NAVIGATION GUIDE

Existing Customers

Revision 3 – 4.11.19

Easy

**No more faxes, phone calls, e-mails
Just a few clicks!**

Convenient

Available anywhere, anytime, any device - 24/7

Reliable

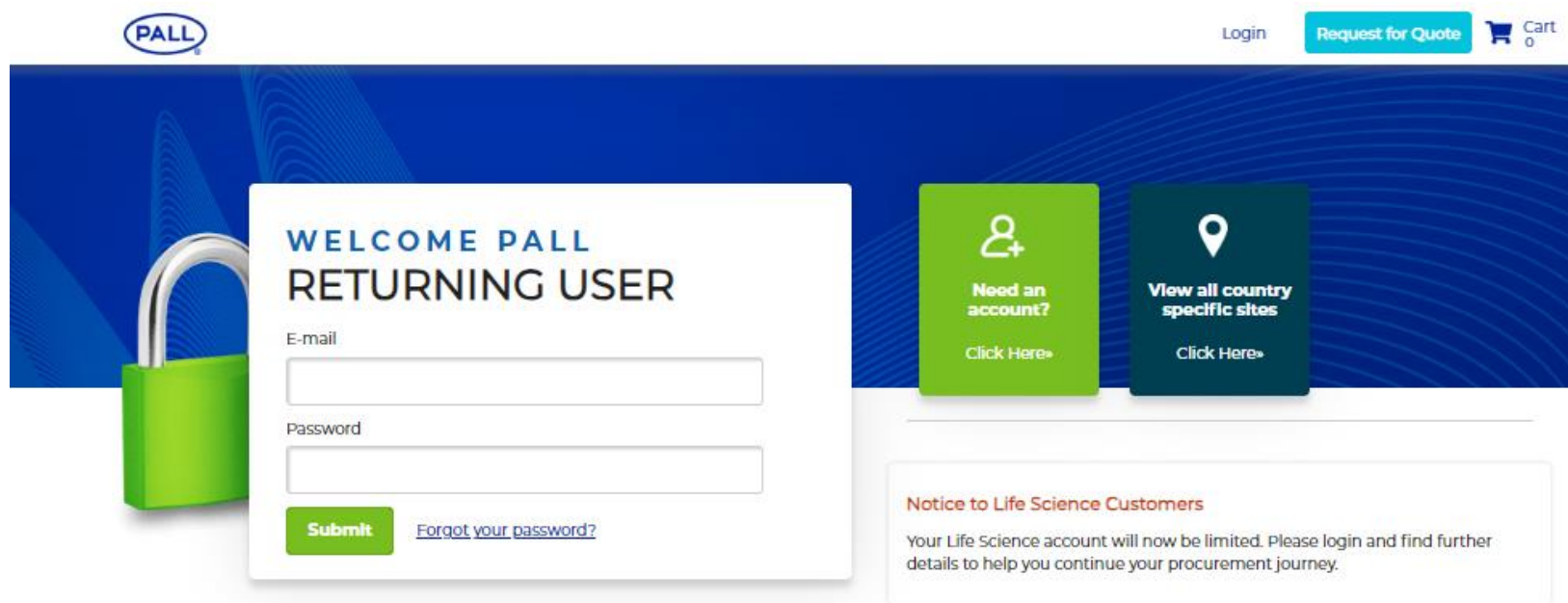**Authentic best in class products from the brand you trust.**

TABLE OF CONTENTS

1. Sign into Pall.com

Note – We have used screen shots from test environment of Australia eComm portal in this document. All details shown here are NOT actual & is for demo purpose only. The basic functionalities will be same for any other country.

- Please access the link to Sign up for Portal: https://shop.pall.com/au/en/login

- Type in your username and password.

  - Please Note - The initial/default user id will be provided to you separately by Pall via email. Password for such login id is default i.e., **pall1234**.

2. My Account Dashboard

- My Account Dashboard provides the buyer to gain easy access to multiple features provided for ease of engagement and shopping on Pall Customer Portal.

3. Order Status Inquiry

- Clicking on Order Status Inquiry shows by default all open, In Progress, Shipped, Rejected, etc. orders for the selected period. The order status will show all orders from all channels of purchase i.e., Online, Phone, E-Mail, Fax or EDI.

- You can filter by your purchase order number, Pall's Order Number, Ship to Addresses, Product Id, Order Status and look back at orders going back as far as past 24 months,

Clicking on Order Number will take you to order details, like – Order No, Purchase Order No, Order creation date, Order Status, Total order value etc.

- Addresses like – Shipping address, Invoice Address & Purchaser details (Name, email Id etc.)

- Attachment of Order Confirmation sent to customer after order creation.

- At item level one can see details like – Item No, Product/Material Number, Description, Order quantity, Unit price, Unit Of measure & total item value.

- Requested Date (Delivery date requested by customer), Committed Date (Delivery date committed/confirmed by system) where you can find out when the order is expected to be delivered.

- If the order is shipped, it will show the Shipped date along with Shipment method & tracking number. Clicking on the tracking number will take you to the shipment carriers' website and to see where your shipment is currently.

- We can also see the Delivery number (if it is created) and Invoice number (if it is created).

