



**EASTERN CONNECTICUT STATE UNIVERSITY** 

# Online Training Guide



## Login

- Open your internet browser and type: <a href="https://www.wbmason.com/Login2.aspx">https://www.wbmason.com/Login2.aspx</a>
- 2. Type in your login credentials.
- 3. Note: If this is your personal computer, click the checkbox to log you in automatically.
- 4. Click Login



## Login Confirmation

#### **HOMEPAGE**

Once you have successfully logged into the WB Mason site you will see the WB Mason homepage.

#### **ACCOUNT #**

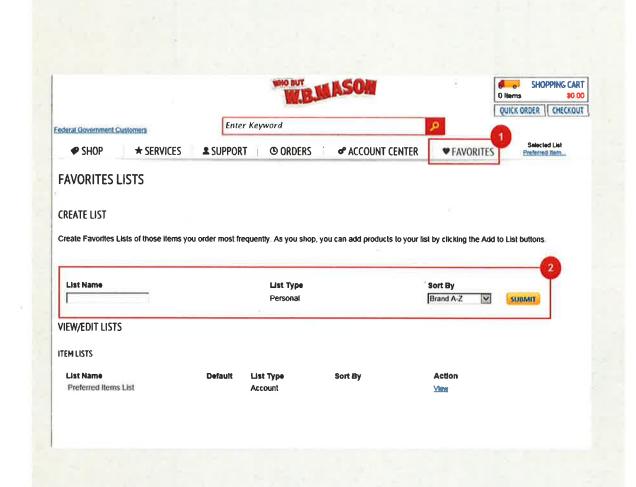
Your account # will be located in the top left hand corner of the screen (underneath your name). Your account # will begin with the letter "C" followed by a series of numbers (i.e. C1237892).



### Favorite's List

From this page you can view, add, modify, and delete your existing personal lists.

- To view and manage your personal favorite's list(s) online you can click on the *Favorites* tab, which will bring you to this overview page.
- 2. To create a new list insert the new list name, select the page sorting preference and click **Submit**.



## Product Search

#### **KEYWORD SEARCH BAR**

Type a keyword into the search bar to search for a broad or specific item. The smart search engine will offer you search suggestions based on what you type.

#### **SHOP TAB**

Scroll over the shop tab and click on a shopping category to view all the products available meeting your selection.



## Filter Search Results

#### **REFINE SEARCH RESULTS**

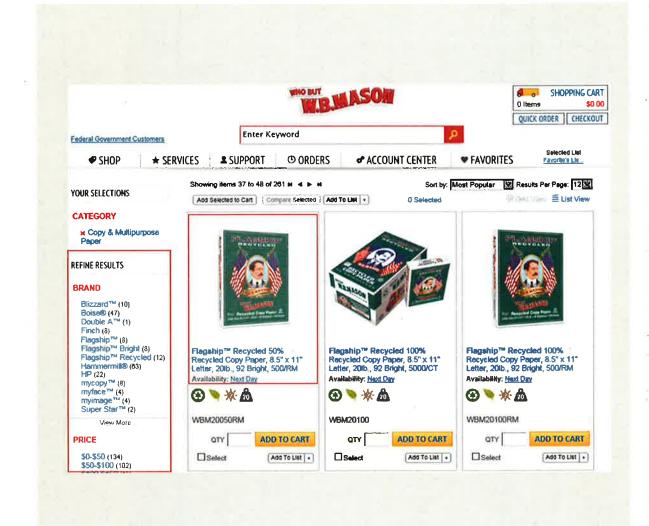
Use the left hand column to refine your search results.

#### **SORT BY**

Use the **Sort By** dropdown and select your product sorting preference.

#### **RESUTS PER PAGE**

Click on the dropdown menu next to **Results Per Page** to select the amount of items you would like to populate per page in your search results.



## Individual Item Detail

#### VIEW INDIVIDUAL ITEM

When conducting a search, click on an item to view additional detail.

#### **ITEM ICONS**

Icons located next to the item help you identify the product type. Scroll over each icon to view the meaning of each icon.

#### **NOTE FIELD**

Special notes added into the *Note* field will populate on your packing slip.

#### ADD TO CART/ADD TO LIST

Make a selection to add this item into either your shopping cart or favorites list.



## Quick Order Tool

#### **QUICK ORDER MULTIPLE ITEMS**

Select *Quick Order* located in the top right hand corner of the screen. This tool will allow you to enter in multiple items and load them into your shopping cart and/or favorites list.

#### **QUICK ORDER**

Use our Quick Order process to rapidly add multiple items to your shopping cart. Enter a specific Item number (as shown in our catalog) and quantity on each line. When you are done entering items, click "Add to Cart" to place the items in your shopping cart or click "Add to List" to add these items to an existing shopping list.

