



Quick Reference – Account Manager

(only for customers with usernames/passwords)

The Account Manager contains options for you to review and initiate activity or changes on your account. Once logged in click the tab at the top right corner called My Account. Below is the list of links in the Account Manager:

* **Create & Review Orders**

Create new Order - Go here to start a new order, template, or quote.

Saved Draft Orders / Templates – lists your saved draft orders, templates, or quotes

Generic Templates - Templates that have been created by an expert. Find one you are interested in, open the template and click the SAVE at the bottom. Look under your MY TEMPLATES section & it should be listed there. Once you click on the template you will be able to see your price and the qty available at your location.

* **Manage your Coburn's Web Account**

Manage Web Users – Allows additional users to an account. Use this feature to allow or disallow access to the different features available. You may also update your e-mail address and password here.

Switch Account Identity - Access multiple accounts (job/tools accts), switch account identities without having to logout and log back in. You need to switch to different accounts in order to review payments & invoices and place orders under different account #s. On this page you will also find a link to a form you may fill out if you want to add / close certain accounts with online access.

* **Review Account**

Pay on your Account using your Credit or Debit Card - See your latest statement balance, choose invoices to apply payments to and make payments to your account using your credit/debit card.

Review Submitted Orders - View a list of orders you have submitted from the website. You can also create an invoice for YOUR customer from any order at this menu.

Payment History - See how payments have been applied to your account. Review the amount of your payment, type of payment and date payment was applied. Under the column "Auth/Check #" you can click on any of the links to view what invoices your payment was applied. You can also download your information as a csv file which can be opened in excel or a word document.

Invoice Summary - Review your invoices. Notice at the top on the right the Amount Due on this account. There is also a listing of invoices and if payment has been applied. Click any invoice number to view the details of that invoice. Sort invoices by clicking on the column title: Invoice No, Invoice Date, Purchase Order #, or Job Name. Invoices available for viewing are those that are unpaid and also those that have been paid but are less than 90 days old. Download the list of invoices or download your invoice summary which includes the products on each invoice. Info will be a csv file which can be opened in excel or a word document.

Invoice/Statement Options - Choose how you want to receive your invoices and statement (mail, e-mail, and/or fax). These options can be changed at any time. Your invoices will always be available online.

Review your Points - During certain periods we may have programs that allow customer to earn points. When those programs are going on you can go to this link to review your points.

* **Other helpful links**

You will find many useful links under this section including help files, feedback form, contact us, and locations.

* **Header** - Located at the top of the Account Manager there is header information based on your account.

Current User - Shows the name of the person logged in.

Account # - Shows what Account # you are logged into. If you want to switch to a different account look on the section called Manage Web Accounts and click on Switch to job/tool Accounts.

Branch Location - Shows the branch you are logged into. If you want to change branch location you will have to log out and then re-log back in and choose what branch you want to log into in the drop down menu under the box where you enter your password.

E-Mail - Shows your e-mail address. If you need to change your e-mail address look at the section called Manager Web Accounts and click Web User Account and you can edit your web account information.

For more Quick References, go to <http://www.coburns.com/site/help.aspx>