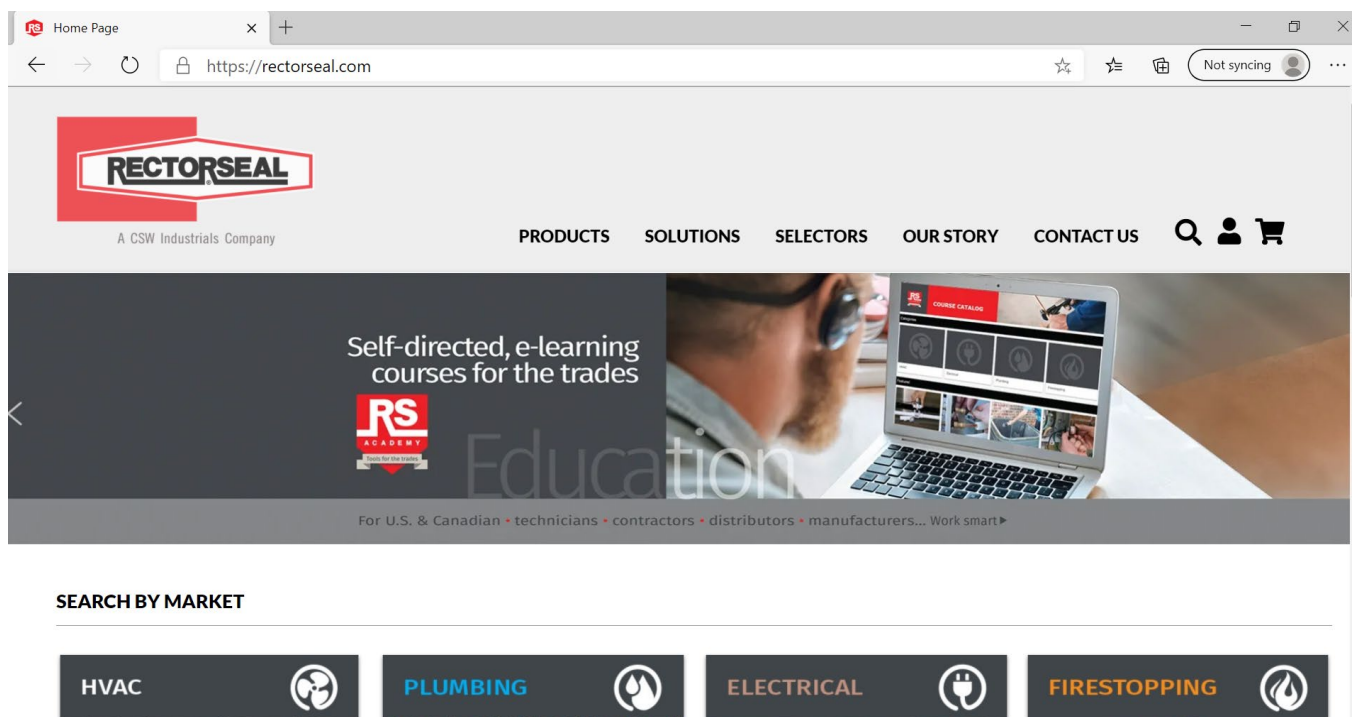
In order to support a more robust customer experience, RectorSeal is rolling out the Magento eCommerce platform. The platform is intended to allow RectorSeal sales staff, manufacturer representatives, distributors and end users to interact with RectorSeal.

The Magento platform allows for multiple permission levels, with differences between what an end user might see vs. a distributor. Moreover, the platform is mobile responsive, allowing for a consistent experience on a laptop or phone, regardless of operating platform.

Over time, RectorSeal will be migrating to the system as the primary means for researching products, ordering products, tracking orders, reviewing invoices and general customer interactions. It will take the place of a number of different systems that RectorSeal currently leverages.

The platform can be accessed directly at RectorSeal.com.

The site includes a navigation around products (e.g. product specifications), as well as solutions (e.g. why our product is better) and selectors (e.g. what applications will a thread sealant work on).