- This order status functionality is runtime i.e., once order is created or if any subsequent document is created, it will reflect on ePortal immediately & automatically.

- All Orders created through any other channels for ex. eComm portal, manually in SAP, through EDI, Ariba, etc. will reflect here.

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4. Quotes & Contracts

- Clicking on Quotes icon or Quotes link on the side menu will take page that will show you all active quotes and contracts that you have with Pall along with product details, product price details, Expiry Date, End User details, etc.

- The Quote/Contract can be searched by putting Quote/PO Number, by product Id, etc.

5. My Catalog

- Clicking on My Catalog icon or the My Catalog link on the side menu will take you to a curated list of SKUs that has been put together based on your historical purchases, open quotes, contracts, negotiated price list, etc.

- User can see below details in "My Catalog."

  - Product Id – Product/Part/Material Number

  - UOM – Unit of Measure of the material. Here we are showing UOM as for ex. 5/EA.

    Here 5 indicates the Delivery Unit/Step quantity (order can be placed in quantity multiple of 5)

    EA Indicates Unit of Measure for ex. EA, PAC, Box, Ft. etc.

  - Minimum Order Quantity (MOQ) – Order Quantity should be equal to or greater than this quantity. For ex. If MOQ is 10, then order quantity should be 10 or more than 10. System will not allow order quantity below 10 in this case.

- If you have a negotiated price list with Pall, the price shown in your listing as your price. Still if some wants to get a quote, he/she can request it through option "Get a Quote" as shown below.

- If you have an open quote with Pall, In My catalog, you can see the quote against product along with Quote/Contract No, quote price, expiry date, End Username, etc.

- If there is no negotiated price available, then in that case, system is showing button 'Geta Quote" (in blue color below)

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- Lead Time - You can also see the lead time for the SKU based on your Primary Address registered with Pall.

- Check Availability – Buyer can also check the stock availability of material from here as shown below –

  - Click On "Check Availability" for the material for which you want to check the availability date for certain stock quantity.
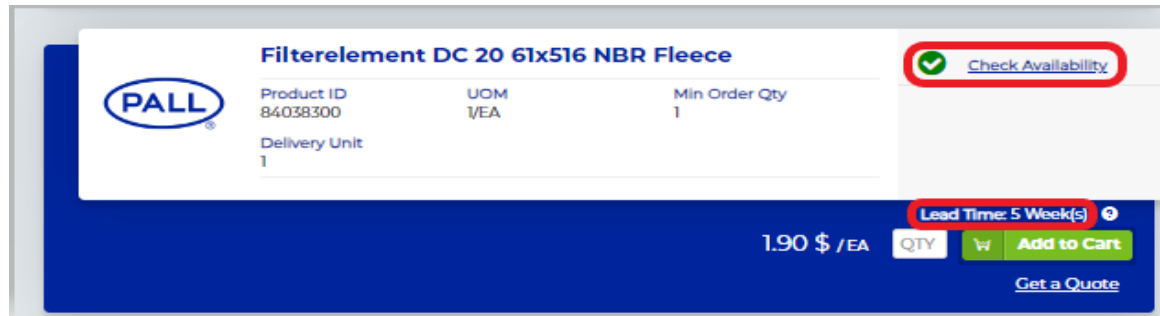

