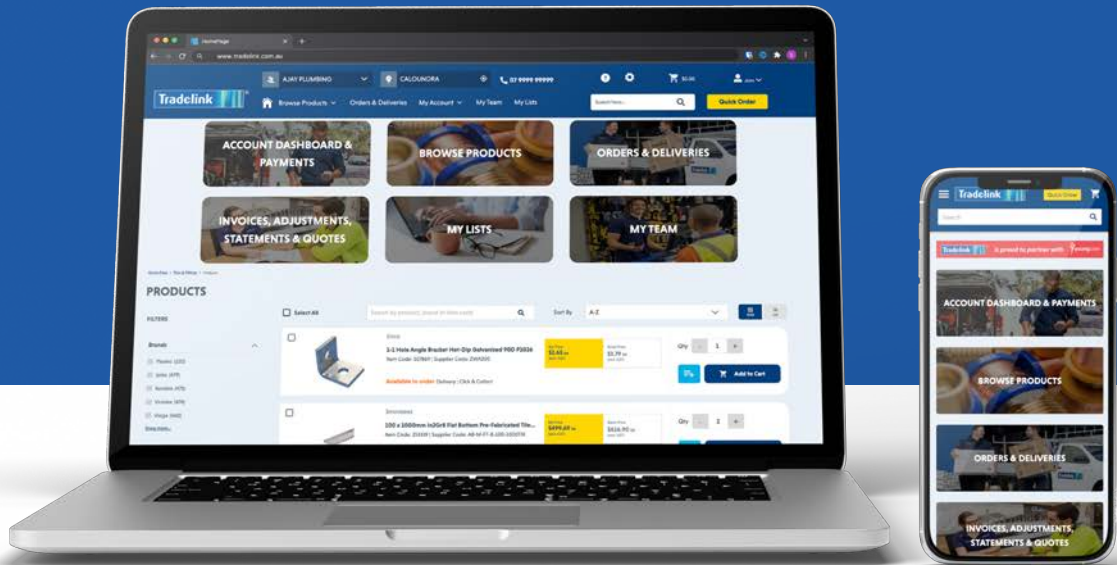




How-To

SAVE TIME, *PLUMB ONLINE*

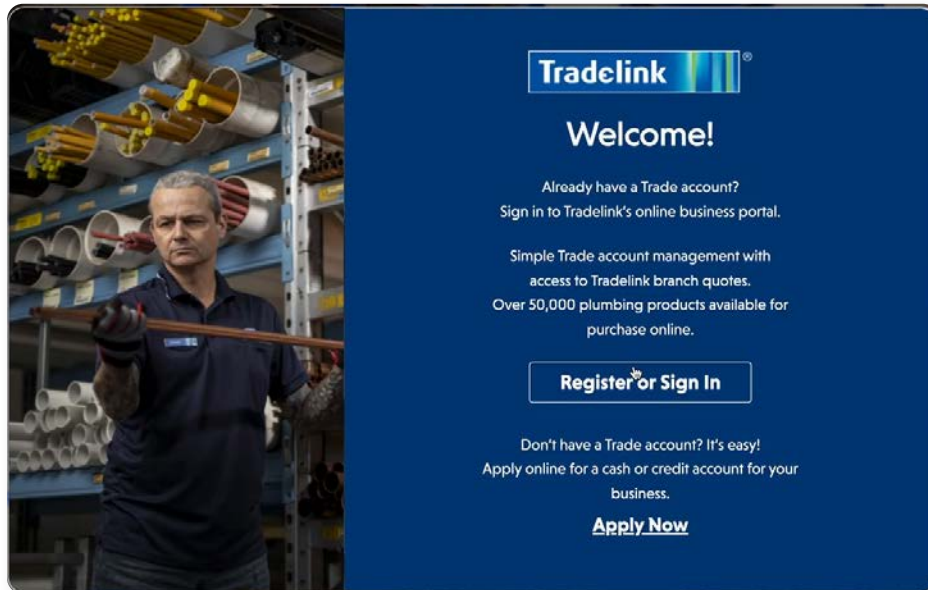


2	Register & Sign In
6	Troubleshooting
10	Manage your Account
21	Use Store Finder
25	Product Search

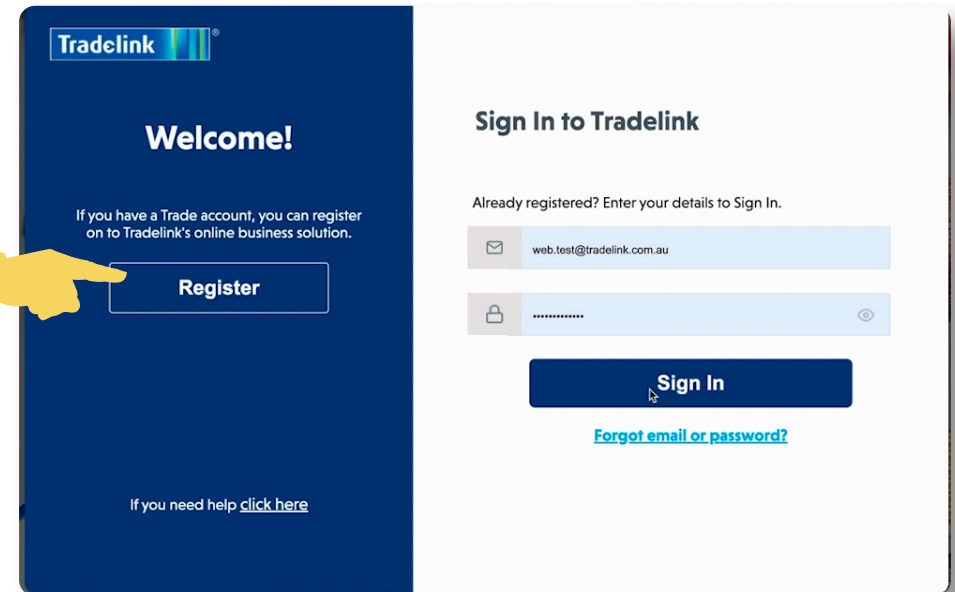
29	Shopping Cart
39	My Lists
41	Quick Order
43	Orders & Deliveries
47	Manage a Team

Register & Sign in

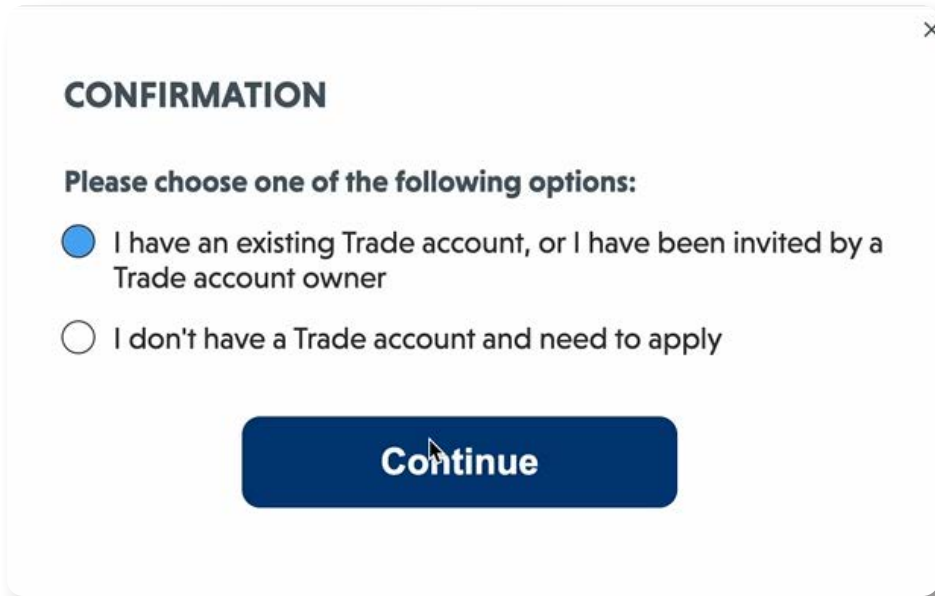
Welcome to the 'how-to guide' for Trade link's new online trade portal. In this chapter, we will get you registered and signed in, so you can start using the platform to manage your business.



1. Click the Register or Sign In button.



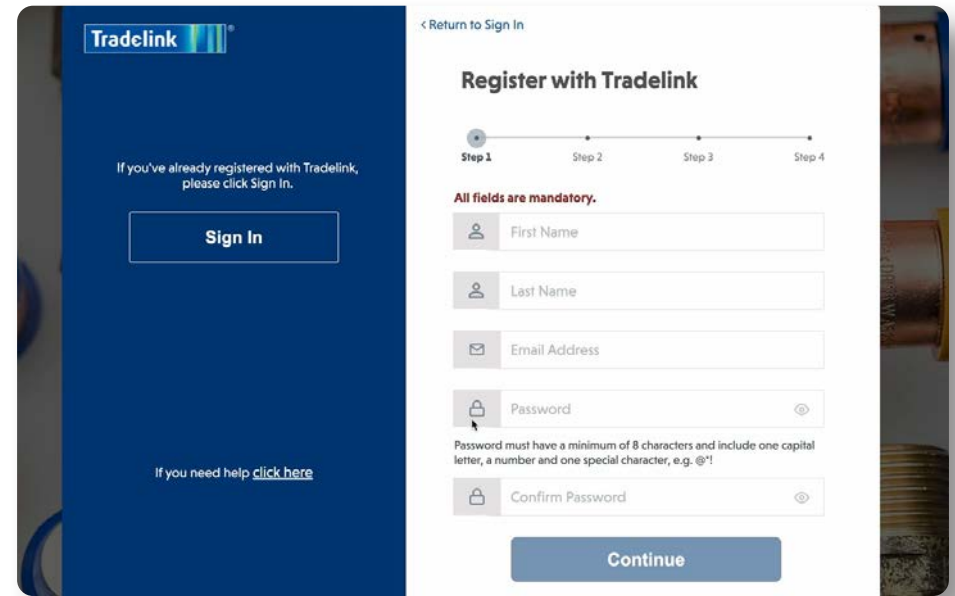
2. Select Register if you have an existing Tradelink Trade Account and are using the portal for the very first time.



3. If you have an existing Tradelink account or have been invited to an account select the first option.

If you do not have an existing Tradelink account, you will need to apply (using the second option).

Click Continue.

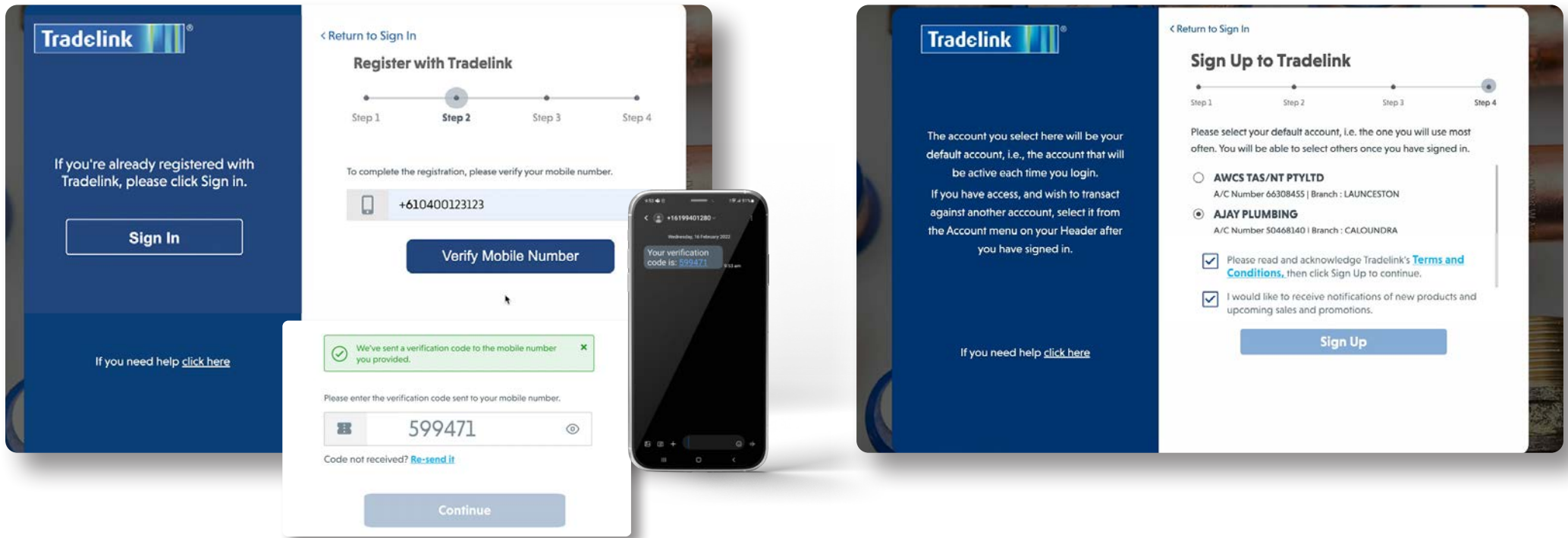


4. Complete all requested fields.

Ensure your password meets all noted requirements.

Click Continue.

TIP: Check on the eye icons in the password fields to ensure your passwords match.



5. Enter your mobile number. Please ensure it is entered correctly as you will be sent an SMS.

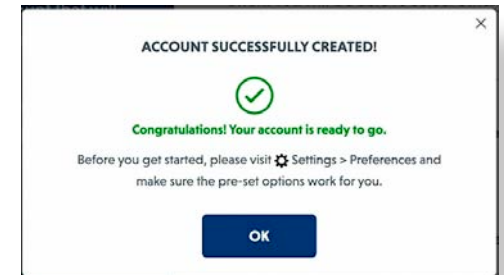
Click Verify Mobile Number.

Enter the 6 digit code you receive via SMS.

NOTE: The mobile number must match the primary mobile number listed on your Trade Account to register your account.

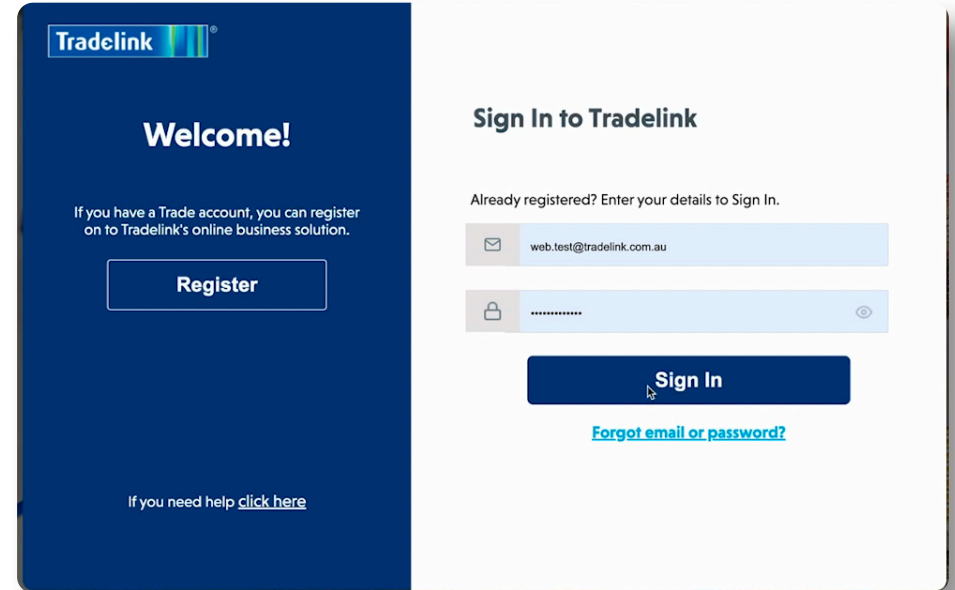
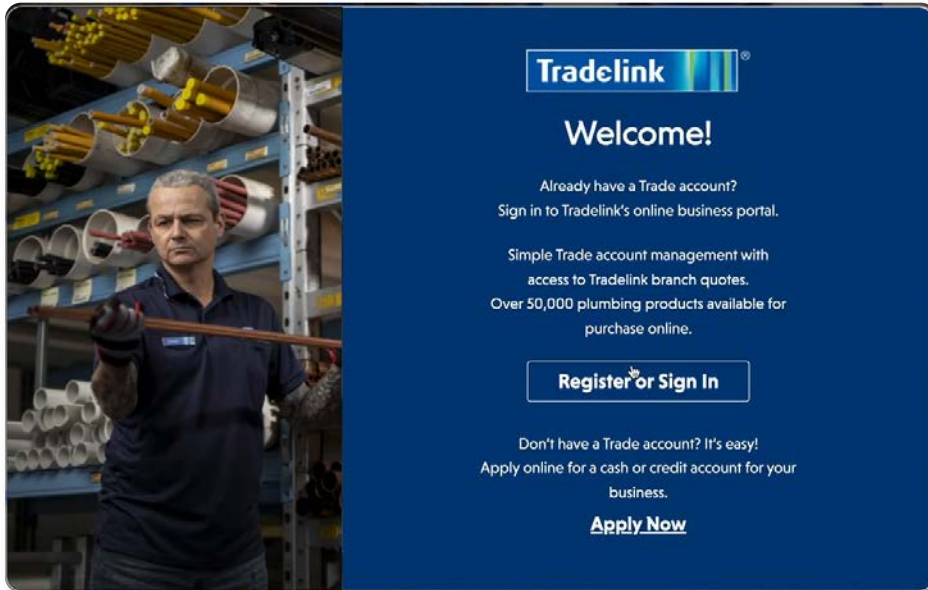
6. Select your 'Default' business. This is only relevant if you have more than one. This will now be the active default business every time you sign in moving forward.