A CSW Industrials Company

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Logging In

Login information can be requested by clicking on the person icon on the homepage and then clicking on Request an Account. Filling out the Request an Account form will send a request to our digital support team to trigger configuration.

The screenshot shows the RectorSeal website header with the logo and navigation links: Products, Alt Category, Blog, and a user icon. Below the header, there are two main sections: 'Registered Customers' and 'Request an Account'. The 'Registered Customers' section has a text prompt 'If you have an account, sign in with your email address.' followed by input fields for 'Email *' and 'Password *', a 'Sign In' button, and a link for 'Forgot Your Password?'. The 'Request an Account' section has a text prompt 'Creating an account has many benefits: check out faster, keep more than one address, track orders and more.' followed by a blue 'Request an Account' button. A small red asterisk note '* Required Fields' is at the bottom left of the login section.

Once an account is created, an email will be sent that will be similar to the email below.



Matt Trimmer,

Welcome to RectorSeal.com eCommerce. We are excited to get you setup to interact with RectorSeal online.

When you sign in, you will be able to:

- Check product pricing and availability
- Place Orders
- Track shipments
- Check the status of orders and invoices
- View past orders

To sign in to our site and set a password, click on the [link](#):

- Email: trimmer1466+email3@gmail.com

Best,

Jeff Underwood
Vice President - Sales & Marketing
Jeff.Underwood@rectorseal.com

Once login information is received, users will set their own password.



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To login, select the Login Icon in the top right corner.

A screenshot of the Rectorseal website's user interface. The top navigation bar includes the Rectorseal logo, the text 'A CSW Industrials Company', and links for 'Products', 'Alt Category', 'Blog', a search icon, a user profile icon (highlighted with an orange box), and a shopping cart icon. The main content area is split into two columns. The left column, titled 'Registered Customers', contains the text 'If you have an account, sign in with your email address.', followed by 'Email *' and a text input field with a red asterisk icon. Below that is 'Password *' and another text input field with a red asterisk icon. At the bottom of this column is a blue 'Sign In' button and a link 'Forgot Your Password?'. The right column, titled 'Request an Account', contains the text 'Creating an account has many benefits: check out faster, keep more than one address, track orders and more.' and a blue 'Request an Account' button. A small red note '* Required Fields' is located at the bottom left of the page.

Enter the user email and password in the fields provided and select 'Sign In.'

If a user does not have a password, or has forgotten their password, select 'Forgot Your Password' to go through the password reset process. The forgot password link will be emailed directly and will be available for a nominal amount of time to allow for a password reset.



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Distributor Login View

A single super-user account is created for each distributor. The intent is to ensure proper security for whom at the distributor should be able to access specific pricing, ordering and information location. The super-user has the ability to assign specific permissions within their organization.

From the “My Dashboard” screen, the super-user can perform account management, as well as view orders, invoices, and shipments.

NAME	PERMISSIONS	DATE CREATED	ACTIONS
New User	Default User	05/08/20	Edit Delete
New User	Company Administrator	05/29/20	Edit Delete
New User	Default User	05/29/20	Edit Delete
New User	Default User	06/01/20	Edit Delete
New User	Default User	06/08/20	Edit Delete

When on the ‘Users Management’ screen, Distributors will see a grid of all created users. Here, a user can either create a new user, or edit an existing user. To create a new user, select the ‘New User’ button at the top of the screen. This will open up the New User form.

New User

First Name *

Last Name *

Email Address *

Location *

Permissions

☐ Manage Users

☐ See Pricing

☐ View Order History

Save Cancel



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Provide the user's First Name, Last Name, Email Address, and Location they are assigned to.

New User

Last Name *

Email Address *

Location *

Permissions

- ☐ Manage Users
- ☐ See Pricing
- ☐ View Order History
- ☐ Purchase On Site

USERS M

DATE CREATED	ACTIONS
05/08/20	Edit Delete
05/29/20	Edit Delete
05/29/20	Edit Delete
06/01/20	Edit Delete
06/08/20	Edit Delete

20 per page

Then provide the permissions that the user is allowed. The permissions are defined as:

Manage Users

The Manage Users permission will allow a user to create and edit other users in their company. If Manage Users is set to 'Yes', then the User Management screen will be available in the My Account for the user. This user will be able to add new users, edit already created users (including their permissions), and delete users that no longer belong. Users will only be allowed to create and manage other users in locations they are assigned to. If Manage Users is set to 'No', then the User Management screen will not be displayed to the user and they will not be able to create, edit, or delete other users.