  - Once clicked on "Check Availability" system will show a pop-up screen - Put Quantity & click on "Check availability" as shown below.
  - Once done, system will show the estimated Ship Date on which the quantity can be delivered along with the location from which the quantity can be shipped as shown below.
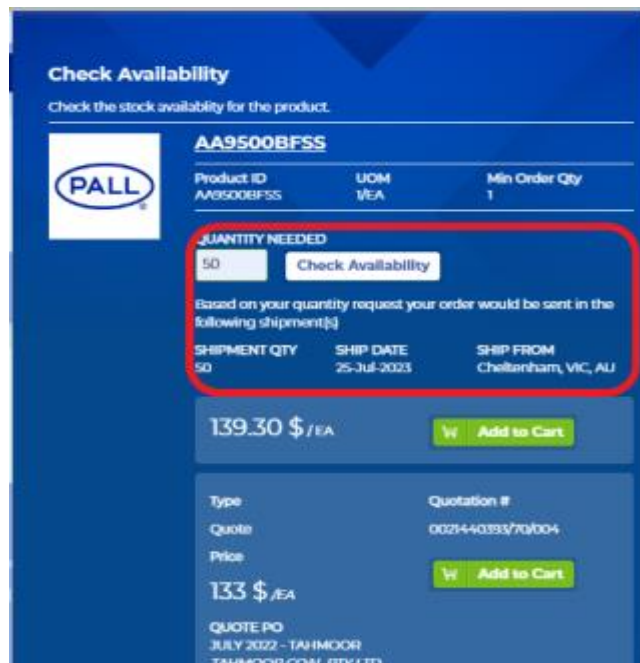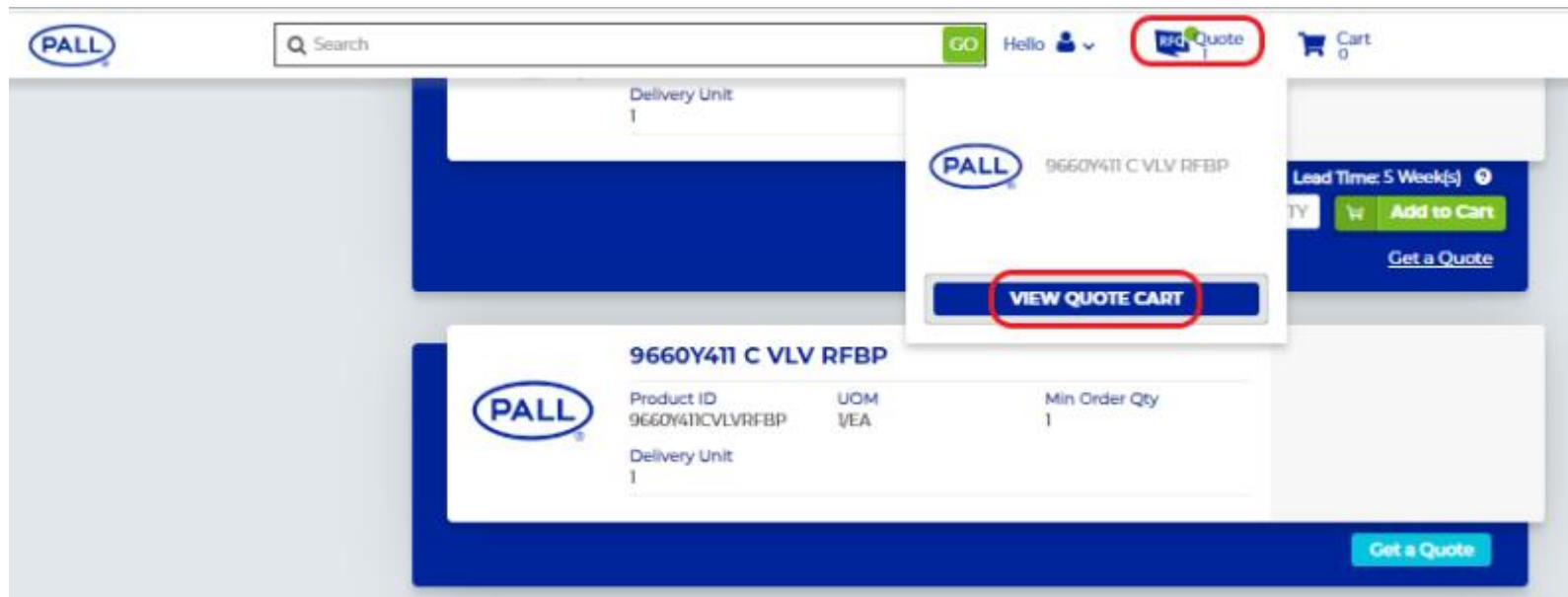
6. Get a Quote (RFQ - Request for Quote)

- – For any product if No price is available, then the buyer can request for a quote for the price of the product by clicking on the "Get a Quote" button as shown below.
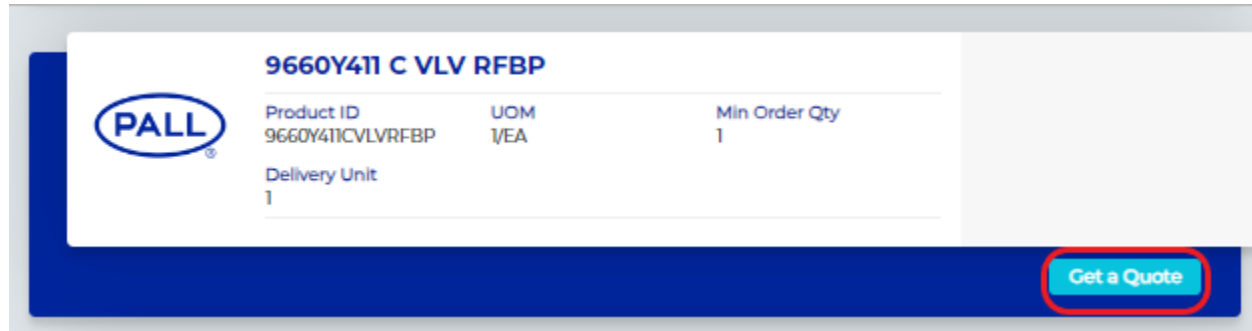
After clicking on "Get a Quote" button, the product will get added to the RFQ cart as shown below. Click on "View Quote Cart"

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Below screen will appear & it will show details like –

- Addresses like customer address, Sales Representative address, End User address etc.

- Product Id, product description, UOM, Minimum Order quantity, etc.

- It will show default quantity as 1. If anyone want to change/update the material quantity, then can be updated in 'Quantity" field.

- If any buyer wants to add additional/new product in quote cart, it can be added through "Add Items to your Quote" as shown below.

- If anyone is not sure about the product id/material number but still want to request for a quote, then a free text/production description/specification can be entered in "Not sure which product you need?"

- Add To Quote – By Clicking on "Add to Quote" button, you can add this material in RFQ cart & search for another material for which you want to do inquiry.

- Submit Quote Request – Once everything is added, buyer can accept the T & C & click on button "Submit Quote Request". Through this, you can add the material in RFQ cart & finish the quote request by submitting the Inquiry.

