



APEX QUICK GUIDE FOR ONLINE ORDERING

Login Benefits

- See real-time inventory.
- Save time with Express Order and saved shopping lists.
- Track order status and order history.

If you have trouble logging in, please contact customerservice@totalapex.com or call 877.901.APEX (2739).

Edit Profile / Change Password

- After logging in, click on **My Account** in the green bar at the top.
- On the green navigation bar on the left, click on **Edit Profile** under **My Settings**.
- Create a new password, confirm the password, and/or edit contact information.
- Click **SAVE CHANGES** on the bottom right.

Create Sub-Users

All online accounts have a primary user (parent). If additional people in your company will be ordering online, sub-user (child) accounts can be created with their email address and unique password.

- After logging in, click on **My Account** in the green bar at the top.
- On the green navigation bar on the left, click on **Manage Users** under **My Settings**.
- On the far right, click on **ADD USER**.
- Fill in the required fields with an asterisk (*).
- Limit user privileges / restrictions if appropriate. All privileges are enabled by default.
- Click **CONTINUE** and add more users if desired.

View On Hand Inventory

On hand quantity is not visible to the public. You must be logged into your account to view this information, and it is only visible on the item detail page. There are two ways to view the item detail page...

- Enter a part number in the search field at the top and click **GO**. If multiple part numbers appear, click on the picture or description of the item you want.
- Select a main category, then sub-category, and click on the picture or description of the item you want.

On hand inventory is shown on the right side of the quantity selector and is refreshed nightly.

Create Shopping Lists

Shopping lists are a great time saver for future orders! Unlike carts that empty when you checkout, shopping lists are saved until you decide to delete them. And you can create as many lists as you want... lists for each of your service techs, different product types, or whatever makes sense for your business.

- After logging in, click on **My Account** in the green bar at the top.
- On the green navigation bar on the left, click on **Manage My Lists** under **My Settings**.
- On the right side, click on **CREATE NEW LIST**.
- Give your list a name (description is optional), then click **CONTINUE** to save it.
- There are three ways to add items to a list:
 - From an item's detail page
 - From a shopping cart
 - From an express order

When it's time to place an order...

- Click on **My Account** in the green bar at the top.
- Click on the saved list on the green navigation bar under **My Tools**.
- Click the checkbox on the left next to each item you want or click the Select All checkbox above the item list.
- Scroll to the bottom of the page and click **ADD TO CART**.

Express Order

Express order is another quick and easy way to fill a shopping cart. There are two methods: **Express Order** and **Import Order**. Even though **Import Order** has more steps, it is probably the fastest way to order if you have a spreadsheet with part numbers and quantities to be ordered. Here's how...

- After logging in, click on **My Account** in the green bar at the top.
- On the green navigation bar on the left, click on **Express Order** under **My Orders**.
- **Express Order** at the top of the page:
 - Fill in the part numbers and quantities in the blank fields on the right side.
 - If you need additional fields, click on **Show More Item Boxes**. Repeat as many times as needed.
 - When the list is complete click **ADD TO CART**.
- **Import Order** at the bottom of the page:

- Click on **Download Template** under Step 1. (In Windows 10 the file appears in the lower left corner of the internet browser.)
- Save the express_order_template.xlsx on your computer.
- Fill in the part numbers and quantities onto the template. Either copy and paste from another spreadsheet, or manually type in the information and save.
- To upload the template, click and a window will open. Locate the file on your computer. Click on it to select it and the file name will appear in the File name field. Then click Open.
- Click **IMPORT** and the items on the template will be added to a shopping cart.

View Orders

- After logging in, click on **My Account** in the green bar at the top.
- On the green navigation bar on the left, click on **View Orders**, **Open Invoices** or **Paid Invoices** under **My Orders**.
 - **View Orders** shows orders in the ordered, picked, packed and shipped stages. When orders move to the invoice stage they leave this folder.
 - **Open Invoices** shows orders that have progressed from the ordered, picked, packed and shipped stages, and are now awaiting payment.
 - **Paid Invoices** shows orders that have moved to the final stage. If you are looking for a specific order and don't see it in the list, fill out the **Search Criteria**, or **Filter by Date**.
- To see the items on each order, click on **Details** on the far right.

Detailed Online Ordering Guide

A fifteen page guide with additional information and illustrations is available at the bottom of the homepage https://totalapex.com/download/APEX_ONLINE_ORDERING_GUIDE.pdf

Assistance

Email customerservice@totalapex.com or call 877.901.APEX (2739).