See Pricing

The See Pricing permission will allow a user to see their company's price for all the RectorSeal products. Instead of seeing list price, they will see their company contract price for the product. Users that have See Pricing set to 'No' will only see list price for products on the website.

View Order History

The View Order History permission will allow a user to see their company's order history for locations they are assigned to. If View Order History is set to 'Yes', then when a customer accesses their order history, they will see the order history for all users in their company at their locations. If View Order History is set to 'No', then a user will only see their personal order history.



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Purchase on Site

The Purchase on Site permission will allow a user to add products to their cart and place an order. If the Purchase on Site is set to 'Yes', then users will have typical shopping experiences and the ability to add to cart and place orders. If the Purchase on Site is set to 'No', then a user will only be able to browse the site. This user will have no add to cart functionality and will not be able to place an order. They will only be able to view products and content on the site.

After the user has been fully configured, select 'Save' to create the user. An email will be sent to the user where they will set their own password for login.

To edit a user, select the 'Edit' link under Actions.

The screenshot shows the Rectorseal Users Management interface. A modal form titled 'Edit User' is open, displaying the following fields and options:

- Name:** First Name (text input), Last Name (text input)
- Email Address:** (text input)
- Location:** (text input, showing '574 GRETN RD STE 164, Houston, TX 77055')
- Permissions:**
 - ☒ Manage Users
 - ☒ See Pricing
 - ☒ View Order History
 - ☒ Purchase On Site

At the bottom of the modal are 'Save' and 'Cancel' buttons. The background interface shows a sidebar with 'Users Management' selected, a 'New User' button, and a table of users with columns for 'NAME', 'DATE CREATED', and 'ACTIONS'.

NAME	DATE CREATED	ACTIONS
Mark Thomas	05/08/20	Edit Delete
Mark Thomas	05/29/20	Edit Delete
David Thomas	05/29/20	Edit Delete
John Hall	06/01/20	Edit Delete
John Hall	06/08/20	Edit Delete

When the edit user form is displayed, all of the user's current information will display and be editable. A user's password is not manageable in the edit form and needs to be updated by the user themselves. To edit a user, change the information in the field that needs to update and then select 'Save.'



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Shopping

When shopping on the website, all products will initially display with RectorSeal List Pricing. To view pricing specific to a ship-to location, select the the 'Shipping Location' field in the top right corner.

Shipping Location: I

- 574 GREYNA RD STE 164, WICHITA, KS 67201, United States
- 7917 CAMP BOWIE W, WICHITA, KS 67201, United States
- 1031 S W ST, WICHITA, KS 67201, United States
- 7610 S KENTUCKY AVE, WICHITA, KS 67201, United States

USERS MANAGEMENT

[New User](#)

NAME	PERMISSIONS	DATE CREATED	ACTIONS
Robert Thompson	Default User	05/08/20	Edit Delete
Robert Thompson	Company Administrator	05/29/20	Edit Delete
Charles Thompson	Default User	05/29/20	Edit Delete
Andy Neal	Default User	06/01/20	Edit Delete
Jeff	Default User	06/08/20	Edit Delete

5 Item(s)

20 per page

This field is both a dropdown and a type-ahead. When a user clicks in the text field, a list of all locations the user is assigned to will display. As a user begins to type, the results will filter to only options that match the input text.

