Marketing Storefront User Guide

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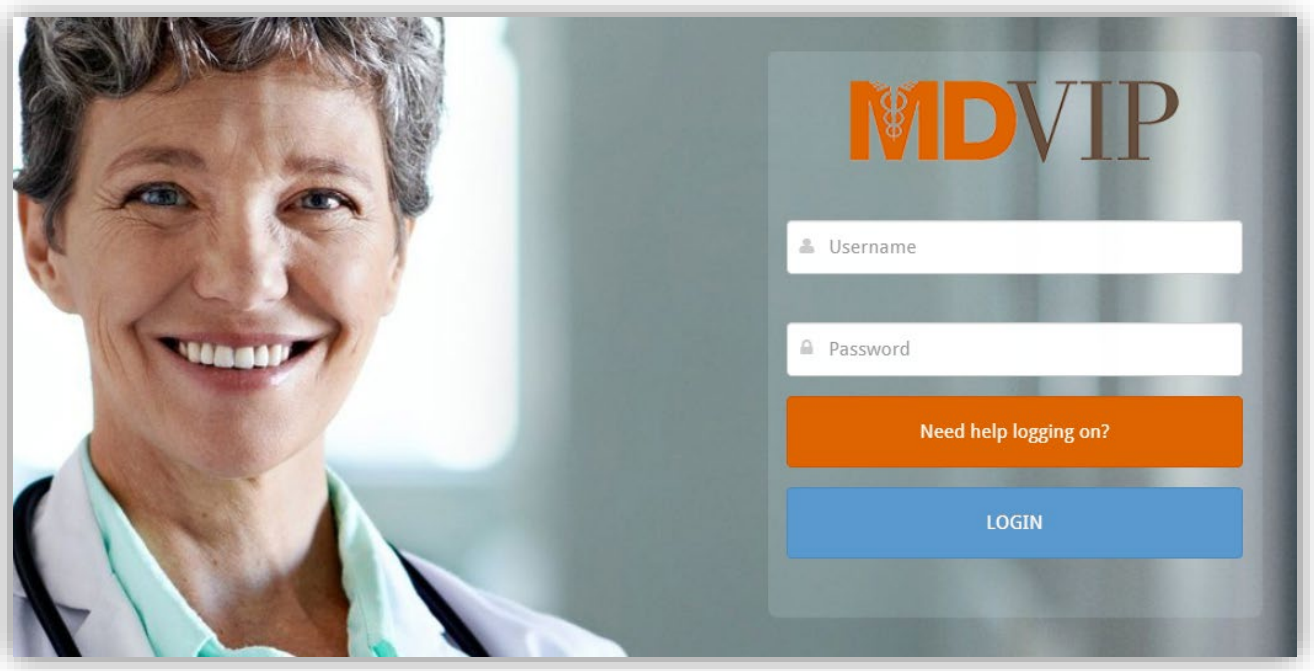
Accessing the Site

Welcome!

- Follow the instructions in your IT Notification to reset your password.
- In the future, you can access the new Marketing Storefront via the **Quick Links on the Pulse**



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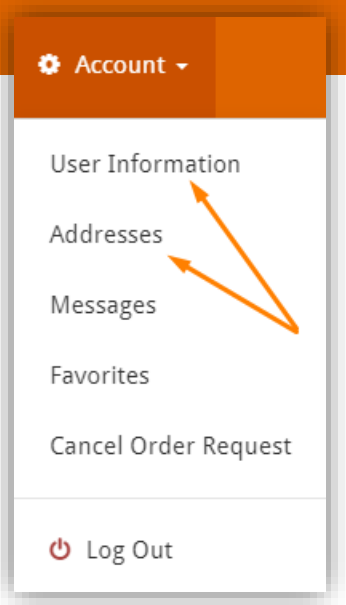
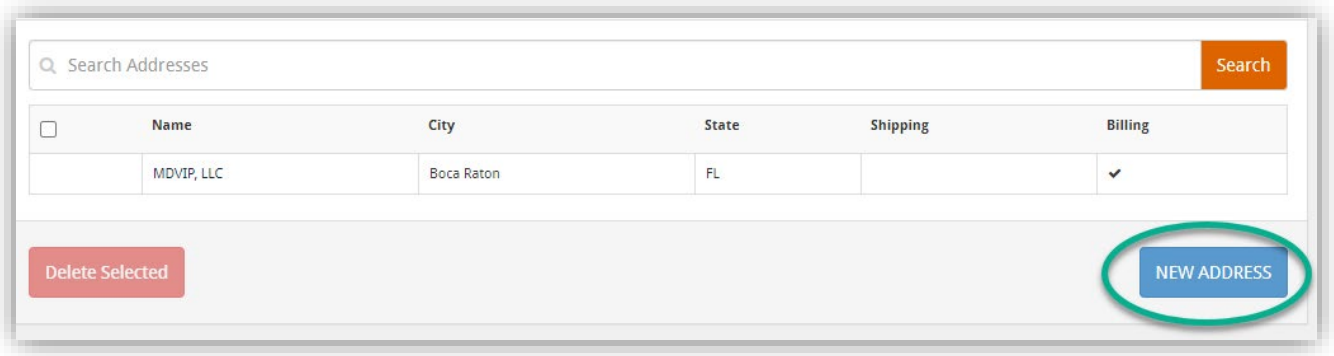
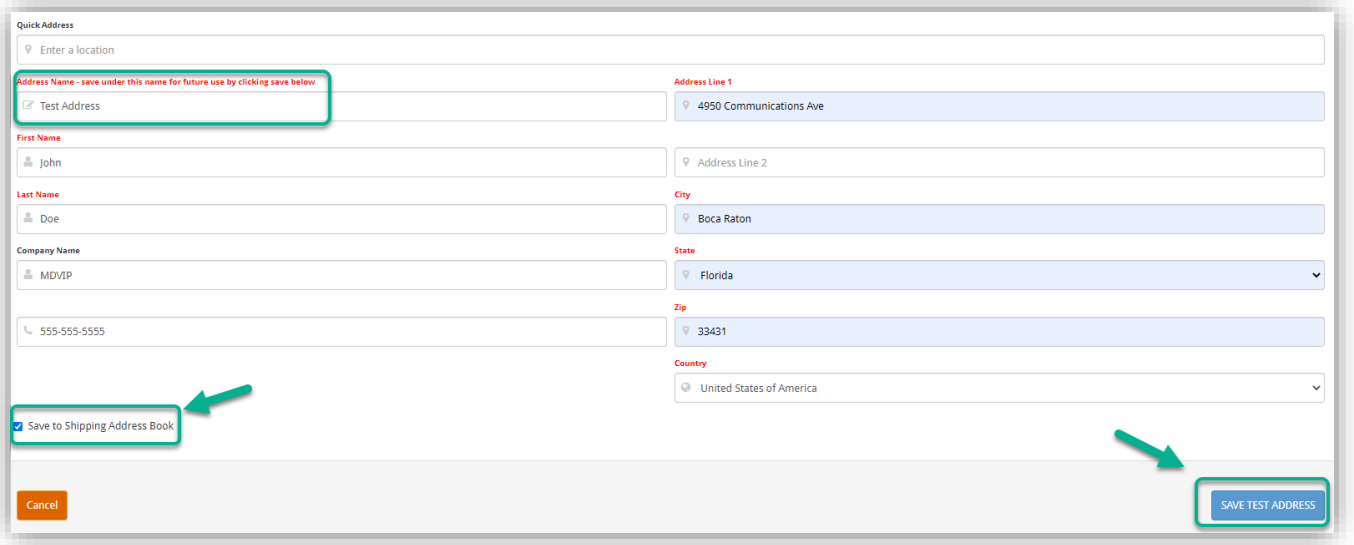
Edit Your Account Information & Save Your Address

- **Account > User Information** to edit your Name, Password, or Email. **SAVE**.
- **Account > Addresses,** NEW ADDRESS, to add a new address.





