



Online Ordering Process

LOYALTY
BRANDS

ONLINE ORDERING PROCESS:

FIRST TIME USER:

You will send an email to request a username and password

Lisa Shook | iT1 Source | Sr Account Manager | O: 480-696-7635 | lisa.shook@it1.com

You will be asked for the following information, and you will be automatically set up for Credit Card Terms.

- Full Name
- Email address
- Phone
- Billing Address
- Shipping Address
- Our standard payment terms are credit card.

ACTIONS YOU CAN DO ON OUR SITE:

- Create a Cart to send to your Account Manager or save for future Ordering
- Place order using Credit Card
- Look up your order history and see the status of your current orders
- Search your company standards by provided Favorites list
- Search our entire catalog for products you may need

CONFIRMATION PROCESS

- You will receive a confirmation once your order is reviewed and sent for processing by your account team
- Most products will ship in 24-48 hours if showing in stock – you will receive an automated email once your item ships with tracking
- Any large items or Furniture will require additional information for delivery and will have a 6–8-week lead time – you will receive an email with information needed to finalize your order – please provide response quickly so your order is not delayed
- iT1 Source will secure a Preauthorization on your credit card when your order is placed to hold funds until shipment
- Once your order ships complete your credit card will be billed and a copy of your invoice will be sent to you in an automated email and will be available in the portal.

HOW TO ACCESS ORDERING SITE

Click on link under the Loyalty Brand vendor page **OR** if you have been issued a Username and Password you can Log in directly on our site www.it1.com

This is a comprehensive guide to ordering site. Once you set up your account and place your first order, you will see defaults and will not have to do all of these steps. I am here to assist you with the ordering process M-F 8am -4pm PST.

FROM IT1 SOURCE WEBSITE

Ordering site link www.it1.com

You will then click on “Client Portals” in the upper right corner



You will select IT Procurement Login




USERNAME AND PASSWORD

If you have not requested a Username, please email for access.

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Your Username will be the email address I receive the request from. You will receive an automated email with a link to set up your password.

Once you have a Username and Password, you will have 24/7 access to our ordering site



Login

New users: Please contact iT1 for your log in at (877) 777-5995. Thank you.

Returning Customer

Email (Your email Address) *

Password *

Remember E-mail

Login [Forgot Password?](#)

PASSWORD RESET

If you need your password reset, you can either click [Forgot Password](#) on the bottom, or send an email to me and I can send you a link to reset your password

CREATING A CART OR ORDER

USING COMPANY FAVORITES LIST

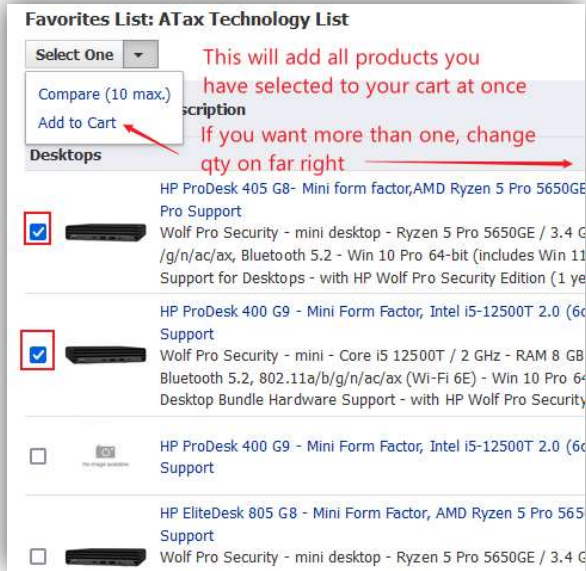
You will see Company Favorites Lists. These will be the recommended and discounted products that your Corporate office has identified for you.

Click on the one you want to view

Company Favorite Lists

- [ATax Technology List](#)
- [ATax Furniture](#)
- [ATax Printer & Toner List](#)

Find your product and add to the cart by either selecting multiple items on the left OR clicking the + on the right



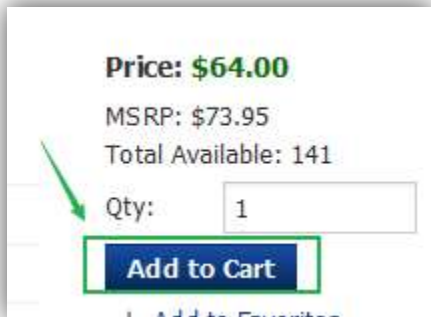
USING THE SEARCH FEATURE

You can search for an item that is not on your Company Preset Favorites list.