- The RFQ will be submitted as shown below & addressed to Sales team for further processing.

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- Once processed completely, the quotation will be created & price will be communicated to buyer/user.


7. Ordering Online

Step 01. Adding to Cart

- **You can add SKUs to your cart in multiple ways.**

  i. **Search & Add to Cart:**
     - Key in the SKU you are looking for in the search. Type in quantity in the quantity field and click on Add to Cart button. Cart Icon on the top right-hand corner will slide down to shown what you have added to cart.
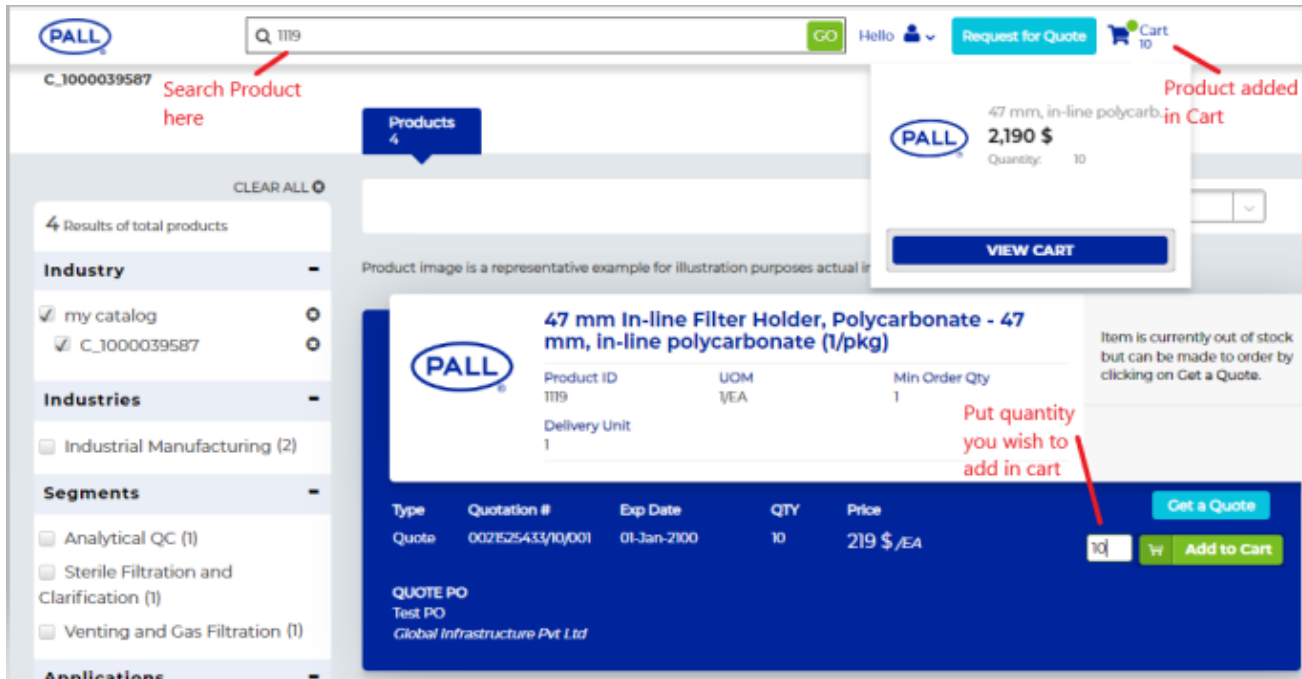
- If you want to add material through Customer Price, you can do the same thing i.e., search for the part number, however instead of adding to cart through quote/contract, add quantity against "Customer Price" & click on "Add to Cart" Button referencing the Customer Price. You can add to cart using that button.
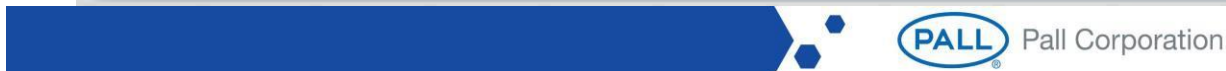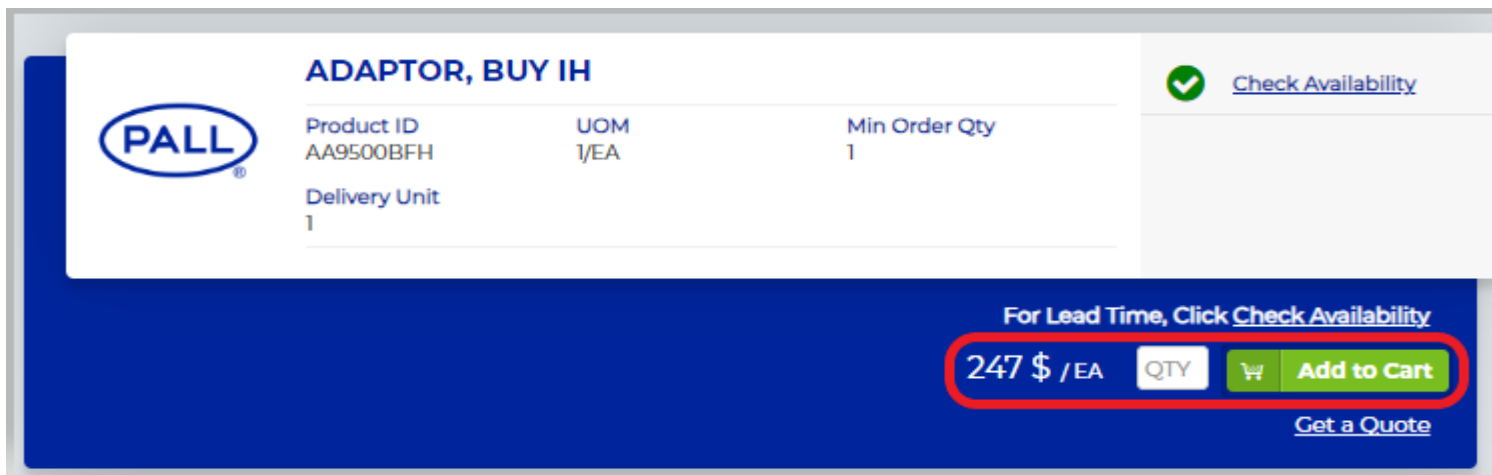
ii.   **Add to Cart via Quick Order**
  - Refer Quick Order