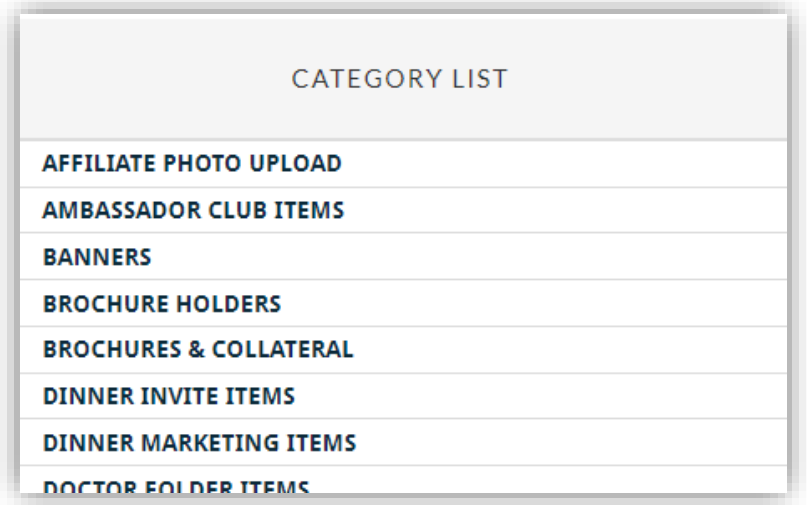
- Enter the address nickname and pertinent information, click **Save to Shipping Address Book and SAVE**.



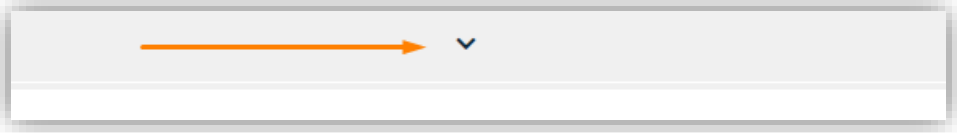
Search for an Item

- Click the magnifying glass on the right side of the page to search for a specific item. Enter item # or name, then Search.

- OR from your homepage, click on a category/sub-category on the left side navigation.



- OR click the down-arrow in the top-center of the page to view a full map of categories and sub-categories.



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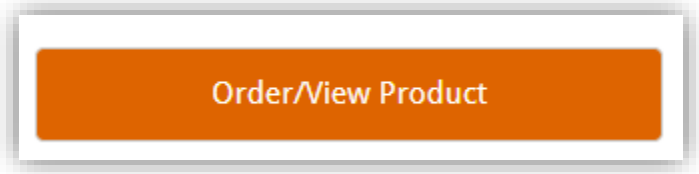
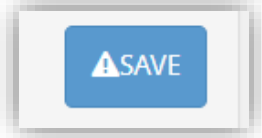
Customizing an Item

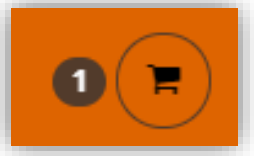
- Click **Order/View Product** to view the product you wish to customize.



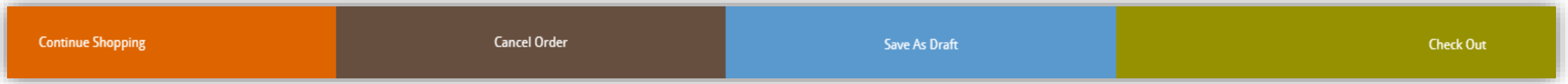
- For customizable items, you will need to click **Create New**.
  - Complete the appropriate fields. Click **SAVE**.
  - You may then do any of the following.
    - **View PDF Proof** to download customized proof
    - **Edit** to make changes
    - **Remove** to start again
    - **Add Quantity and Add to Cart** to complete your order.



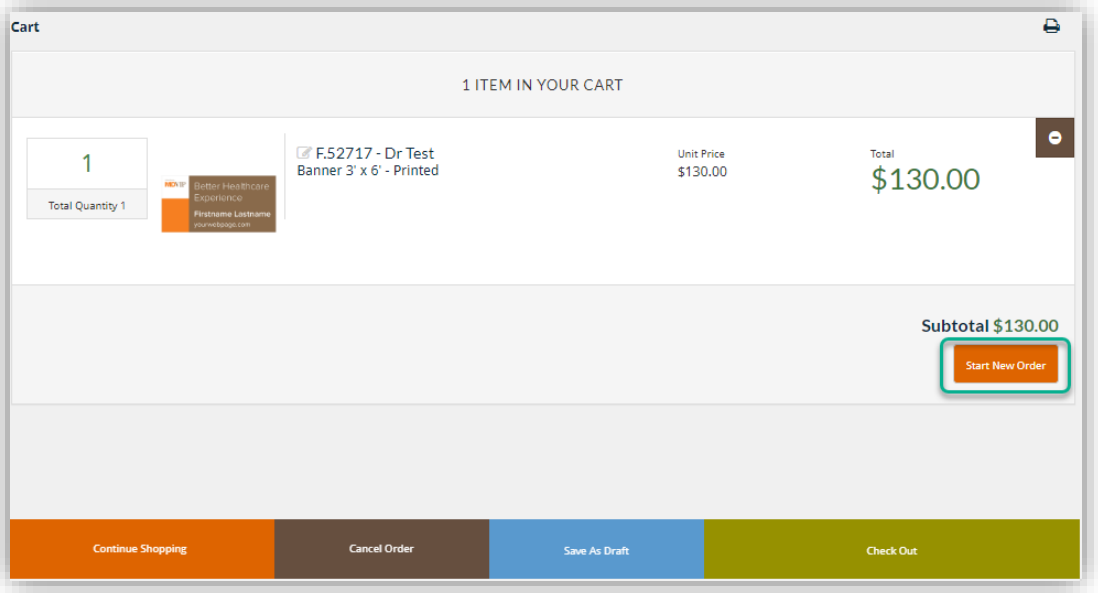
Shopping Cart & Saved Orders

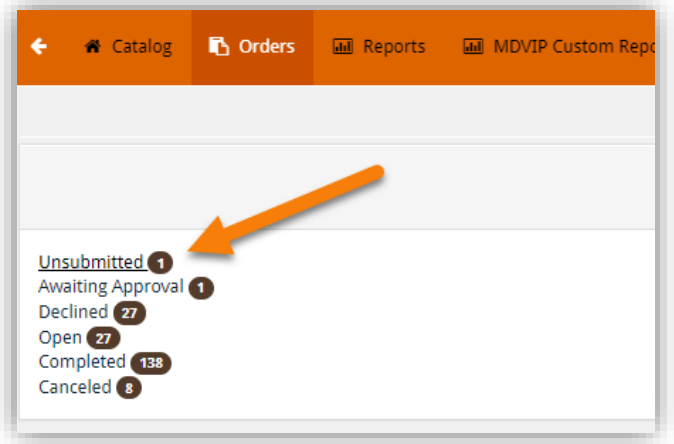


- Your shopping cart will appear in the upper left once an item has been added to your cart.
- Along the bottom of the cart page, several selections are presented that enable you to do the following.
  - **Continue Shopping, Cancel Order, Save As Draft, Check Out**