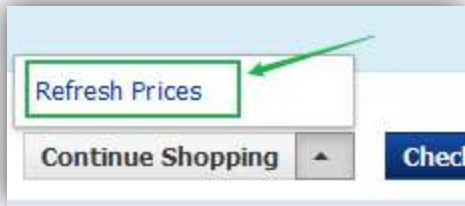
You will enter the product description or MFG PN in the search box, select which you would like to do from the drop down on the right (Keyword or Mfr Part #)



On the right you will see your cost and Total Available.



Please note if you create a cart and then come back later to check out, be sure to **“Refresh Prices”** Cost so you will get accurate cost and availability. Don't worry, If you forget this step, I will do this for you after your order is submitted and if there is anything that comes back “Out of Stock” I will reach out to you right away to discuss your options.



ACCESSING ACTIVE CART

Once you have added all of the items you would like to your cart you will click on the cart icon in upper left corner



ACTIVATING BILLING AND SHIPPING ADDRESS

You will see a default BILLING & SHIPPING address for your cart. You will need to select your billing and shipping address from the drop-down options by click on the PENCIL icon either now or during checkout. I suggest doing at the cart level so you can have accurate pricing for Tax and your account team will be able to assess proper shipping charges.



TIP: AN ADDRESS WILL SHOW UP FOR YOUR CART, BUT UNTIL YOU EDIT AND SELECT FROM THE DROP DOWN YOUR TAX WILL NOT CALCULATE CORRECTLY.

Once you select the pencil you will get to a screen that allows you to select a billing/Shipping address from the drop down depending on which one you are modifying.

NOTE: IF YOU DO NOT SEE THE ADDRESS THAT YOU ARE LOOKING FOR, SEE **“ADD NEW BILLING OR SHIPPING ADDRESS”** IN THE NEXT SECTION BELOW. YOU CAN ADD NOW OR YOU CAN UPDATE BILLING/SHIPPING AT CHECK OUT IF YOU PREFER

Billing Info (one per company)

Copy from existing Select billing address address

Bob Smith CC billing address

Select billing address ...

Bob Smith CC billing address

Default Billing Shipping

ACTIVATING SHIPPING ADDRESS:

You will select your shipping address

If you do not see the address you need, you can follow instructions below to add new billing and/or shipping address to your list

Shipping Info (multiple per company)

Copy from existing Select shipping address address

Bob Smith CC billing address

Select shipping address ...

Bob Smith CC billing address

ADD NEW BILLING OR SHIPPING ADDRESS

Select Account from list on Left column

Account

Favorites

Reports

Logout

Then click on Account Addresses, this will show your list of Addresses

Accounts - Billing & Shipping Addresses:

Account Addresses Contact Addresses

You will see Create New button, click to open up fillable form to enter you new Billing address

Accounts - Billing & Shipping Addresses:

Account Addresses Contact Addresses

Create New ←

You will select if you want this address to be Billing and/or Shipping and if you want it to be default. For this example, I will have it available for both types.

Enter new billing and shipping information here, or edit existing.

Billing Address Use as Default Billing Address

Shipping Address Use as Default Shipping Address

Fill out the form and give your Billing a "Description" at the very bottom

Description

Bob Smith CC billing address ←

Auto-Generate ←

Uncheck this box FIRST, then Add a description you will recognize at checkout under dropdown list

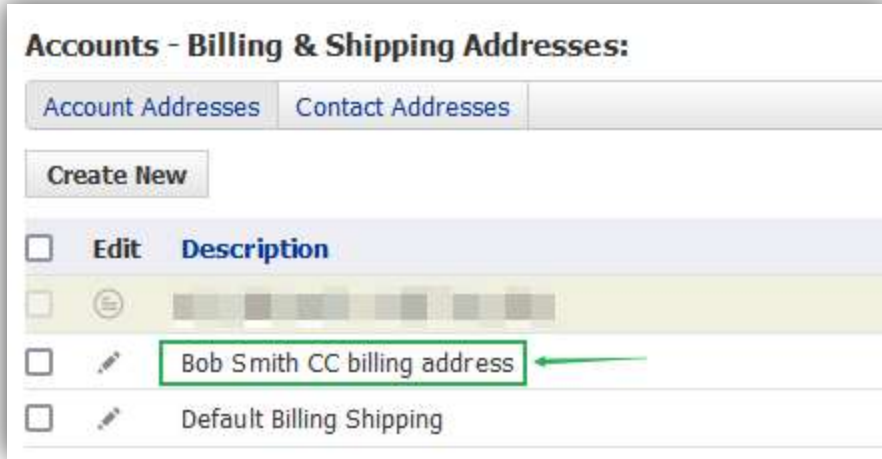
Save ▲

You will SAVE AND EXIT to get back to your list of addresses

Save & Exit ←

Save ▲

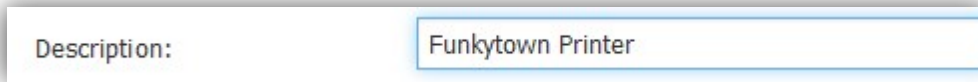
This will take you back to your list of Billing & Shipping addresses where you will see the new record show up



