

Innovative Office Solutions Punchout Training Guide

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Introduction

Overview

The purpose of this manual is to discuss the general use of the Innovative Office Solutions punchout catalog to be used when ordering **Office Supplies**. This document will provide an overview of the various functions of the catalog so that all end-users will have success in submitting an order using the punchout.

Intended Audience

This manual will be used by users of the SDezBuy application that SHOP to place orders electronically.

Documentation and Disclaimer

None

General Information

Innovative will be accepting Punchout and Non-Catalog POs from SDBOR. Innovative will not accept phone-in orders from SDBOR.

Contract - The Innovative Office Solutions punchout catalog in SDezBuy is based on the office supplies State Contract-RFP 612. The pricing will always be current since the punchout catalog is managed by Innovative Office Solutions.

Shipping Costs - Shipping costs are built-in to the pricing within the catalog unless a custom order such as stamps, engraved or embossed items.

Delivery Schedules – One, two and three day delivery is possible in South Dakota.

These SDBOR locations will have one day delivery:

- Aberdeen
- Brookings
- Madison
- Pierre
- Rapid City
- Sioux Falls
- Spearfish
- Vermillion

Adding Non-Catalog Items to a Punchout Order - Non-Catalog items are not to be added to a punchout order after the cart is returned to SDezBuy.

Smartfind Included with this Punchout - This means that items are found during a keyword search from the Shop-at-the-Top. You click on the [Order from Supplier](#) link which will take you directly to the product in the punchout.

Changes to a Punchout Cart - Users cannot make changes once the shopping cart is returned to the SDezBuy application. A new cart will have to be produced.

External Notes - External notes are not accepted and are not sent to the vendor.



Order Distribution – All orders through the punchout are sent to the vendor through a cXML integration portal and all non-catalog orders are sent via email to customer service representatives.

Order Confirmation and Shipping Confirmations - These will be emailed to the email address listed in the Ship To section of the PO.

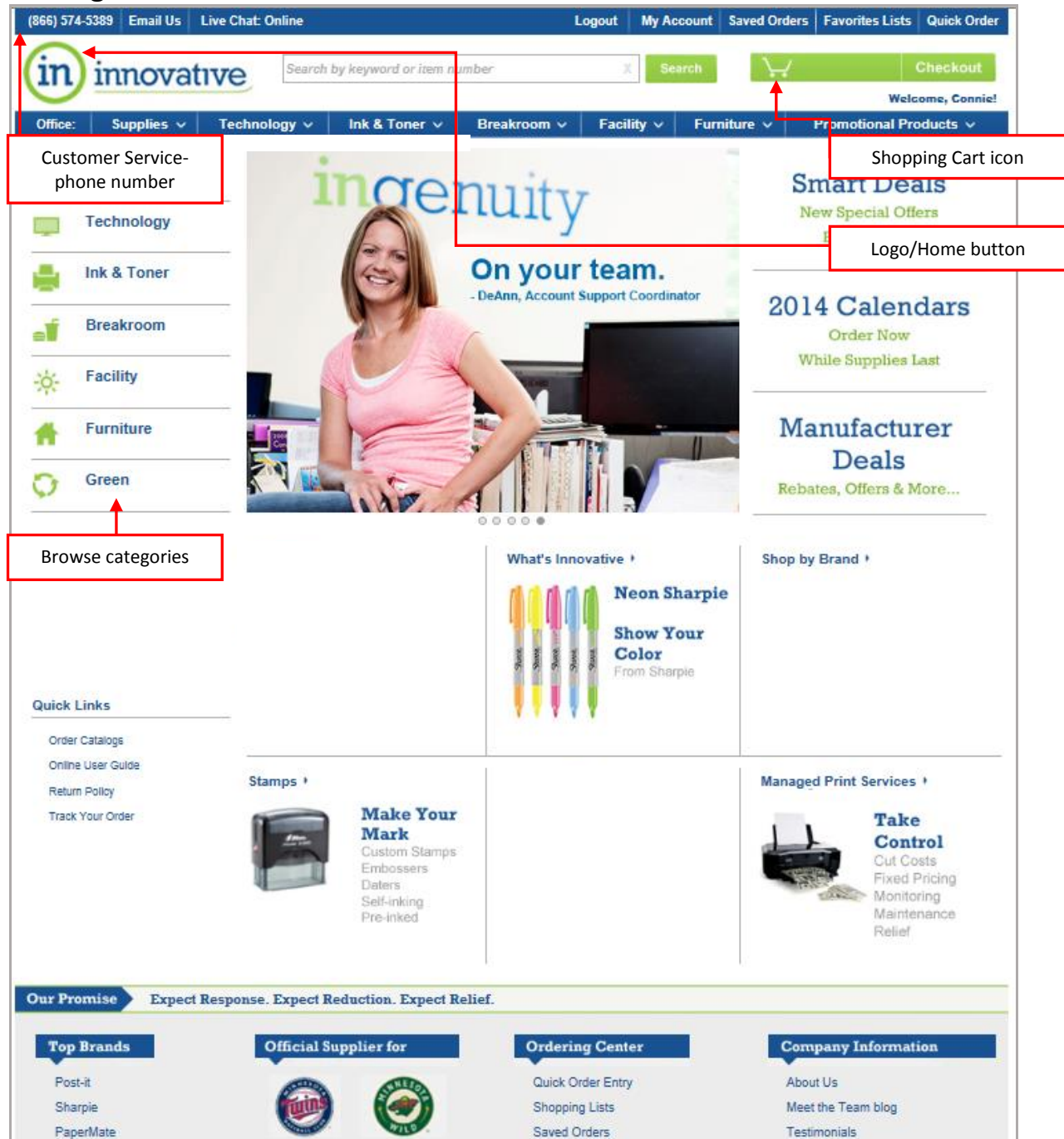
Duplicate Order Prevention - If the same PO number is duplicated for same customer, it will flag in their system so the order stops for review to determine if needed.

