

Ingram Micro Website Quick Reference Guide

Step-by-step instructions for
the website's new features

August / 2020



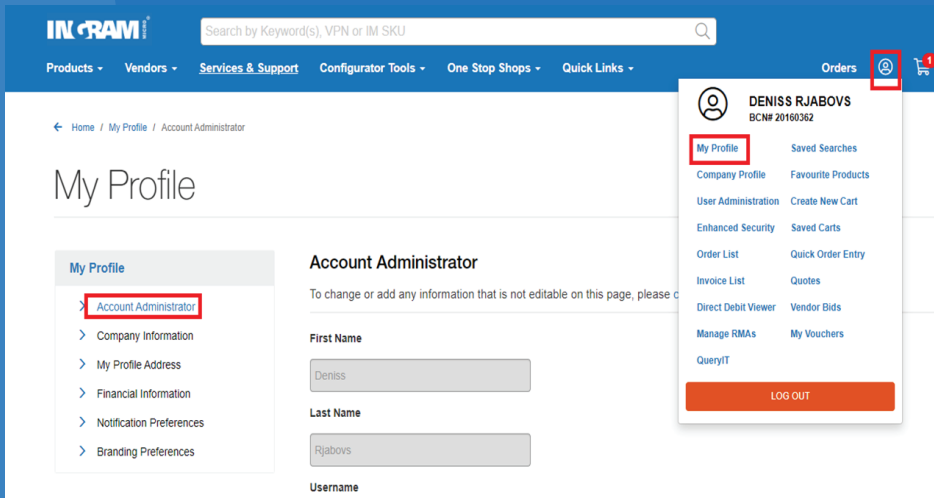
Login

Logging in for the first time

When you visit the site for the first time, please log in with your username and password that you should have received in an email from us. Please ensure you have donotreply@ingrammicro.co.uk added to your "Safe Sender List".

Steps:

1. Ingram Micro will ask you to accept the new site's terms and conditions and may ask if you're the sole person using the log-in credentials. Tick the box to accept.
2. In the "My Profile" section at the top of the page once logged in you can view Your account and personal information.
(Profile button > My Profile > Account Information)
If you would like to amend your company details, please contact: new.accounts.uk@ingrammicro.com



Forgotten Username

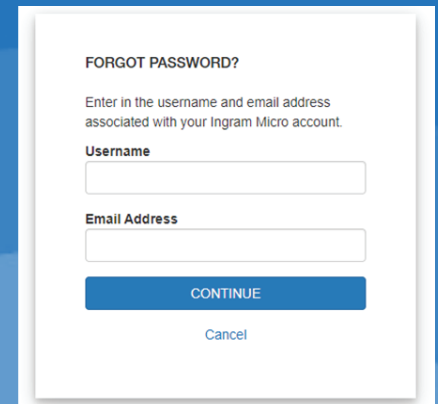
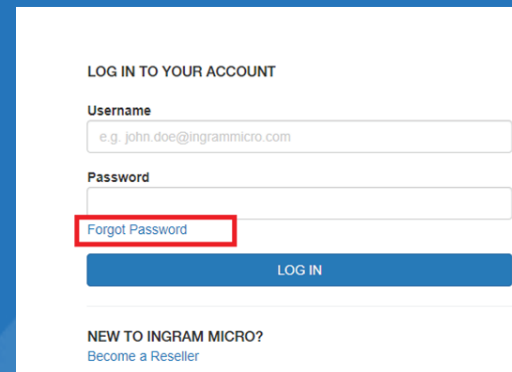
if you forget your username, please contact your company's account administrator or email Web.UKSupport@ingrammicro.co.uk

Forgotten Password

1. Go to the Ingram Micro [Log-in page](#) and click "Forgot Password?" 2. Enter your username and email address > Click OK
3. You will receive an immediate email with a temporary password that you will need to modify when you next log in.

Please note: Too many incorrect log-in attempts or expired credentials resulted in your account being locked.

