

Miller's Building Supply, Inc.

Since 1982



25 years of Quality Service

I-Net Account Online

Instruction

Manual

Revised 06/07

We trust you will find the I-Net Account Online system user friendly and make you more efficient in your business. Our goal is to look for things that will help us partner together for the long term. Please feel free to let us know how we are doing.

If you ever have any questions regarding the I-Net package please feel free to call or email the office and we will work with you make sure that your questions are answered. You will find contact information listed below.

Office Phone: 574-534-3973

Fax Number: 574-533-8604

Email Addresses: Nate Miller – nate.miller@millerscorp.com
Richard Miller – richard.miller@millerscorp.com
LaMar Miller - lamar.miller@millerscorp.com

Accessing, Logging On, and Exiting iNet

Use the following procedure to access a store's iNet site, log on the site, and exit when you have finished your iNet session. Click one of the following to take you to the procedure steps:

[Accessing the iNet Store's Site](#)

[Logging On to iNet](#)

[Exiting iNet](#)

Accessing the iNet Store's Site

To access the iNet store's site on the Internet, do the following:

1. Connect to the Internet using your normal procedure.
2. In the Address box of your Internet browser, enter the web site address given to you by the iNet store, and press ENTER.
3. From the iNet store's web site, click on the appropriate link to take you to the OrderPro Sign In screen.

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Logging On to iNet

From the iNet Sign In screen, do the following:

1. At User Name, type the user name that was assigned to you by the iNet store. Note: If your user name contains any letters, you must type them in CAPITAL LETTERS.
2. Press Tab.
3. At Password, type the password that was assigned to you by the iNet store. Note: Passwords are case-sensitive. If your password contains any letters, enter them exactly as given to you by the iNet store.
4. Click Sign In.
5. The "home page" of the iNet store displays on your screen. You are now ready to proceed by clicking one of the categories in the left pane of the window.
6. Note: If the home page of the iNet store does not display, make sure your web browser or firewall software is set up to accept "cookies." A "cookie" is a small piece of information sent by a web server to your PC so it can be read back from the browser at a later time.

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Exiting iNet

1. Click Sign Off at the top of the window.
2. A message displays to confirm that you wish to exit iNet.

3. Click Yes. You will now see a 'Signed Off' screen telling you your account has been secured.
4. Click the X in the upper right corner to close the window.

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What You Can Do in iNet

The iNet store has set you up with certain capabilities, so as you peruse the online help, keep in mind that you may or may not have access to all the functionality of iNet that is discussed in online help.

Finding Where You Last Left Off

You can exit iNet at any time, even if you are in the middle of creating a quote or an order. Fortunately, iNet remembers where you left off. The next time you log in to the iNet store in which you have an incomplete transaction, a message displays on the iNet "home page," informing you that you can resume work on your estimate or order by clicking View Current. We do recommend that you exit from iNet using the Signoff feature. If you plan to work on a document over a series of sessions, you should begin the transaction as a quote and "Save" the document when you are done with your session. Saving the quote allows you to recall and edit the document at a later time.

Changing Your Password

Use the following procedure to change your password. Note: you can not change your User Name-- only your password. If you want your User Name changed, you must contact the iNet store.

1. From the list in the left pane, click Options.
2. Click Change Password.
3. In the New Password box, enter a new password. If you use any letters in your new password, make sure you type them in CAPITAL LETTERS.
4. In the Re-Enter Password box, enter the new password again.
5. Click Change Password.

Viewing Account Information

You can view your account balance or look up your account's transactions (invoices, credits, payments, adjustments, finance charges, etc.). Click one of the following to take you to the procedure steps:

[Viewing Your Account Balance](#)

[Looking Up Your Account's Documents](#)

[Looking Up Your Account's Archived Documents](#)

Viewing Your Account Balance

1. From the list in the left pane, click Balances. The balance of your account automatically displays, along with other information about your account.
2. If you have Job accounts:
 - i. To view the balance of a particular Job account, enter the job number in the Job Number box, then click Account Balances. If you do not know the job number, click the "Select Jobs" button to see a listing of jobs for your account. Click on the desired job number.
 - ii. To view the consolidated balance of all Job accounts, click Consolidated Balances.

