



Regal Web V1.5

Guide C. **PLACING ORDERS USING THE NEW FEATURES – For Reps with a Personal Web Store**

This guide is for Reps want to use the new features and benefit immediately from a Personal Web Store and managing orders by customer

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The new features are exciting and very, very easy to use BUT please take a minute to read and print this out. If you have this handy you will find entering an order very simple.

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 the My Orders folder and you will notice a new sub-folder called Pending Web Order. You should check every day to see if you have any orders from your web store. You can only check on orders here – you enter from the Add New/Master Order folder.
3. 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)*. You can keep multiple Master Orders open at one time (say one if for a Fundraiser and one is your next customer order).
4. 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)*. You cannot add any other customer’s orders or web store orders to a direct ship – one address per order.
5. This brings you to the enter items page – which you will see looks different as you can now enter items by customer name. To use the new features:

ADDING WEB STORE ORDERS

- a. On the left you will see a red button for Pending Web Orders – click this button to import your pending web orders into your master orders (you will notice a column for Ship To Customer – if this shows a YES – that customer want it direct shipped and you will need to enter that order by itself – the system will not let you combine with other orders.
- b. Click on the web orders you want to import and enter and these order will now appear – by customer – on your order pad

ADDING CATALOGUE ORDERS

- c. To add other items from your catalogue orders to this Master Order is simple as well. First, you need to identify which customer is ordering this item. You can either set yourself as customer, search for a customer in your database by starting to enter their name (you won’t have any early on but later this will



- happen all the time) or add a new customer in the field and then click on the red Create this Customer button.
- d. When you create a customer simply enter their name and click the button. This will take you to a profile screen you can fill in about the customer. You can enter as much or as little information. If you just want to record their name then click proceed and you will come right back to the order pad. We recommend you enter all their information so this becomes your customer database.
 - e. Once you have entered all the items for that customer then you simply repeat the procedure for each customer and complete your order.
 - f. You will notice on the left side that all the customers names in this order are listed in blue – you can click on individual customers and see just their items (to check and make sure you ordered correctly) and then click the red button below to return to viewing all items in your cart.
6. 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.
 7. 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. Here are the simple instructions for payments:
 - a. Rep Master Total Top Left is your Rep total owing, with your discounts applied plus the total shipping for the order with taxes. This column keeps a running total in red of how much you owe on the order and when using customer credit cards and overpay an order it will go into the black (negative) and that will be credited to your cash on account.
 - b. Customer List on the Left just below you running total is where you can select individual customer to apply their payment. It is divided into Web orders and Catalogue orders as often it will only be the Web orders that you have credit cards for to apply a payment. You can apply these payments one by one and when you are complete any amount owing you would pay with your own card.
 - c. Individual Customer Total at Retail will be shown in the top right section. It will name the customer and show their retail total and the taxes on this total. This will help you when applying their credit card payment – which you will add your shipping or handling charge to.
 - d. USING CREDIT CARDS – You will see a drop down menu for Credit Card Holder – here you can:
 - i. save your own credit cards under your name
 - ii. apply “one-time use” cards from your customers.
 - iii. add a credit card to one of the customers payments and save it to their name
 - iv. make a payment for an order from the web – the credit card information will automatically populate

When you are entering a new card you will 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.



If it is a saved card for one of your customers you will need to know their expiry date to use the card and if it is from a Web order the credit card information and expiry date will come through automatically.

8. Once you have entered all your payments you can submit your order
9. Historical Orders will be saved with all the customer and referral records and you can access this at anytime to make your job easier.