Timeout - Inactive punchout sessions will expire or timeout after 8-hours of inactivity. The carts will be saved and accessible, as will user favorites lists and order history, so the user will not have to start over.

Instructions

Click on the Innovative logo  at any time while in the punchout to return to the Home screen. Click on the Shopping Cart icon  at the top of the screen to go to your shopping cart from anywhere within the punchout.

Getting to Know the Home Screen



The screenshot shows the Innovative Office Solutions punchout home screen. The top navigation bar includes contact information (866) 574-5389, Email Us, Live Chat: Online, and user options: Logout, My Account, Saved Orders, Favorites Lists, and Quick Order. The main header features the Innovative logo, a search bar, and a Shopping Cart icon with a Checkout button. Below the header is a category menu with dropdowns for Office, Supplies, Technology, Ink & Toner, Breakroom, Facility, Furniture, and Promotional Products. A left sidebar lists categories: Technology, Ink & Toner, Breakroom, Facility, Furniture, and Green. The main content area features a large banner for 'ingenuity' with the tagline 'On your team.' and a photo of DeAnn, Account Support Coordinator. To the right of the banner are promotional sections: 'Smart Deals' with 'New Special Offers', '2014 Calendars' with 'Order Now While Supplies Last', and 'Manufacturer Deals' with 'Rebates, Offers & More...'. Below these are 'What's Innovative' (Neon Sharpie 'Show Your Color'), 'Shop by Brand', 'Stamps' (Make Your Mark), and 'Managed Print Services' (Take Control). A footer section contains 'Our Promise' (Expect Response. Expect Reduction. Expect Relief.) and four columns: 'Top Brands' (Post-it, Sharpie, PaperMate), 'Official Supplier for' (Twin and Inkredible Wild logos), 'Ordering Center' (Quick Order Entry, Shopping Lists, Saved Orders), and 'Company Information' (About Us, Meet the Team blog, Testimonials).