You can now go back to your cart and activate your billing and shipping addresses. It will give you an error message if you have not completed this step

QUOTE DESCRIPTION

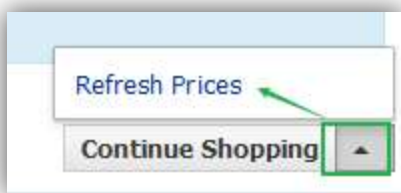
You can use this field to help you locate your quote and also it will be an identifier for your Account team as well



I would use this for location or project description or other identifier

REFRESH PRICING

You will do this to update cost and availability on your cart to see Current Cost and Availability and must be done prior to checkout.



TIP: IF YOU MISS THIS STEP, YOU MAY BE ORDERING SOMETHING THAT HAS HAD A COST CHANGE OR INVENTORY QTY CHANGE. IF THIS HAPPENS YOU WILL RECEIVE AN EMAIL FROM YOUR ACCOUNT TEAM NOTIFYING YOU OF THE OPTIONS.

SAVE & CREATE NEW CART FOR CHECKOUT

Save & Create New Cart

This will save your cart and create a quote that you can locate under Activity Tab – see *Checkout process for instructions for that step*

SAVE AND PRINT TO USE FOR BUDGETING OR REFERENCE

You also have the option to SAVE/PRINT – if you click this you will get a pop out that allows you to send yourself the PDF document. Your cart will then show up under ACTIVITY tab if you want to go in and modify or purchase

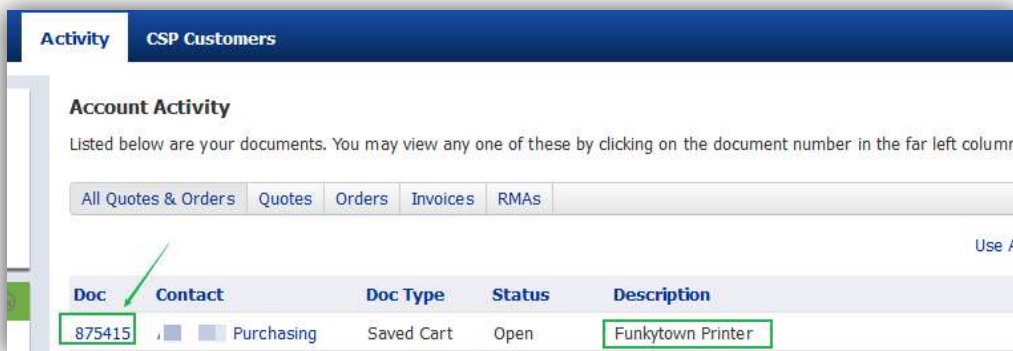


CHECK OUT PROCESS

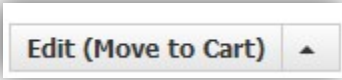
Then you will click on the Activity tab, locate your Cart, and activate it to go through checkout process



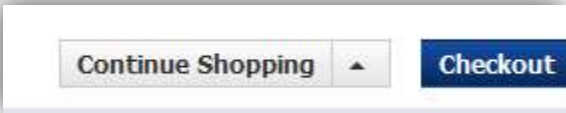
You will locate your Saved Cart by the description you named it. Click on the DOC number and it will take you to what you saved.



Once in the cart you will scroll to bottom and click “Edit (move to cart)”



Click Check out and follow prompts



Then you will check Billing and Shipping info one last time, you can change here if you need to before continuing

A screenshot of a checkout page. At the top, it says "Checkout" and "Verify your shipping addresses below." Below that is a horizontal line and a note: "Enter new billing and shipping information here, or edit existing. You may also use the 'Copy' buttons located between the columns to avoid re-typing similar addresses." A breadcrumb trail reads "Billing & Shipping Addresses / Payment & Delivery Methods / Review Order/Terms & Conditions". The form is split into two columns. The left column is titled "Billing Info (one per company)" and contains a dropdown menu with "Main Billing" selected. The right column is titled "Shipping Info (multiple per company)" and also contains a dropdown menu with "Main Billing" selected.