iii. **Add to cart via Order Template**
  - Refer Order Template

iv.   **Add to cart from Quote or Contract**

  - You can add a SKU to the cart by navigating to the quote screen using the Quotes icon or Quotes link on the side menu on your account dashboard.

Pull up the quote for the SKU, key in the qty and click on the "Add to Cart" button.

Step 02.   View Cart

- Once you have completed adding your purchase into your cart, you can view you cart by either clicking on the cart icon.
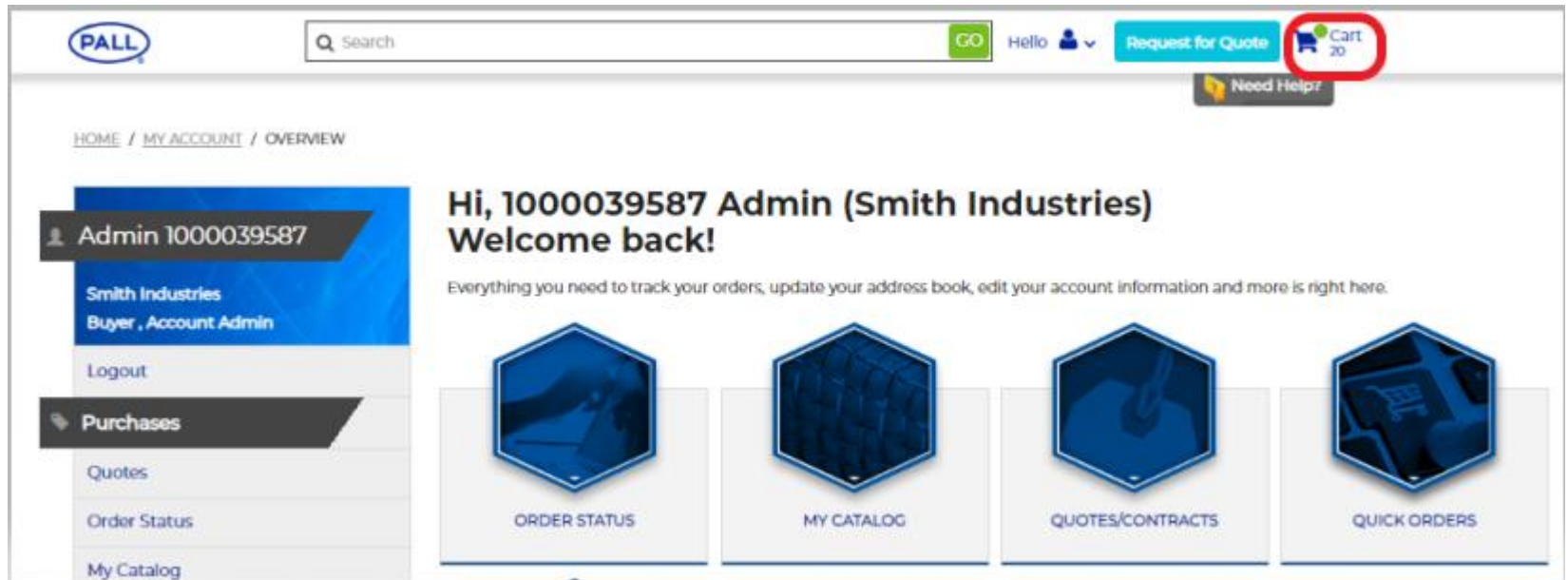
- Cart with show the details of SKUs added to the cart and your price. If the SKU was added with reference to a quote. The details of quote will be show in the cart.

- Clear Cart – Can be used to clear (remove) all added products in single click.

- Update Cart – Can be used to update (change quantity, add/remove product, etc.) the cart. Once changes are done, click on Update Cart so that cart will update price & quantity accordingly.

- You can add, additional products to the existing cart through "Add an Item to Cart", put quantity & click on "Add to Cart."

- You can initiate checkout by clicking on "Checkout" button.

- Email Cart – You can email the cart to your registered email Id.