NOTE: For those who have a third party accounting intergration with Tradedoor, you will receive a pop-up to use the software. Click **Yes**.



THAT'S IT!
Your Tradelink account is linked and you are now registered!

You're set up and ready to start exploring the site. Each time you visit the site from now on, signing in is as simple as entering your email and password.



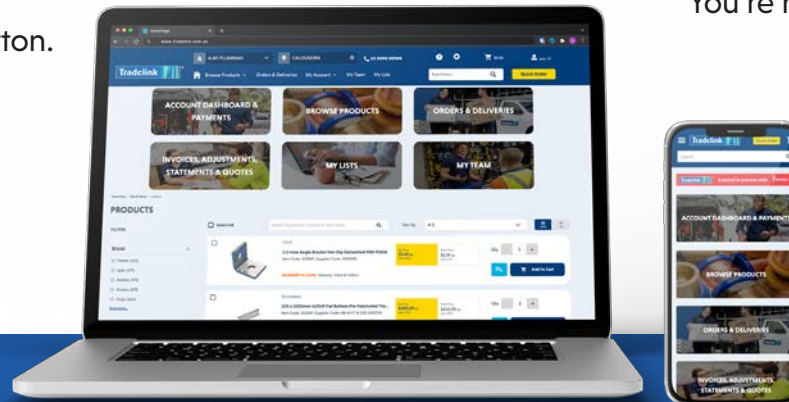
After Registering, you'll just need your email and password to sign in moving forward.

1. Visit www.tradeportal.tradelink.com.au.
2. Click on the **Register** or **Sign In** button.

3. Enter your email and password.
4. Click **Sign In**.

You're ready to start exploring the portal!

SAVE TIME, **PLUMB ONLINE**



Sign In

Troubleshooting

Welcome Page Error

The screenshot shows the Tradelink 'Welcome!' page. On the left, there is a 'Register' button. On the right, the 'Sign In to Tradelink' form has an error message: 'The email or password you have entered is either incorrect or you have not yet registered. Please check and try again.' Below the error message, there are input fields for email and password, and a 'Sign In' button. A link for 'Forgot email or password?' is also visible.

SOLUTION: User is trying to **Sign In** without completing **Registration**, or they have entered the wrong details. They should try again or select **Register** and complete the process in full.

Sign Up Page Error

The screenshot shows the Tradelink 'Sign Up to Tradelink' page. It features a progress indicator with four steps, where Step 1 is active. An error message states: 'Sorry something went wrong, please check your details and try again.' Below this, it says 'All fields are mandatory.' and lists input fields for 'Name', 'Username', 'Email', and 'Password'. A password requirement note is visible: 'Password must have a minimum of 8 characters and include one capital letter, a number and one special character, e.g. @*!'.

SOLUTION: User is trying to **Register** after already starting the process and getting beyond Step 1. Step 1 creates a profile for the user in a security portal. User should select **Sign In**, enter their email and password and complete Registration.

TIP: Users only need to Register on one device, i.e. Desktop OR Mobile, not both. Once users Register on either device, they'll be able to Sign In on the other.

Mobile Verification Error

The screenshot shows the Tradelink mobile verification process. On the left is a dark blue sidebar with the Tradelink logo and a 'Sign In' button. The main content area is white and titled 'Sign Up to Tradelink'. It features a progress bar with four steps: Step 1, Step 2 (active), Step 3, and Step 4. A red error message box states: 'The number you've entered is either incorrect or you have already registered on Tradelink. Please try again or click Sign In to continue.' Below this is a text input field for a mobile number, showing '+61' and a masked number. A 'Verify Mobile Number' button is at the bottom.

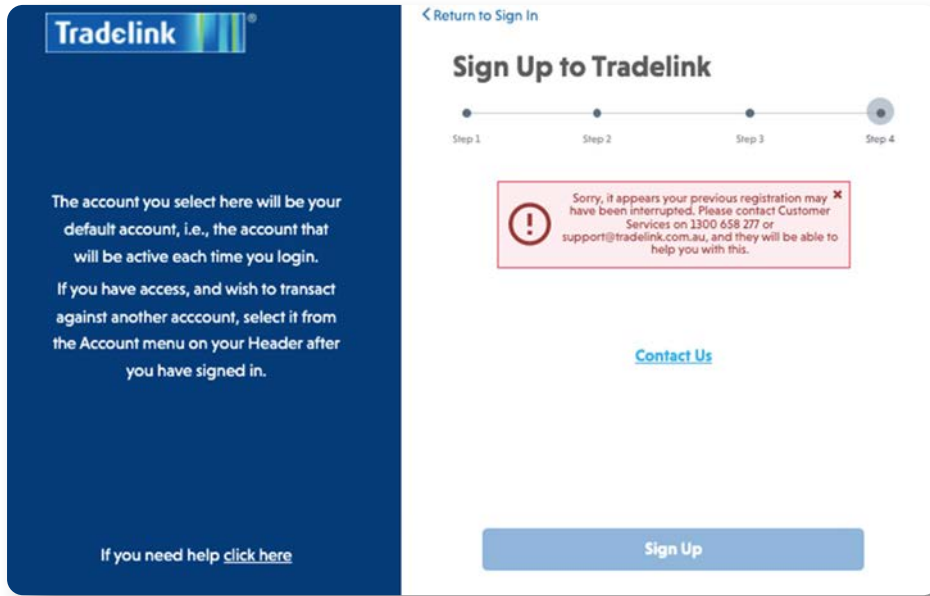
SOLUTION: User sees this if they have entered an incorrect mobile number or have already been beyond Step 1 during **Registration**. They should try again or select **Sign In** and enter their email and password. They will be taken to Step 2 again to complete the **Registration** process.

Link Account Failure

The screenshot shows the 'Link Account Failure' screen. It has a white background with a dark blue sidebar on the left. The main content area is titled 'Sign Up to Tradelink' and has a progress bar with four steps: Step 1, Step 2, Step 3, and Step 4 (active). A red error message box at the top says 'Link Account Failed'. Below this is a text input field for an account number. A list of accounts is shown with radio buttons: 'M2P ENGINEERING - SA' (selected), 'MAHONEY CONSTRUCTIONS', and 'MACKAY KAWASAKI'. Each account entry includes 'A/C Number' and 'Branch'. At the bottom, there is a checkbox for 'Please read and acknowledge Tradelink's Terms and Conditions, then click Sign Up to continue.' and a 'Sign Up' button.

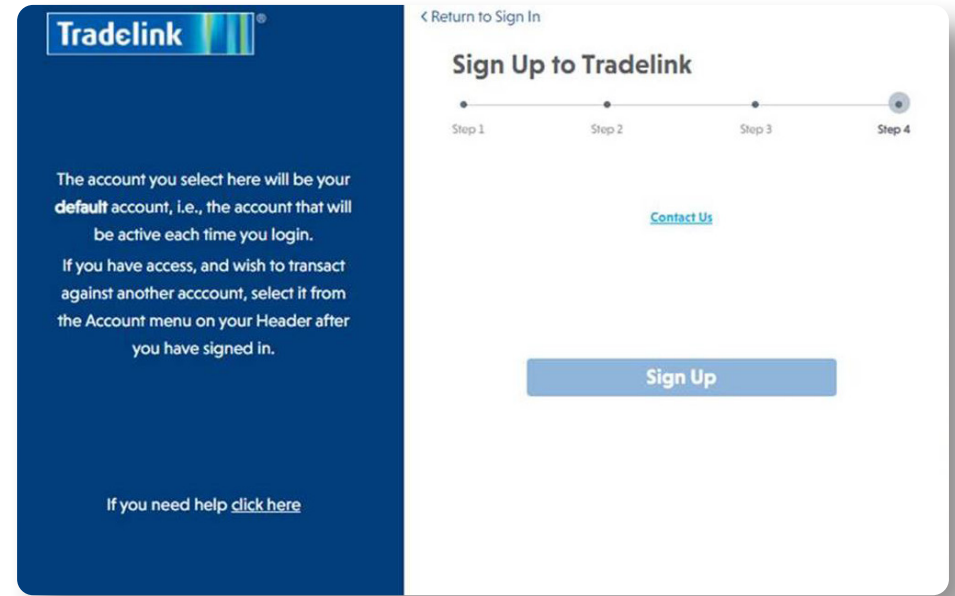
SOLUTION: A ticket should be raised with Tradelink Customer Service to a) have the account removed, or b) clear the account. The user can then **Register** and **Sign In** with their correct details.

Registration Error



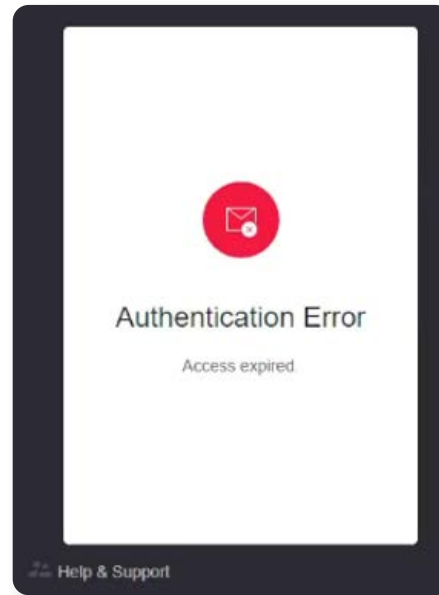
SOLUTION: Please call Tradelink's Customer Service team who will ensure your account is cleared to **Register** correctly.

Sign In Error



SOLUTION: Please call Tradelink's Customer Service team who will ensure your account is reset.

Authentication Error

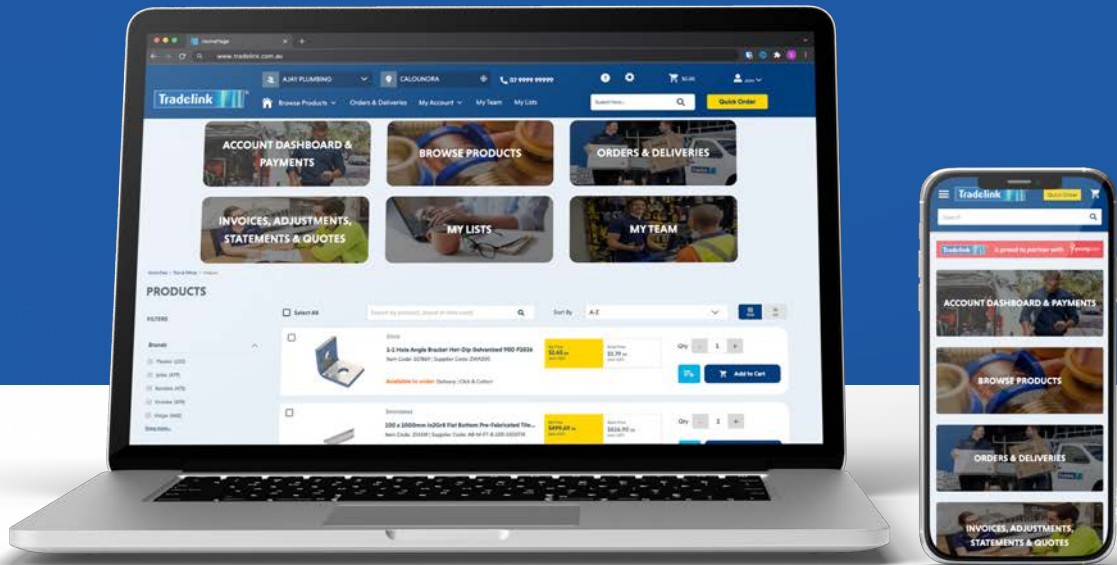


SOLUTION: A user sees this message if they have clicked on the **Reset Password** link in an email sent to them by Tradelink. If there was a delay in receiving the Password Reset email and the user makes another request (resulting in another email), they may be trying to activate a link that has expired. The user should click on the link received in the most recent email.



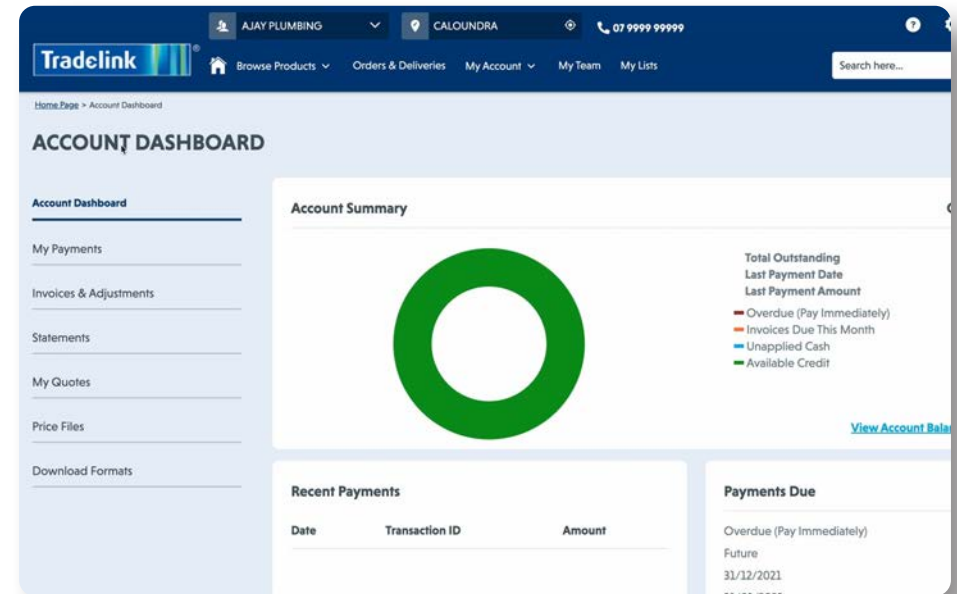
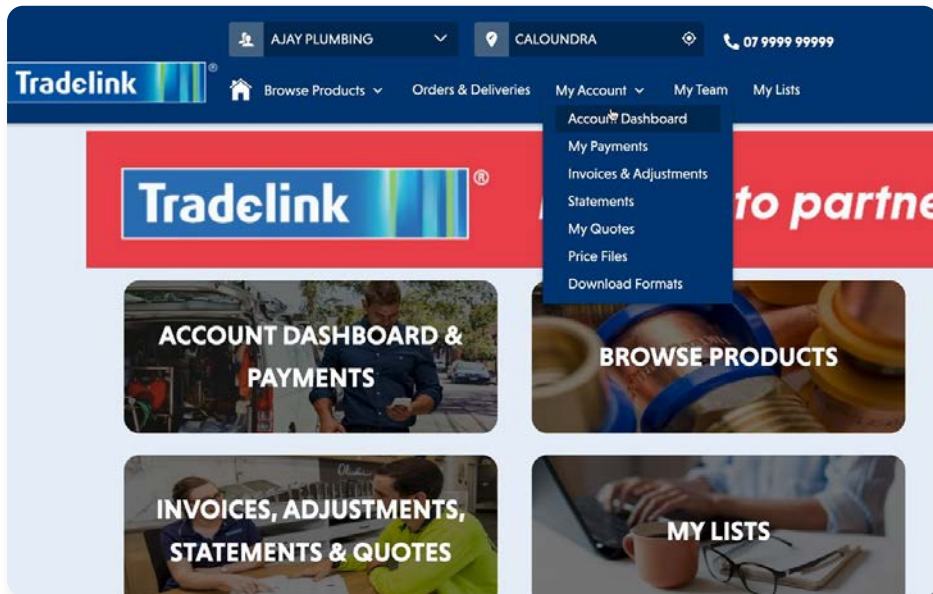
How-To