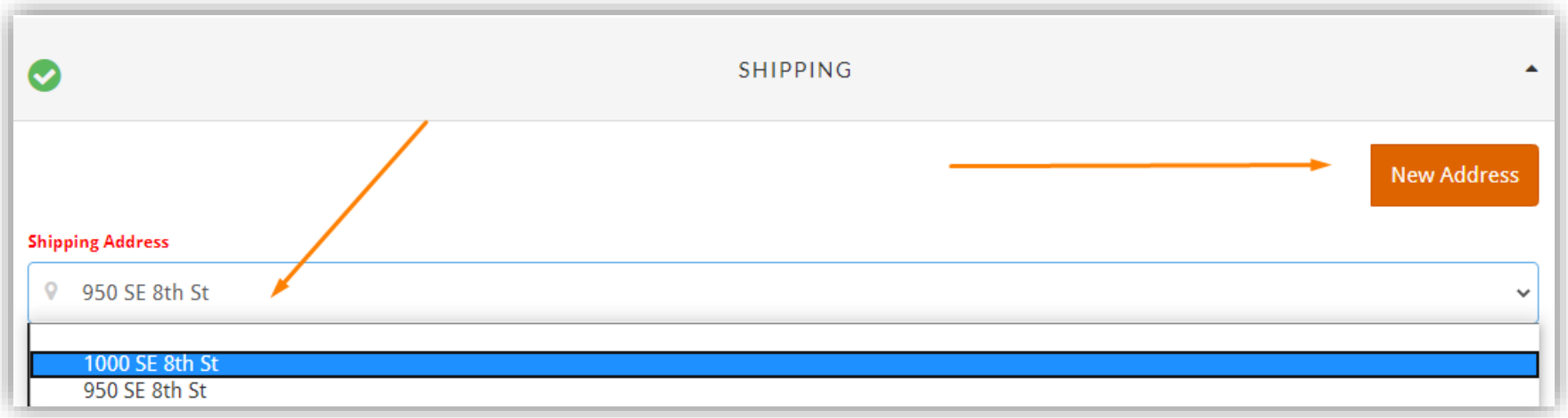
  - **Note:** If you click **Start New Order,** your session will start over and your order will be saved to **Orders > Unsubmitted**



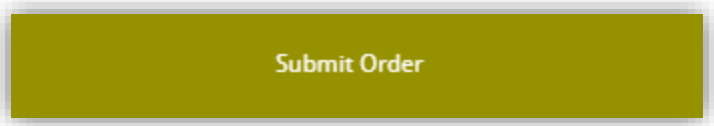


Your Shopping Cart & Shipping Address Book

- After clicking **Check Out**, select a shipping address from your address book in the Shipping Address dropdown, or ship to a New Address.



- Select the desired Shipping Method, then **Submit Order**.



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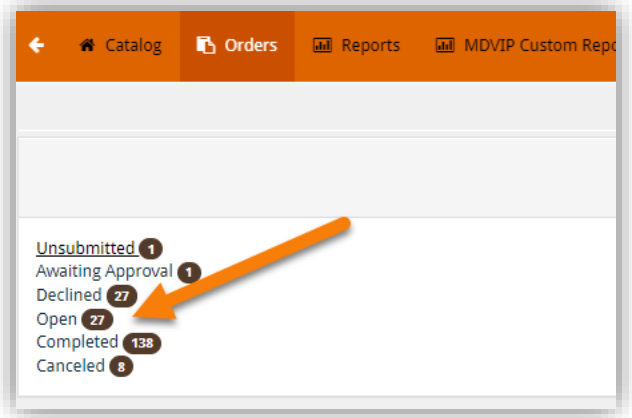
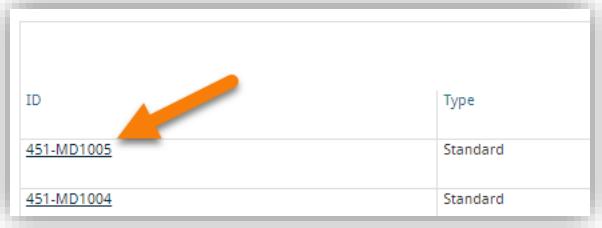
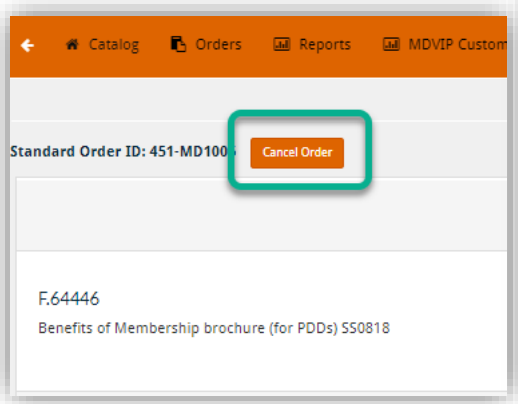
Cancelling an Order (preferred method)

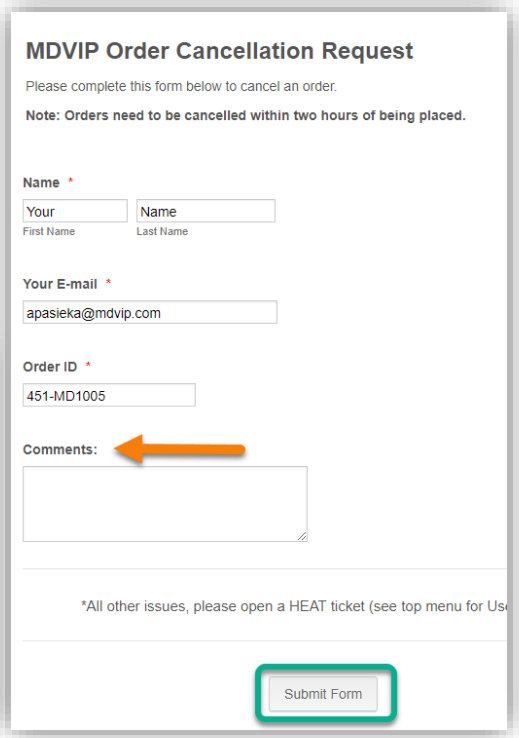
- **If you need to cancel and order, you can cancel for only up to 2 hours after your order was placed.**

  - Go to **Orders > Open** and scroll down to locate your order number.
  - Click on the order number hyperlink.
  - Click **Cancel Order** next to your order number.
  - You will be redirected to a Cancellation Request form. Enter any comments regarding the request and **Submit**.



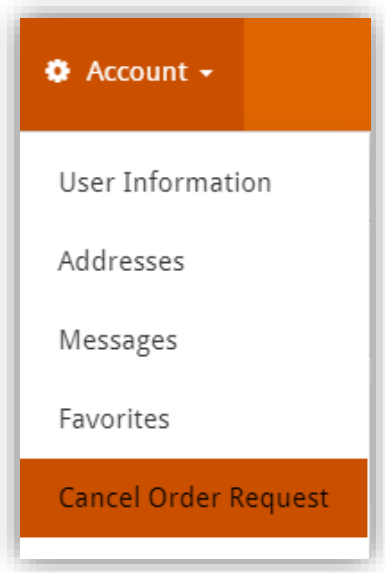


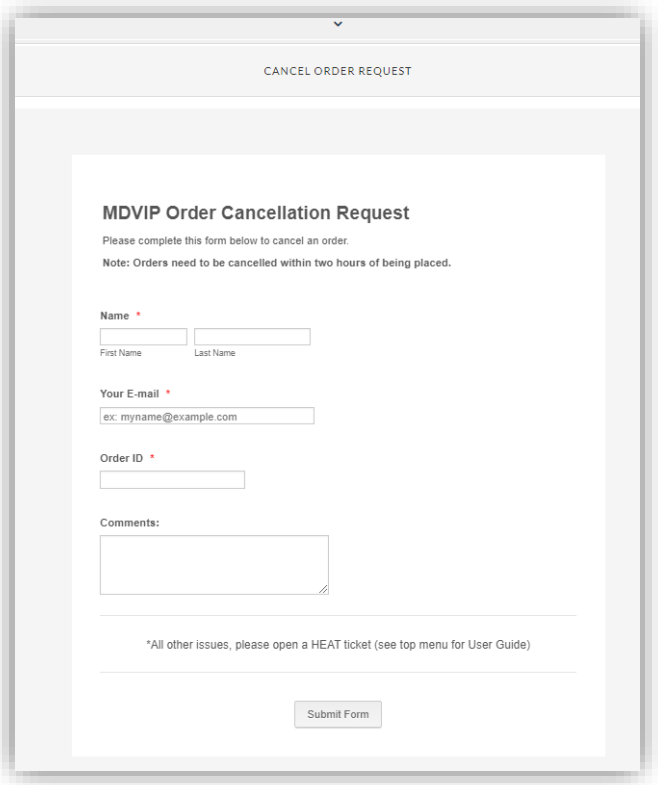




Cancelling an Order (alternate method)

- **If you need to cancel and order, you can cancel for only up to 2 hours after your order was placed.**
- To do this, go to **Account > Cancel Order Request** and complete the Order Cancellation Request form.





