



## Regal Web V1.5

### Guide A. Quick Order Guide (Doing business as usual)

*This guide is for Reps who do not want to use the new features at this time and just want to do business as usual.*

Date: October 2009

**V1.5 is simple to use but if you do not want to use any of the new features at this time and just want to do business as usual then you should have no problems**

1. Log into your Back-Office as usual with your Rep Number and password. *(The only change you will see is one extra folder at the top called "My Customers" where your customer list will be found when you decide to enter orders by customer name).*
2. Click on My Orders to enter a new order then click on the red button "Add a New Master Order" *(Master Order is the new term for an order placed by a Rep).*
3. You will come up automatically as the customer so you can click proceed – unless you wish to direct ship this order to one customer then simply change the ship-to address on this page *(same as the current system).*
4. This brings you to the enter items page – which you will see looks different as you can now enter items by customer name. To enter items as you do today simply click the check box "Set Self as Customer" and then enter items exactly as you do today *(a tip – after you update your cart you can use the "referral" field to enter any information you wish – you could put the customer name here as a quick reference but if you do – this field is not saved).*
5. Once you have finished entering all your items click on the proceed button and the Cash On Account screen appears exactly as today and you can apply any COA you might have and click proceed.
6. You are now on the enter payments page. Payments have changed to make our system PCI (Payment Card Industry) compliant but it is incredibly easy to use. You will see a drop down menu for Credit Card Holder – here you can save your own credit cards under your name and apply "one-time use" cards from your customers. You now enter card information and click SAVE CARD – this will immediately send your card to CPI and change it into a token – making it totally safe – Regal never sees your full card Number. You can apply as many of your own cards and customer cards to an order as you wish.