Item Number	QTY	Notes
	1	
	1	
	1	
	1	
	1	
	1	
	1	
	1	
	1	
	1	
	Add To	List . ADD TO CAR

## Shopping Cart

**Update your cart** – update your cart after you make modifications to items in your cart.

**Empty Your Cart** – removes all items from your shopping cart

**Save Cart for Later** – will allow you to save your current shopping cart. You can retrieve saved carts anytime in *Account Center* > *My Saved Carts* 

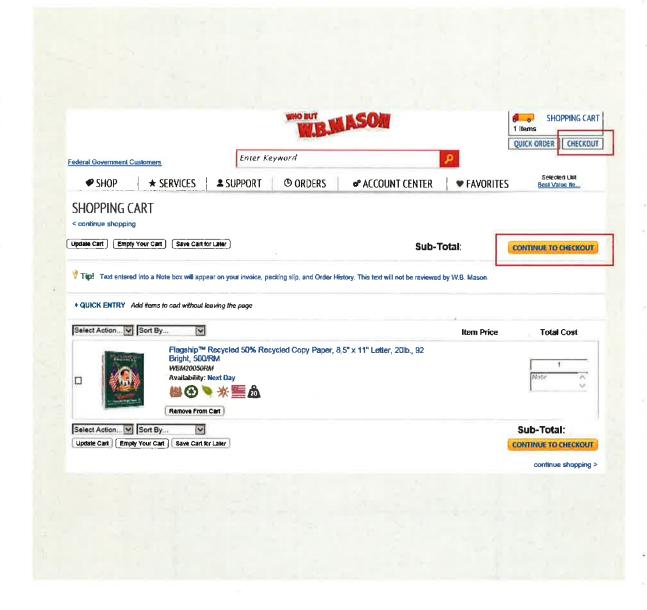
**Continue to Checkout** – Click this icon to proceed to checkout.



### Go to Checkout

#### Ready to Checkout?

When you are ready to checkout click the *Checkout* button located next to the *Shopping Cart* or click *Continue to Checkout* from the shopping cart page.



## **Checkout Steps**

- 1. The checkout process will be listed at the top of the page and will turn green as you complete each step.
- Your order will be complete when you've reached the order confirmation page and are provided with an order #.
- 3. If your order requires an approval, you will be notified on the confirmation page. An approval workflow message will display underneath the WB Mason truck + Order #. You will see who your order has gone to for approval and your approver will get an e-mail notification letting them know an order is awaiting approval.





# Instructions for Order Approvals

Steps on how to approve/reject and modify an order that is awaiting approval.



## E-Mail Notification

You will receive an e-mail notification when you need to approve an order.

- 1. Use this link to login to wbmason and review and/or edit the order.
- Click this link to instantly approve (without needing to login and approve online).

Hillary Homick

The following order is awaiting your approval:

Order Number: S053775402
Customer Number: C2581519
Order Date: 10/23/2017
Orderer: Hillary Homick

This order requires approval for the following reason(s):

\* Order total is over specified limit

Your Approval Options:

#### Review & Edit Order Online

Ose this link to login to WBMason com to review or edit this order.
Copy and Paste the following link into your browser if necessary http://www2.wbmason.com/OrdersAwaitingApproval.aspx

#### Click Here to Approve this Order Now 'As -

Use One Click Approval only if you want to instantly approve this order.

Copy and Paste the following link into your browser if necessary

http://www.wbmason.com/ApprovalResults.aspx?GUID=(DE808A4C-9324-42CF-AE85-9D4199A74DA6)

Shipping Address: W.B. Mason Company

53rd West 23rd Street, 10th Floor

New York, NY 10010

ention: Hillary Homick

Billing Address: W.B. Mason Company

53rd West 23rd Street, 10th Floor

New York, NY 10010

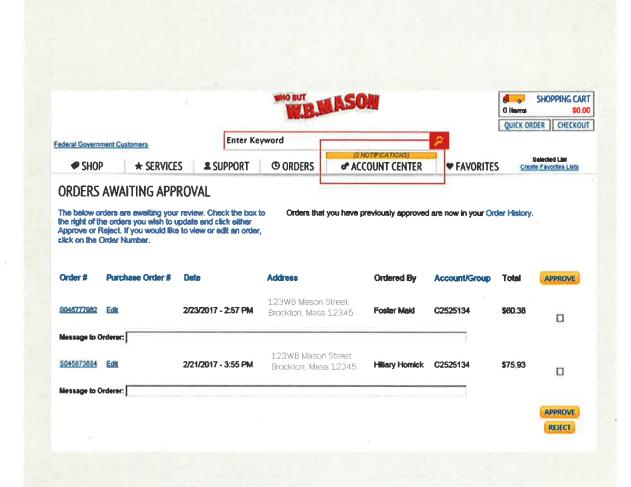
Po Number: 123456789

Cost Center: 1234 - Marketing Dept.