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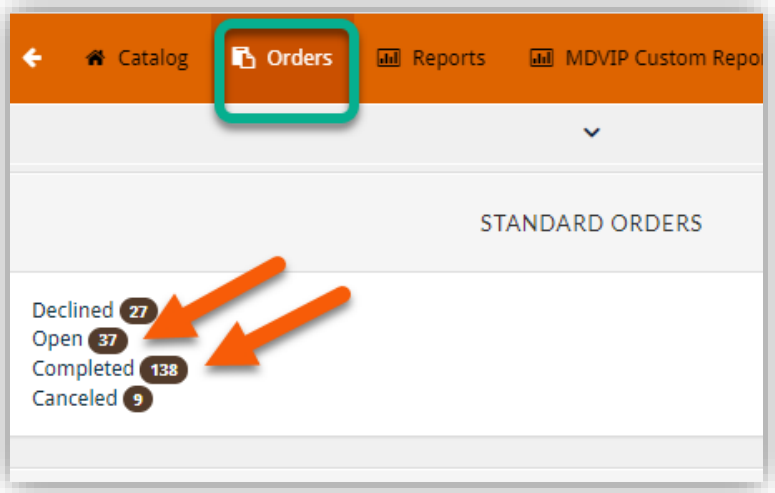
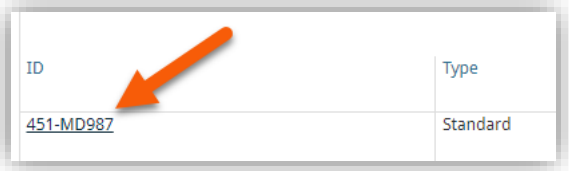
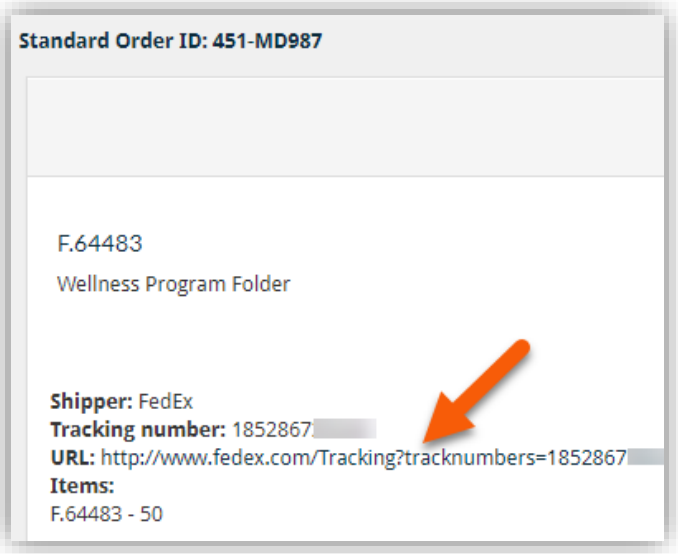
Order Status

- Once an order is placed, an Order Confirmation Email will be sent to confirm receipt of your order.
- Go to **Orders** to view the status of all pending **(Open)** and shipped **(Completed)** orders.
- Once an order has shipped, you will receive a shipment confirmation email with tracking information.
- You can also find this by clicking **Orders > Completed.** Locate the order and click on the tracking hyperlink to view the tracking and delivery details.







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Frequently Asked Questions

Frequently Asked Questions – Managing Your Account

- Q. How can I change my password or email associated with my account?

  A. Go to **Account** at the top of the page, then **User Information**. Click **Save** after changes are made.

- Q. How do I create an Address Book for frequently used shipping addresses?

  A. Go to **Account** at the top of the page, then **Addresses**. Click **New Address**. Be sure to click **Save To Shipping Address Book** in the lower right. Save.

- Q. How do I add or change my shipping address?

  A. The first time you place an order, you will want to add and save your shipping address. In the future, if you need to change your shipping address, create a new one rather than change the existing one.

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Frequently Asked Questions – Ordering & Customizing

- Q. How do I locate an item on the site?

  A: Click on the magnifying glass on the right side of the page. Type in an item name or # and click **Search**.

- Q. What if I cannot find the product I am looking for?

  A. This could be due to access permissions, product name change, or inventory depletion. Submit a non-technical HEAT request via the "Event & Marketing Collateral Site (SEP) Non-Technical Request" service request. See Appendix A for directions.

- Q. Some items have a green **Add to Cart** button, some do not. Why?

  A. Items that are shipped from inventory or are produced without customization have the **Add to Cart** button. To order items with customization available, only the orange **Order/View Product** button appears. Click to proceed with customization.

- Q. I want to customize a product such as a business card. Where do I start?

  A. After clicking on a customizable product, in the lower left click **Create New**. This will reveal the customizable fields. Complete the appropriate fields then click **Save**. You can then view the **PDF Proof**, **Edit** to make changes. Click **Remove** to start again or **Add to Cart** to complete your order.

Frequently Asked Questions – Ordering Cont'd & Re-Ordering

- Q. I am in my cart, what happens if I click "**Save As Draft**"?

  A. If you are not ready to order now, this will save all items in your shopping cart for ordering later. You can then start over by clicking **Start New Order**. When you are ready to order the saved cart, go to **Orders > Unsubmitted** and scroll down. Click on the order and proceed to checkout.

- Q. "I just submitted an order, but realized I need to cancel it. What do I do?"

  A. Orders must be cancelled within two hours of submission. To do this, go to **Orders > Open** and find your order. Click the **CANCEL button** next to it. Or, you can submit a request to cancel your order by going to Account > Order Cancellation Request form.

- Q. How can I duplicate a previous order without starting all over again?

  A. Go to **Orders** at the top of the page. Click **Completed** and scroll down to show all prior orders. Click on the order number that you wish to re-order. Click **REPEAT ORDER** in the lower left. You can add or remove items in the cart as needed before checking out.

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Frequently Asked Questions – Shipping & Tracking

- Q. How long will it take to get my order?

  A. Items from inventory in stock typically ship within 24 hours. Print On Demand (POD) items are typically produced and shipping within 3 to 5 business days.

- Q. How can I check my order status?

  A. When logged in to your account, click **Orders** at the top of the page. Click on the order status to see which orders are **Open** (still in process), **Completed** (shipped), or perhaps **Declined** if part of an approval workflow that requires a review prior to processing.

- Q. How can I track my order?

  A. Once your order is shipped, you will receive a Shipping Confirmation in your email with a tracking number. Use this number to follow the progress of your shipment. You may also locate your order and the tracking information in the Orders tab at the top of the page.

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Frequently Asked Questions – Deliveries & Returns

- Q. "I tracked my order and it shows delivered, but I do not have it. Now what?"

  A. The freight company's tracking page should show who signed for the package. Is this name familiar? If the name is not familiar, or if the package shows "Left At Door" or some other reason without a signature, please submit a non-technical HEAT ticket. See Appendix A for directions.

- Q. "How can I return product that I do not need or is the wrong size?"

  A. Please submit a non-technical HEAT ticket (information located in Appendix A), including order #, item name and reason for return. SEP staff will then respond with detailed instructions for your return.

  NOTE: Returns for customized items (printed on demand) such as business cards or customized flyers are not accepted.

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Frequently Asked Questions – Everything Else

- Q. "Quantity Available shows "0". Will the product be re-stocked? If so, when?"

  A. If a product is depleted and is not available for ordering at this time, please submit a non-technical HEAT ticket. See Appendix A for directions.

- Q. My topic is not a frequently asked question. How can I get some assistance?

  A. Submit a request for support. We are happy to help. You can do this by submitting a non-technical HEAT ticket. See Appendix A for directions.