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Looking Up Your Account's Documents

1. From the list in the left page, click Documents. The first page of documents for your account automatically displays.
2. To view the next page of documents, click the More Documents button at the bottom of the grid (if there are no more documents, the More Documents button does not display).
3. Repeat step 2 to view subsequent pages of documents.
4. If you know the document number of the document you want to view, type it in the Document # box and click Refresh Documents.
5. If you want to view a particular type of document only, such as Invoices, Credits, or Payments, click the arrow in the Document Type box and select a document type to view. Then click Refresh Documents.
6. If you want to view documents for a particular job, do one of the following:
 - i. If you know the job number, enter it in the Job Number box. Then click Refresh Documents.
 - ii. If you don't know the job number, click Select Job. Then click on the appropriate job number from the list that displays.
7. If you want to view and/or print the detail of a particular invoice or credit, you can do so if the document number in the middle of the grid displays in blue underlined text.
 - i. Click on the document number. The document detail displays.

- ii. If you want to see more information about a particular SKU on the document, click on the SKU number (in blue underlined text). When you are finished viewing the information, click Back.
- iii. If you want to print the document, click Print Document at the top of the screen.

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Looking Up Your Account's Archived Documents

If "History" displays as a category in the left pane of the iNet store's home page, then you can view your account's past documents (point-of-sale-generated invoices and credits). If "History" does not display, skip this section.

Note: The iNet store determines how long they archive invoices, which in turn determines how far back in time you can view invoices.

1. From the list in the left pane, click History. The Account History screen displays, containing a grid in which your account's archived documents are listed.
2. Do one of the following:
3. Click on any document number in the grid to display the archived document.
4. Enter an item number (SKU) in the Item Number box and click Refresh History to display all documents containing the item number you entered.
5. Enter a document number in the Document Number box and click Refresh History to view a particular document.
6. Enter a cutoff date in the Cutoff Date box and click Refresh History to view all documents that occurred on or before the cutoff date you entered.
7. Enter a job number in the Job Number box or click Select Job. Once a job is selected, click Refresh History to view all documents for the job number you entered.

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Looking Up Item Information

You may want to look up items in the iNet store's inventory because you are creating an order or quote, and need to know what items are available to you. Or, perhaps you are just inquiring about the types of items the store carries. There are two methods of looking up inventory items: Search and Departments. Click one of the following to take you to the procedure steps:

[Looking up items using Search](#)

[Looking up items using Departments](#)

Looking Up Items Using Search

1. From the list in the left pane, click Search.
2. Click the circle next to the search method you would like to use: Description Word, Manufacturer Part Number, Item Number, or UPC Number.
3. In the Search For box, enter the information you want to search for. Note: If you chose Description Word as your search method, you may want to use a wildcard search in this field (how to use wildcards is explained on the screen, just below the Search For box)..
4. Click Search.
5. For more information about an item, click on it. If desired, you can add an item(s) to an order or quote you are currently creating by entering a quantity in the Quantity box, and then clicking Add Items.

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Looking Up Items Using Departments

1. From the list in the left pane, click Departments.
2. Click Show Categories or Show Catalog Items.
3. Click on a Department in the grid.
 - i. If you selected Show Categories in step 2, continue to narrow your search by selecting subcategories until you reach the level where actual inventory items display. (Note: the iNet store can have up to two subcategories per department, but they may have only one or possibly none at all).
 - ii. If you selected Show Inventory Items, a list of inventory items displays immediately.
4. For more information about an item, click on it. If desired, you can add an item(s) to an order or quote you are currently creating by entering a quantity in the Quantity box, and then clicking Add Items.