Shipping Location: 1

- 574 GREYNA RD STE 164, WICHITA, KS 67201, United States
- 1031 S W ST, WICHITA, KS 67201, United States
- 1022 NW 38TH ST, LAWRENCE, KS 66044, United States
- 1300 SE 82ND ST, OKLAHOMA CITY, OK 73129, United States

USERS MANAGEMENT

[New User](#)

NAME	PERMISSIONS	DATE CREATED	ACTIONS
Robert Thompson	Default User	05/08/20	Edit Delete
Robert Thompson	Company Administrator	05/29/20	Edit Delete
Charles Thompson	Default User	05/29/20	Edit Delete
Andy Neal	Default User	06/01/20	Edit Delete
Jeff	Default User	06/08/20	Edit Delete

5 Item(s)

20 per page



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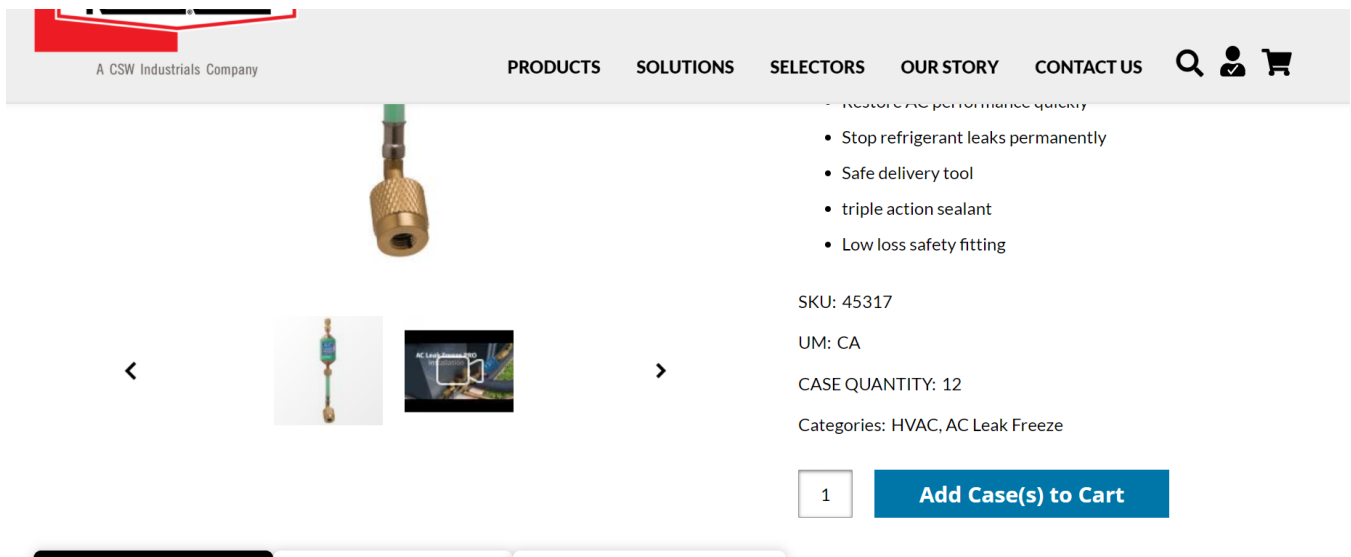
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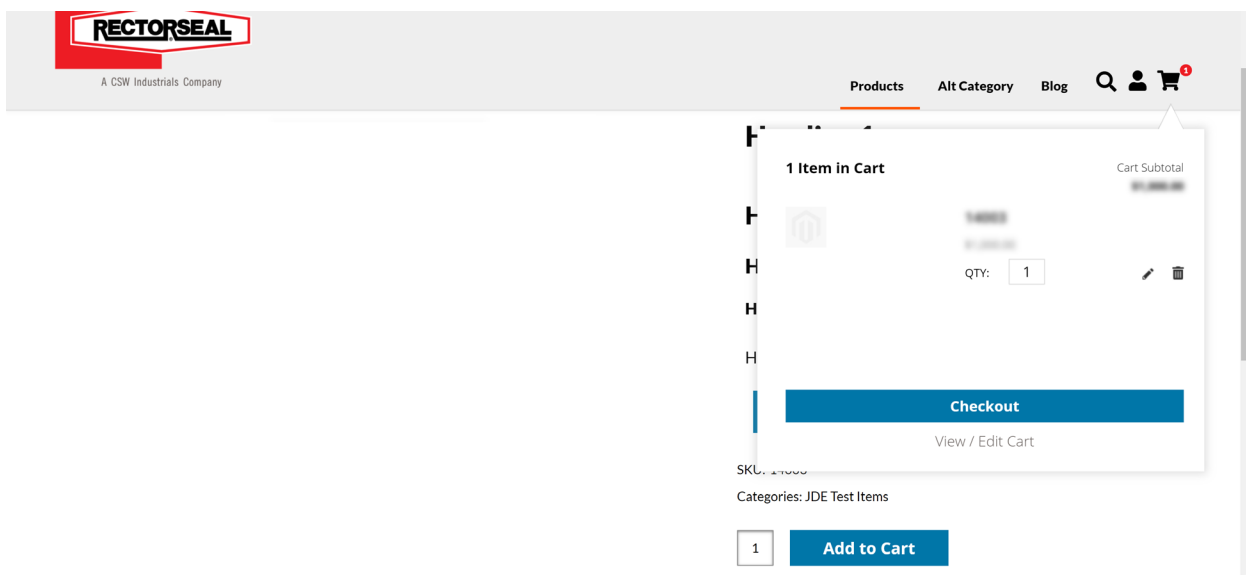
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If a user is only assigned to a single address, that address will be preselected in the field and the user will see the pricing for their ship-to location.