- Download PDF of cart – Cart can be downloaded in PDF format if required.

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Step 03.   Check Address

- Validate your primary addresses (Company Address, Invoice Address, Shipping Address, Payer Address, Sales Rep) in our record.
- If there are multiple address, system will show drop down to select proper address.
- If any address is missing from the drop down. You can request for one to be added by calling our customer service.
- Continue to Checkout

Step 04. Shipping Details.

- This page captures details around shipment of goods,

  - You can request for a desired date by when you need the shipment by filling in the requested delivery date.

  - You can choose a complete delivery of the entire order by checking the "Complete Delivery" check box.

  - You can have it delivered to you as soon as partial stock is available by checking the "Delivery When Stock Available". It can be checked at order level or line level. If checked at order level, order lines will be split and shipped partially as soon as any stock becomes available. If you want it to be done for a certain SKU line and not for others, you can check "Delivery When Stock Available" check box for the line and leave others blank.

  - Distributor PO – Here PO number received from distributor can be maintained. This will flow as Sales Order line-item PO.

  - End User – This shows the name of End user for which the order is getting created.

- Additional Text – If you want to pass some internal shipping instructions, it can be entered here.

- Estimated Delivery date shown by when we can ship you the goods (this includes time to ship goods to your location).

- Order Ref Id – You can enter the Purchase Order No (Reference No) against the sales order.

- Upload Purchase Order Document (Optional Functionality) – You can upload the PO document (In PDF format only) with reference to which you are placing the order. The PO document attached here will reflect in sales order automatically created in ERP/SAP system.

- Once you have completed filling up details in the shipping page, you can continue to checkout to the next step.

Step 05. Payment

- This step requires to acknowledge and agree to the payment terms and that you are authorize by your organization to buy from Pall.

- On this page, in the right blue box you will get idea about Subtotal amount, some additional charges (if applicable) like Minimum Order Surcharges, Tax amount, shipping charges etc.

- Once all charges have been reviewed, you can proceed to checkout through "Continue Checkout" button.

Step 06. Review Order

- In this step, you review your order completely in one single page with all the preference you have selected in earlier steps to confirm before submitting the order.

- You can review all details like – Product entered, quantity, unit price, all addresses, additional charges (tax, minimum order charges, etc.), requested date, estimated delivery date, PO number, etc.

- Once you feel, all data is correct or verification is successful, select the check box against "Agree with Terms & Conditions" & hit on "Submit Order" button next to it.

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Step 07. Order Receipt

- Upon submission, the order gets directly created in our system for further processing and you will be taken to a receipt page. On receipt page, you will see the Order No created in our ERP system along with details you entered/selected (for ex. product id, quantity, price, addresses, etc.) in earlier steps.

THANK YOU

Your order number is: 0004522908

We will e-mail amit_mulay@pall.com to keep you updated on the status of your order.

← Continue Shopping | 🖶 Print Receipt | 👤 My Account

Order Summary

Subtotal	4,380 $
Sales Tax	438 $
Total	**4,818 $**

Shipping Address

Smith Industries
Road No 1
BROWNS City
Queensland
4229
Australia
07380056789

Invoice Address

Smith Industries
Road No 1
BROWNS City
Queensland
4229
Australia
07380056789
amit_mulay@pall.com

Payer Address

Smith Industries

Road No 1
BROWNS City
4229
Australia
Fax 0738009555
07380056789

Pall Representative

ANGELINI TALM Jeffrey
BROWNS City
Australia
TALMJeffrey.ANGELINI@scrambled.etc

- Upon submission, system will also send order notification mail to buyer's email id. This mail can also be sent to few other members by adding their email id in CC.

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Order Submitted - Pall

IS info@stage-shop.pall.com
To ✅ Mulay, Amit
Cc 🟡 Baker, Nick

ⓘ If there are problems with how this message is displayed, click here to view it in a web browser.

Order Submitted - Pall

Your order number is: **0004522908**

Your Order Reference Number is:

Test PO

Dear Amit Mulay,

Your order has been submitted!
Thank you for shopping at Pall.
We received your order on 30-Jun-2023.

Invoice Address	**Shipping Address**
Smith Industries	Smith Industries
Road No 1	Road No 1
BROWNS City	BROWNS City
Queensland	Queensland
4229	4229
Australia	Australia
07380056789	07380056789

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8. Quick Order

- If you know exactly which SKUs you are purchasing and you do not want to search them and add them to cart individually, there is a much easier way by using quick order. You can type in the SKU and qty, using the Quick Order screen which can be accessed using "Quick Order" icon or the "Quick Order" link in "My Account Dashboard", and simply add them to cart.

- Click on "Add 5 more rows" to add more lines.

Quick Order & Order by File

Add multiple products to the cart by their Product ID!