tem Number	Description	Qty Price	Total
WBM1234	Item Description	\$1 00	\$1.00
		Product Subtotal:	\$1.00
		Tax Subtotal*:	\$1.00
		Order Total:	\$1.00
		* may include bottle deposit	s

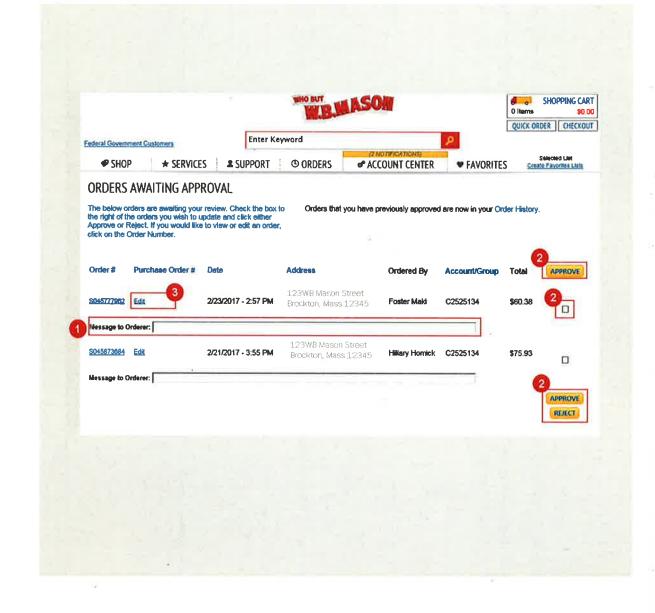
## Login Online

- 1. Once you login you see a notification box highlighted in yellow (above the Account Center Tab) reflecting the amount of orders in the que.
- 2. Click on the Account Center Tab to view all orders awaiting approval.



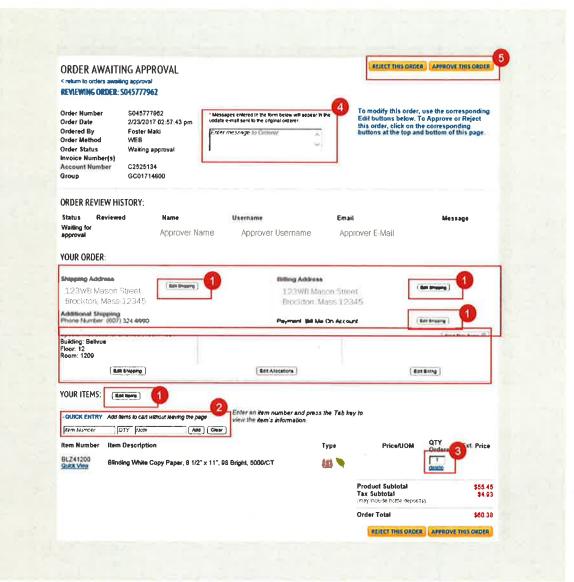
## View All Orders Pending Approval

- 1. Send a message to the orderer (if necessary)
- 2. Click on the check box and then click either "Approve" or "Reject"
- Click "Edit" to view full order and make modifications to the order.



## View/Modify Individual Orders

- 1. Click "edit" in the section in which you would like to modify.
- "Quick Entry" will allow you to add an item to this order
- 3. Adjust the quantity of each item or delete will remove each item from the order
- 4. Send message back to orderer
- Reject or Approve this order





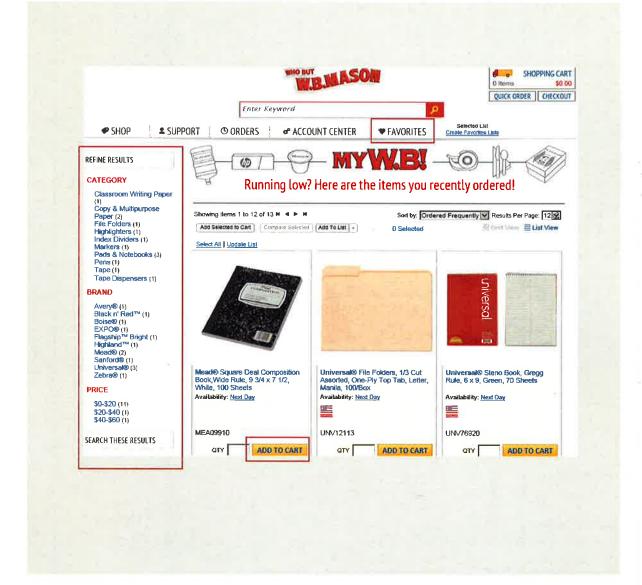
# Additional Information



## My WB!

Re-ordering items?? Easily find all the items you've previously ordered all in one place.