Manage your Account



Managing Your Account

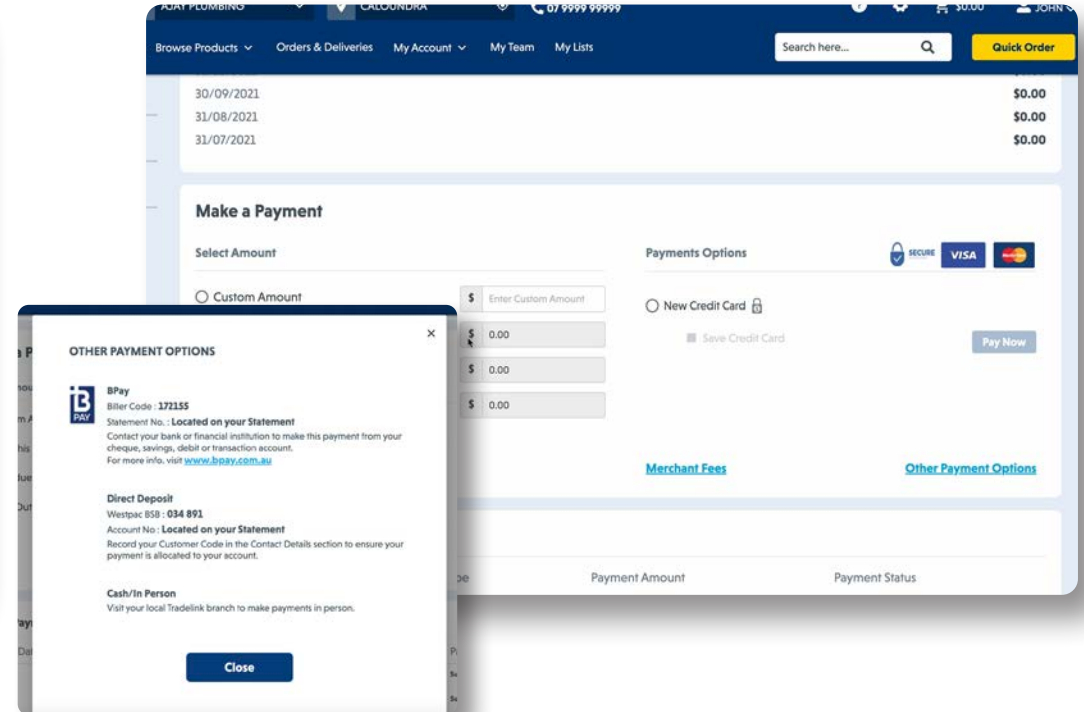
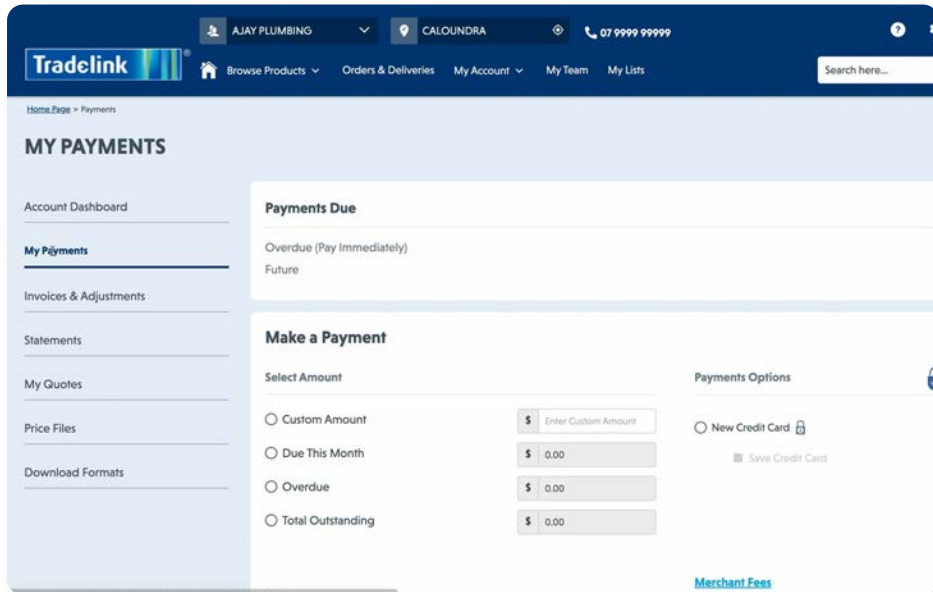
Welcome to the how-to guide for Tradelink's new online Trade portal. In this chapter, we will show you an overview of managing your account.



- Go to the **My Account** drop down in the top menu panel.
- Select **Account Dashboard**.

- Here you'll see a overview of your account.

My Payments

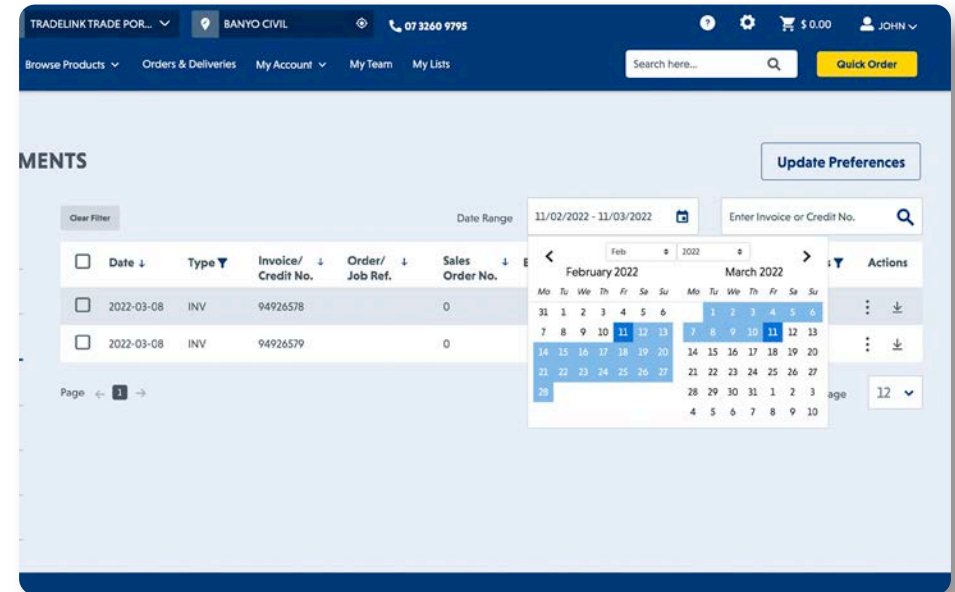
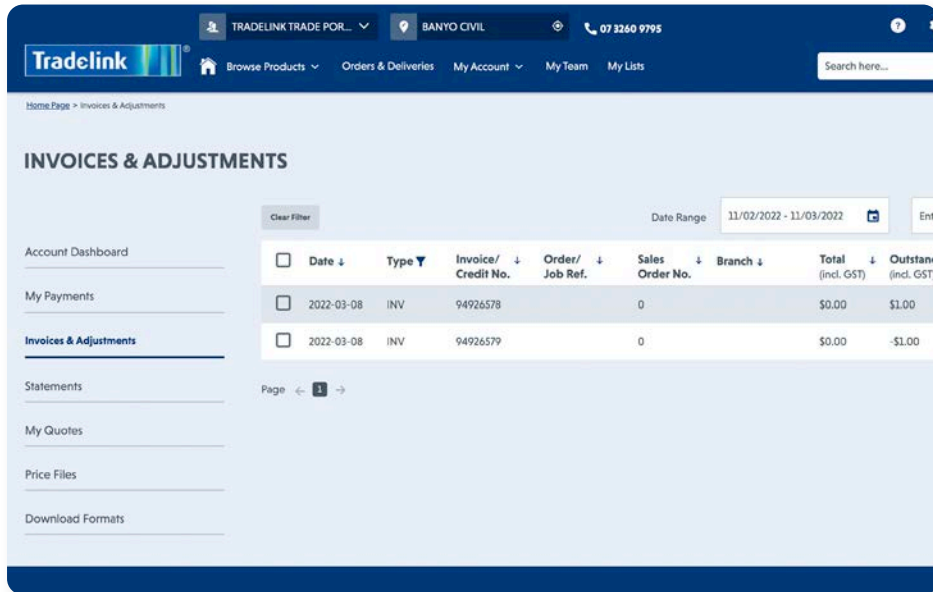


- The **My Payments** page will display a summary of **Payments Due** and a history of your online payments.
- Payments made in a branch will not display here, only payments made through the trade portal.

TIP: You can save your credit card details securely, making future payments quick and easy.

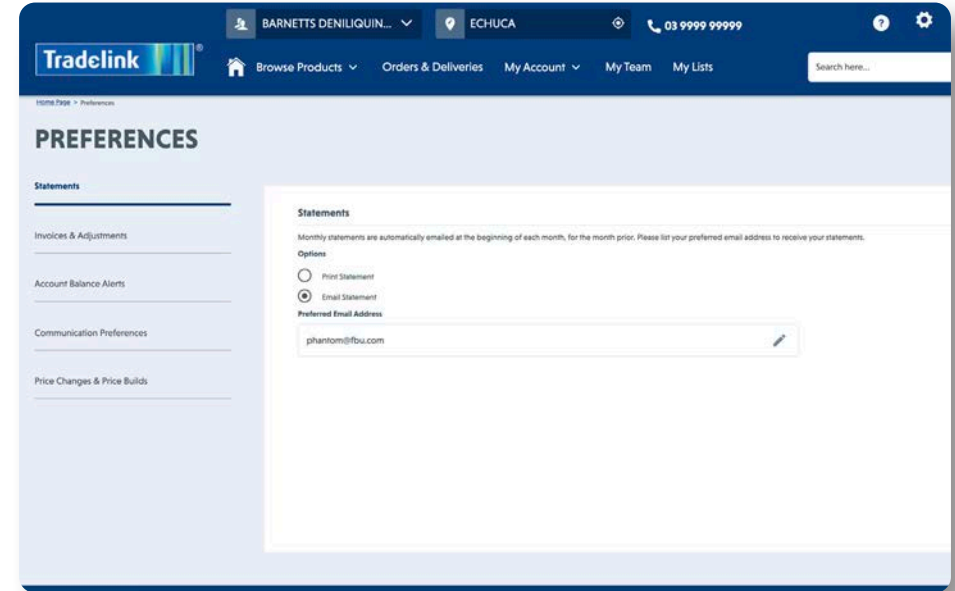
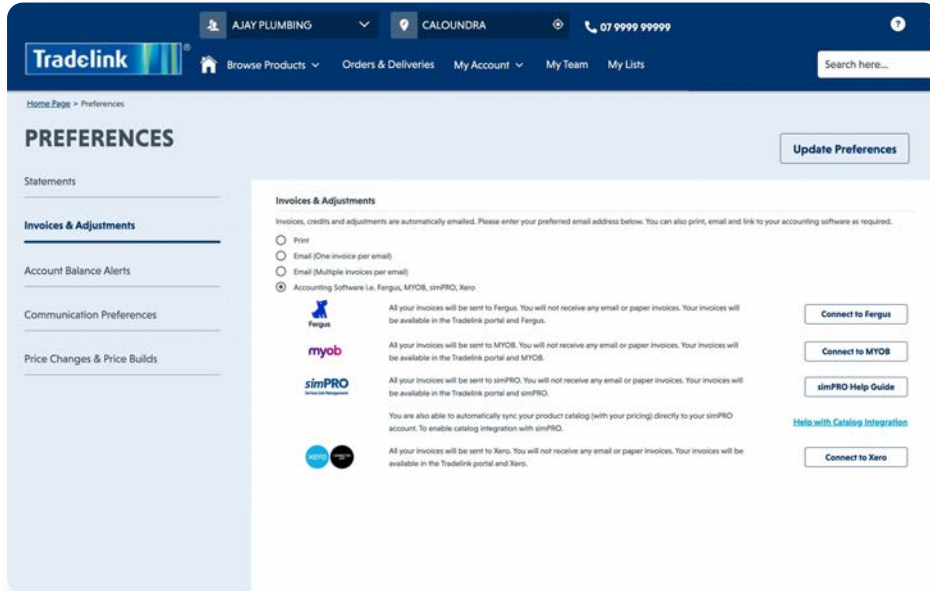
- In the left menu options, select **My Payments**.
- Here you can see a summary of your Payments Due as well as past online payments.
- You are able to make a payment via Credit Card in the Make a Payment tile. Click **Other Payment Options** for BPay, Direct Deposit and Cash/In Person.

Invoices & Adjustments



- In the left menu options, select **Invoices & Adjustments**.
- You can search for invoices by date, type, invoice number, order number or branch. Upon registering, 3 months' of orders, invoices, credits & statements will be populated in your account.
- You're also able to update your preferred method of receiving invoices by clicking **Update Preferences**.

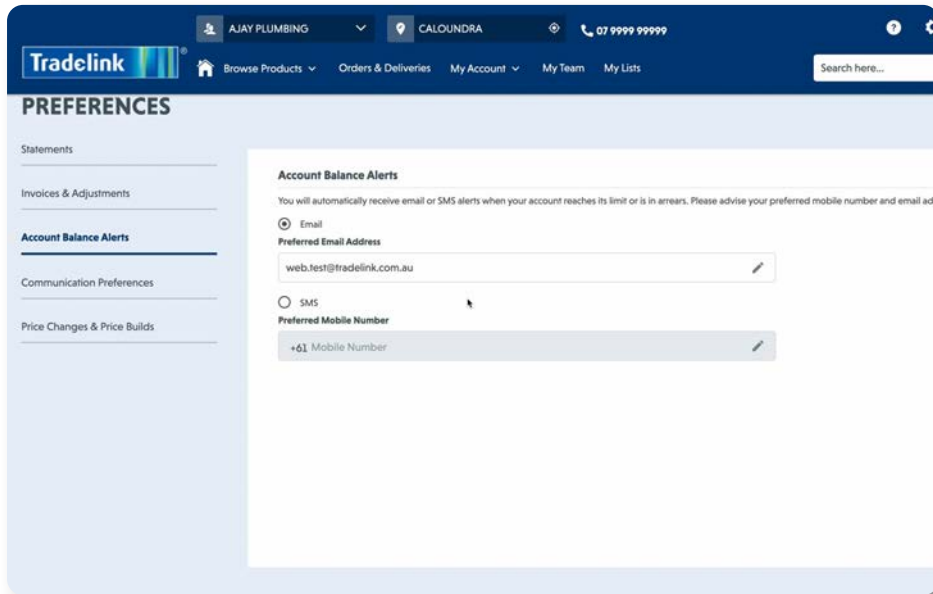
Update Preferences



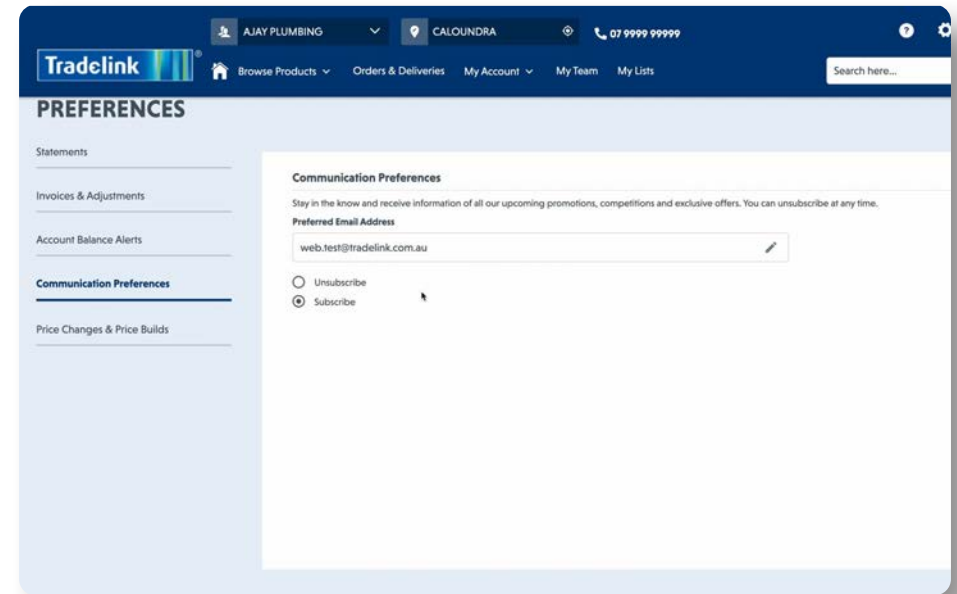
- On the **Invoices and Adjustments** page, select **Update Preferences**.
- Click one of the **Email** options to nominate your preferred email address. Invoices, credit notes and account adjustments will be automatically emailed to this address.
- Alternatively you can connect to your preferred accounting software.

