WEBCON

Monitor Business Activity
When It's Most Convenient

- ➢ Create and edit orders

- ➢ Gain access to product information

- ➢ Access item pricing

- ➢ View purchase history & promotions

- ➢ Review accounts receivable information

- ➢ Run retail velocity & analysis

DOYLES SHEEHAN

ONLINE ORDERING INSTRUCTIONS

Monitor business activity, create movement reports, place new orders and more with WEBCON. This handy tool is another value-added benefit provided to the customers of Doyles Sheehan.

WEBCON sends in real-time to the offices without any delay. When an order is placed, it is available immediately in the system.

Please Note: All orders must be received by Doyles Sheehan prior to Noon (12 pm – PST) for next-day delivery.

For assistance please contact Jared Powell – (800) 772-7141 ext. 8310

Using the Internet and a standard web browser provides access to a user-friendly website to execute the following actions:

- View and print invoices and account statements
- Show current and pre-booked orders
- Create and write purchase orders
- Search and view product information
- Generate real-time reports
- Manage retail pricing, create velocity reports and analyze data

Login

The creation of a login must be done through Doyles Sheehan personnel. Please have a password in mind beforehand because any changes to the password will require help from a representative. Passwords are case sensitive!

Account Number: _____

Password: _____

- Access the WEBCON via www.doylessheehan.com
- Click on "WEBCON" (located in the top, right corner of the homepage)
- Enter the account number, password and click on the *'Logon'* button

Overview

- The screenshot below is the primary navigation/homepage
- New item images will rotate in the window to the left
- Recall notifications will be available below the new item window

Accounts receivable information is located on this screen as well. The current amount due and the amount of the last payment are displayed.

The **'User Options'** are found along the top of the homepage providing a clear list of available options.

Viewing / Printing Invoices

- Mouse over the **'Account'** tab and click on **'Statement'**
- A list of all unpaid invoices will display
- Any credits available will also be shown

Statement Date:	This is the date that the statement is available to view
Account ID:	Customer number
Terms:	Payment terms set by Doyles Sheehan
Click Here to Print:	Print a copy of a statement
Account Info:	Account name and delivery address
Date:	Date of the open invoice or credit
Reference:	Doyles Sheehan invoice number
Description:	Invoice or credit
Original Amount:	Full dollar amount of the invoice or credit
Remaining Amount:	If a credit or partial payment has been applied to an invoice
Running Balance:	Total of all invoices and credits

- Any viewable invoices or credits can be opened/printed by clicking on the **'_Blue Reference'_** number
- The bottom line provides the total amount due as of the date of viewing
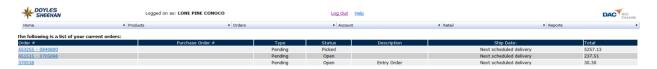
Viewing / Creating / Submitting Orders

It's important to remember when an order is placed, via WEBCON, it is live in the Doyles Sheehan system. All orders are due by Noon (12pm – PST) the day prior to delivery!
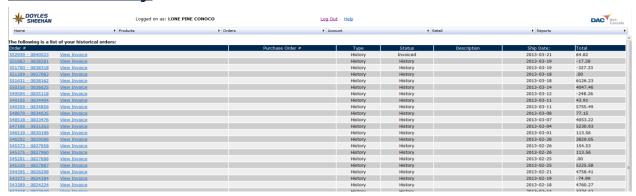
- Click on the _'Orders'_ tab

Current Orders

- The example below shows that there are 3 current orders in the system
- The first order (top of screen) is in the process of being picked
- All 3 orders are available to view
- Only the 2 bottom orders can be edited
- **An order can ONLY be modified in the current screen when the order is in an 'OPEN' status**

Order History

- When viewing **'Order History'**, users can print and/or reorder
- Click on **_'View Invoice'_** to view and print an order from history
- Click on the invoice number (far left) to reorder product from a previous invoice
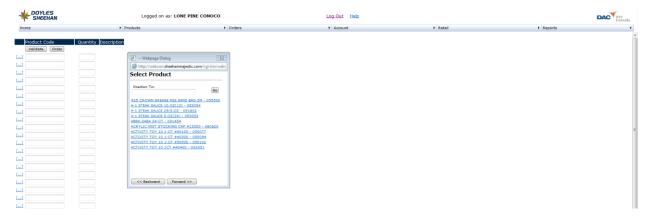
Booking Orders

- Access the feature under the **'Orders'** tab
- Drag the mouse over the tab and select the bottom option, **'Booking'**

This feature is helpful for viewing orders with a future delivery date and allows the tracking of tobacco force-outs as well as tradeshow orders.

- Select a date range to explore and click on *'GO'*
- This will load a PDF file displaying future deliveries that are in the system
- View or print the PDF to avoid duplicate item purchases

Creating Orders (Rapid)

- There are few options for creating orders within the WEBCON
- The easiest route is through **'Rapid'**
- This can be located by dragging the mouse over the <u>**'Orders'**</u> tab
- Then click on *'Rapid'*

- Enter the six-digit item number in the **'Product Code'** field
- Use the tab key to move to the **'Quantity'** field and enter the desired amount
- At this point, enter the items needed, or validate after each item

Validating the item will provide an item description to the right of the quantity field in order to eliminate mistakes.

- Need help finding an item?
- Click on the *'[…]'* to the left of the screen
- This will populate a search box to help find an item

When item entry is complete, or if additional cells are required, click on *'Order'* to move the order into a current status. Products successfully added to the order will be visible.