- Select Favorites then click the SHOP button located under MY WB! You are now viewing all the items you've previously purchased from WB Mason in the past.
- Use the left hand column to help you refine your results and help you identify the item you're looking to re-purchase!
- 3. Once you've found the item click ADD TO CART to include these items in your existing shopping cart!



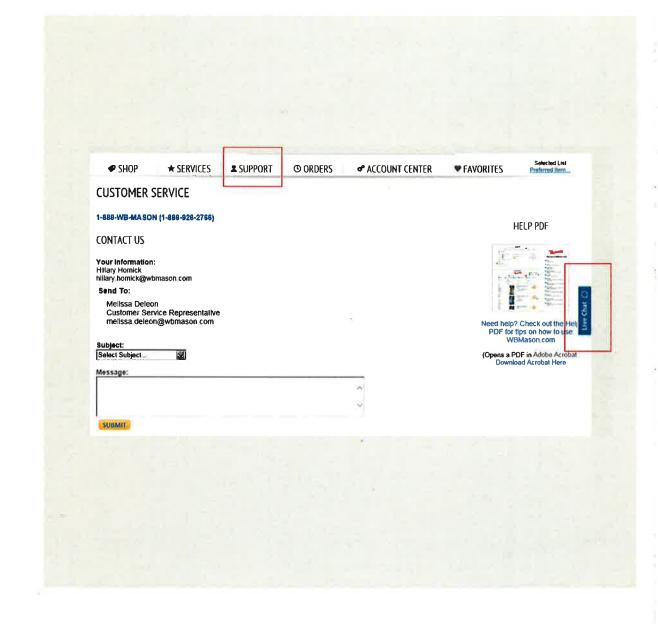
## Customer Support

#### **CONTACT CUSTOMER SERVICE**

Select the *Support* tab to contact your dedicated customer service representative. Select appropriate subject matter, type message and click *Submit* to send message to your dedicated customer service.

#### LIVE CHAT

Select the *Live Chat* icon on the right hand side of the screen to open up a live chat with a WB Mason Customer Service Representative.



## Order History

Click on the Orders tab to view your order history.

#### **ORDER STATUS**

The status column will tell you the live status of your order.

#### **VIEW ORDER DETAILS**

Click on the "Order #" to view details of each order.

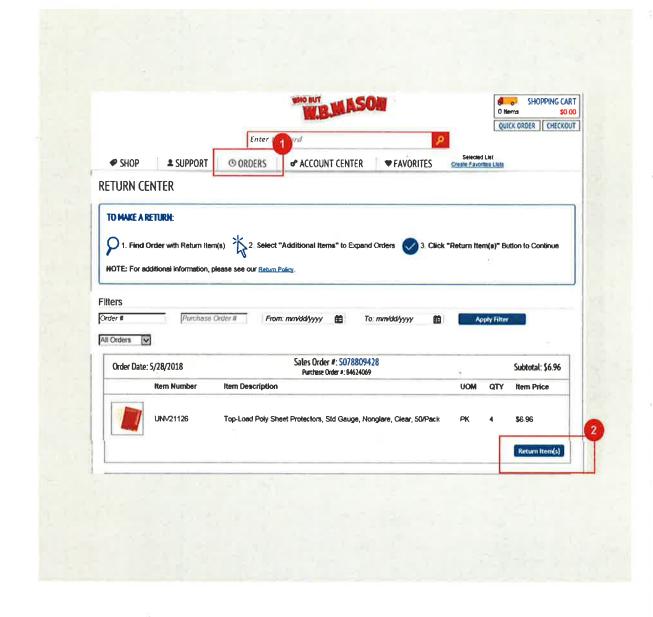
#### **RE-ORDER ITEMS**

Once you view an order you can select the *Re-order Items* button on the page to easily re-order items.



## Return Center

- Select Return Center from the drop down under the Orders tab. Use the filter tool to help you find the order you would like to place a return for.
- 2. Click on *Return Item(s)* to process a return. Don't forget to print the return label at the last step of the return process and set aside with product for your driver to pickup next-day.



## Delivery Updates

After you place an order you can easily check up on your delivery status.

Delivery notifications will be highlighted above the *Orders* tab. To view updates, just click on the green notification on your homepage.



### Thank You

Thank you for choosing W.B. Mason for your office supply needs. We appreciate your loyalty to our family owned business. If you have any questions, please do not hesitate to reach out to us. We are always happy to help!

- The WB Mason Team

#### ALRS

Competitive & custom pricing with perpetual contracting

#### ASONVIII.

Local, dedicated account management, customer service, and distribution

#### buyright

The largest selection of the branded products you want at low prices you'll love!

#### wonderful!

One Order, One Delivery, One Invoice

#### WBMASOM.COM

Easy, flexible online ordering, integrated and customized for your organization

#### W.B.MASON

A Brand you can trust since 1898



Guaranteed Next Day delivered by a uniformed WB Mason driver!