Product ID	UOM	Min Order Qty	PRICE	Quantity	
10RPN20	1/EA	1	4,000 $	10	✖
36028PTBU14NPT	1/EA	1	5,000 $	10	✖
Product ID				QTY	✖
Product ID				QTY	✖
Product ID				QTY	✖

+Add 5 more rows

🛒 **Add to Cart**
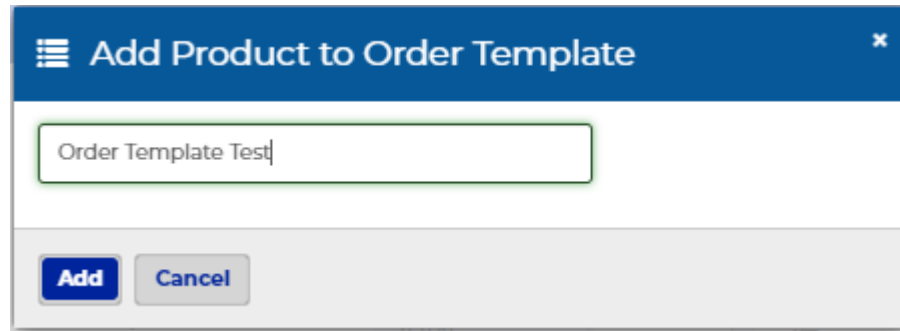
9. Order Templates

- The order templates feature allows the user to collect products in a special product list to order them frequently. Order templates can be managed (create, update, delete) in the My Account Dashboard. Order templates can be added to the cart completely and the cart can be saved into an order template.

- **How to create an Order template:** If you frequently buy a list of products, you can create an order template using your cart by simply clicking on the button "Create Order Temple".
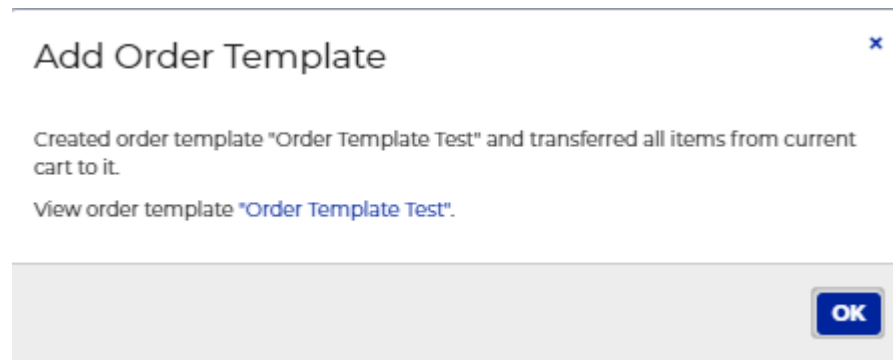
Pop up will appear as below. Add template name here & click on Add.

Order template will get created as below –

- You can also choose to create an order template using only a product line item in your cart or add a part to an existing template by clicking on the button as shown below.

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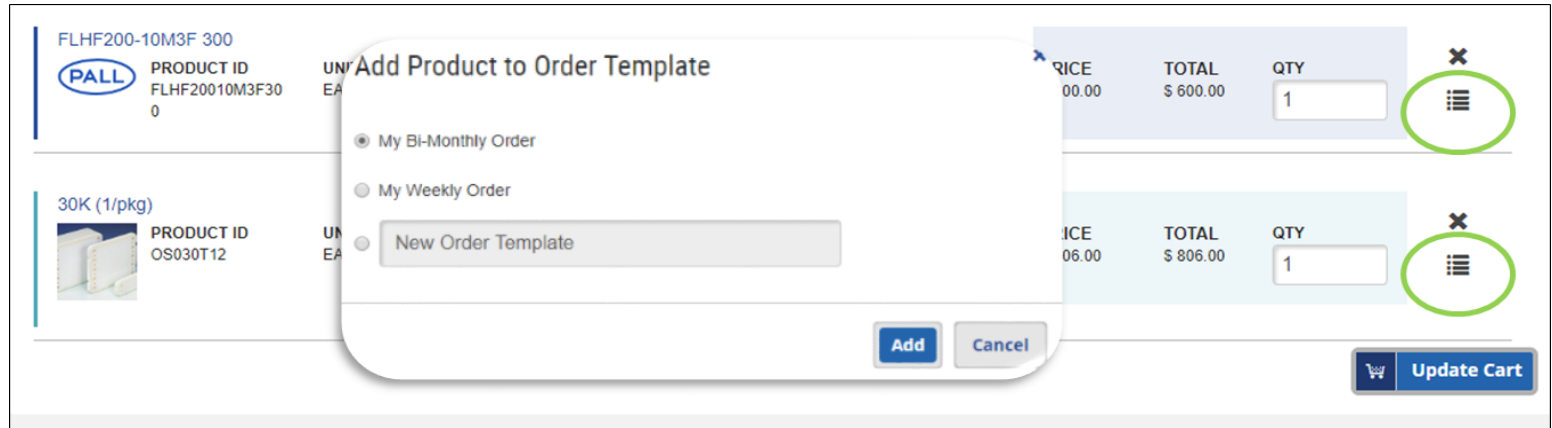
- **How to access Order template:** You can access your order templates by Clicking on Order Template icon or the My Catalog link on "My Account Dashboard". Here you can update, delete or add your order template to the cart.
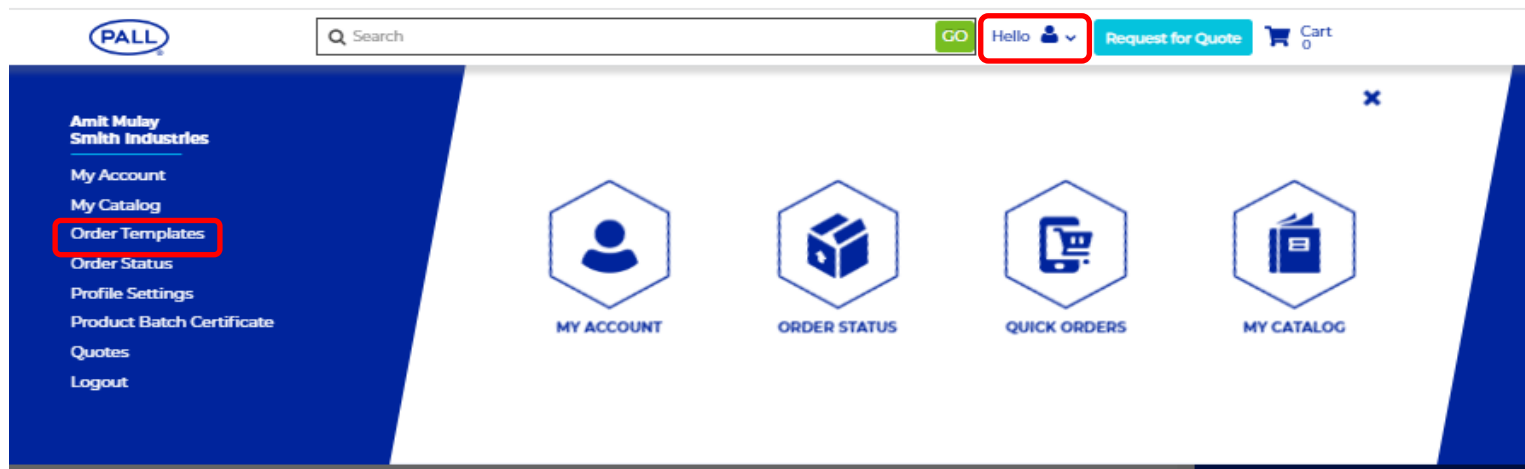
10. Product Certificates