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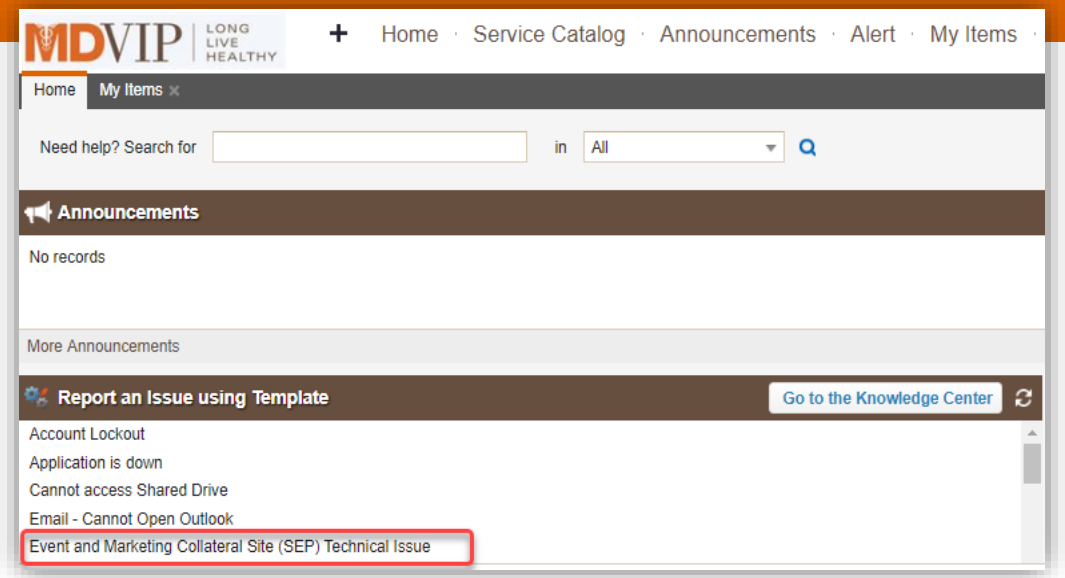
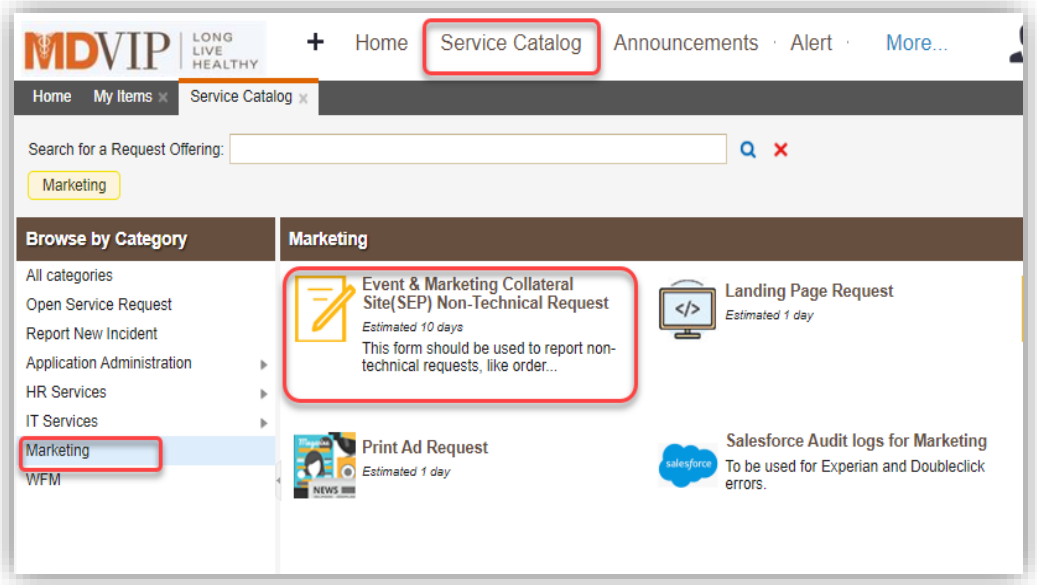
Appendix A
Marketing Storefront Support & HEAT Instructions

Marketing Storefront Support

- If the user has a **technical issue** (e.g. cannot log in, site down, etc.), report the issue via a technical ticket in HEAT.
  - HEAT Home > Report as Issue using Template > **Event & Marketing Collateral Site (SEP) Technical Issue**



- For **non-technical** matters (e.g. order not received, inventory depleted, site enhancement request, etc.), submit a Service Request via HEAT.
  - HEAT Home > Service Catalog > Marketing > **Event & Marketing Collateral Site (SEP) Non-Technical Request.**



Note: For fastest service, please call the help desk directly.

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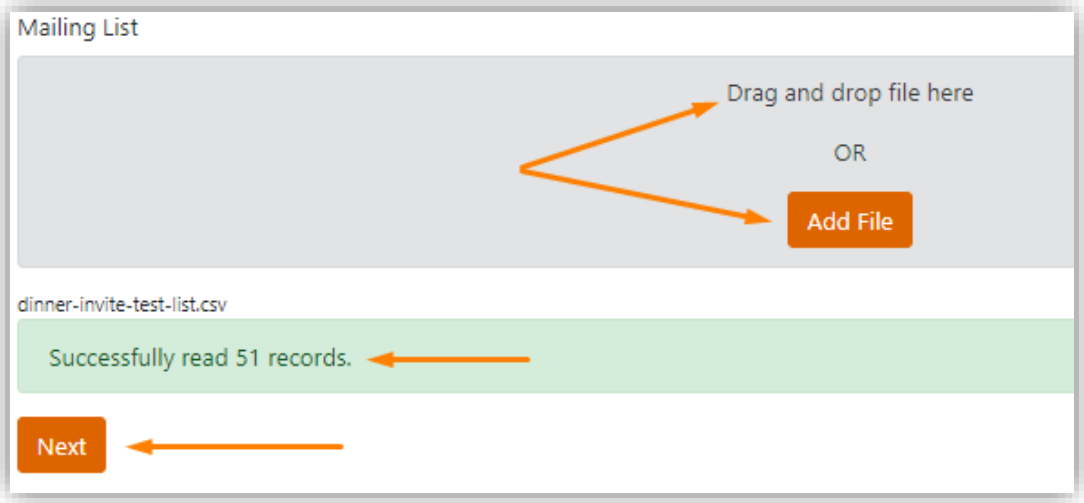
Market Development/ Marketing Department

Dinner Marketing Kits & Dinner Invites

Customizing Dinner Marketing Kits

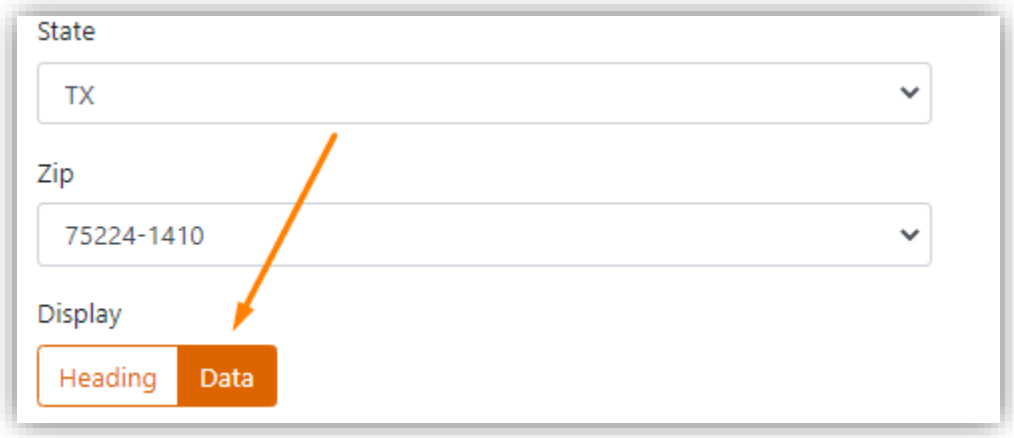
- Locate the **Dinner Marketing Kits** and click **Order Now**.