Customer Service-phone number

Shopping Cart icon

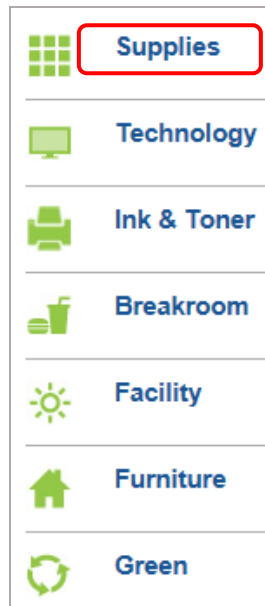
Logo/Home button

Browse categories

Start Shopping

1. Once you have entered the punchout catalog, you have the option to search for an item by description, Innovative item number or by manufacturer number in the keyword search box.
 - a. Enter the keyword or item number
 - b. Click on the Search button

2. You may also search for products by clicking into a specific category such as Supplies, Ink & Toner, Breakroom, etc.
 - a. Click on one of the categories in the list



- b. Click on Office: Supplies; Technology, Ink & Toner, etc. to view a drop-down list of items.

(866) 574-5389 Email Us Live Chat: Online Logout My Account Saved Orders Favorites Lists Quick Order

in innovative Search by keyword or item number Search 4 items Checkout

Welcome, Connie!

Office: **Supplies** Technology Ink & Toner Breakroom Facility Furniture Promotional Products

Batteries & Electrical Supplies	Identification Badges
Binders & Binding Supplies	Index Dividers
Breakroom Supplies	Labels & Stickers
Calendars, Planners & Personal	Mouse Pads & Wrist Rests
Organizers	Paper & Printable Media
Carrying Cases	Presentation/Display & Scheduling
Cash Handling	Boards
Classroom Teaching & Learning Materials	Room Accessories
Crafts & Recreation Room Products	Safety & Security
Cutting & Measuring Devices	Shipping & Mailroom
Desk Accessories & Workspace	Shredders & Accessories
Organizers	Stamps & Stamp Supplies
Envelopes, Mailers & Shipping Supplies	Staplers & Punches
File & Storage Cabinets	Tags & Tickets
File Folders, Portable & Storage Box Files	Tape, Adhesives & Fasteners
Forms, Recordkeeping & Reference	Writing & Correction Supplies
Materials	
General Office Accessories	

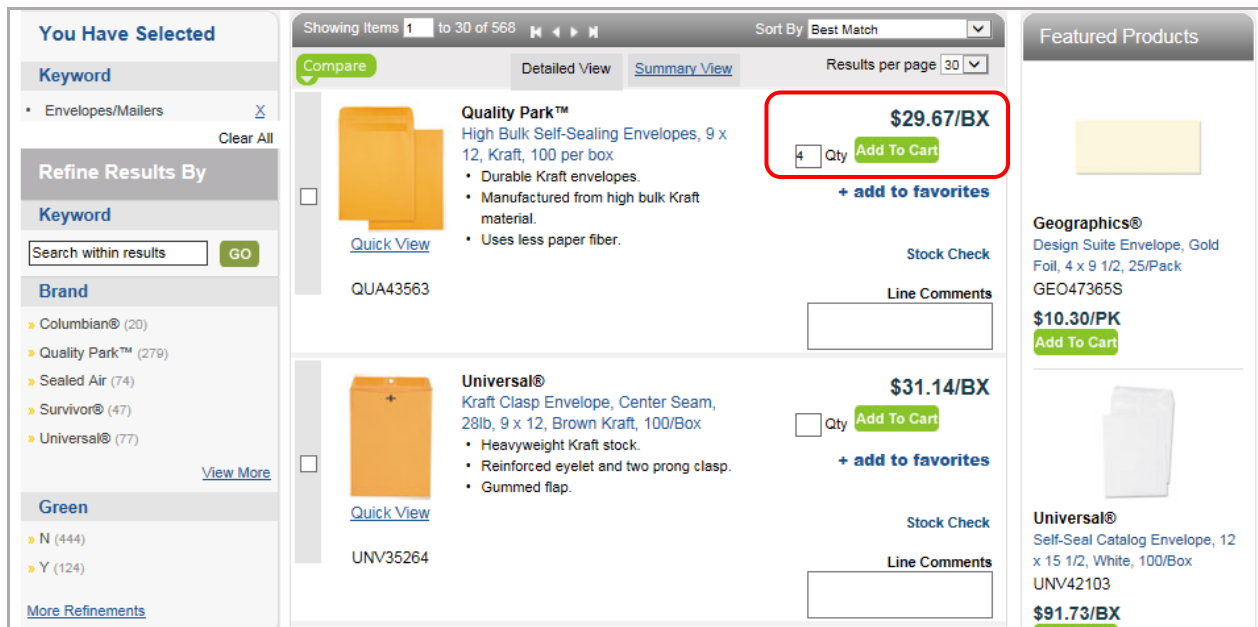
Smart Deals
New Special Offers
Every Month