Users have two ways to shop. First, they can go to the Products tab and select products that they would like to purchase. Each of these items can be added to the cart during the shopping process using the “Add Case(s) to Cart” functionality for individual product pages or for groups of products.



After navigating to products and adding them to cart, a user can either navigate to the Cart Page or directly to Checkout.





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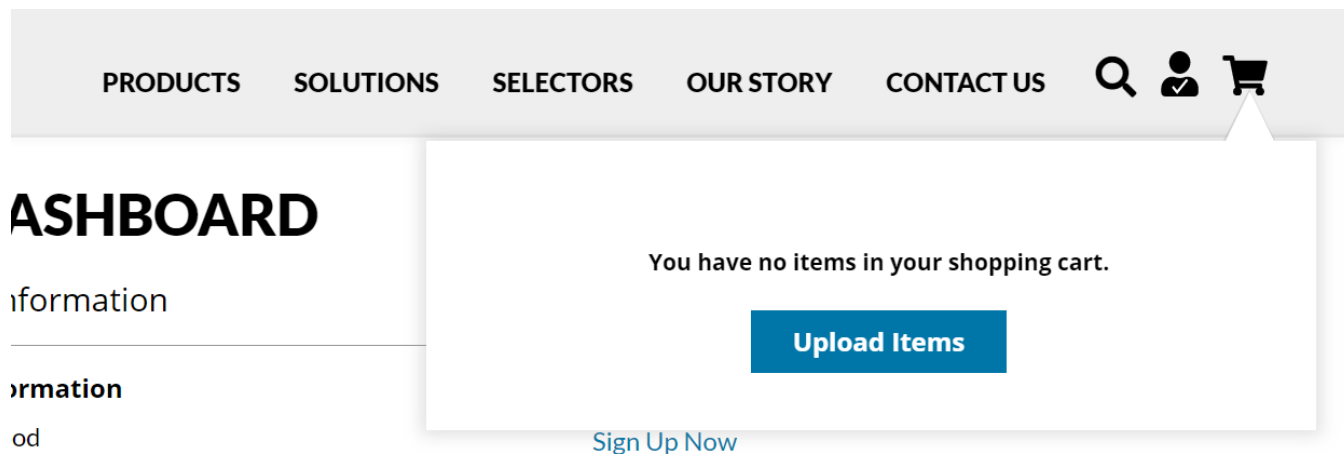
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T (713) 263-8001 • (800) 231-3345