- On the **Statements** page, select between the options **Print Statement** and **Email Statement**.

TIP: Only 1 email address can be nominated.

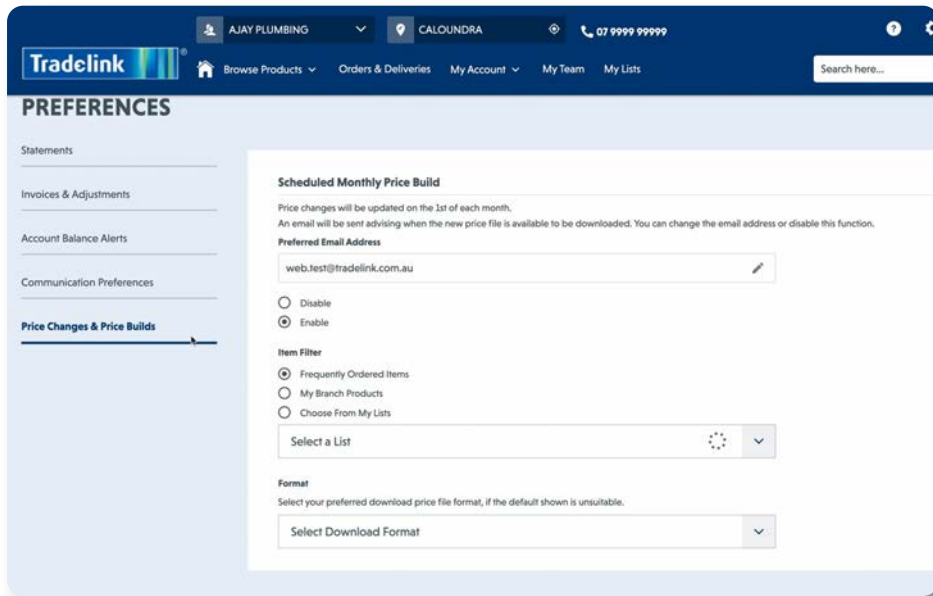


- In the menu on the left, select **Account Balance Alerts**.
- You can control how you receive notices about the state of your account balance, (email or SMS).

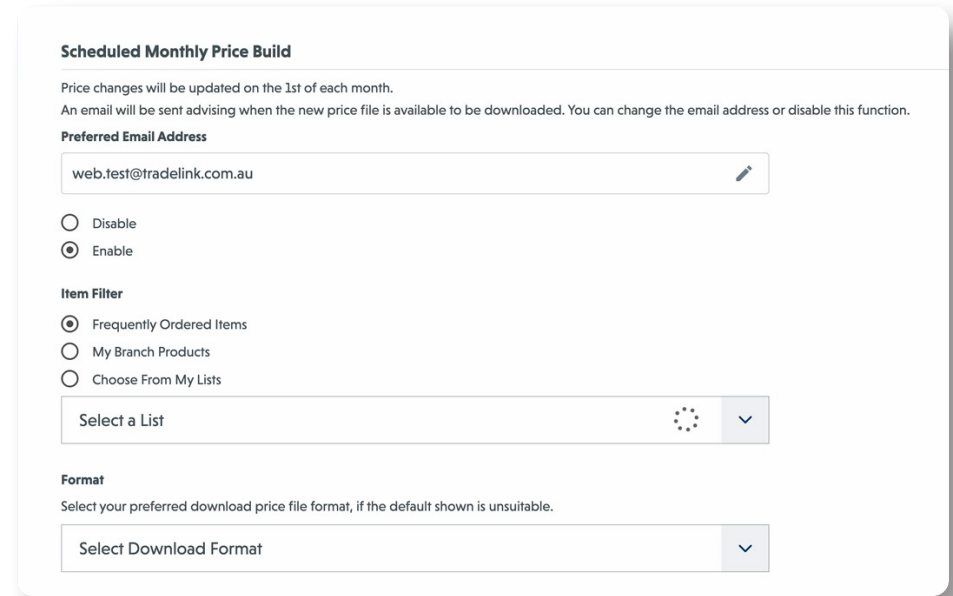


- In the menu on the left, select **Communication Preferences**.
- This is where you can **Subscribe** or **Unsubscribe** to Tradelink Communications. You can unsubscribe or resubscribe at any time.

TIP: Subscribing to Tradelink Communications means you will receive monthly promotion offers, exclusive event invites, and where appropriate, branch status updates (in extreme weather events, for example).

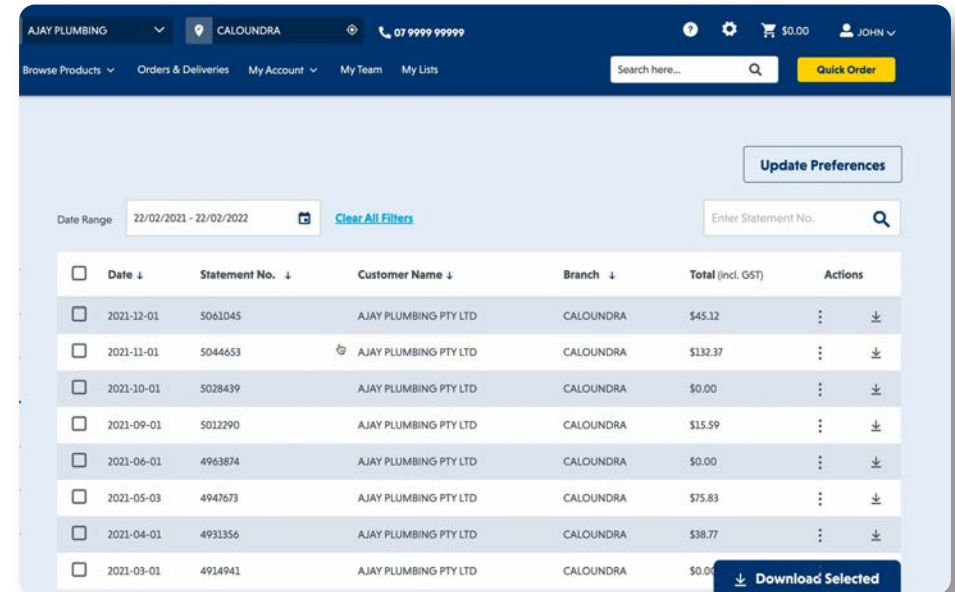
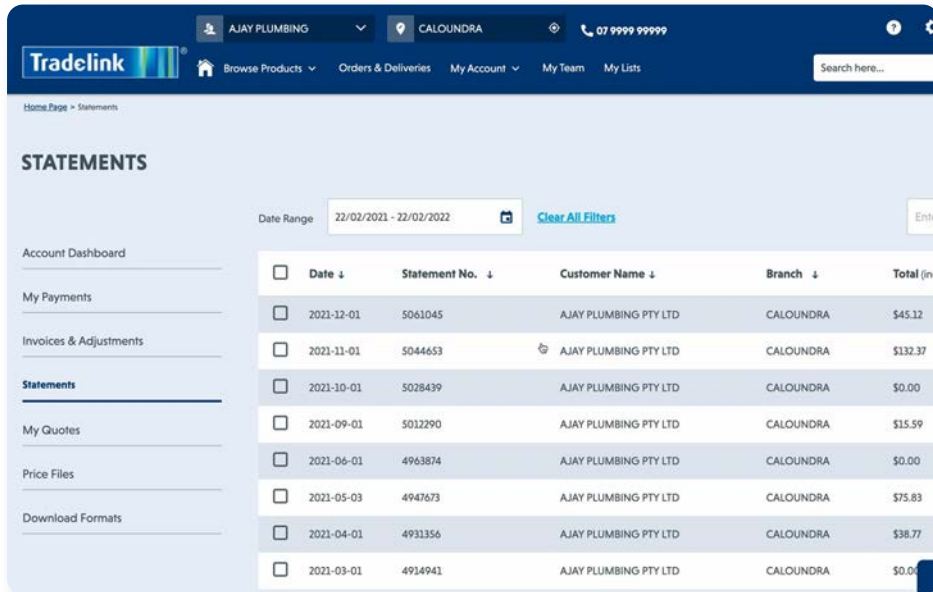


- Select Price Changes & Price Builds to receive monthly communication on price changes.



- Enter your **Preferred Email Address**, **Item Filter** (includes Lists), and the **Format** for the price list that will be compatible with your accounting package.

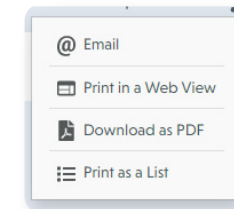
Statements



- To view Statements, return to your **Account Dashboard**, and select **Statements** from the menu on the left.

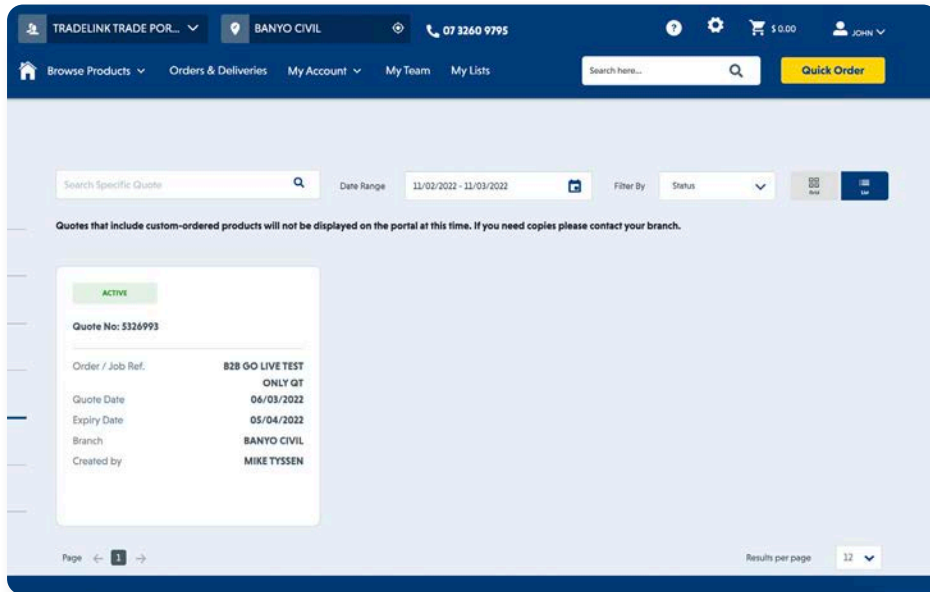
TIP: You can download single statements, or select a number to download or select all at once by ticking the boxes next to the date column

- View, search, share or download your monthly statements here.

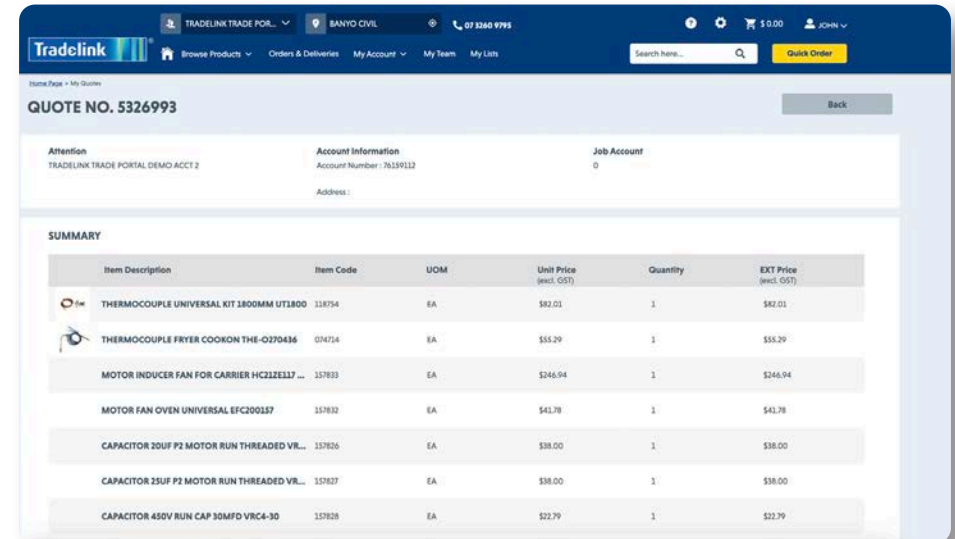


- Click on the 3 verticals dots for options to download statements to email, web view, pdf or print as a list.

My Quotes

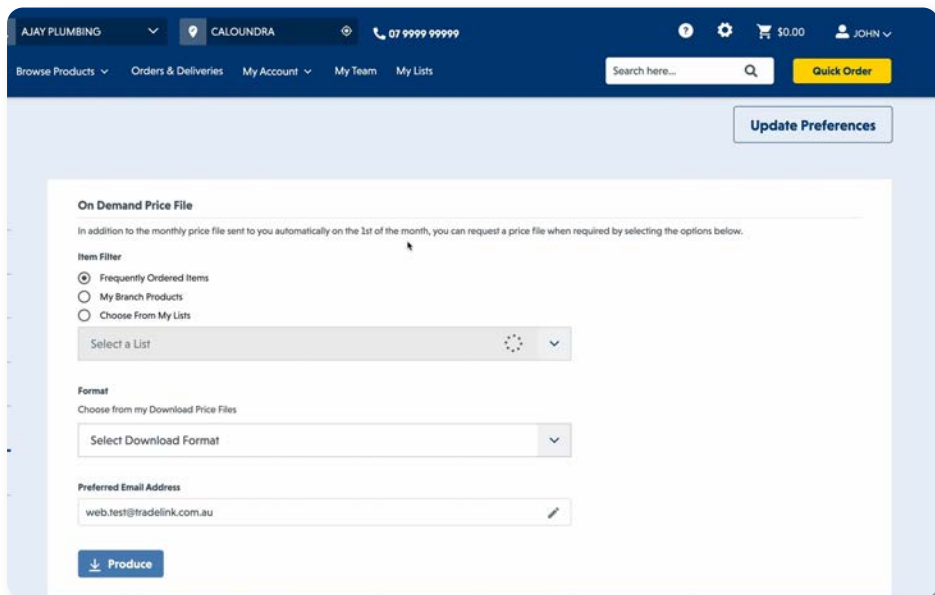


- To quickly view your Quotes, return to your **Account Dashboard** and select **My Quotes** from the menu on the left.
- Quotes will be defined as either active or expired.

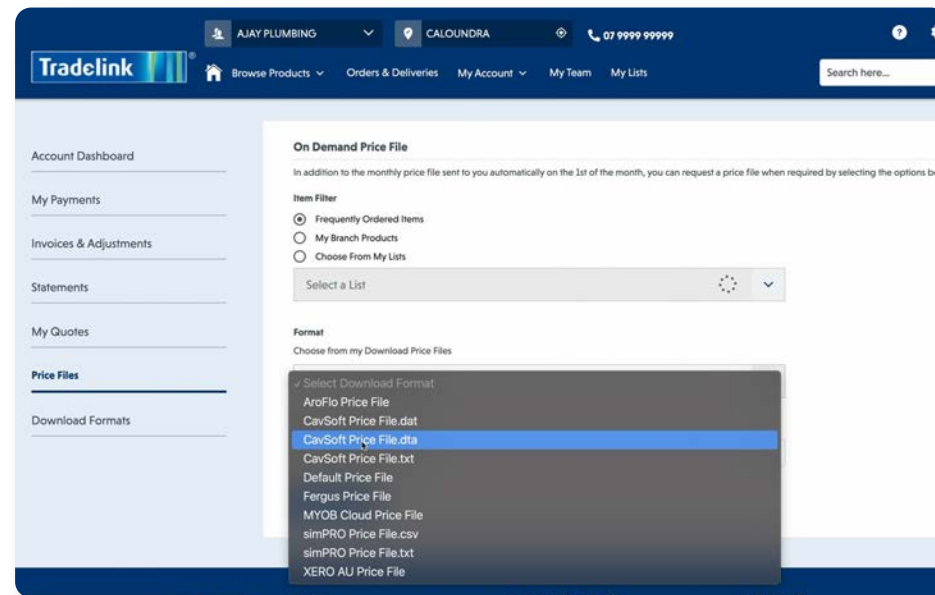


- Click on any quote to see a summary of the product details.