If you have any questions regarding this process, please contact your company's account administrator or email Web.UKSupport@ingrammicro.co.uk



Create a new Password

Steps:

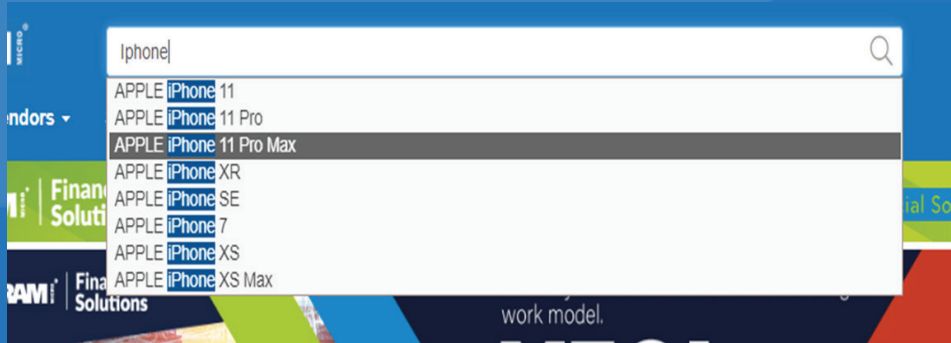
1. Profile > My Profile > Account Information
2. Enter Current Password
3. Enter New Password. Password must contain at least three of the following:
 - * A minimum of 6 characters
 - * At least one upper case (A-Z) and one lowercase (a-z) letter
 - * At least one number (0-9)
 - * Non-alphabetic characters (for example, !, \$, #, %)Your new password must be different from the last 5 passwords and cannot contain any part of your username.
4. Enter new password > Save
5. Your password has now been saved
6. Login with your new password

Search

Type Ahead Product Search

Steps:

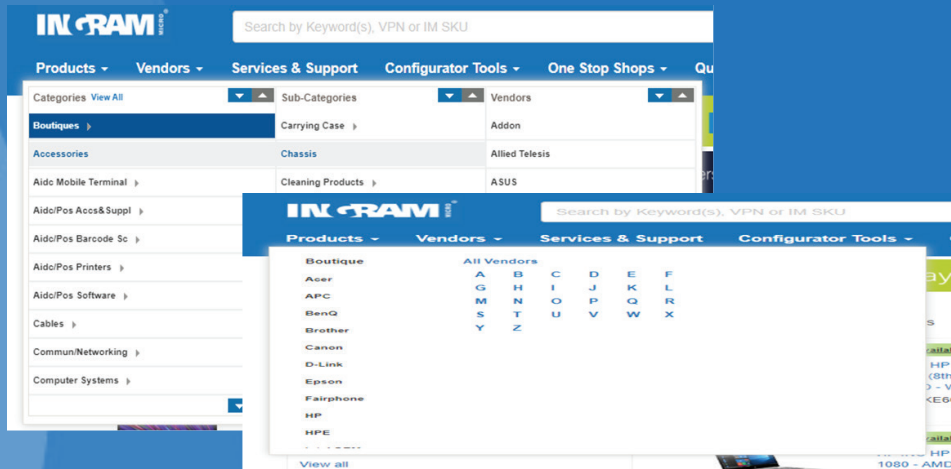
1. Type keyword(s), VPN, EAN, SKU, or Price Code into main keyword search field. As you type the results will appear related to your search.



Browsing

You have 2 options:

1. Move cursor over Products > Hover over preferred category > Sub-category > Vendor > Click to see results
2. Move cursor over Vendors > Browse by alphabetical order > Click to see results



Narrowing Search Results

You have 3 options:

Single Selection

1. Search or Browse > Click search parameter

Multiple Selection

1. Search or Browse > Click checkboxes of multiple parameters > Go

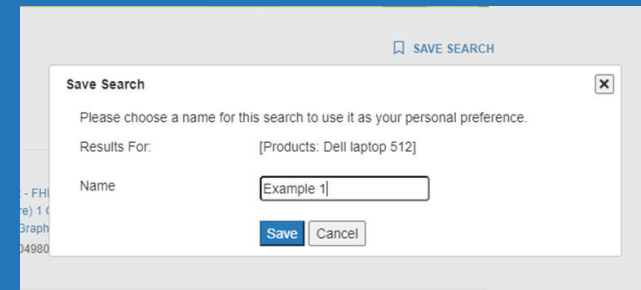
Add additional keywords to your search

1. Search example: Dell Laptop 512 SSD

Save Searches

Steps:

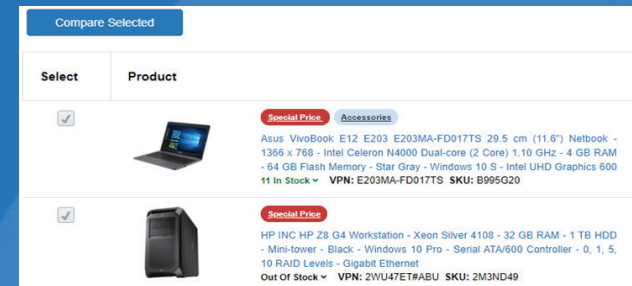
If you search frequently for the same products, it's convenient to save the search parameters. Click Save Search, name your search in the pop-up window, and click Save. Access these results anytime by adding a Saved Search link to your dashboard or visit My Account > Saved Searches.



Product Comparison

Steps:

1. Products can be compared on "Favourite products" Page
2. Click Compare > Select viewing display options > Select List or With Images
3. Select Email and/or Print, if desired
4. Click Add to Cart to purchase or Click Clear Comparison to empty list

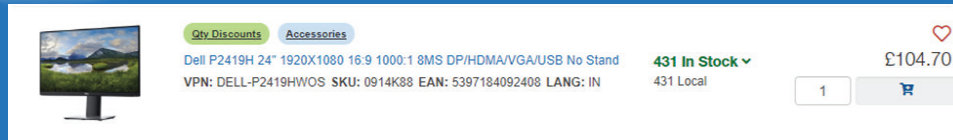


Carts & Checkout

Add Item to Cart

Steps:

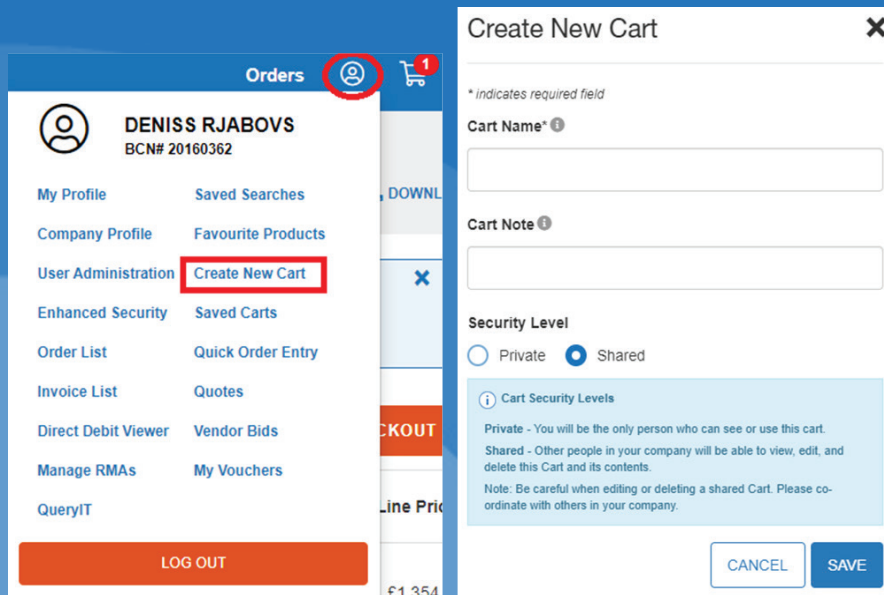
1. Enter Quantity > Click Add



Create New Cart

You can create and save up to 100 Carts at a time to make re-ordering easier and save time. There are two ways to create a Cart