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Orders and Quotes Overview

Creating orders and quotes in the iNet store from your PC is quick and easy. Although the cycle of events may vary, the following describes a typical cycle of events between you and the iNet store.

1. You create a quote.
 2. You save the quote, which tells the iNet store that you're still working on the quote, and are not ready to submit it for review yet
- or
- You submit the quote to the iNet store for review, because you do not wish to make any further additions or changes to the quote. The quote is automatically marked "Submitted".
 - If you saved the quote, you eventually submit it for review. The quote is automatically marked "Submitted."
 - The iNet store reviews the quote, makes any necessary changes to it, and marks the quote "reviewed." You view the quote, and notice its status has changed from "Submitted" to "Reviewed".
 - You print the quote for reference. You then turn the quote into an order, because you are satisfied with the quote, and want to order the merchandise.
 - The iNet store fills the order.

Creating Orders and Quotes

1. From the list in the left pane, click Create New. The Create New Quote or Order screen displays.
2. In the Type box, click the arrow and select Quote or Order from the drop-down list.
3. If you are creating an order or quote for a specific job, do one of the following:
 - i. If you know the job number, enter it in the Job box.
 - ii. If you don't know the job number, click Select Job. Then click the appropriate job number from the list that displays.
4. In the PO box, enter a purchase order number, if required.
5. Click the Create Quote or Order button.
6. If you know the SKU number of the item you want to add to the transaction, enter it in the SKU box. Then enter the quantity you want to order in the Quantity box. If desired, enter a comment in the Comment box. Click Add Item. Repeat this process as necessary to add other items to the transaction.
7. If you don't know the SKU of the item(s) you want to add to the transaction, and you want to search for the item(s) by Description, Manufacturer Part Number, Item Number, or UPC Number, do the following:
 - i. Click Catalog Search.
 - ii. Click next to the search method you want to use (Description, Manufacturer Part Number, Item Number, or UPC Number).
 - iii. Enter the search criteria in the Search For box, then click Search.
 - iv. Once you've located the item(s) you want to order, enter a quantity in the Quantity box to the left of the item(s) and click Add Items.
 - v. As necessary, repeat steps i through iv to add additional items to the transaction.
8. If you don't know the SKU of the item(s) you want to add to the transaction, and you want to search for the item(s) by Department, do the following:
 - i. Click Departments.
 - ii. Click the department you want to search (and then click the sub-department, if available). Once you've located the item(s) you want to order, enter a quantity in the Quantity box to the left of the item(s) and click Add Items.
 - iii. As necessary, repeat steps i and ii to add additional items to the transaction.

Editing Orders and Quotes in Progress

Use the procedure below to modify an order or quote in progress. Note: you can not edit a submitted quote or order. To edit a saved quote, see "Editing a Saved Quote."

1. If the order or quote in progress isn't already displayed, then from the list in the left pane, click View Current. The quote or order currently in progress displays.
2. If you want to change the quantity of an item, double-click in the Quantity field, enter a new quantity, and click Update Items.
3. If you want to remove an item from the quote or order, click in the Remove box to the left of the item so that a checkmark displays in the box. Then click Update Items.

Editing Saved Quotes

If you have saved a quote, you can edit it as often as you like before you submit it. For more information about saving a quote, see the topic "Saving Quotes."

1. From the list in the left pane, click View All. All outstanding quotes and orders display in the grid.
2. *(Optional)* In the Document Type box, select Quotes, and then click Refresh Documents. Only outstanding quotes display in the grid.
3. Click the Doc # (in blue text) of the saved quote you want to edit. Note: all saved quotes have the word "Saved" in the status column of the grid.
4. Click Edit Document.
5. If you want to change the quantity of an item on the quote, double-click in the Quantity field, enter a new quantity, and click Update Items.
6. If you want to remove an item from the quote, click in the Remove box to the left of the item so that a checkmark displays in the box. Then click Update Items.
7. Click Finish Document.
8. Do one of the following:
 - i. If you intend to work on the quote again at a later time before submitting it, click Save Document.
 - ii. If you are finished creating the quote and want to submit it to the iNet store now, click Submit Document.