2014 Calendars
Order Now
While Supplies Last

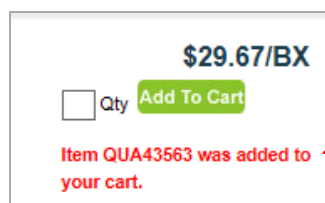
3. If you have selected a category, there may be sub-categories to select next.




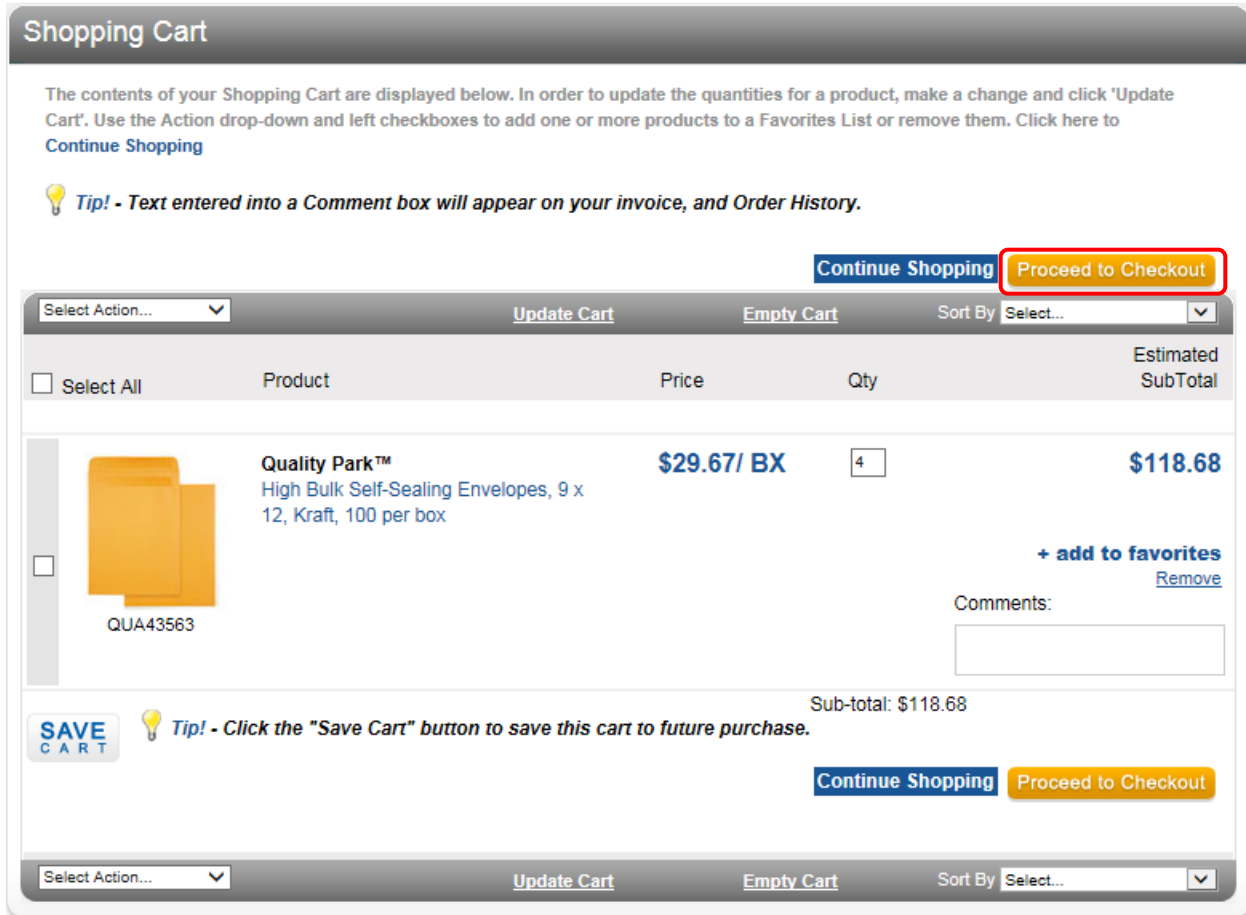
4. Use the filters in the left-hand column to narrow results (if necessary).
5. When you have found the item/items you are looking for, you can add them to your cart by entering a quantity in the Qty box, then clicking on the Qty **Add To Cart** button.