- You can access product quality certificates for the product you purchased by clicking on the link "Product Certificate" in your "My Account Dashboard". Provide the part number, lot number etc. to access the certificate.

11.   Credit History

- Here, you can see the current credit history of the customer/distributor i.e., Open Order amount, Open delivery amount & the open Invoice amount as shown below.

12.   Managing Profile

I) Saved Address:
- You can look up for all saved address for your organization in Pall by click on this link. If you want to add or update an existing address, please request by clicking on "Need Help?" button.

II)   Profile Settings & Password:
- You can view your organization's profile and your profile in this section. You can also change password for your account using this profile setting.

III) Users – Create User Id & Password for your buyers/users -

-

a. If you are an account admin within your organization, you will be able to see the "Users" option in your profile. This helps you to create and managed account for other Pall eCommerce users/buyers within your organization.

b. Clicking on the "Users", will take you to the page show below, where you can review all the users within your organization who have access to the site. You can delete them or edit their access.

c. The administrator user Id provided to you initially, does not have the Buyer rights. You have to create a separate user id with Buyer role.

Users

Add User

👤 **Admin 1000039587**

Smith Industries
Buyer , Account Admin

Logout

🏷 **Purchases**

Quotes

Order Status

My Catalog

⚙ **My Profile**

Addresses

Profile Settings

Users

📄 **Documents**

NAME ⌃⌄	LOGIN	PENDING ORDERS	ROLE(S)	ACTIONS ℹ
1000039587 Admin	a1000039587@pall.com	0 order(s)	Buyer Account Admin	✏ 🗑
Dummy User	du@pall.com	0 order(s)	Buyer Account Admin	🔓 ✏ 🗑
Mohammed Aamir	nd-au@pall.com	0 order(s)	Buyer Account Admin	🔓 ✏ 🗑
Test User	test_user@pall.com	0 order(s)	Buyer Account Admin	🔓 ✏ 🗑
User Dummy	ud@pall.com	0 order(s)	Buyer Account Admin	🔓 ✏ 🗑

Continue Shopping

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    d.   You can add a new user by click on the "Add User" button, provide their credentials as below –

- First Name – Buyer's First Name

- Last Name – Last name of Buyer

- Username – User Id which will be used to login on eComm portal.

- Email Id – Actual email Id of buyer. On this email buyer will get notification once User Id is created.

- Role – Here we have different roles as described below.

    a)   Buyer – With this role, buyer can only place the order. He will not get permission to create any new user Id.

    b)   Account Admin – With this role, buyer can place order as well as he can create new user Id's for another buyers.

    c)   View Only – With this, buyer can only view the portal. He/she will not get access to create order or new user Id.

Once done, please click on "Create User" below. User will get created as show below.

Buyer will get an automatic email notification as shown below. He/she can set the password through link provided in notification & can login to the portal.

13.   Asking for Help

- If in case you need help navigation our website or in case of any issue, we are always here to help you.

- Please click on the link "Need Help" and call on country specific given number as shown below.

- You can also connect with our technical team through email ecomm@pall.com for any kind of technical issues or questions.

THANK YOU

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