SMARTworks®

Quick Reference Card

GETTING STARTED

1. In your web browser, type https://login6.smartworks.com in the URL address field, press the **Enter** key on your keyboard.

2. Add this address to your list of **Favorites** or **Bookmark** it for easy access.

3. Enter your **User Name** and **Password** on the Login screen, and then click the **Sign In** button to enter the SMARTworks application.

Sign In Here
Please enter your username and password below.

Username
Password

SIGN IN

ENTERING A REQUISITION

Performing a Product Search

Doing a Product Search lets you search for products based on a full or partial Product ID and/or Description. There are 2 locations where a search can be performed; the search icon at the top right of the screen or the Product Search in the menu bar.

🔍 🛒 ✉️ **or** ➡️ Browse Catalogs › Quick Entry **Product Search**

1. If using the magnifying glass, select the icon and key in your criteria and hit **Enter**.

2. If using the **Product Search** button, key in your criteria and select the **Search** button.

   ♦ For more options you can select the **Search Options** link in the Product Search screen.

3. Key in the **Quantity** and click on the **Add** button. You can either select **Continue Shopping** or **Proceed to Checkout**.
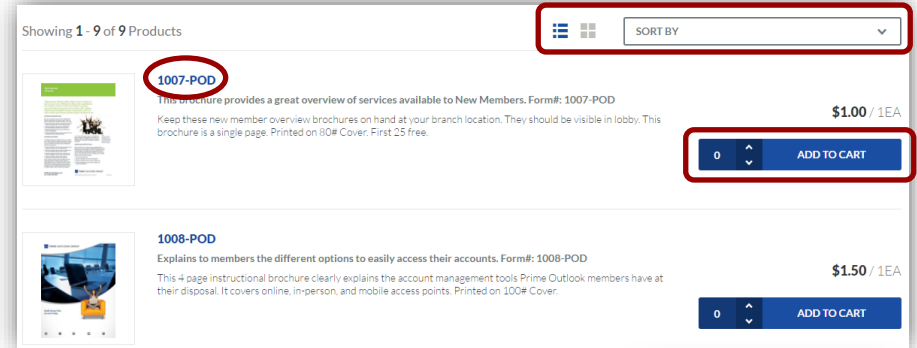
Making a Quick Entry

Quick Entry is the fastest way to order an item in SMARTworks. A **Product ID** (form number) and **Quantity** are required.

1. On the top menu bar choose **Quick Entry**.

Browse Catalogs › **Quick Entry** Product Search

2. Enter the **Product ID** and **Quantity** and choose **Add to Shopping Cart**.

Quick Entry

Please enter a Product ID and a Quantity.

Product ID * 1022-POD
Quantity * 2

Add to Shopping Cart | Proceed to Checkout | Clear Entry | Cancel

3. To review your order and begin the checkout process, select **Proceed to Checkout**.

4. You can change the order quantity in the shopping cart and it will automatically recalculate your total price. See the **Checking Out** section of this reference card for more details.

Browsing by Catalogs

Browsing catalogs allows you the ability to look up multiple products and add them to your shopping cart as you browse.
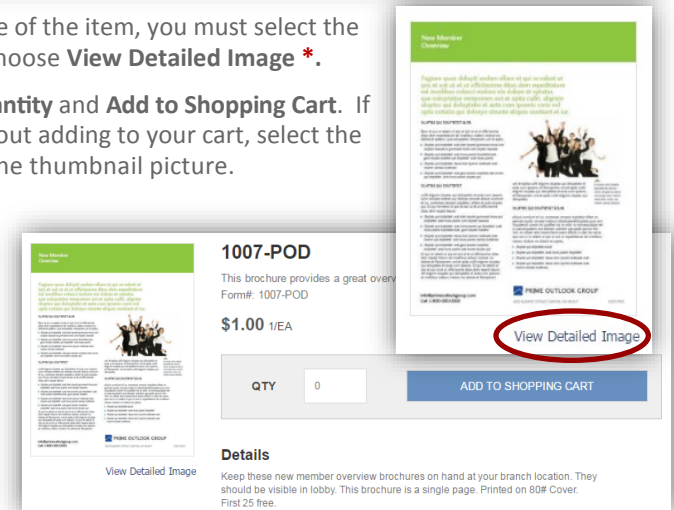
1. On the top menu bar choose **Browse Catalogs**, another dialog box will open displaying all of the catalogs you have access to.

2. Select the catalog you would like to explore; if there is an arrow next to the catalog name it simply means there are sub-categories within that catalog. Select the All Catalogs to get back to the main list.

3. A list of items will appear, review the products listed until you've found the item you are looking for.

   ♦ You can also change the view by choosing your choice of displays and by sorting in a variety of different ways.