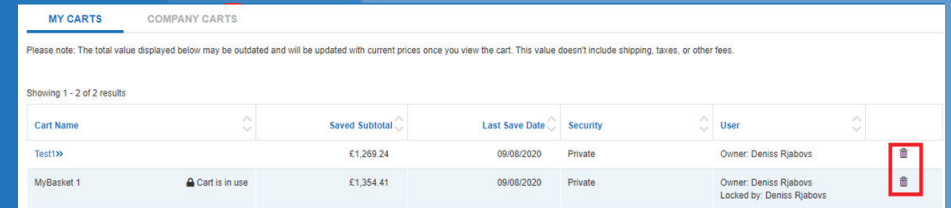
1. Click profile Icon > Create new Cart > on My Carts page create new cart > Complete form > Save.
 2. My Cart > Switch Cart > Create New Cart > Complete form > Save
- Make sure you give the Cart a unique name in the pop-up window; define if it's private, public, or shared (*) and click Save.
- (*) Private Cart: You are the only person who can see or use this Cart.
- Shared Cart: Others in your company will be able to view, edit, and delete the Cart and contents.



Delete Carts

Steps:

1. Profile Icon > Saved carts > Delete cart



To add a product to a Cart you've created:

Steps:

1. Make sure the desired Cart is selected.
2. Click Add to Cart from search results and the item will be added to the active cart
3. The active Cart stays active until you switch to another Cart in your saved list or create a new Cart.

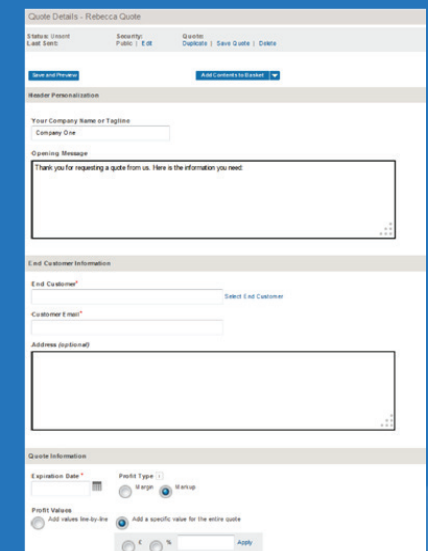
To switch active Carts:

1. Click on Cart icon on the top right, select "Switch cart" option, select desired cart from the list.

Convert a Quote to a Cart

You have 2 options:

1. Profile icon > Quotes > Quote details > Add Contents to Cart
2. Profile icon > Quotes > Quote details > Arrow next to Add Contents to Cart > Select a different Cart or create a new one



My Orders

Searching for Orders

Steps:

1. Click "Orders" icon that is located next to your Profile in the top right corner.
2. You may search by Order Number, Reseller PO Number, Serial Number, Date Range, SKU, VPN, Vendor or Order Status.
3. Click IM Order Number to view details, tracking information and serial numbers

Reseller P.O. #	IM Order #	End User P.O. #	Order Type	Order Date	Ship Date	Total	Status
TPO20200810-01	20-90744-11	ENDUSERPO1	S	10/08/2020		£6.02	Voided
TPO20200807-28	20-86647-11	201029881	S	07/08/2020		£6.02	Voided
TPO20200806-29	20-86489-11	201029881	S	07/08/2020		£6.02	Voided
TEST123321	20-86453-11		S	07/08/2020			Voided
TPO20200806-29	20-86380-11	201029881	S	07/08/2020		£6.02	Voided
TPO20200806-29	20-85980-11	201029881	S	06/08/2020		£6.02	Voided

Returns:

Steps:

1. Profile Icon > Returns Management > Click Return Items

ACCOUNT INFORMATION

Company Name : BRIGHTPOINT GREAT BRITAIN LTD
Account Number : 16BP0001
Address :
City - Postcode :

* Contact Name :
* E-Mail :
* Telephone :
Fax :

RMA ENTRY

* Type of Return : Select Reason Code
Your Reference Number :
Invoice Number :
Customer PO # :

* Required

Invoices

Find Invoices

Steps:

1. Profile Icon > Invoice list
2. Search by Invoice Number, P.O. Number, Date Range, or Payment Status > Search
3. Click Invoice Number to view details