On Demand Price File

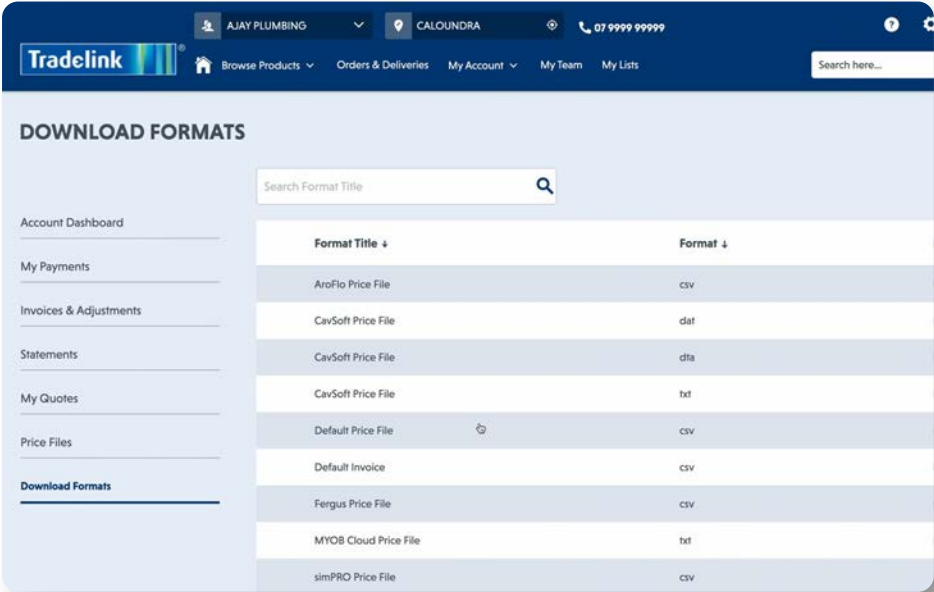


- The **Price Files** tool provides you access to your price file at any time.
- Like the scheduled monthly Price Changes & Price Builds tool, you can select from Frequently Order Items, My Branch Products or Choose from My Lists.

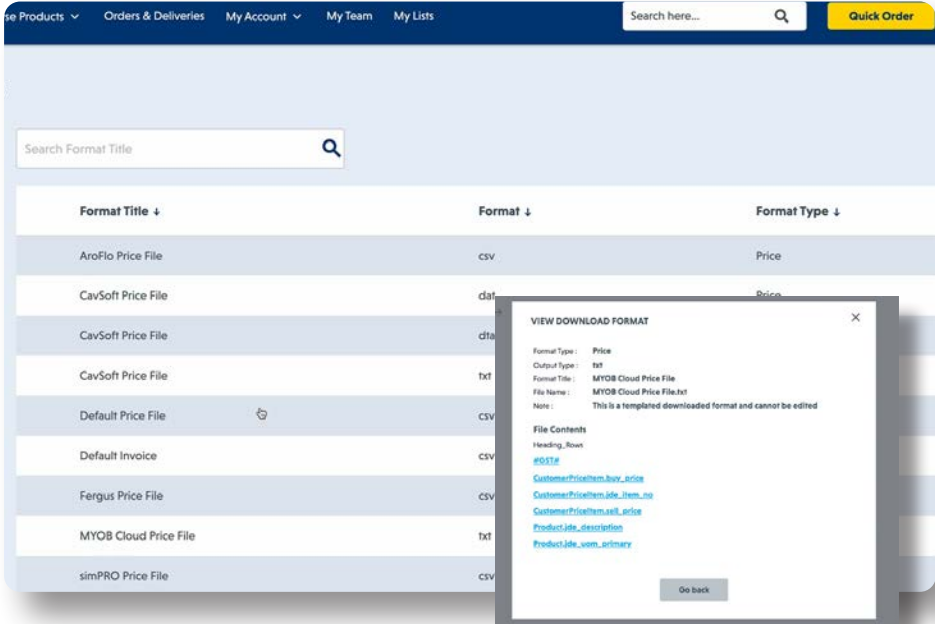


- Select your desired **format** to be emailed.
- Click **Produce**.

Download Formats



Download Formats is an index of available file types that are compatible with your accounting software.



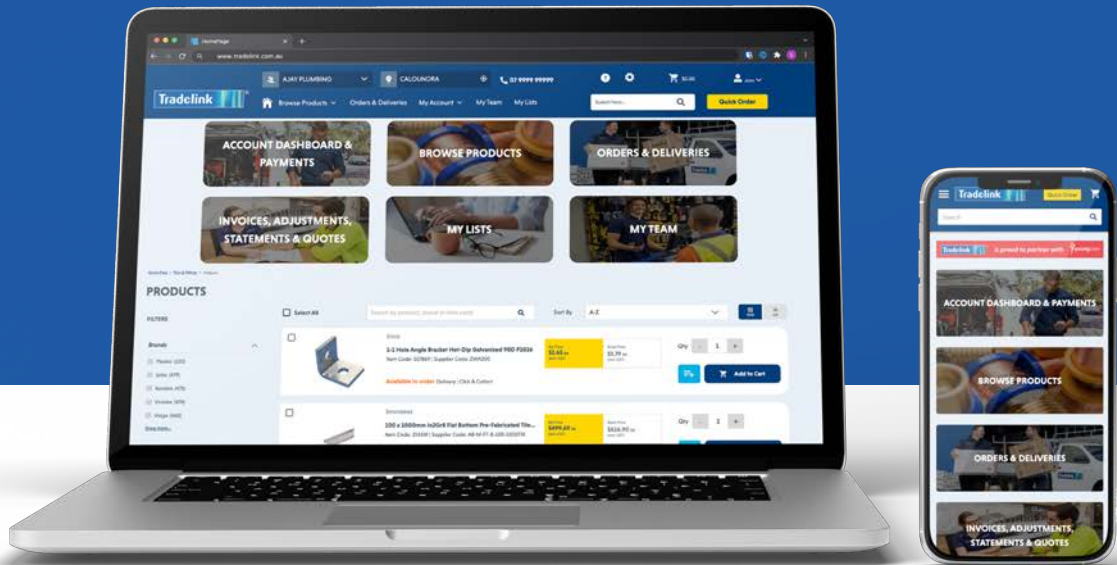
Clicking on the file format that is used by your accounting software displays the information you will receive.

TIP: If you require a format that is currently unavailable, please provide this feedback to your Account Manager.



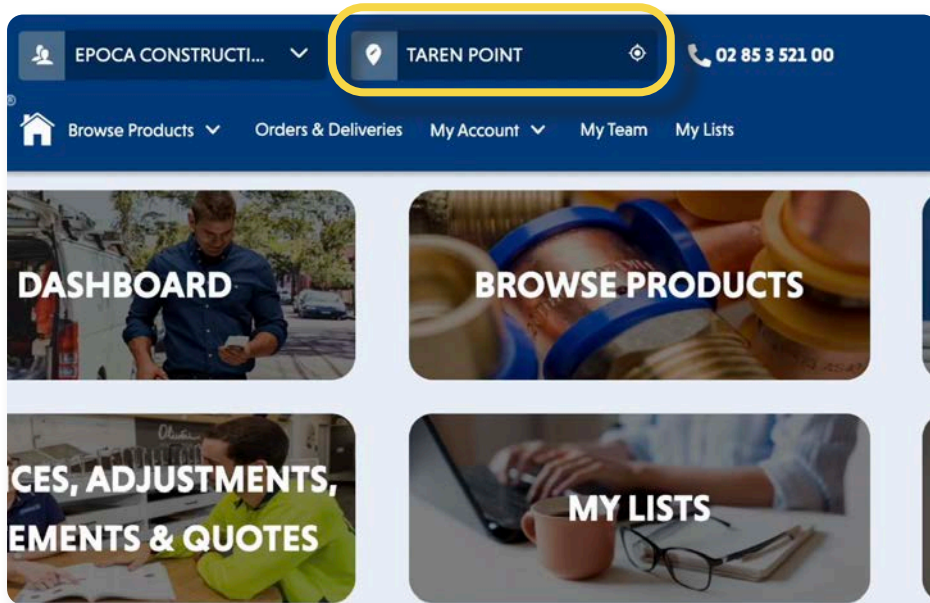
How-To

Use Store Finder

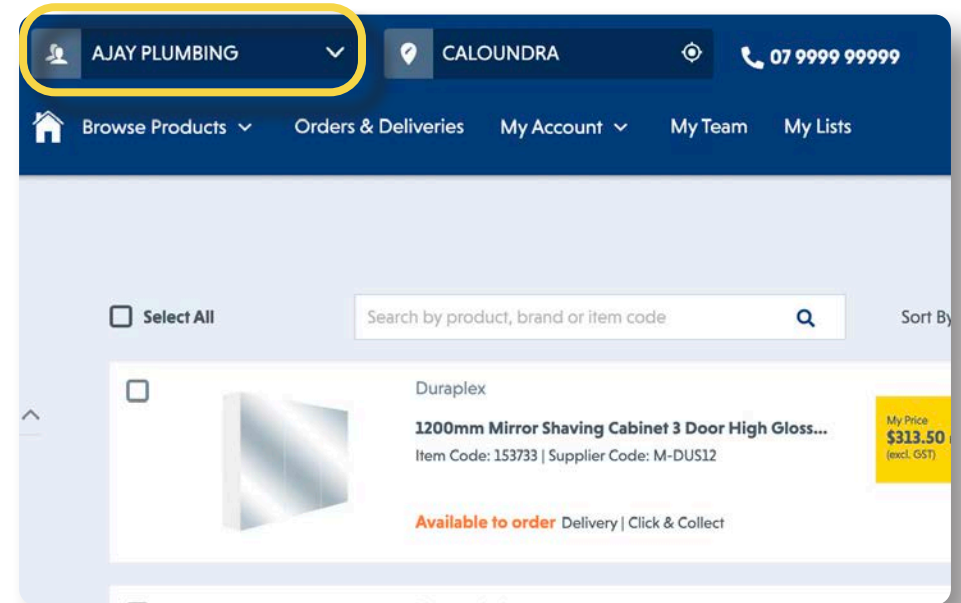


Use Store Finder

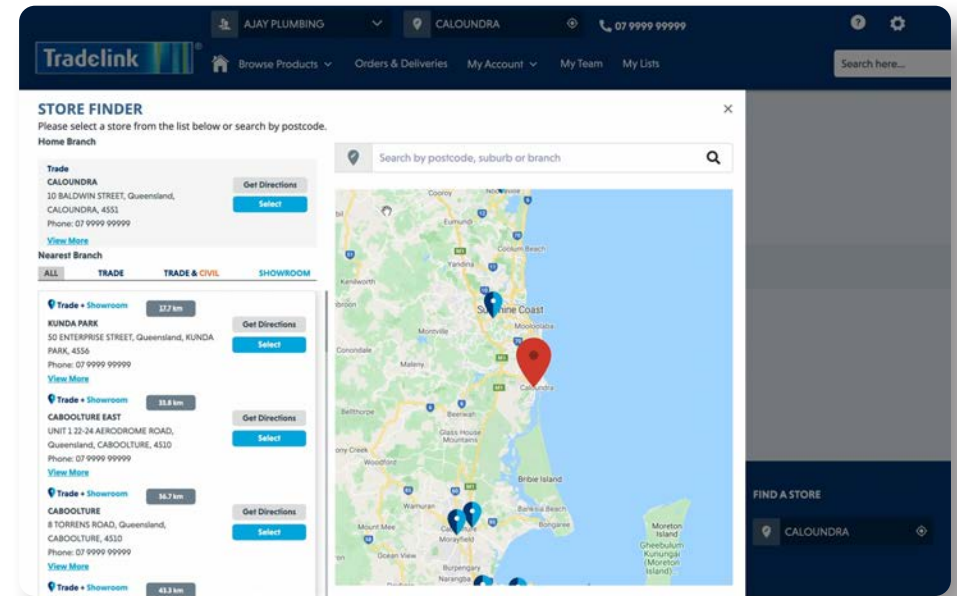
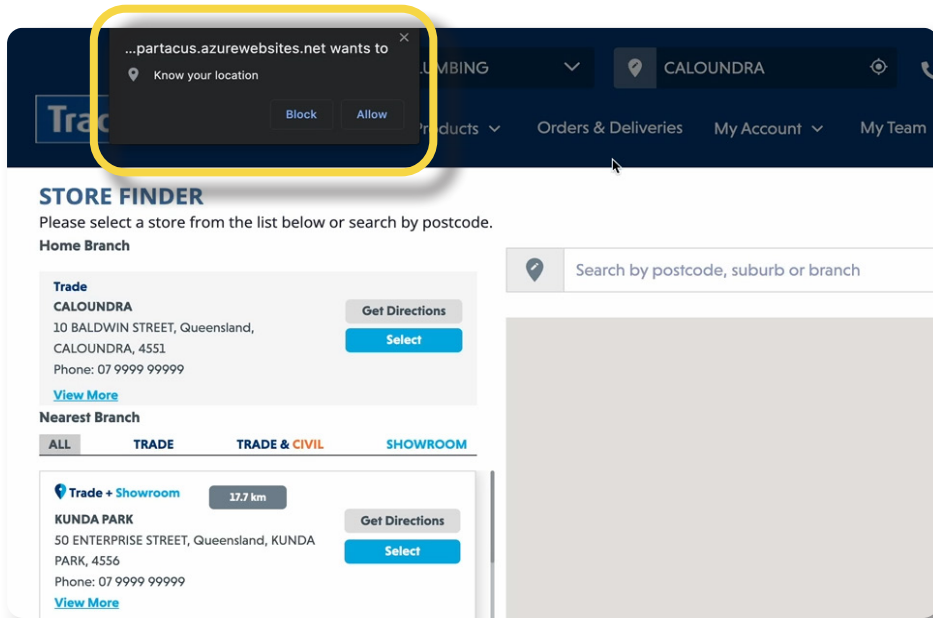
Welcome to the 'how-to guide' for Tradelink's new online Trade portal. In this chapter, we will show you how to utilise the store-finder tool.



- Your Account Name and associated home branch will always be displayed in the **top navigation bar** of the portal.

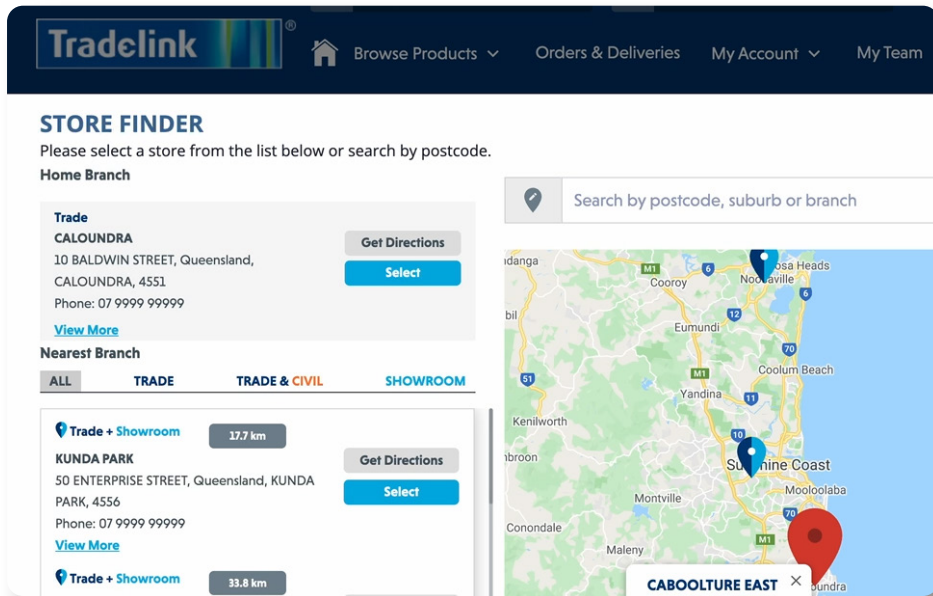


- If you have multiple accounts with Tradelink, select the drop-down arrow and you can change to an alternate account.