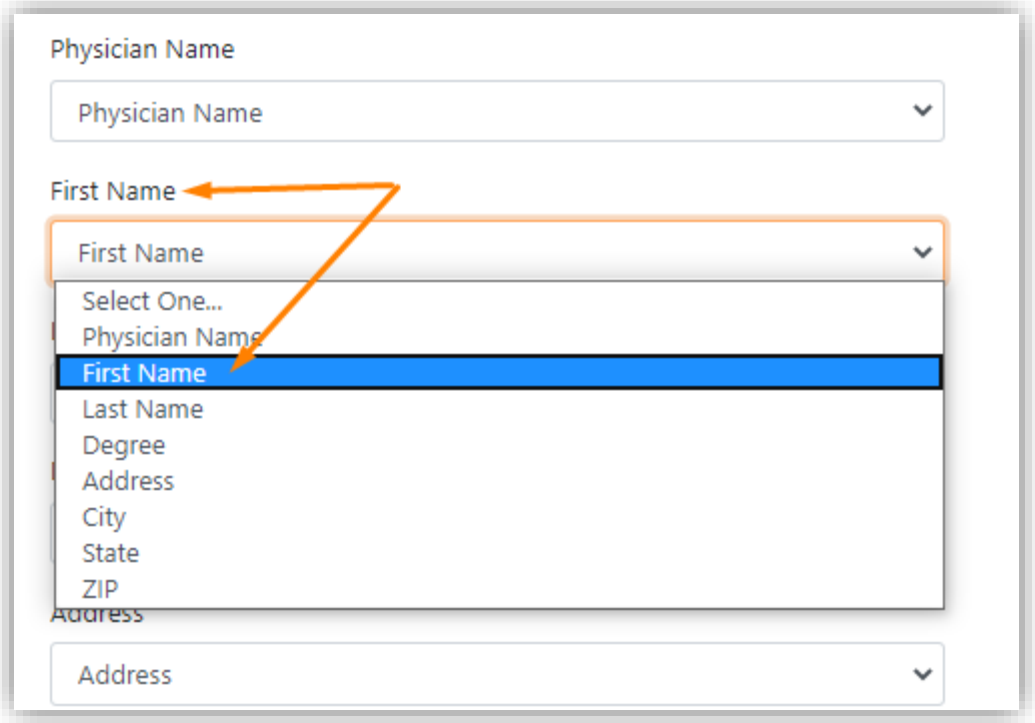
- Upload Attendee List (CSV Format)
  - Click **Add File** to browse for your file and upload
  - Or, drag and drop your list.



Customizing Dinner Marketing Kits

- Map the data from your list by matching the column names in your file to the corresponding customizable fields in the template.
- Check your data mapping by doing the following.
- Toggle the Display from **Heading** to **Data** to view the actual data from your list and ensure it is mapped properly.





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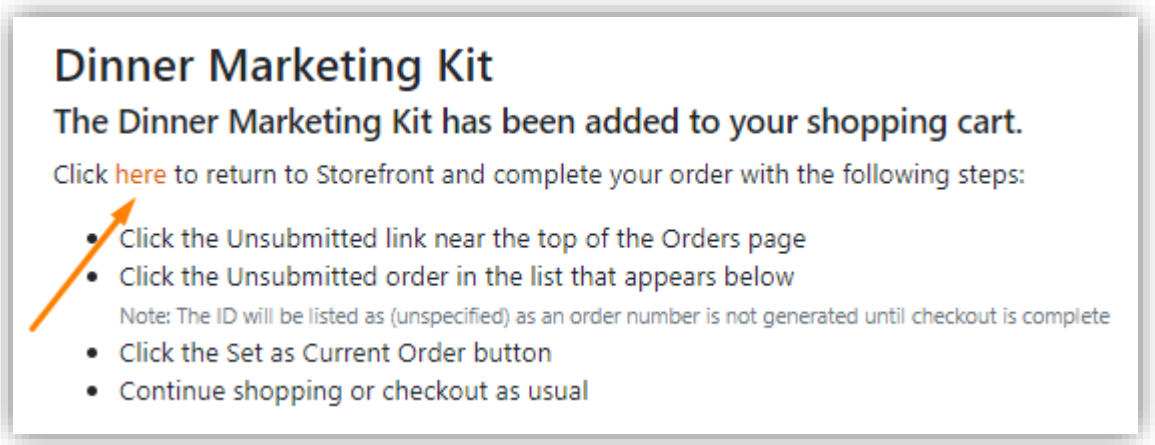
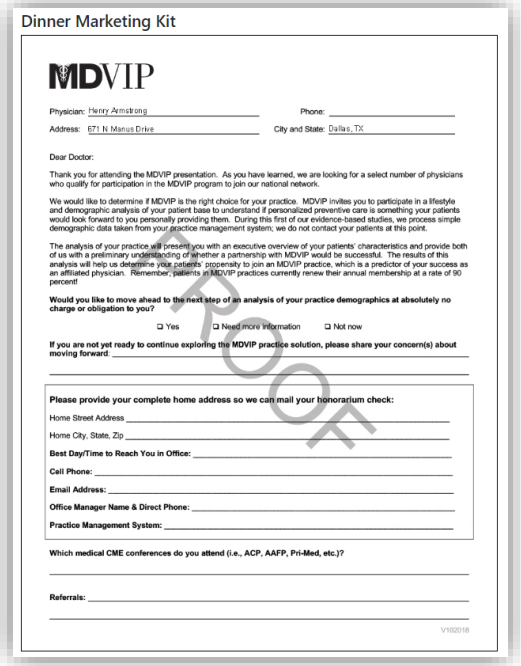
Customizing Dinner Marketing Kits

- To complete and order your **Dinner Marketing Kit:**
  - Proof your customized Dinner Marketing piece and click **Finish**.

- Click on the link as shown below. You will then be re-directed back to the storefront.





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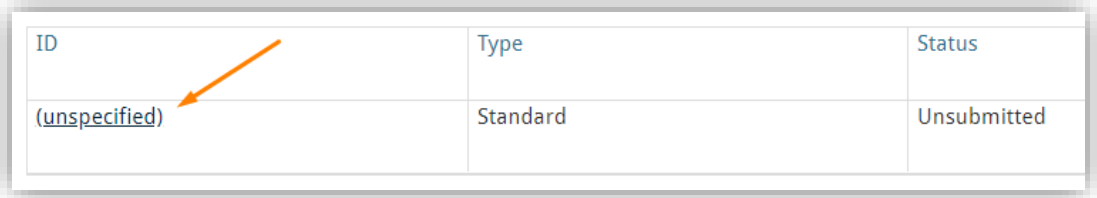
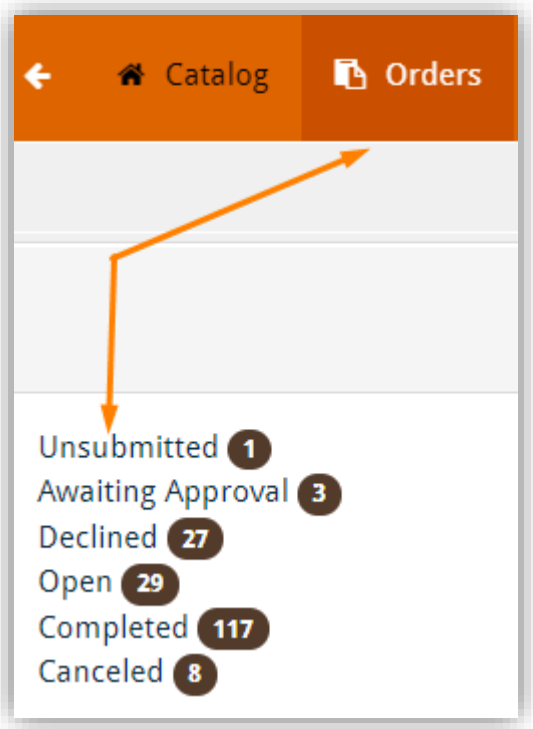
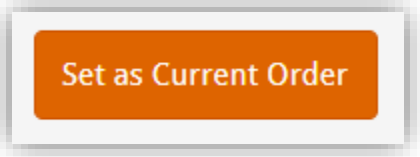
Customizing Dinner Marketing Kits – Final Steps

- Once re-directed, click the **Unsubmitted** filter and scroll down to locate your order.
- Click on the order **ID** hyperlink (it will read “unspecified”)





- Scroll down and select **Set as Current Order**



- Select **Check Out** to complete your order.