Due Date	Invoice Date	Invoice #	Reseller P.O. #	Value	Status	Download
30/04/2020	30/04/2020	208	Your PO Here	£7.37	Paid	
29/04/2020	29/04/2020	208	Your PO Here	£66.00	Paid	
29/04/2020	29/04/2020	208	Your PO Here	£52.88	Paid	
29/04/2020	29/04/2020	208	Your PO Here	£25.67	Paid	
29/04/2020	29/04/2020	208	Your PO Here	£20.28	Paid	

Quotes

Create a Quote

Steps:

1. Profile Icon > Quotes > Create New Quote
 2. Name Quote > Public or Shared* > Create Quote
 3. Complete Header Personalisation/Quote Information fields
- * Public Quote: Others in your company will be able to view and duplicate the quote, but cannot change or delete it.
Shared quote: Others in your company will be able to view, edit and delete the quote and contents.

Create a New Quote

You can edit these settings later.

Quote Name:
Rebecca Quote

Security

Public
Other people in your company will be able to view and duplicate this quote, but they cannot change or delete this quote.

Shared
Other people in your company will be able to view, edit, and delete this quote and its contents.

NOTE: Be careful when sharing quotes to coordinate edits between users.

Create Quote Cancel

Find Existing Quotes

Steps:

1. Profile Icon > Quotes > Calendar Date Range > Search

Find Quotes

Find quotes by filtering to the date when the quote was last saved.

From: 29/12/2013 To: 29/01/2014 Reset

1 - 14 of 14

Select: All | None Delete Create New Quote

	Last Saved	Last Sent	Quote Name	End Customer	Quote Value *	Status
<input type="checkbox"/>	27/01/2014	--	Test 100	N/A	£0.00	Unsent
<input type="checkbox"/>	03/08/2012	03/08/2012	product1	im	£159.00	Expired

Add Items to a Quote

You have 4 options:

- Create a Quote from a Cart
 - Direct Entry
 - Import from a Spreadsheet
 - Duplicate Existing Quote
1. Profile Icon > Saved Carts > Click Cart name to open
 2. Add items to Cart > Create a quote from a Cart
 1. Profile Icon > Quotes > Click quote name to open > Enter SKU and Quantity into direct entry field > Click Add
 1. Profile Icon > Quotes > Click quote name to open > Enter SKU and Quantity into direct entry field > Click Add
 2. Click Import from Spreadsheet > Browse to file > Select file
 3. Import > OK
 1. Profile Icon > Quotes > Click quote name to open > Click Duplicate > Create Quote

Quote Lines

Add Items (Maximum 10 items)

SKU or VPN	Qty	
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>

Add to Basket

Import Items to Basket *

Import from Spreadsheet Download a Template

*Note: Accept Only CSV, 2003, 2007 Excel File Format. Column 1 should contain SKU numbers. Column 2 should contain part numbers. Column 3 should contain quantity numbers. Row 1 is taken as header information.

Add Non-Ingrom Micro Items

Made Changes? U

Total Costs

Your Total	Your End Customer Total
Item Subtotals: £0.00	Item Subtotals: £0.00
Shipping: TBD	Shipping: £ 0.00
Online Order Discount: -	Discount: £ 0.00
Order Subtotal: £0.00	Order Subtotal: £0.00
VAT: TBD	VAT: £0.00
Total: £0.00	Total: £0.00

Quote Footer Personalization

Your Contact Information

Address Telephone Email

Closing Message

Please contact me if you have any questions regarding the quote. I look forward to helping fulfill your computer and technology requirements.

Quote Details - Test 100

Status: Unsent Security: Public | Edit Quote: Duplicate | Save Quote | Delete

Last Sent: []

Save and Preview Add Contents to Basket

Header Personalization

Your Company Name or Tagline

Logan Micro Mobility show your logo

Opening Message

Thank you for requesting a quote from us. Here is the information you need

End Customer Information

End Customer* Select End Customer

Customer Email* []

Address (optional)

Quote Information

Expiration Date* [] Profit Type [] Margin Markup

Profit Values

Add values line-by-line Add a specific value for the entire quote

Quote Lines

Add Items (Maximum 10 items)

SKU or VPN	Qty	
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>

Add to Basket

Import Items to Basket *

Import from Spreadsheet Download a Template

*Note: Accept Only CSV, 2003, 2007 Excel File Format. Column 1 should contain SKU numbers. Column 2 should contain part numbers. Column 3 should contain quantity numbers. Row 1 is taken as header information.