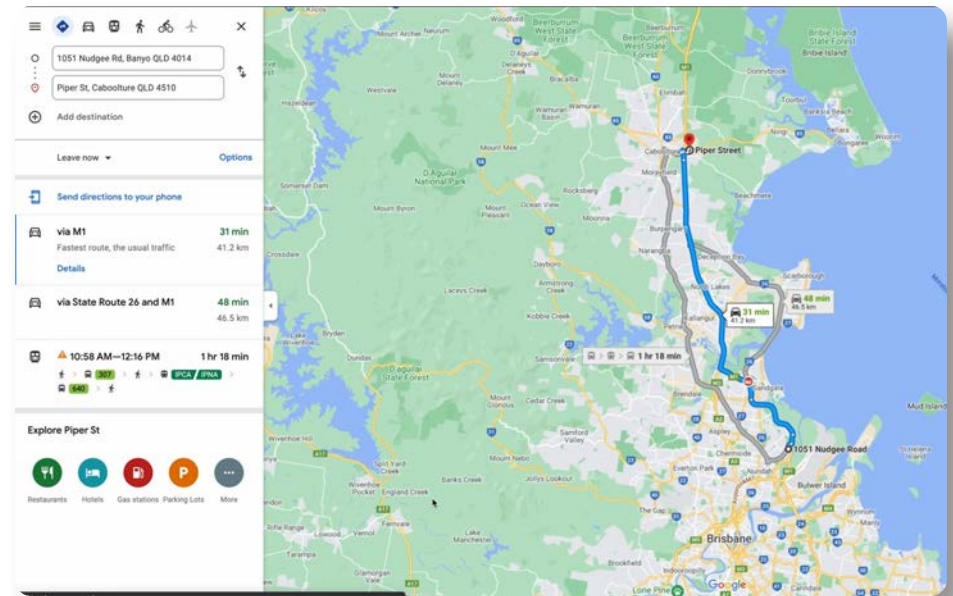


TIP: You may need to allow or activate your **location settings** on your device, (highlighted in yellow), so the **Store Finder** can serve you your closest branch, based on your current location.

- To change or search for a Tradelink branch, **click within the location box** at the top of the screen.
- This will open the **Store Finder** where your home branch address and phone number are located at the top.
- You can view stores by their available services: All, Trade, Trade & Civil or Showrooms.



- To change the branch you wish to view, click **Select**.
- You can immediately access the directions to the branch by clicking **Get Directions**.
- When using this feature on a mobile, it will open the Google Maps App for you.

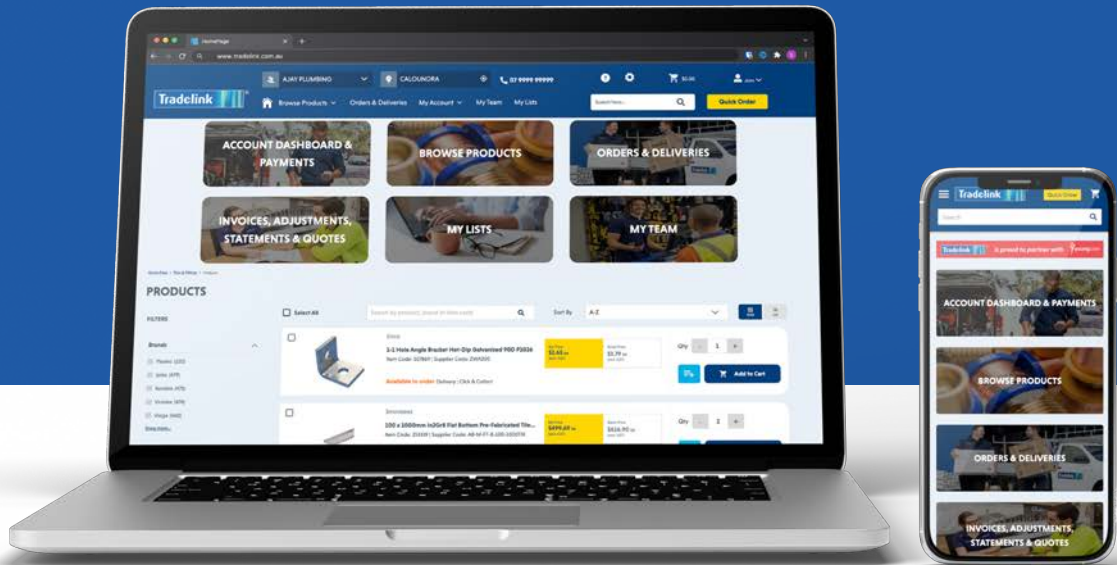


- Upon clicking **Get Directions**, Google Maps will open in a new window with full functionality.



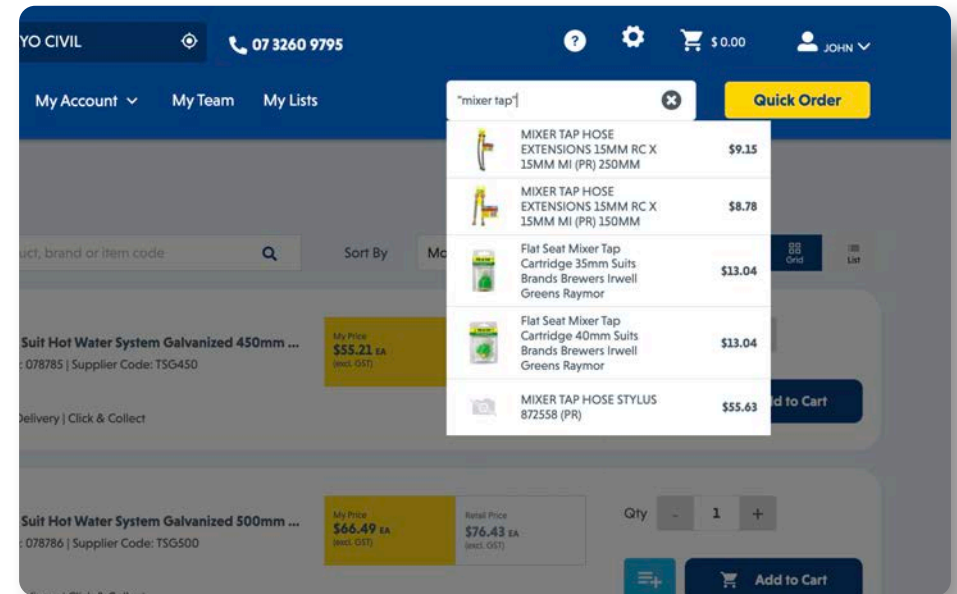
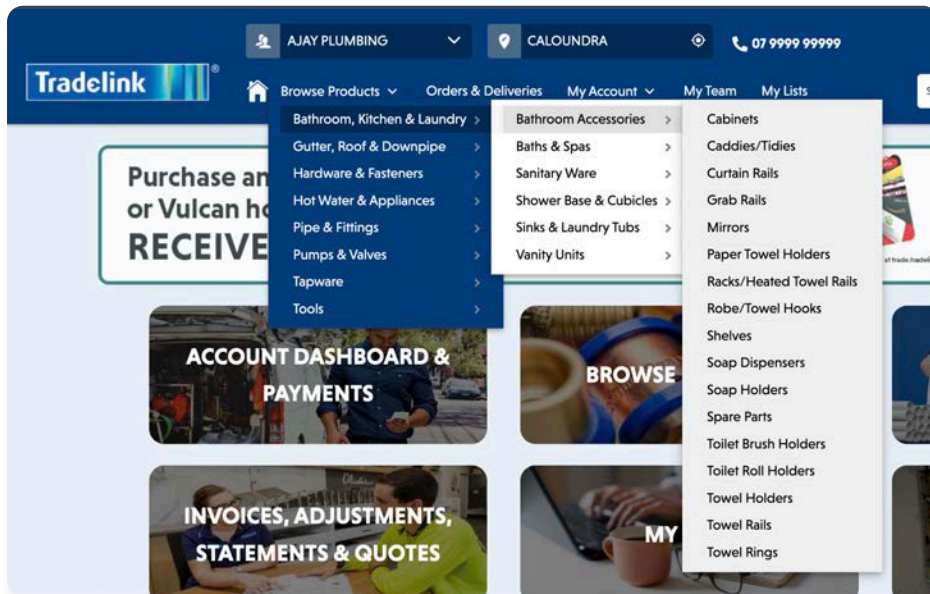
How-To

Product Search



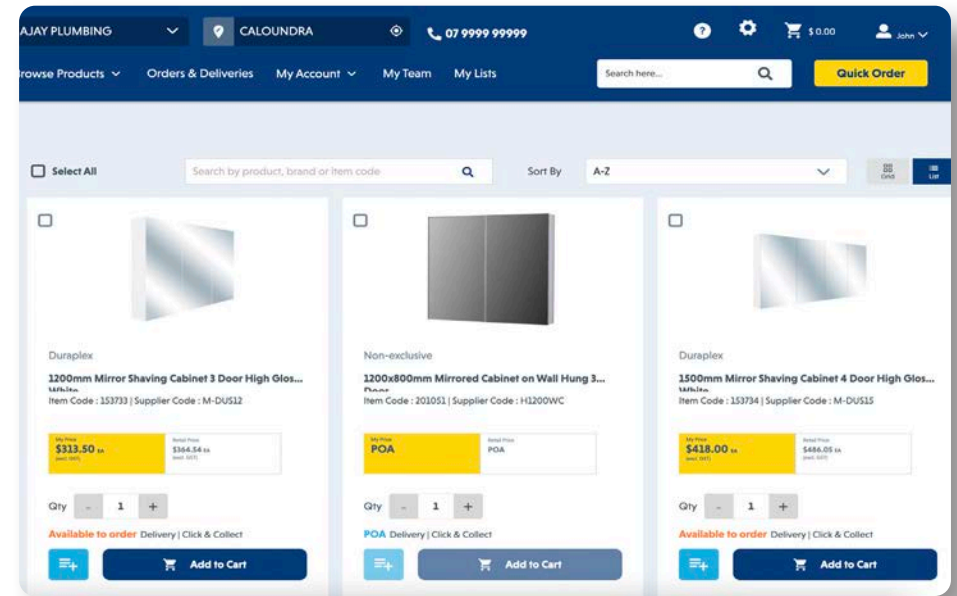
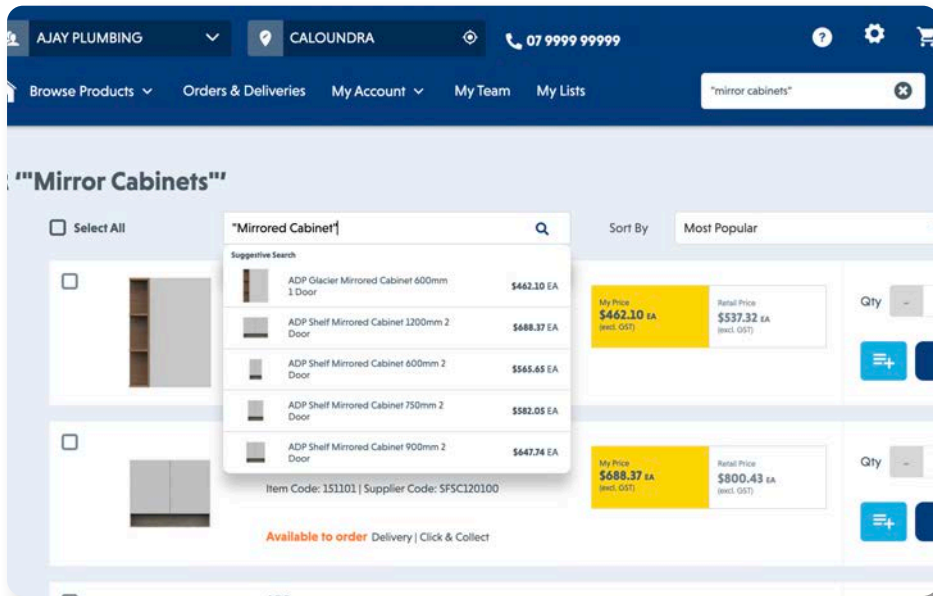
Product Search

Welcome to the 'how-to guide' for Tradelink's new online Trade portal. In this chapter, we will show you how to utilise the powerful search tool.



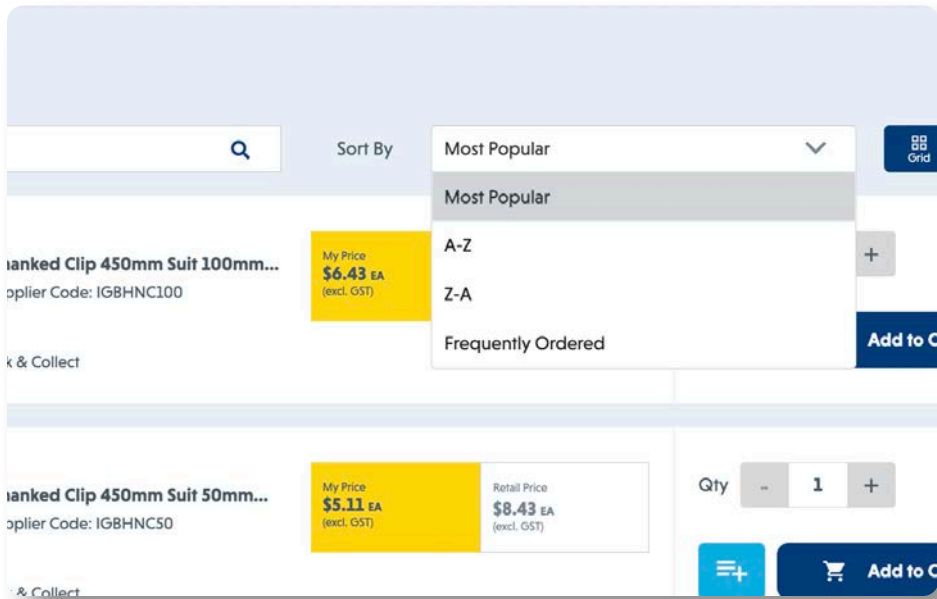
- On any page on the site, there are 2 options for finding the product you need.
- From the **Browse Products** drop down menu, you can access a 3-tier search hierarchy to filter through to a product type.

- In the **Global Search Bar**, search using a single word or "multiple words" within quotation marks which will power you to specific brands or products.

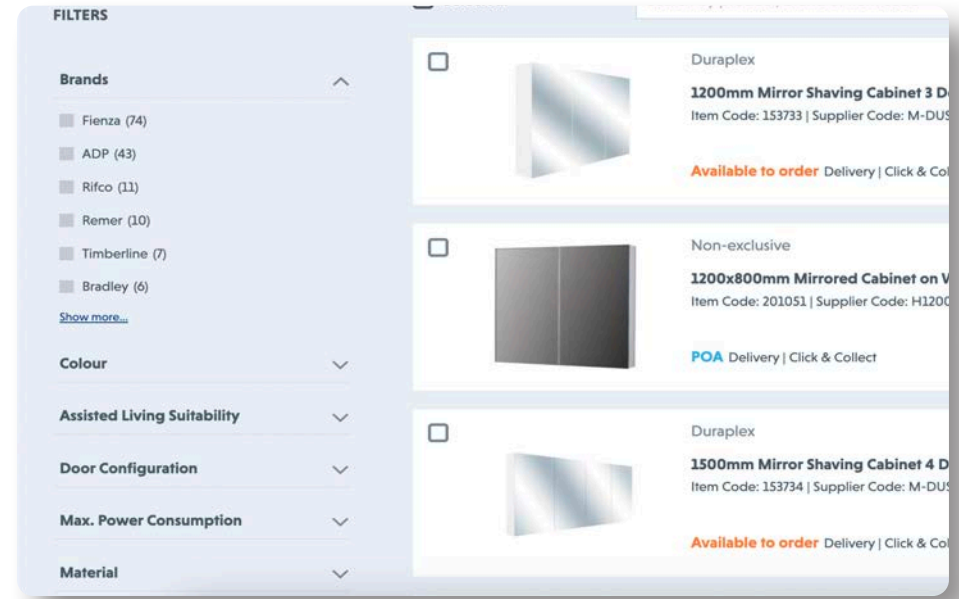


- In any **Product List** page, there is an additional search bar where you may search by brand, product, or item code.
- Just like the **Global Search Bar** in the site navigation bar, you can use a single word or "multiple words" in quotation marks.

TIP: Review your product list in either *Grid* or *List* format using the icon at the top right of your list.



- On the Product List page, you can sort the results by Most Popular (our top sellers), or alphabetically A-Z or reversed Z-A.