6. You will see this notation after clicking the “Add to Cart” button.




7. You may access the cart with the  button or you may search for other items as above.
8. Once in the cart, you will have several options. You may click on the [Continue Shopping](#) button to return to the home page, change the quantity (Qty), Update Cart, Empty Cart, remove items, add to favorites or [Proceed to Checkout](#).
 - a. In our example, we will click on the **Proceed to Checkout** button.




Shopping Cart

The contents of your Shopping Cart are displayed below. In order to update the quantities for a product, make a change and click 'Update Cart'. Use the Action drop-down and left checkboxes to add one or more products to a Favorites List or remove them. Click here to [Continue Shopping](#)

 **Tip!** - Text entered into a Comment box will appear on your invoice, and Order History.

[Continue Shopping](#) [Proceed to Checkout](#)


Select Action... [Update Cart](#) [Empty Cart](#) Sort By [Select...](#)

<input type="checkbox"/> Select All	Product	Price	Qty	Estimated SubTotal
<input type="checkbox"/>	 Quality Park™ High Bulk Self-Sealing Envelopes, 9 x 12, Kraft, 100 per box QUA43563	\$29.67/ BX	4	\$118.68

[+ add to favorites](#)
[Remove](#)

Comments:

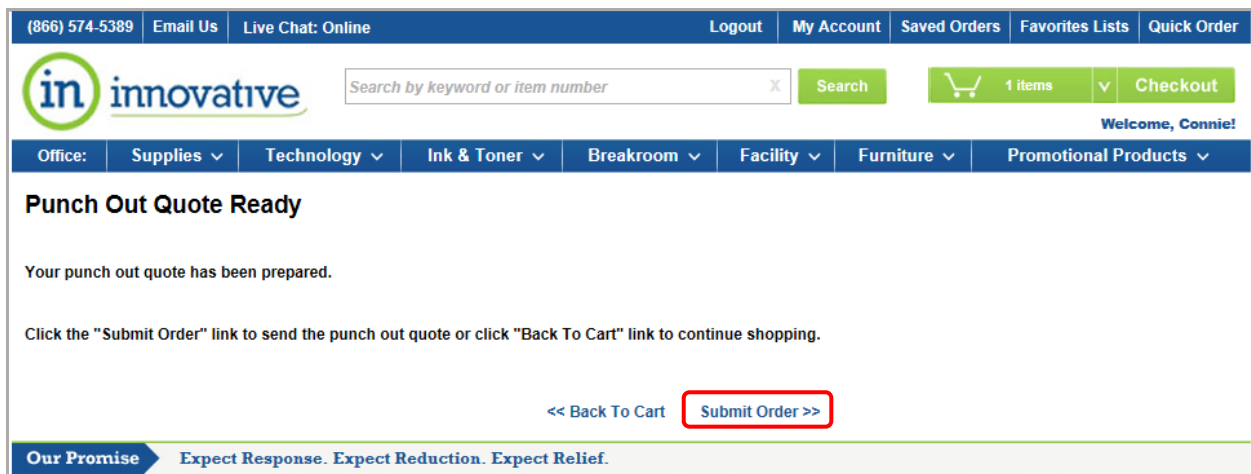
Sub-total: \$118.68

[SAVE CART](#)  **Tip!** - Click the "Save Cart" button to save this cart to future purchase.



[Continue Shopping](#) [Proceed to Checkout](#)

Select Action... [Update Cart](#) [Empty Cart](#) Sort By [Select...](#)

9. Click on the **Submit Order >>** link to return the contents of your shopping cart to SDezBuy.



(866) 574-5389 [Email Us](#) [Live Chat: Online](#) [Logout](#) [My Account](#) [Saved Orders](#) [Favorites Lists](#) [Quick Order](#)

 [Search](#)  [Checkout](#) Welcome, Connie!

Office: [Supplies](#) [Technology](#) [Ink & Toner](#) [Breakroom](#) [Facility](#) [Furniture](#) [Promotional Products](#)

Punch Out Quote Ready

Your punch out quote has been prepared.

Click the "Submit Order" link to send the punch out quote or click "Back To Cart" link to continue shopping.

[<< Back To Cart](#) [Submit Order >>](#)

Our Promise [Expect Response. Expect Reduction. Expect Relief.](#)

Quick Order