Add Non-Ingrom Micro Items

Made Changes? U

Quotes (continued)

Transform a Quote to a Cart

When you're ready to convert a quote into an order, first convert it to a Cart.

Steps:

1. Profile Icon > Quotes > Click Quote name to open
2. Click Add Contents to Cart at the top of the Quotes detail page
3. Your quote contents will now be included in your active Cart.

You also may click on the arrow beside the Add Contents to Cart button to select a different Cart or create a new Cart.

To create a new Cart from a quote:

1. Profile Icon > Quotes > Check box of quote you wish to add to new basket
2. Click Add Contents to Cart arrow and select + Create New Cart
3. Select if quote is Public or Shared*
4. Create Quote

*Public Quote: Others in your company will be able to view and duplicate the quote, but cannot change or delete it.

Shared Quote: Others in your company will be able to view, edit and delete the quote and contents.

basket 24

Status: Expired
Last Sent: 20/11/2011

Security: Public | Edit

Quote: Duplicate | Edit Name

Resend Quote

Add Contents to Basket ▼

Personalise Quotes

Both admins and users may personalise quotes for customers.

Steps:

1. Profile Icon > My Profile > Branding Preferences Admins may update the company logo.
2. Admins may update the company logo.
3. Admins may then enter legal terms and conditions for footer display
4. Click Save, or Undo Changes to start again

Branding Preferences

These branding preferences are applied to quotes, product sheets, end user email notifications and others, as the default values for all users within your company, but may still be customized for individual quotes and product sheets.

Your Logo

Your Logo
This is an account-level setting for administrators only. Subordinate users may choose not to include the logo, but only administrators are allowed to change it.

Upload New Logo Remove Logo

Your Company Name or Tagline
Ingram Micro

Quote Header Personalization

Default Header Message
This area is for text that appears before the quote information.
Thank you for requesting a quote from us. Here is the information y

Upload New Logo

You may store one logo to customize your quotes. If you already have a logo, uploading a new logo will replace it.

Browse... No file selected.

Supported image formats include JPG and GIF. Maximum file size is 1048576 bytes. We recommend minimum logo dimensions of 250 x 250 pixels and maximum logo dimensions of 500 x 500 pixels.

I certify that I have the right to use this image and it complies with the Ingram Micro site usage policies.

Configurator Tools

You can select tools and configurators to help you find out-of-the-box and best-in class solutions for your business. Ingram Micro offers:

Configurator Tools -

1. HP Top Configurator
2. HPE /HPI iQuote
3. Apple CTO
4. Dell Power Quote

Product Finders -

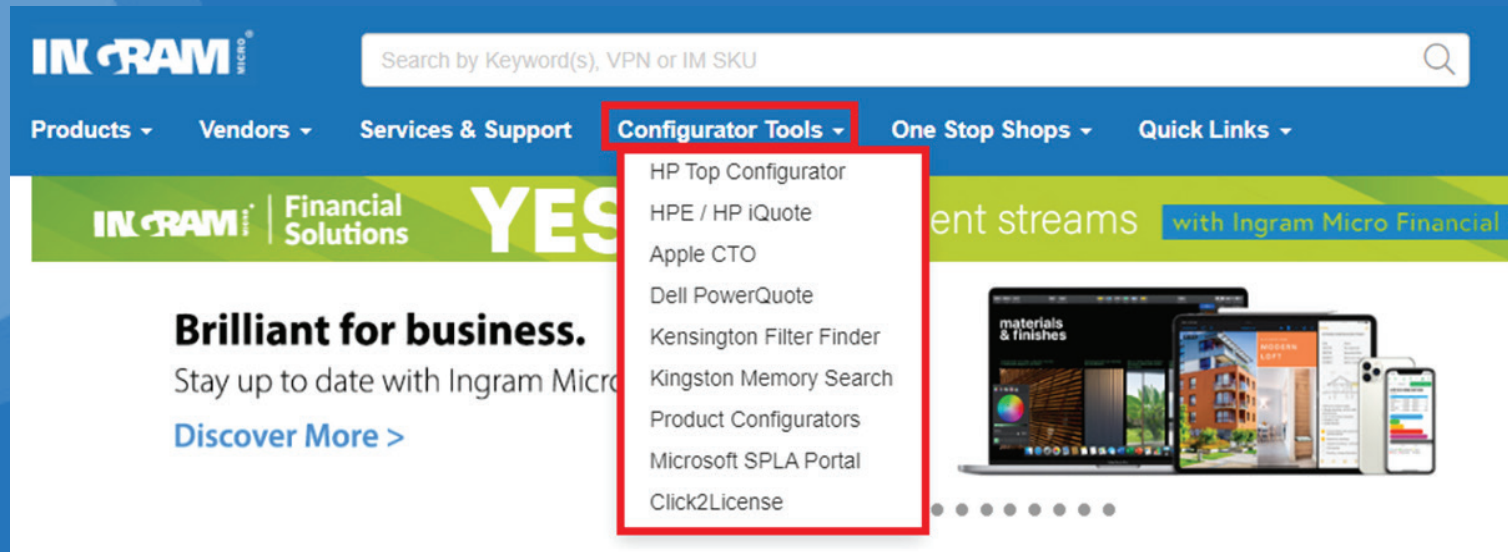
1. Kensington Filter Finder
2. Kingston Memory Search
3. Product Configurators offered by Vendors

Tools -

1. Microsoft SPLA Portal
2. Click2License

Steps:

Configurator Tools > Select any Tool > Click on a product, view the product details, configure it the way you like, and add all the items to the basket.



My Account

Set up Notifications

You can more easily track pertinent business information by setting up a variety of personalised notifications from password changes, to shipment confirmations.

Steps:

1. Profile Icon > My Profile > Notification Preferences
2. Enter the email address you want notifications to be sent to
3. Select the method and timing of your preferences
4. Click Save

Notification Preferences

Please select your notification preferences below

Email

Basic Notifications

The following notifications will always be sent to the email address shown on this page.

- Privilege changes
- Password reset
- Order Confirmation

Quotes Notifications

- Copy me on sent quotes
- One day before expiration
- Three days before expiration
- One week before expiration
- Two weeks before expiration

Backorder Notifications

- Daily summary
- Weekly summary

Shipment Notifications

- Shipped order details

My Account (ADMINS ONLY)

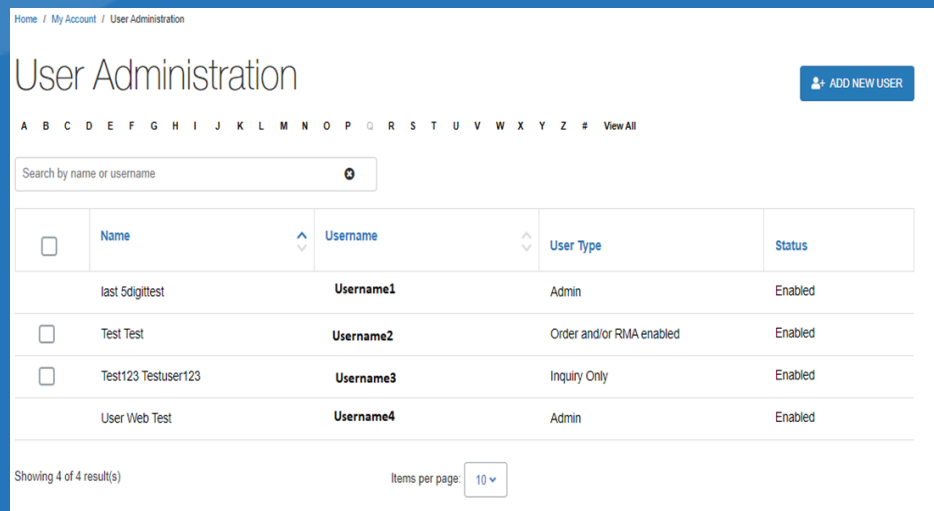
Create and Enable a New User

Users with admin privileges have the flexibility to create personalised accounts for all of the employees in their company.