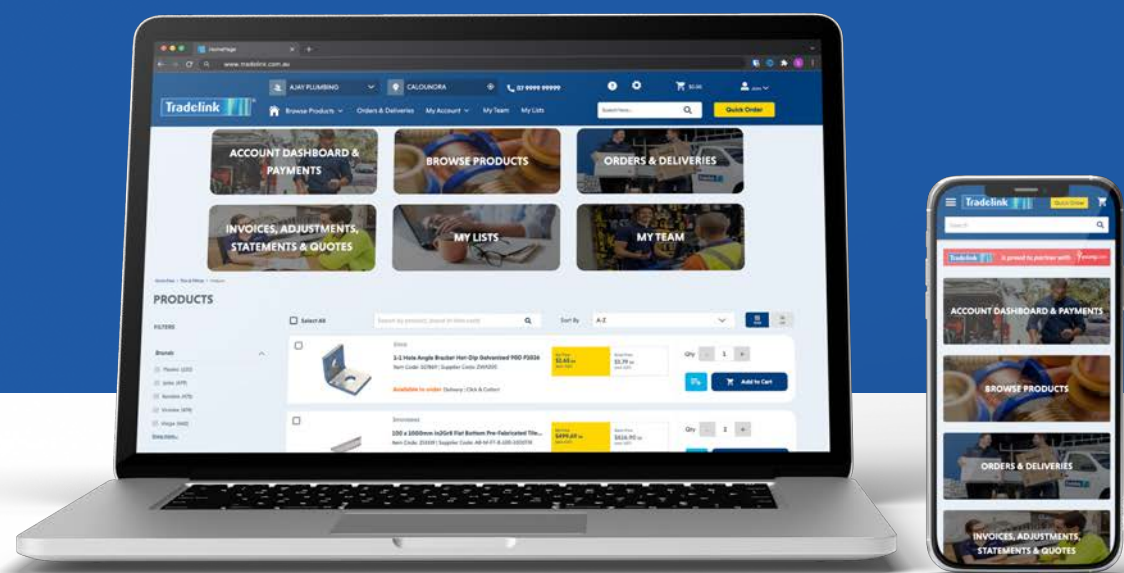


- You have added search capability with the **Filters** that appear to the left of your product list. You may filter your Search list by Brand, Colour or other specific attributes related to your product list.



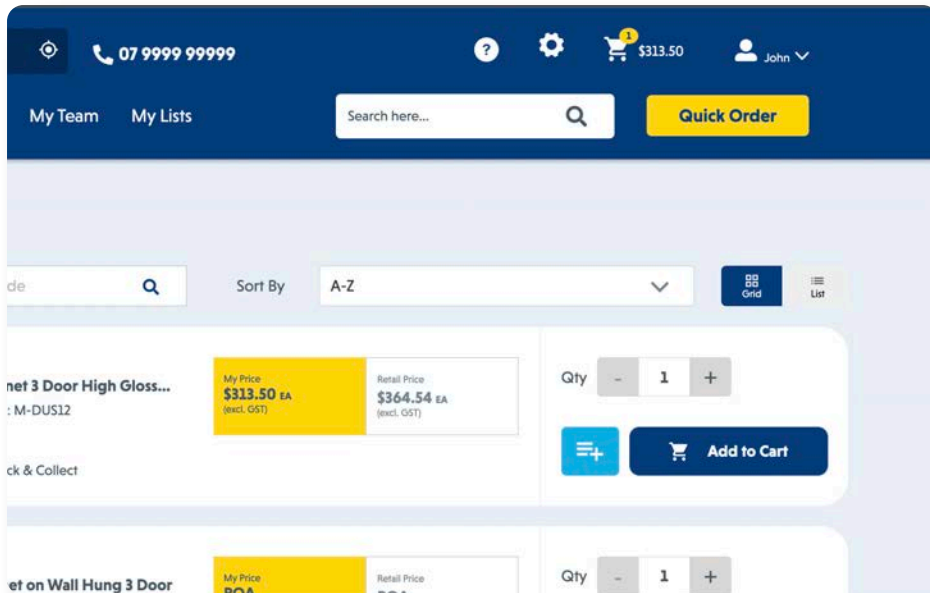
How-To

Shopping Cart

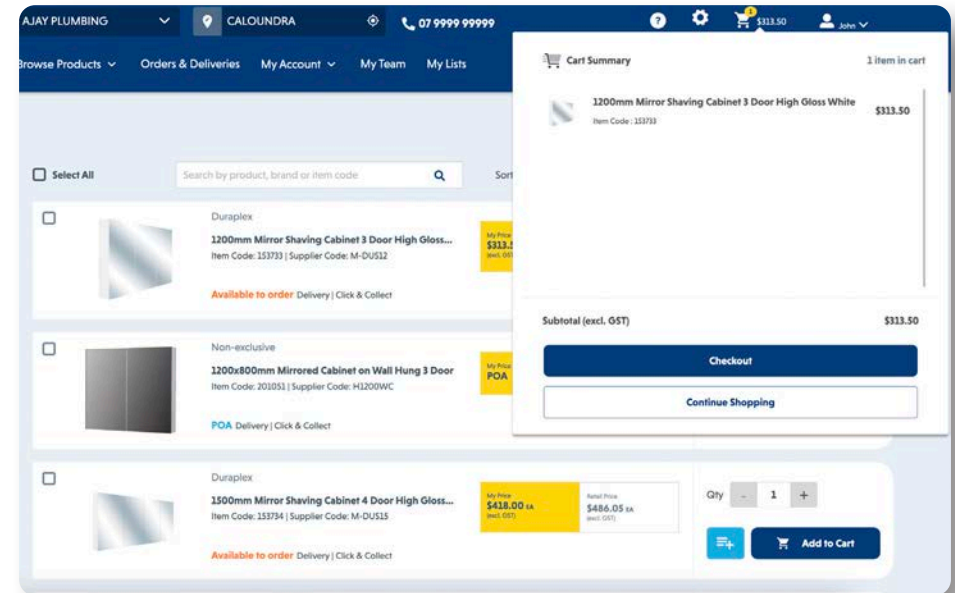


Shopping Cart

Welcome to the 'how-to guide' for Tradelink's new online Trade portal. In this chapter, we will explain how to navigate the Shopping Cart.

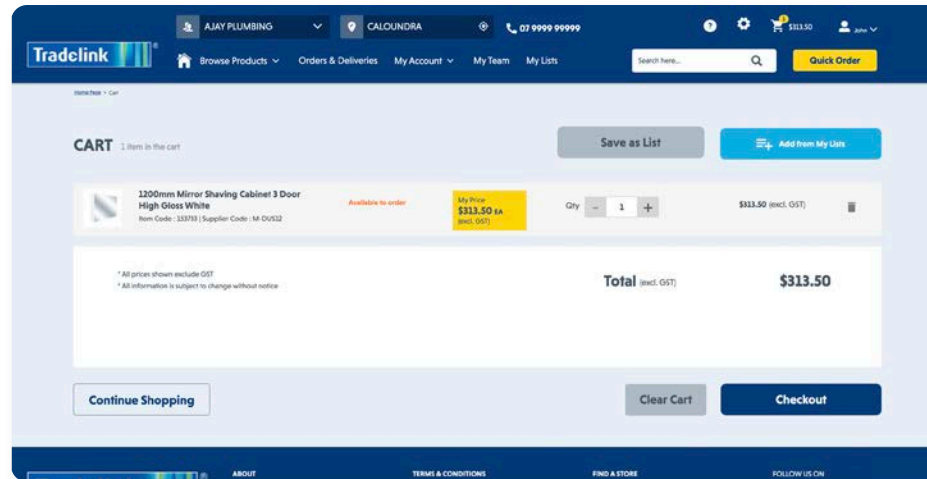


- On each **Product List** page, you will be able to **Add to Cart** with a single click.
- Alter the **Quantity** you wish to order by selecting the '+' or '-' buttons, or simply type the number into the box.



- When you hover over the **Cart** icon, the mini cart will appear with a summary of your cart (you're able to scroll up & down the cart list).
- You may also click **Checkout** when completing your order or **Continue Shopping** to return to the Product List.

TIP: Products will display **In Stock**, **Available to Order** or **POA** from the branch you have selected. You can Change Your Branch in the **Store Finder** to check stock availability at other branches.



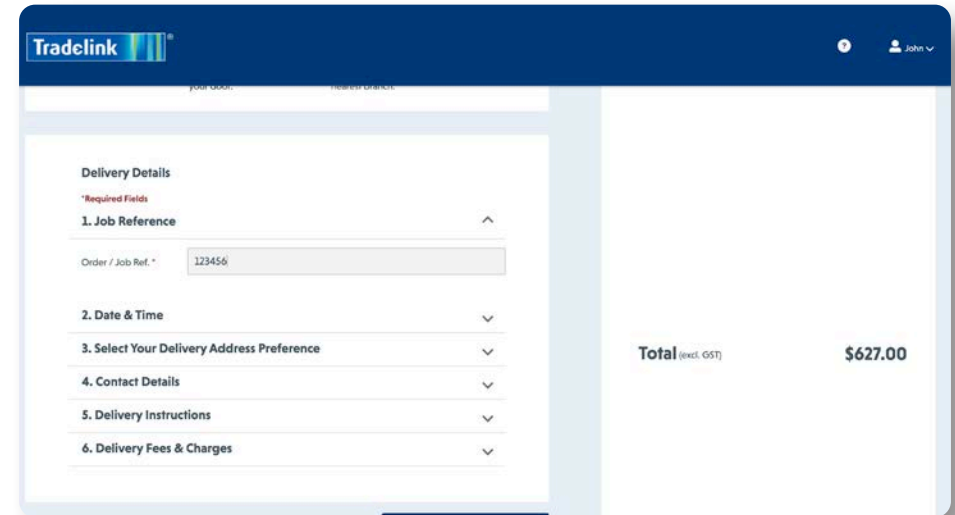
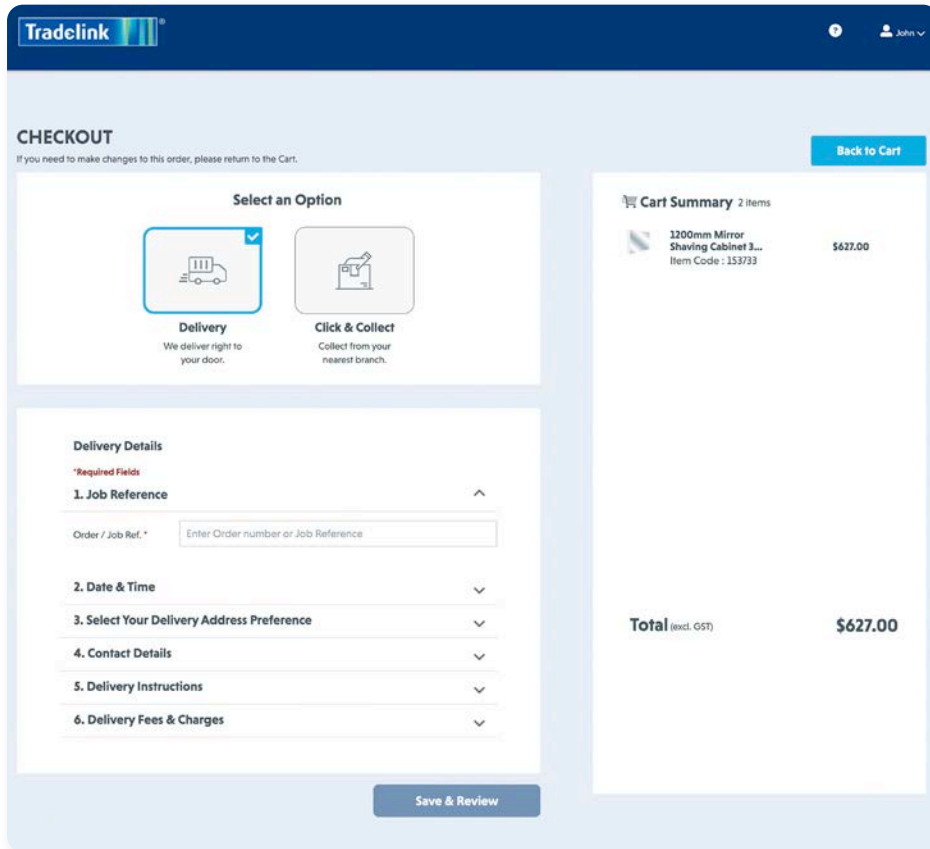
If you have clicked **Checkout** you will see the **Cart** displayed with the full details of items to be purchased.

You may still alter your purchase selection in the **Cart**:

- **Save As List** (for frequently ordered items)
- **Add from My Lists** (import items from a List created already)
- Update the quantity of the selected item
- Remove any product item (**Rubbish Bin** icon)
- **Continue Shopping**
- **Clear Cart** (removes all selected items)
- **Checkout** (complete order)

TIP: List functionality is covered in the **My List** section of this guide.

Checkout - Delivery



- First, add your **Job Reference**. This reference is specific for your business requirement, such as the order number for your customer or the name of the job.

- The **Checkout** page shows your Cart Summary and options for **Delivery** or **Click & Collect**.
- In this example, we are selecting **Delivery** and will now need to complete the details for the order.

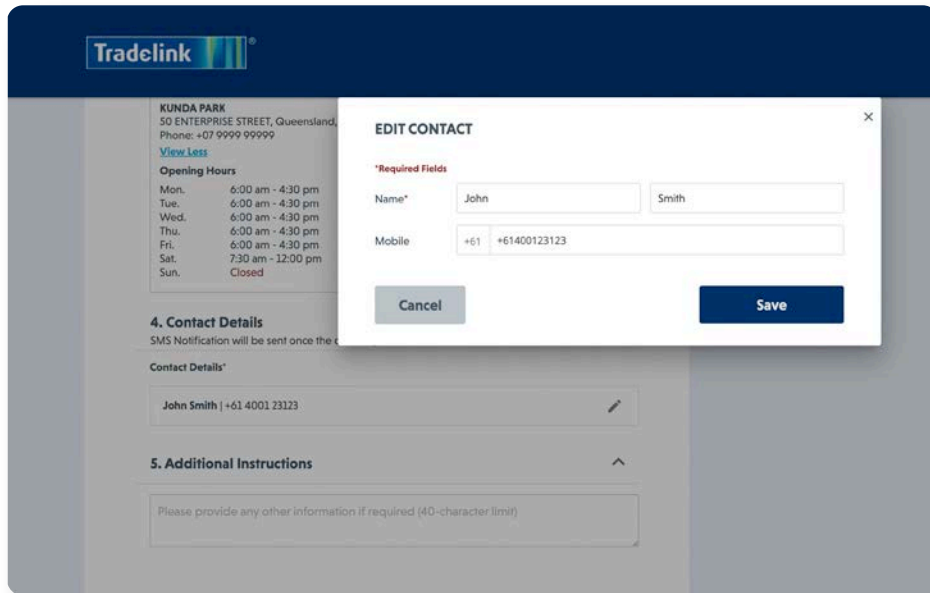
- **Date & Time** for your delivery. The fields will automatically populate the earliest date and time for your delivery (30 minutes from your order). You can select an available date using the **Calendar** button and a time from the drop-down field.

TIP: If you do not complete a delivery order in full and return to complete it later, a message will display to review the delivery date and time. The original option selected may no longer be available.

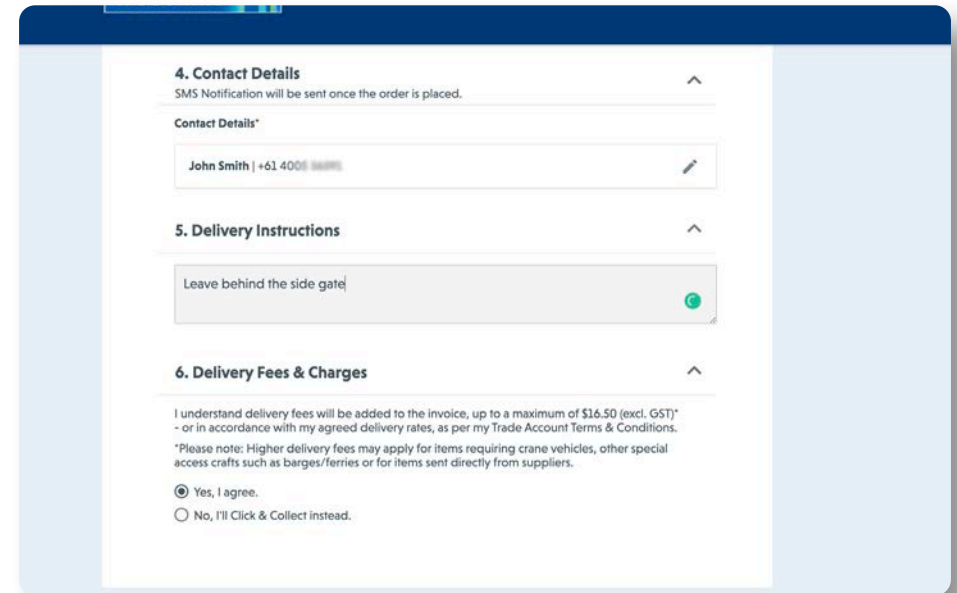
- **Delivery Address Preference** is the next field to complete.
- There are several options and the first is the default address for your business account (**Job Account Address**).
- This address is based on the account you have selected to transact against.