If you already know the item numbers of the products you wish to purchase, you may enter the item numbers and quantity quickly on the Quick Order Entry screen.

- Click on the **Quick Order** tab in far right of the main menu
- Enter the Item ID and Qty fields of the Quick Order Entry screen, tabbing to each field.
- Click on the **+ add to cart** link to add all the items to your cart.

Quick Order Entry

Enter Item Numbers or Part Numbers


You can quickly enter an order here, if you already know the item numbers.

Select the lines per page ▼
[clear](#) + add to cart

Item ID	Qty	Unit	Description	Your Price	Comments
<input type="text" value="SAN81505"/>	<input type="text" value="4"/>	EA	ERASER, DRY ERASE SURFACES	\$1.69	<input type="text"/>
<input type="text" value="BICGSM11BK"/>	<input type="text" value="2"/>	DZ	PEN, ROUND STIC, MED, BK	\$0.86	<input type="text"/>
<input type="text" value="MMM8101K"/>	<input type="text" value="12"/>	RL	TAPE, MAGIC, .75" X 1000", CR	\$1.69	<input type="text"/>
<input type="text" value="BICWOELP21"/>	<input type="text" value="3"/>	PK	FILM, CORRECTION 2PACK, WHT	\$3.34	<input type="text"/>

Sometimes you may have a pop-up window with a comparison of the item you selected and a consideration for a like item. It may be lower or higher in cost due to a different construction. You may choose Order original item or Order this item instead.

You have selected the following item: [- do not add to cart](#)




EXPO®
 SAN81505
 Dry Erase Eraser, Soft Pile, 5 1/8" w x 1 1/4" h

\$1.69/EA 4 Qty **\$6.76**

Order original item



Also Consider



Universal®
 UNV43663
 Dry Erase Eraser, Synthetic Wool Felt, 5w x 1 3/4d x 1h

\$4.85/EA 4 Qty **\$19.40**

Order this item instead

After the items have been added to your cart, you may review your cart contents or click on the  **4 items**  **Checkout** button.

State of SD Core

The core list is located in the Favorites Lists tab. The core list of 297 items are items that are most purchased by State employees and pricing is deeply discounted.

State employees may also create individual or shared favorites lists of their most purchased items. When ordering supplies in the punch-out catalog, items may be added to the favorites lists by clicking on the **+ add to favorites** link.