Steps:

1. Profile Icon > User Administration > Add a New User
2. Complete information > Create a New User

Please contact Ingram Micro at Web.UKSupport@ingrammicro.co.uk to create a new admin user.



Home / My Account / User Administration

User Administration

[+ ADD NEW USER](#)

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z # View All

Search by name or username

<input type="checkbox"/>	Name	Username	User Type	Status
<input type="checkbox"/>	last 5digitest	Username1	Admin	Enabled
<input type="checkbox"/>	Test Test	Username2	Order and/or RMA enabled	Enabled
<input type="checkbox"/>	Test123 Testuser123	Username3	Inquiry Only	Enabled
<input type="checkbox"/>	User Web Test	Username4	Admin	Enabled

Showing 4 of 4 result(s) Items per page: 10

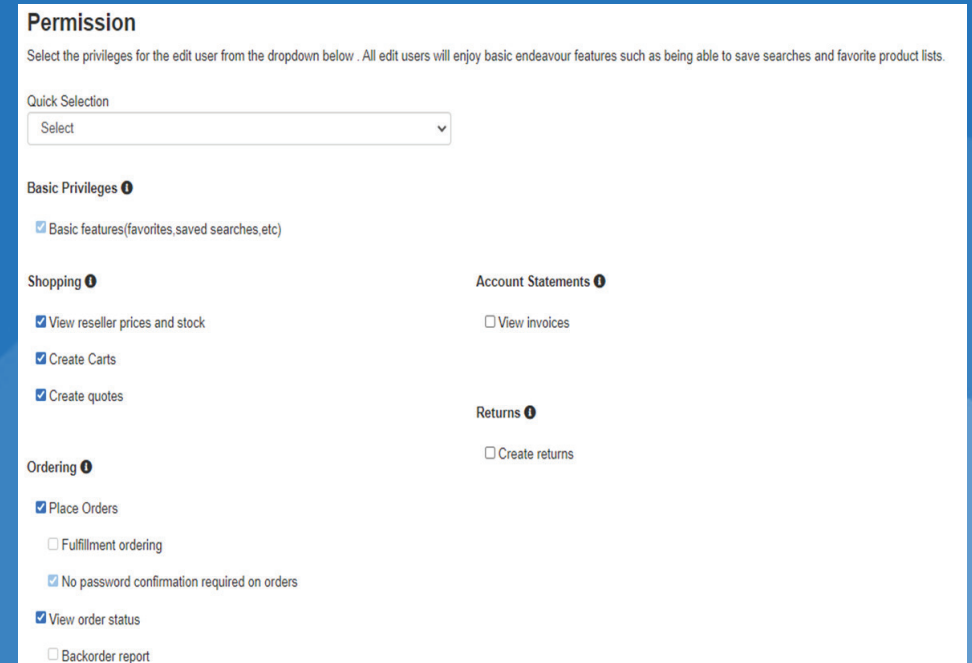
IM Online Contact Details

If you have any questions that haven't been covered in this Quick Reference Guide please contact Ingram Micro at Web.UKSupport@ingrammicro.co.uk

Set Up and Change Privileges

Steps:

1. Profile Icon > User Administration > Select User Select privileges tab > Choose privileges > Save



Permission

Select the privileges for the edit user from the dropdown below. All edit users will enjoy basic endeavour features such as being able to save searches and favorite product lists.

Quick Selection
Select

Basic Privileges

- Basic features(favorites,saved searches,etc)

Shopping

- View reseller prices and stock
- Create Carts
- Create quotes

Account Statements

- View invoices

Returns

- Create returns

Ordering

- Place Orders
- Fulfillment ordering
- No password confirmation required on orders
- View order status
- Backorder report

For more detailed information, review the Help Section at <https://uk-new.ingrammicro.com/>