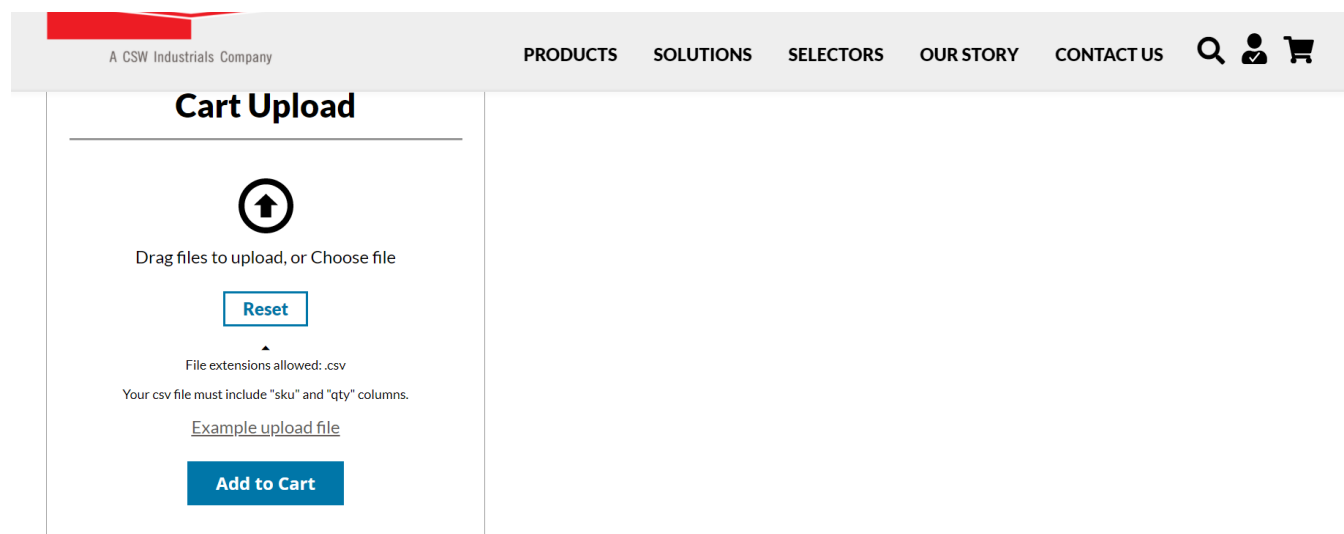
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Secondly, a user who already knows what they want to order, can click on the checkout cart and then select “Upload Items” to gain access to a .CSV file that allows for a user to simply enter the SKU number and Case Quantity.



The file can be dragged from the desktop to the uploader. An example file is included immediately below the Cart Upload functionality.



In checkout, users will pick a shipping address out of the address book. If the user already has selected an address in the Shipping Location field, that address will be preselected.

Switching the shipping address in checkout will update pricing for the new shipping location for the order.



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In the Shipping step, there are many shipping options a user can input to send an order to RectorSeal. Note that the shipping stage has an API to RectorSeal's shipping partner, CH Robinson, which will return a shipping quote for orders where the customer is responsible for freight.

- Request Date: the date a customer is requesting for delivery of the order
- RSQ – Quote Number: an approved PAR number that will trigger a CSR review and price adjustment. Note that the price reflected in Magento will be the everyday price and the RectorSeal CSR will send an updated order confirmation post pricing review.
- Order Instructions: if the customer has any instructions needed for the order
- Require Expedited Shipping: if the order needs to be expedited
- Require Special Handling: if the order requires special handling, which will need to be included in the Order Instructions
- Freight Options
 - o Full Freight Allowed: if the order qualifies for Full Freight, best way will be provided as the shipping method
 - o Freight Pre-Pay and Add: if the shipping is to be added to the order and paid for, the shipping methods available will display for customer approval. This is handled by a freight pricing call to C.H Robinson.
 - o Freight Collect: if a customer need freight collect, add the Carrier and Account number to Order Instructions
 - o Customer Pickup: if the customer needs pickup at a RectorSeal distribution center, add the pick-up contact to the Order Instructions, including name and phone number
 - o Third Party Billing: if the customer needs third party billing, add the Carrier and Account number to Order instructions.



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Once a user has completed the Shipping step of checkout, they continue to the Billing step of checkout. At Billing, they will confirm the Billing Address on the order and input a Purchase Order Number to identify the order. If the order does not meet the Minimum Order Value, a warning will display to the user and it will go on a hold once placed.