- a. Click on the **Favorites Lists** tab in the main menu at the top of the HomePage.

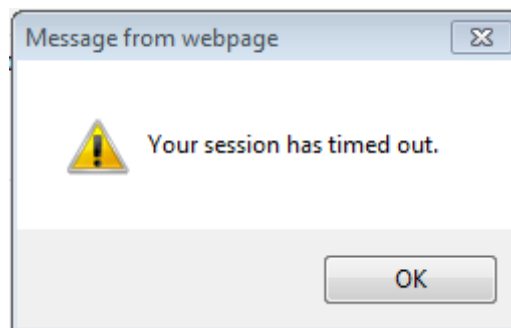


- b. Click on **View>>** to view the list of Core items. Please note that if you do a keyword search for these items they will appear in your search results also and at their discounted pricing.



Your session has expired!

With an 8-hour window, it is not often you will see the session timed-out message below.



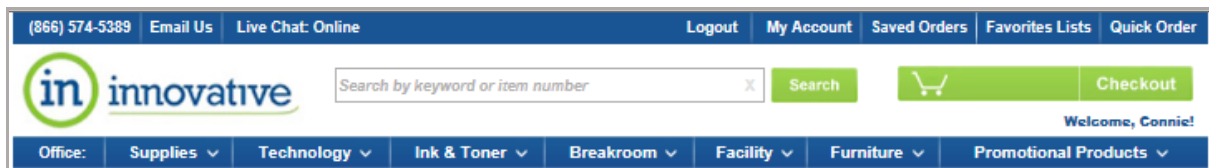
How to Get Support

There are two methods to contact customer support listed at the top of all screens within the punchout

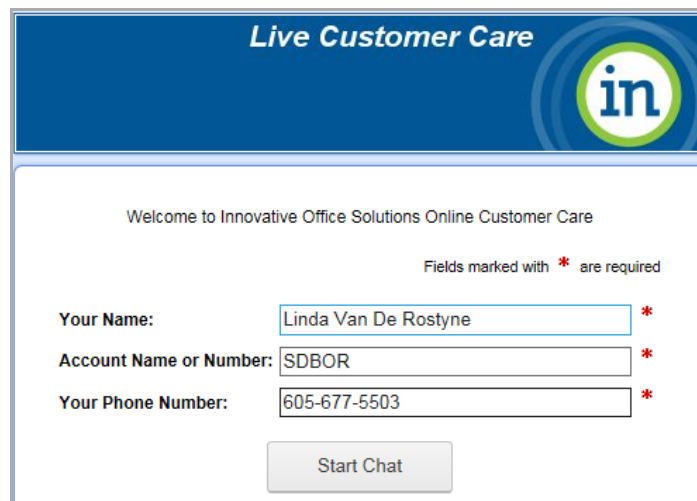
(866) 574-5389 ~~Email Us~~ **Live Chat: Online**. Contact customer support for order status, order changes, cancellations, returns and problems.

Requesting Support through the Live Chat: Online

1. Click on the **Live Chat: Online** tab at the top of the homepage of the punchout.



2. Type your name in the Your Name: field.
3. Type SDBOR in the Account Name or Number: field.
4. Type your phone number in the Your Phone Number: field.
5. Click on the Start Chat button to begin chatting with Customer Care at Innovative.

A screenshot of the 'Live Customer Care' chat interface. The header is blue with the text 'Live Customer Care' and the Innovative logo. Below the header, it says 'Welcome to Innovative Office Solutions Online Customer Care'. A note indicates 'Fields marked with * are required'. There are three input fields: 'Your Name:' with the value 'Linda Van De Rostyne', 'Account Name or Number:' with the value 'SDBOR', and 'Your Phone Number:' with the value '605-677-5503'. Each field has a red asterisk to its right. A 'Start Chat' button is located at the bottom of the form.

Requesting Quotes or Support through Email

1. Request Quotes or help by using the following email address: southdakota@innovativeos.com. You may need quotes for custom stamps, engraved or embossed items.