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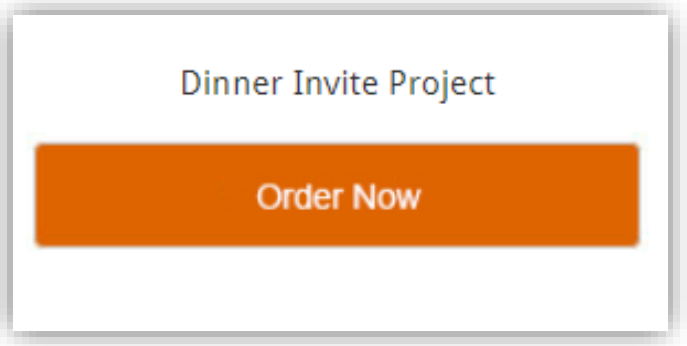
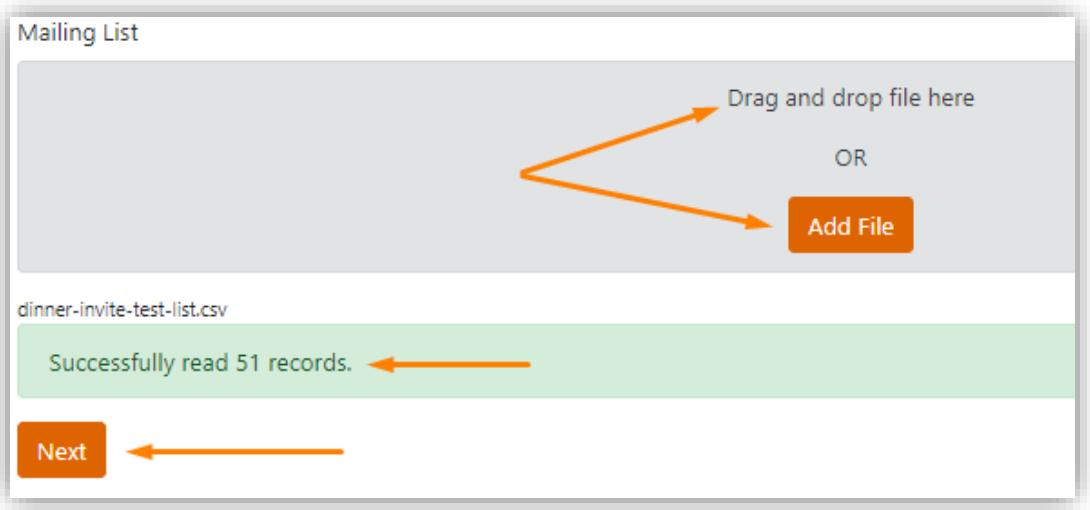
Customizing Dinner Invites

- Locate the **Dinner Invites** and click **Order Now**.
- Name your Project. Select a Dinner Invite option from the dropdown.
- Upload Attendee List (CSV Format)
  - Click **Add File** to browse for your file and upload
  - Or, drag and drop your list.





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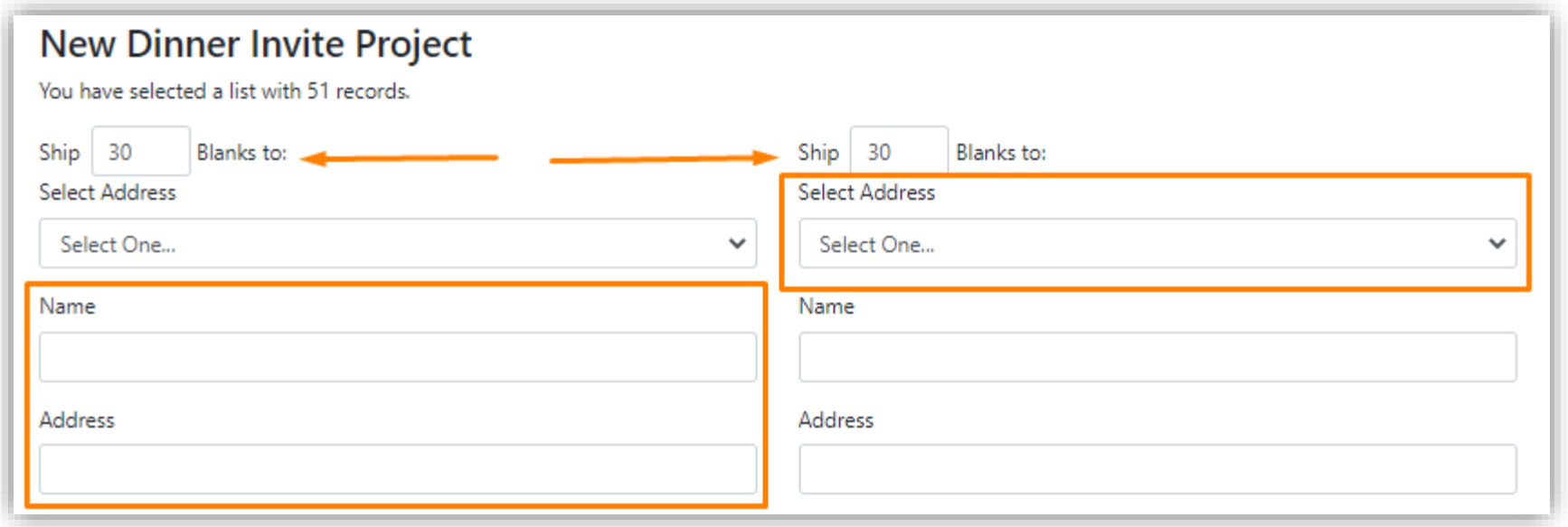
Customizing Dinner Invites

- NOTE: The **Dinner Invites** have some additional options.
  - Select if you would like to send additional blank invitations to one or two individuals.
    - Select a name from the dropdown library or enter new address information.



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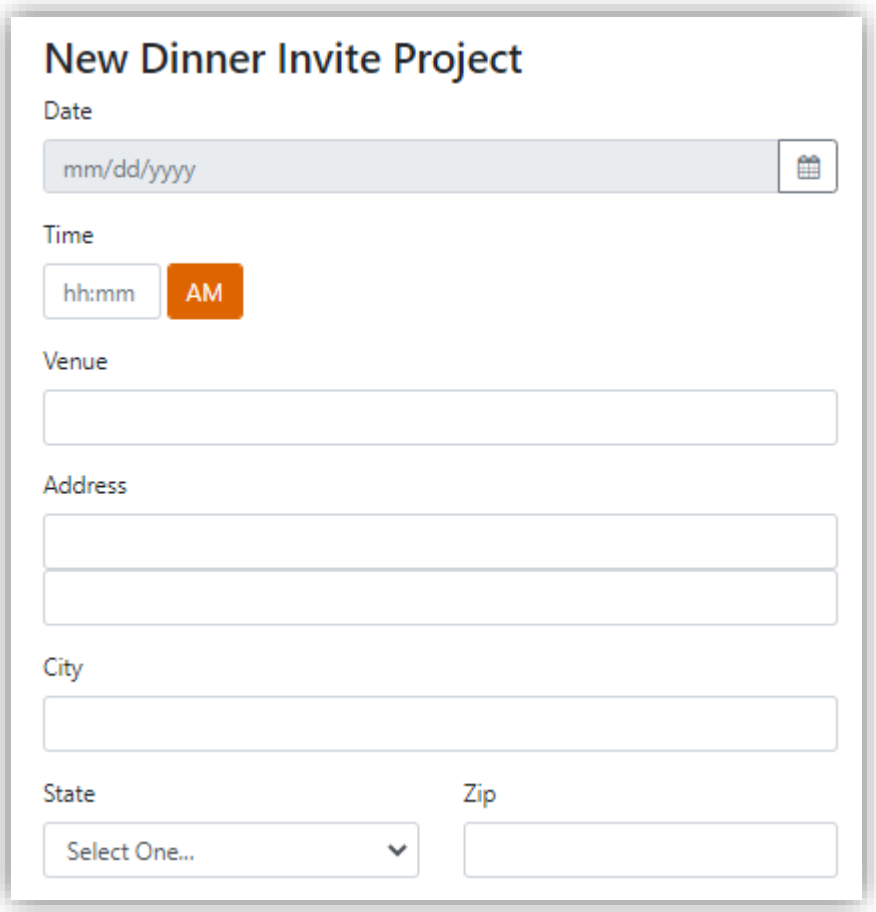
Customizing Dinner Invites