Then click NEXT



This screen you will enter PO and select payment type, you will only see what you are authorized to use for purchasing type.

Default ship method will be Ground, you can change this by clicking on the drop down to the far right.

Checkout
Please confirm your payment and delivery methods below.

Billing & Shipping Addresses / Payment & Delivery Methods / Review Order/Terms & Conditions

Payment Method

You are authorized to make payment no later than Net 30 days from the date of invoice (invoice date).

Select a Payment Method *

You are not currently authorized to purchase via a P.O. number, but the following field allows you to enter a P.O. number.

P.O. #: P3-FD46566 (40 char max)

Credit Card Electronic

Delivery Method

Delivery Method: * use the drop down all the way to the right to change ship method

Carrier Account #:

Special Instructions:

NOTE: A red asterisk (*) indicates required information

Previous Back to Cart Cancel

Click NEXT on the Far Right to continue



Then you will Agree to terms on bottom lower corner on the next screen

Document Notes (Optional) Customer Comments

Terms & Conditions

All returns must be accompanied by original invoice and authorized RMA number.

Pricing Disclaimer


IT1 Source disclaims any responsibility for product information and products described on this site. Some product information may be confusing without additional explanation. All product information, including prices, features and availability is subject to change without notice.

Previous Back to Cart Cancel Agree

Your account is Credit card only, you will see a box pop up for entering your Credit card number.

Card Information ✕

Credit Card **Bank Account
(USA Only)**

 Card Number *

Exp. Date * Card Code

First Name Last Name

Zip

Order Confirmation


Your order has been forwarded to your iT1 Source salesperson.

Sales Order You have 'read-only' access to this Sales Order.

Your account rep will review your order and send for processing or reach out to you if there are any issues

You will also receive an email once your order is released for processing

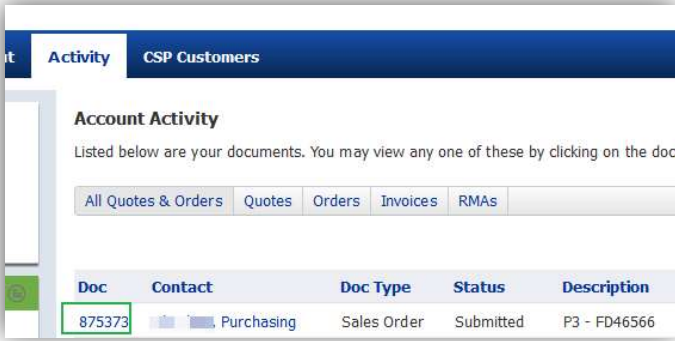
An order has been placed

 iT1 On-line Ordering <it1source--newaccount-at-it1.com@noreply.channelonline.com>
To Lisa Shook - **Your account team email**
Cc [redacted]@[redacted].com - **The email associated with your account**

CHECKING UP ON YOUR ORDER

Log back in to the www.it1.com website

Click on Activity and find your order



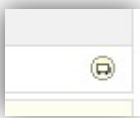
To view shipping information, click on Show Serial/Shipping



This will expand each line and show you tracking numbers and serial number if it is a serialized item.

Status	Shipped On	Carrier	Tracking #	
Shipped	1	08/26/2022	UPS Ground	1ZX5656V0370387982
Serial #s				

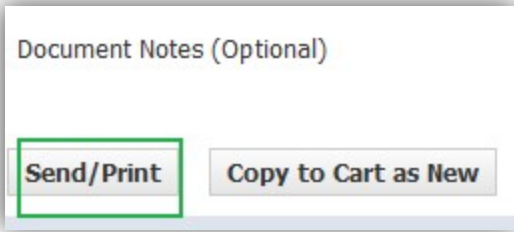
There is a little Truck icon on the far right that will link you to the carrier site. If this doesn't work, you can copy and past into the carrier site for tracking



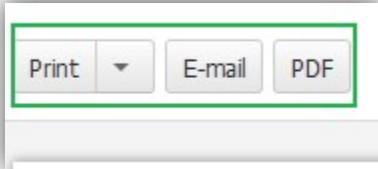
PRINTING YOUR INVOICE

To print invoice, you will access your order using "Checking up on your order" Instructions above