A screenshot of the RectorSeal checkout interface. The top navigation bar is light gray and contains the RectorSeal logo, the text 'A CSW Industrials Company', and links for 'PRODUCTS', 'SOLUTIONS', and 'SELECT'. Below the navigation bar, the page is divided into two sections: 'Shipping' and 'Review & Payments'. The 'Review & Payments' section is active and contains a 'Payment Method' heading. Under this heading, there is a 'Purchase Order' section with a 'Selected Address' button (indicated by a checkmark icon) and a 'Purchase Order Number' input field. Below the input field, a warning message is displayed in an orange box: 'Warning: Order subtotal is less than the \$250 minimum order amount.' At the bottom right of the 'Review & Payments' section, there is a blue 'Place Order' button.

Order Status

When in the Orders screen of the My Dashboard, users can view all orders, and their current status. Orders are displayed with their PO Numbers, as well as associate dates, order total, and the status.

The status will update in real time as the status updates in the RectorSeal system and when clicking in an order, users will see specific statuses for each individual line item. For instance, if 9 of 10 items have shipped on an order, users would see the ship date for the 9 items and would see that the 10th item is either Open or Backordered.

It will include all orders placed for the customer, regardless of order methodology.

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ORDER STATUS

Search by P.O. Number

Search

Order Number	P.O. Number	Entered Date	Request Date	Order Total	Status
402945	1354224-00	11/01/2020	11/03/2020	10160.18	Closed
405324	1355219-00	11/09/2020	11/09/2020	7474.4	Closed
406321	1357122-00	11/09/2020	11/11/2020	4079.32	Closed
407826	1359430-00	11/16/2020	11/16/2020	6053.94	Closed

When clicking on an Order Number hyperlink, additional order details will follow. On an individual order, users will see line level detail, with the most recent status from our ERP software system.



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Shipments



When in the Shipments screen of the My Dashboard, a user can view all. If the Shipment has available tracking, a 'Tracking' button will display, allowing the user to view the tracking status via the freight carrier's tracking system.

PRODUCTS SOLUTIONS SELECTORS OUR STORY CONTACT US   					
SHIPMENTS					
Ship Date	Shipment #	Carrier	Invoice #	Order #	Tracking
12/07/2020	165811	CHR - ESTES	28333	402731	Tracking
11/29/2020	1365562	CHR - ESTES	25815	407939	Tracking


If the Shipment has a single tracking number, the button will navigate a user directly to the carrier website to track the shipment.


← → ↺ estes-express.com/myestes/shipment-tracking/?type=PRO&query=1560214335 ☆ 


ESTES Ship Track Manage Solutions Resources Contact   My Estes ▾


 **Service Advisory** 
Inclement weather is creating hazardous road conditions and limiting service in some areas. Please [click here](#) for more details.


TRACK
Shipment Tracking


 **Quick Links**

 Shipment Tracking >


 LTL Rate Quote >

 Image Retrieval >

 Terminal Lookup >

 Transit Time Calculator >


Shipment Tracking

Get a high-level status on your freight, including delivery date and time along with the name of the receiving party. For more detailed information such as pickup dates, freight charges and images associated with your freight, [log in](#) to My Estes today! 

Search by *
PRO Number ▾

Enter or copy/paste one or more PRO numbers here. One per line.

1560214335

Need Help?
 custsrv@estes-express.com



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If the Shipment has multiple tracking numbers, the tracking button will display a dropdown of tracking numbers and selecting a tracking number will navigate a user to the carrier website to track the shipment.

In most cases, this will result in going to the master shipment and seeing all packages on the order.

12/04/2020	2199250	CHR - SOUTHEASTERN FREIGHT LINES	28038	410171	Tracking
12/03/2020	2305686	CHR - FEDEX GROUND	27918	406321	Tracking ▼

Invoices

When in the Invoices screen of the My Dashboard, users can view all invoices, and their amounts due. This screen shows the dates, including the due date, and the amount due at that time for users to review.

The amount due will update as the amounts update in the RectorSeal system in real time. This will include any credits issues to a distributor.

Invoice Number	Invoice Date	Due Date	P.O. Number	Invoice Amount	Invoice Due
28752	12/09/2020	01/08/2021	6212138	221.92	221.92
28754	12/09/2020	01/08/2021	6212263	110.96	110.96
28333	12/08/2020	01/07/2021	6210467	6539.46	6539.46