- Enter additional customization including Date, Time, Venue, Address, and Director Information.



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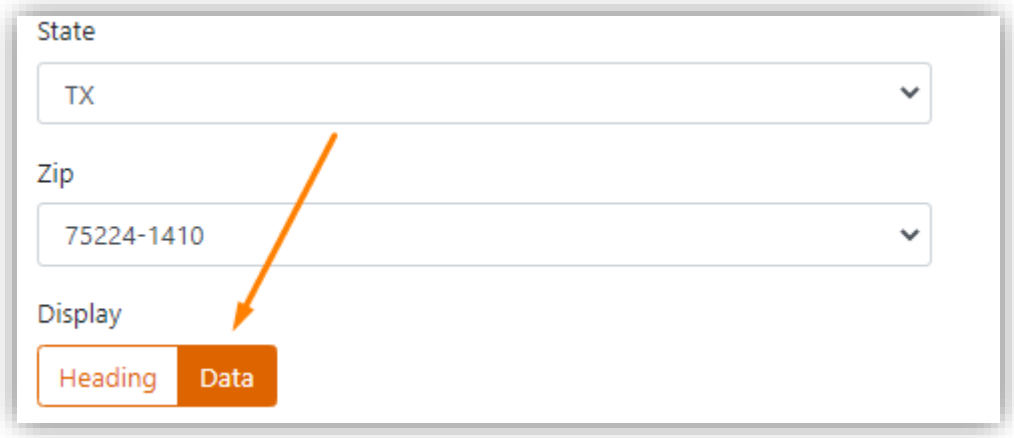
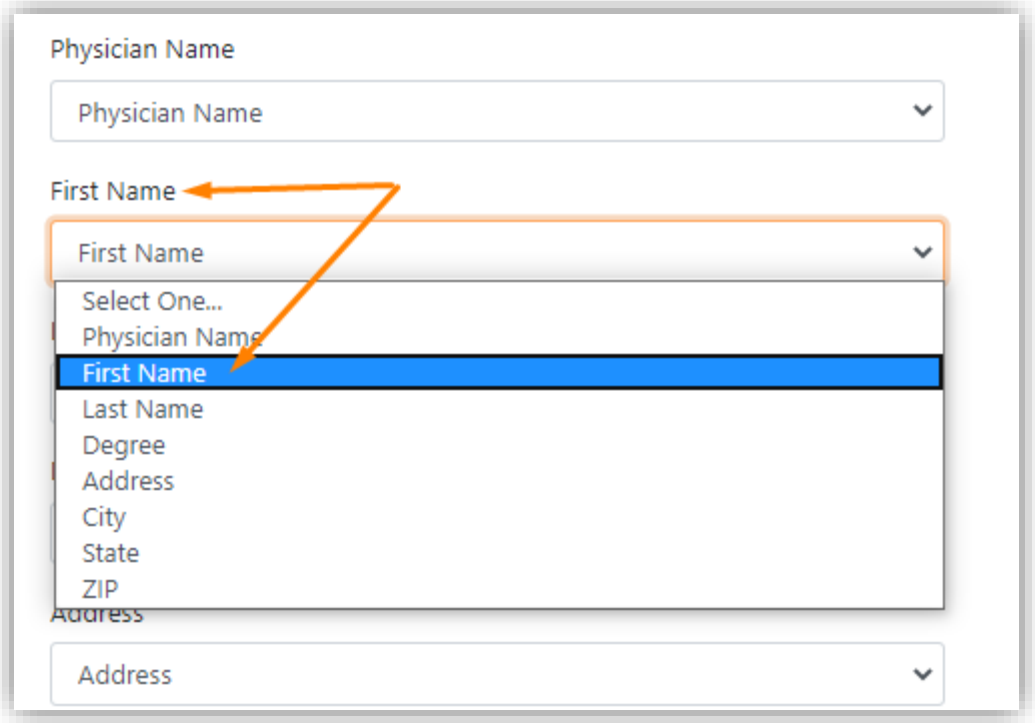
Customizing Dinner Invites

- Map the data from your list by matching the column names in your file to the corresponding customizable fields in the template.
- Check your data mapping by doing the following.
- Toggle the Display from **Heading** to **Data** to view the actual data from your list and ensure it is mapped properly.





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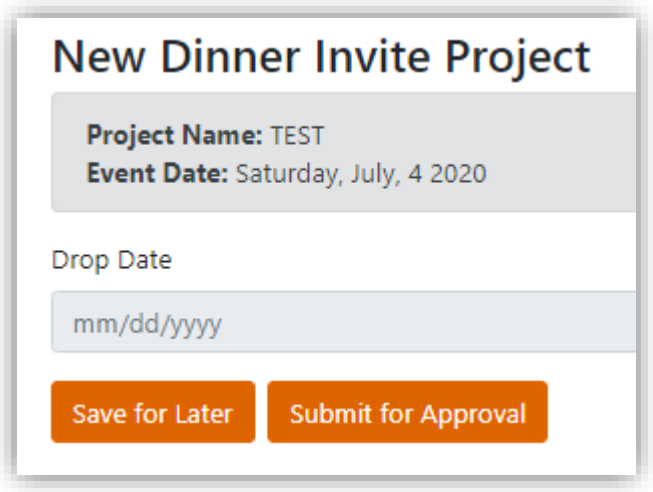
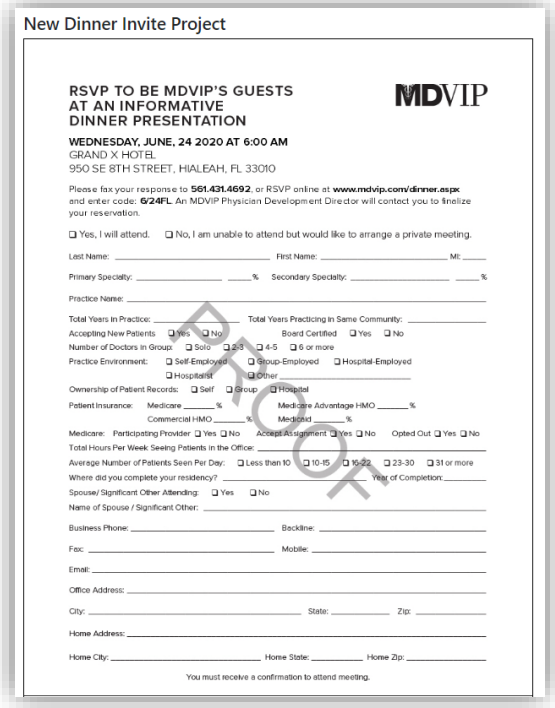
Customizing Dinner Invites – Final Steps

- To complete and order your **Dinner Invites**.
  - Proof your customized Dinner Invitation piece and click **Next**.

- Select your desired mail Drop Date.
  - **Save for Later** or **Submit for Approval.**





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