   ♦ You can select the **Quantity** and **Add to Cart** right from the catalog if you choose or you can select the **Product ID** link to open up the product detail screen as shown below.

Showing **1 - 9** of **9** Products   SORT BY

1007-POD
This brochure provides a great overview of services available to New Members. Form#: 1007-POD
$1.00 / 1EA
Keep these new member overview brochures on hand at your branch location. They should be visible in lobby. This brochure is a single page. Printed on 80# Cover. First 25 free.

0 ⬆⬇ ADD TO CART

1008-POD
Explains to members the different options to easily access their accounts. Form#: 1008-POD
$1.50 / 1EA
This 4 page instructional brochure clearly explains the account management tools Prime Outlook members have at their disposal. It covers online, in-person, and mobile access points. Printed on 100# Cover.

0 ⬆⬇ ADD TO CART

4. To view a larger image of the item, you must select the **Product ID** link and choose **View Detailed Image ***.

5. Enter the desired **Quantity** and **Add to Shopping Cart**. If you want to exit without adding to your cart, select the **Previous** link above the thumbnail picture.

New Member Overview

View Detailed Image

<u>**NOTE:**</u>

* Catalog images may not be available for all products and links to PDF files open in a separate window.

1007-POD
This brochure provides a great overview
Form#: 1007-POD
$1.00 1/EA

QTY 0   ADD TO SHOPPING CART

Details
Keep these new member overview brochures on hand at your branch location. They should be visible in lobby. This brochure is a single page. Printed on 80# Cover. First 25 free.

View Detailed Image

CHECKING OUT

Your current order can be accessed at anytime by selecting the shopping cart on the Home/Welcome page.

- ♦ To get back to the Home/Welcome page you can click on the logo in the upper left portion of the screen.

1. Once in your cart, select **Checkout Now** at the bottom of the screen.

2. Review the **Shipping**, **Delivery** and **Billing Information** and make appropriate changes as needed. To make revisions to what is displayed, click on the **Change** link if available. **

3. Key your name into the **Attention** field (or the person that the order should be delivered to). Complete the **Mailstop** information to ensure proper delivery.

4. **Name Your Order** to help make it easier to identify.

5. Review the products and quantities under the Order Items section; if needed, you can change the quantity by selecting the icon and editing.

6. Once ready, select the **Submit Order** button to place the order.

** Depending on your setup, your screen may look different; this information may be pre-filled and you may or may not have the ability to change it.

UPDATING YOUR USER PROFILE

Updating Your Personal Information

1. Click on your name in the upper right portion of the screen and choose **My SMARTworks** from the menu.

2. Enter and/or update missing or incorrect information (phone number, address, email, etc.). ***

3. Select the Save Changes button when through editing.

*** Some of this data may be used to auto-fill variable products such as business cards.

Changing Your Password

1. Within the **My SMARTworks** screen, select the **Change Password** link.

2. Enter your old password, new password, and then confirm it; click **OK**.

IMPORTANT: To cancel a SMARTworks order after its' been submitted, contact your Customer Support Center indicated on the Welcome page.

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CHECKING ORDER STATUS

The Manage Orders and View Orders functions provide you with the ability to review orders of all statuses. **Manage Orders** provides access to all orders in your company (if you have access privileges), while the **View Orders** provides access to only your orders.

1. Select **View Orders** or **Manage Orders** from the top menu bar.
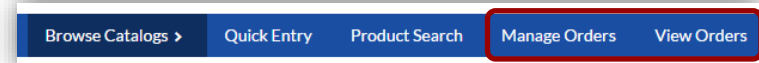
2. All of your orders are displayed by status in the Consumer Order Dashboard screen. To see orders with specific status, select the number next to the status type.

3. You can perform a specific search by selecting one or more of the following criteria:

- ♦ Order Statuses
- ♦ Predefined Date Range
- ♦ Order Type

4. Key in your search information in the **Order Criteria** field; the Order List Display screen shows your search results. Click an Order Number to view it's contents.

SAVING OR DUPLICATING AN ORDER

To simplify the ordering process, you can recall and duplicate or save a previous order:

Duplicating an Order

1. Click the **View Orders** link on the top menu bar.

2. Pull up the order that you want to duplicate.

3. Click the **Make Current** button on the **Order Detail Display** screen.

4. Select **Yes** when the **Make Order Current** screen appears. The contents of the order appear on the **Review Current Order** screen.

Saving an Order

1. You can save an order as you are working on it by selecting the **Save Order** icon at the bottom of the order screen.

2. **Saved Orders** can be viewed by selecting **View Orders** > **Saved Orders** on the dashboard.