Turning Quotes into Orders

Once you are satisfied with a quote, use the following procedure to turn the quote into an order so that the iNet store knows you intend to purchase the merchandise.

1. If the quote is already displayed, skip to step v.
2. From the left pane, click View All. All outstanding orders and quotes for your account display in the grid.
3. (*Optional*) To make locating the quote easier, you can limit the information that displays in the grid. Do one or both of the following:
 - i. To display only quotes in the grid, then in the Document Type box, select Quotes.
 - ii. To display quotes for a specific job only,
 - a. and you know the job number, enter it in the Job box.
 - b. and you don't know the job number, click Select Job. Then click the appropriate job number from the list that displays.
 - iii. If you followed either or both procedures in step ii, click Refresh Documents.
 - iv. Click the document number (highlighted in blue) of the appropriate quote in the grid.
 - v. Click Create Order (in the upper right of the window). A confirmation message displays.
 - vi. Click OK.

Viewing Outstanding Orders and Quotes

Use the following procedure to view outstanding orders and quotes for your account.

1. From the left pane, click View All. All outstanding orders and quotes for your account display in the grid.
2. *(Optional)* You can limit the information that displays in the grid. Do one or both of the following:
 - i. If you want only orders or only quotes to display in the grid, then in the Document Type box, select Orders or Quotes.
 - ii. If you want only transactions for a specific job to display,
 - a. and you know the job number, enter it in the Job box.
 - b. and you don't know the job number, click Select Job. Then click the appropriate job number from the list that displays.
3. If you followed either or both procedures in step 2, click Refresh Documents.

Printing and Copying Orders or Quotes

You may want to print an order or quote as a reference document. You may also want to copy an order or quote so you can use it as a template for another quote or order.

Use the following procedure to print or copy an order or quote.

1. If the order or quote is already displayed, skip to step v.
2. From the left pane, click View All. All outstanding orders and quotes for your account display in the grid.
3. (*Optional*) To make locating the order or quote easier, you can limit the information that displays in the grid. Do one or both of the following:
 - i. To display only quotes or only orders in the grid, then in the Document Type box, select Quotes or Orders.
 - ii. To display quotes or orders for a specific job only,
 - a. and you know the job number, enter it in the Job box.
 - b. and you don't know the job number, click Select Job. Then click the appropriate job number from the list that displays.
 - iii. If you followed either or both procedures in step ii, click Refresh Documents.
 - iv. Click the document number (highlighted in blue) of the appropriate quote or order in the grid.
 - v. Click Print to print the document, or click Copy to copy it.

Submitting Orders and Quotes

1. If the order or quote in progress isn't already displayed, then From the list in the left pane, click View Current. The quote or order currently in progress displays.
2. If the quote or order is ready to submit, click Finish Document.

If you need to modify the quote or order before submitting it, refer to the topic entitled "Editing Orders and Quotes in Progress."

3. (*Optional*) Enter any of the applicable information on the screen such as P.O. number, Reference, special instructions, shipping address, etc.
4. Click Submit Document.

Important: You must click Submit Document for your quote or order to be submitted to the iNet store.

5. (*Optional*) You can print the screen for future reference. To do so, click Print on your browser's toolbar.

Canceling Orders and Quotes in Progress

Use the following procedure to cancel a quote or order in progress. Note: You can not cancel a saved or submitted quote, nor can you cancel a submitted order.

1. If the order or quote in progress isn't already displayed, then from the list in the left pane, click View Current. The quote or order currently in progress displays.
2. Click Cancel Document. A dialog box displays to confirm your cancellation.
3. Click OK.