View Order

From the current order view, the following actions are available:

- Delete the entire order
- Remove an item
- Change a quantity
- Add to the order (by clicking *'Rapid'* again)

Creating Orders (Rapid) Continued…

If ANY changes are made to the order, remember to click on *'Apply Changes'*

- When the order is completed, click on *'Confirm'* to process the order
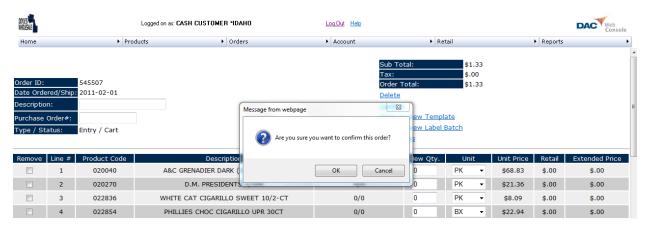

- A window will pop-up to confirm the order

- Once *'OK'* has been clicked, the order is processed and finalized
- When the order is done processing, it will be viewable under **'Current Orders'** on the WEBCON website
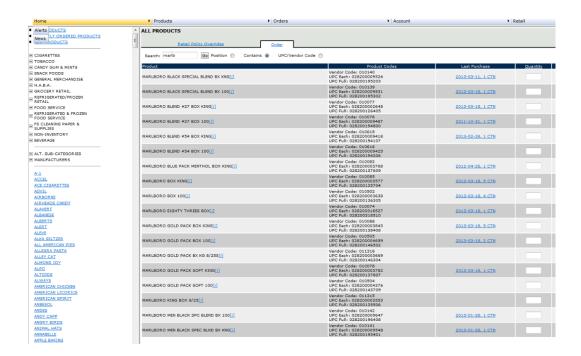
Please remember the order is LIVE! If an error is made, please contact the warehouse ASAP to resolve the issue.

Creating an Order

- From the '**Orders**' tab, click on *'Create'* and this will pop-up the window below

- Click on *'Continue >>'* – a blank order is now in the current system
- Select '**Set to Cart**' on the left side of the blank order
- The blank order is now in the '**Current**' tab with a status of *Cart*
- Click on the *'Products'* tab and select *'Catalog'*
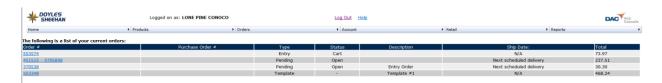- Select the '**Order**' section as shown below

Creating an Order Continued…

- Use the **'Search'** field to load items to an order
- When searching by item description, click on *'Contains'* before clicking the *'GO'* button

- The list will display every item that contains **'marl'** in the item description
- Key in a desired quantity in the right column
- Use the scrollbar on the right side to find additional items
- When complete, click on the *'Order'* button on the bottom, right of the screen
- To add more items, enter a new search and repeat the process
- When all items have been added to the order, drag the mouse over the **'Orders'** tab and click on *'Current'*

- Within the **'Status'** column, select the **'Cart'** order from the list to make any changes or submit
- Click on the blue order number to the left of the order to display

- Make any necessary changes to the order
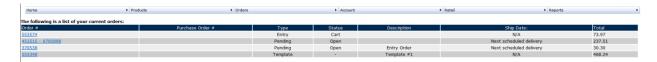- Click *'Apply Changes'*

Creating an Order Template

- If an order will be used again in the future, click *'Save as new template'*
- Name the template and click on *'Click to create your template'*

Create a new template from order 553339

Give your new template a description:

Click to create your template

- The order template is now in **'Current Orders'**

Home	Products	Orders	Account	Retail	Reports	

The following is a list of your current orders:

Order #	Purchase Order #	Type	Status	Description	Ship Date:	Total
553574		Entry	Cart		N/A	73.97
451515 - 0705898		Pending	Open		Next scheduled delivery	237.51
370538		Pending	Open	Entry Order	Next scheduled delivery	30.30
553348		Template	-	Template #1	N/A	468.24

- To use the template in the future, go to the **'Orders'** tab and select **'Create'**
- Click on *'Create an order using a template'*
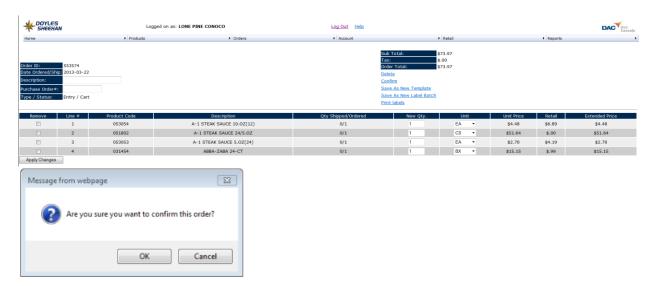- Click on the *'Continue >>'* icon

Select an option:

- ○ Create an empty order.
- ● Create an order using a template.
- ○ Create an order based on your average purchase history.

Continue >>

- Select the correct template from the dropdown menu
- Entering a description is optimal
- Click the *'Continue >>'*

Home	Products	Orders

Select the template that your new order will be based on: Template #1 ▼

Give your new order a description: (optional) [   ]

<< Back   Continue >>

- The **'New Qty'** field can be utilized to change the amount
- Click *'Apply Changes'* if edits were made

- When finished, click on *'Confirm'* and *'OK'*

- This template order is now in the system
- Please feel free to call the office to confirm that the order was placed properly

Jared Powell   (800) 772-7141 ext. 8310