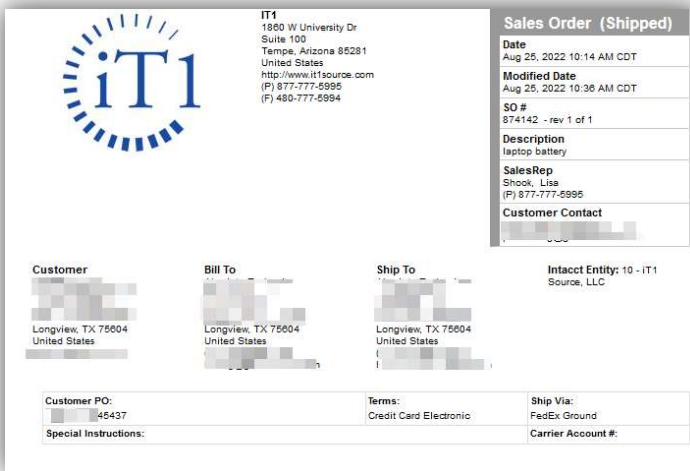
At the bottom left of the screen you will see "Send/Print"



This will pop out a screen that will give you the option to Print, Email or (Save to) PDF



Select your option and follow prompts. This can be used as an invoice for your records



TERMS AND CONDITIONS:

- Please visit our website for full T&Cs, But I will supply some key things to remember. Please read return policy and if you have any questions, please reach out to discuss.
 - <https://it1.com/terms-and-conditions/>

RETURN POLICY TIPS FOR SUCCESS:

- **iT1 Source requires that you notify us within 14 days of shipment if there are ANY issues with your equipment.**
- **We require enough time to do the required steps to assist with your request for return/replacement before the return window for suppliers closes at 30 days!**
- **Please do not wait until day 30, we may not be able to accommodate your request and will have to deny your return request.**

- **If your return for Defective product is denied for any reason, we will refer you to the Manufacturer for assistance with product issues. We will assist you with this if you are having trouble. Please review your Warranty for the item to make sure you fall under warranty with manufacturer.**
- **Please Note: The date of the start of this window is SHIPPED date, NOT delivery date!**

FIRST 30 DAYS:

- **Defective items:**
 - If there are any issues with your equipment, we must be notified in writing via email immediately with pictures of Damage or Reason you would like to return your items for either replacement or credit in the first **14 days!** Your request will be reviewed right away and we will call to discuss your options and come up with your return plan. Things to be aware of:
 - You **MUST** have Original Manufacturer packaging for iT1 Source to replace any shipping damaged or defective machines.
 - **We ask that you keep all original packaging for a minimum of 30 days.**
 - **Please note:** We are unable to accept a return for any product for ANY reason without original Serial number **matching** packaging!
 - Items will only be replaced by iT1 Source within 30 days of shipment if ample time has been provided and one of the following conditions are present.
 - (a) Item is found to be damage by shipper in transit, both visible or hidden damage – we require pictures of packaging and damage and a statement.
 - (b) Defective Upon Arrival, or
 - (c) After consulting with MFG tech support, ticket is issued, and it is stated in that ticket that the Mfg has agreed to provide full credit for item to iT1 Source and authorizes iT1 Source to replace the unit due to MFG Defects.
 - If items are to be replaced, we will require either to receive the product back or charge for the second shipment and credit for the first once it is received back. We will work with you to come up with a good solution if the need arises to replace the unit.
- **Returning unwanted items:**
 - **IF** you are just returning unwanted items, you may be only eligible to request the return in the first 14 days as we require time to request return authorization from distribution source.
 - **IF** you are just returning unwanted products, You must identify correctly if the Manufacturer seal is broken. There may be a restocking fee applied depending on the circumstances and the condition of your item.
 - **IF** you do not disclose the correct status of packaging **OR** if you do not package to avoid damage during return shipment, you risk have the item returned back to you and return denied.

30 DAYS OR LONGER:

- **30 or more days after shipment:**
 - **IF** you are outside of the 30-day return window or have not allowed iT1 Team enough time to request and gain Return Authorization and you have an issue with your device, iT1 Source will guide and assist you with reaching out to Manufacturer to take advantage of the warranty process.
 - **IF** you are outside of the 30-day return window or have not allowed iT1 Team enough time to request and gain Return Authorization from distribution source, your return will be denied.
 - Please note we will work with you to try avoid this if there is any way possible.

- **Non-Returnable Items (boxed or electronically delivered software or otherwise indicated on your order as Non-Returnable)**
 - ***IF*** your item is Software (Box or Electronically delivered) or was marked as NON_RETURNABLE we will not be able to process any return request unless item was damaged in shipping or not working as expected, we will work with you to come up with a resolution on a case-by-case basis.

Please read the guide above fully and if you have any questions, reach out to your account team for assistance.

Lisa Shook | iT1 Source | *Sr Account Manager*

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