- The next delivery address preference is **Most Recent Addresses**. This will conveniently allow you to select an address you have used for past deliveries.
- Finally, you may elect to **Add New Address** and manually enter a new address.

TIP: Use the handy "Cross Street" option; this will more accurately navigate to some job sites.

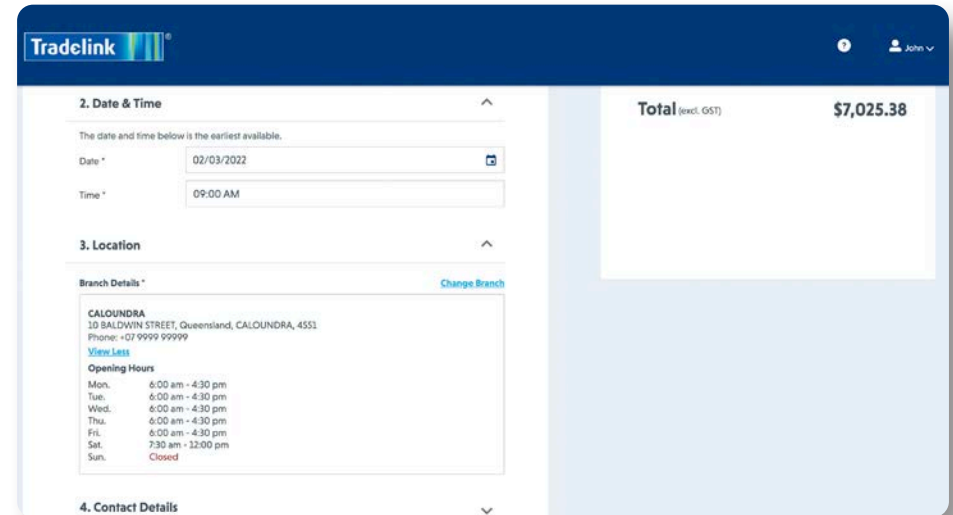
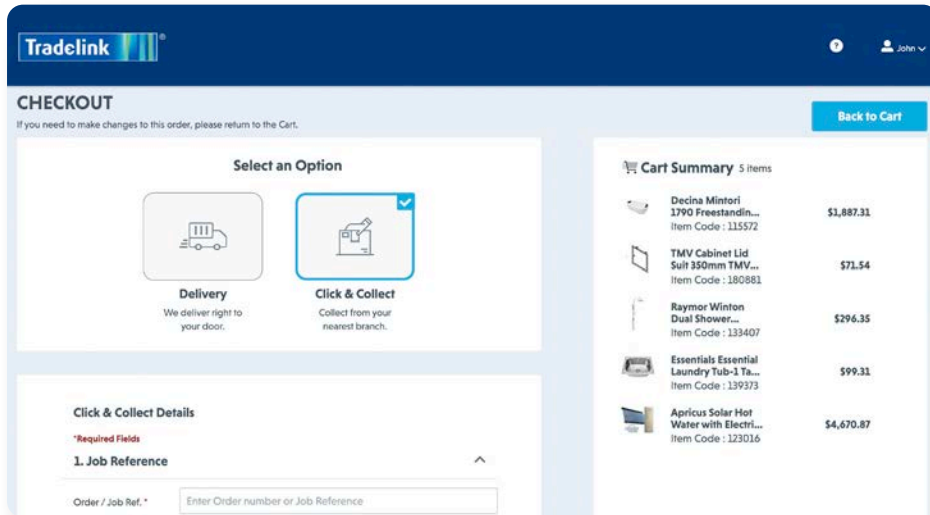


- **Contact Details** for the order can be any member of your team. An SMS will be sent confirming the order has been placed.
- The name and mobile number by default are those of the account owner but can be changed to another member of your team. Simply click the edit button to change the details.



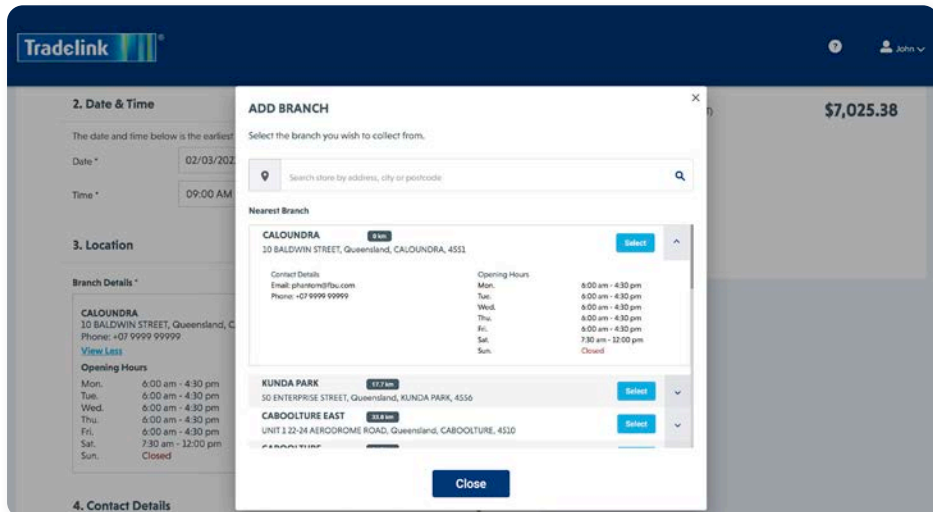
- **Delivery Instructions** are useful if the location is difficult to find or you wish to nominate a secure location on site.
- Finally, acknowledge the **Delivery Fees** and **Charges**. After you click **Yes, I agree**, you will then click **Save & Review** to continue. *[Skip now to page 38 to continue with a delivery order.]*
- If you choose **No, I'll Click & Collect instead**, you will need to complete the details required for this order type.

Checkout - Click & Collect

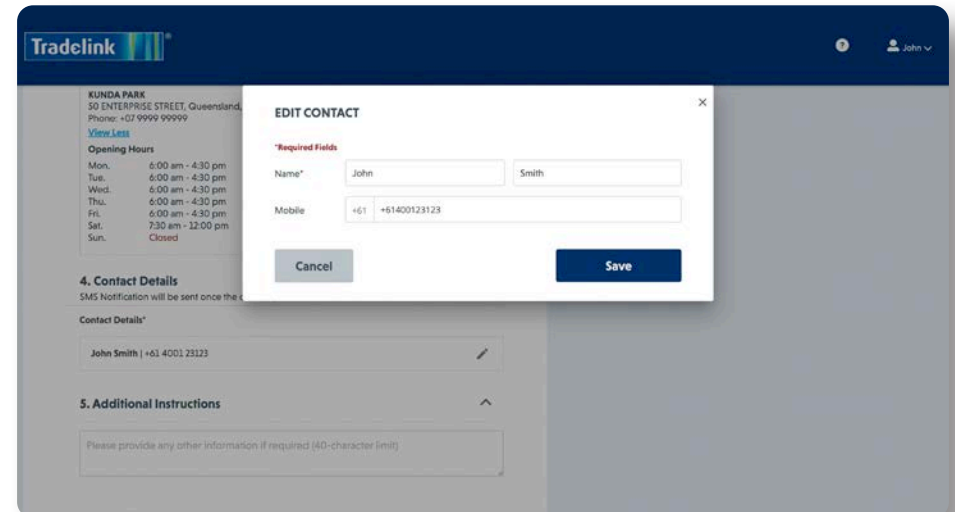


- Selecting **Click & Collect** provides you the option to pick up your order directly from the branch.
- First, add your **Job Reference**. This reference is specific for your business requirement, such as the order number for your customer or the name of the job.

- You will populate the **Date & Time** for the collection of your order. You can select an available date using the **Calendar** button and a time from the drop-down field.
- The **Location** will display your default branch for the account you are transacting against.
- You may opt to **Change Branch** by clicking on the highlighted blue text.

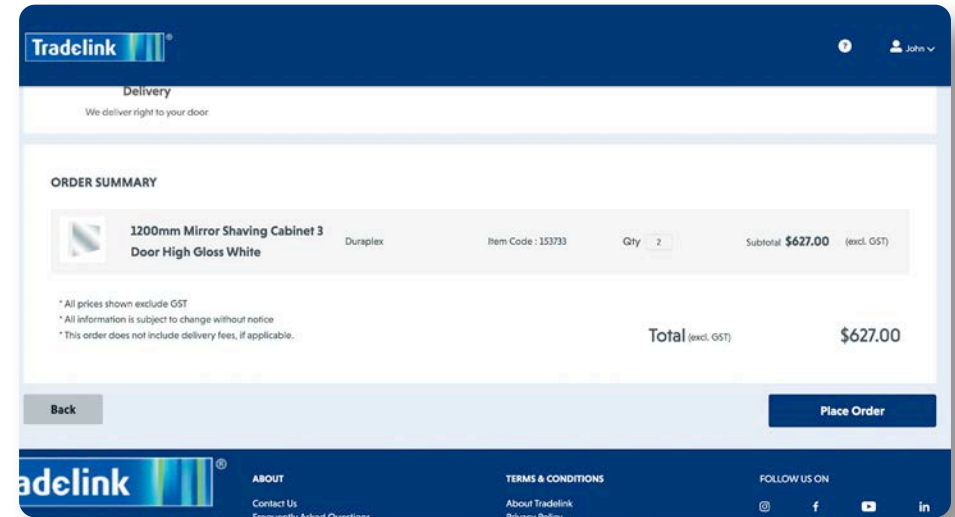
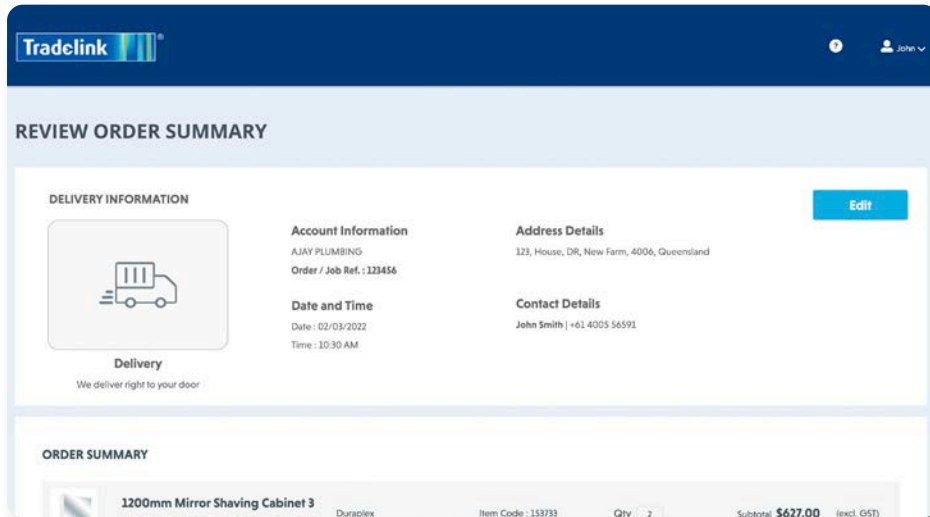


- By clicking **Change Branch**, a pop-up window will appear, and you can select an alternate branch from a list based on your current location.
- You can manually search for a branch using the suburb or postcode you'd like to collect from.
- Once you have chosen a branch, click **Select** next to the branch name.



- **Contact Details** for the order can be for any member of your team. An SMS will be sent confirming the order has been placed.
- The name and mobile number by default are those of the account owner but can be changed to another member of your team. Simply click the edit button to change the details.
- **Additional Instructions** are useful if you'd like to list a specific requirement for your order collection.

Review Order Summary



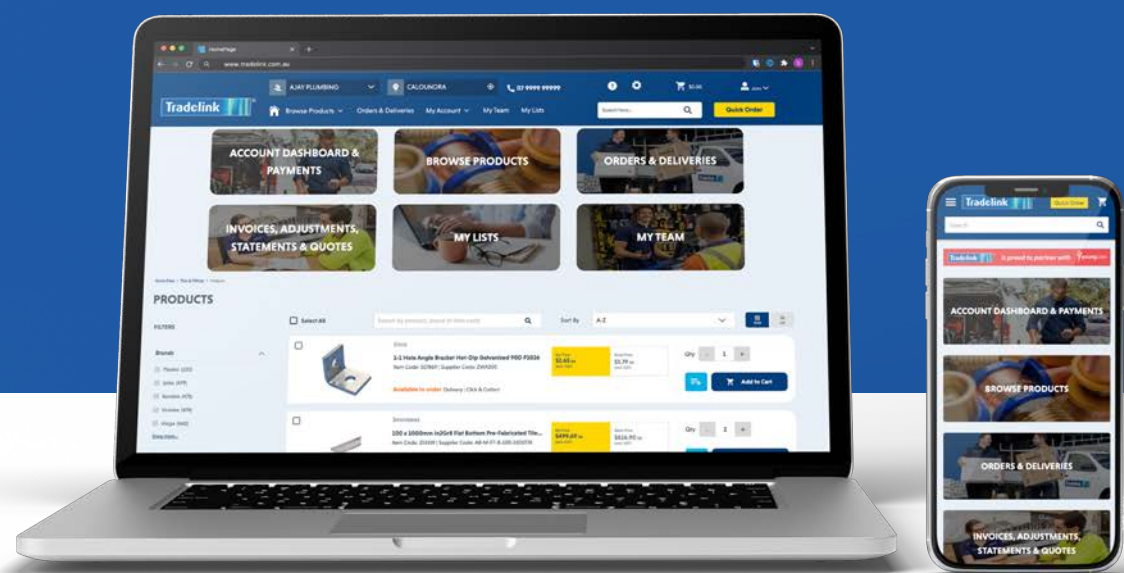
- Once you have clicked **Save & Review**, you'll be taken to the **Review Order Summary** page.
- You should review all information you have entered for your order.
- Click **Edit** to go back to the previous screen if any changes are required.

- The **Order Summary** will display all the items added to your cart. After checking the list and quantities are correct, click **Place Order**.
- Your order is now complete and being processed by the selected Tradelink branch.



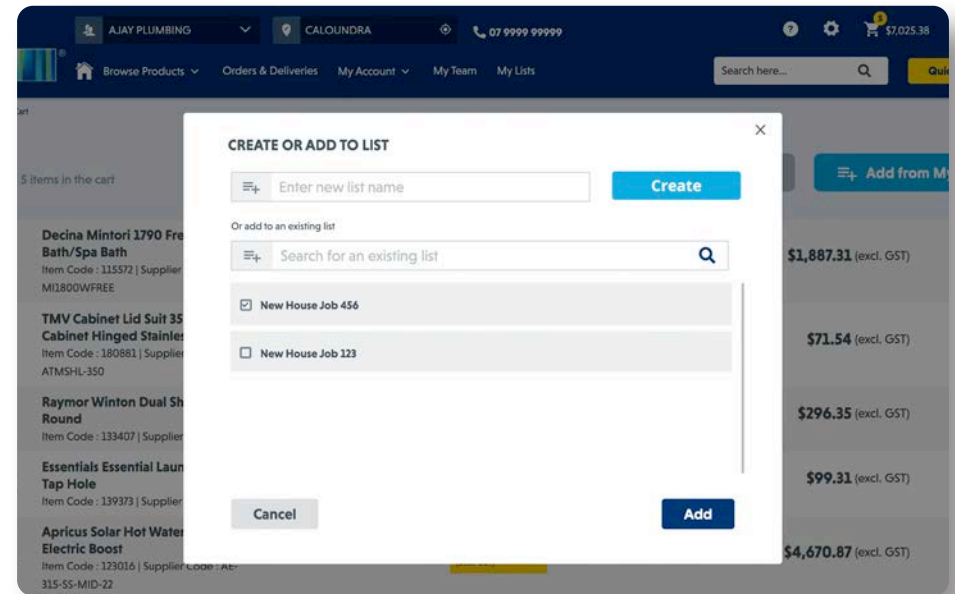
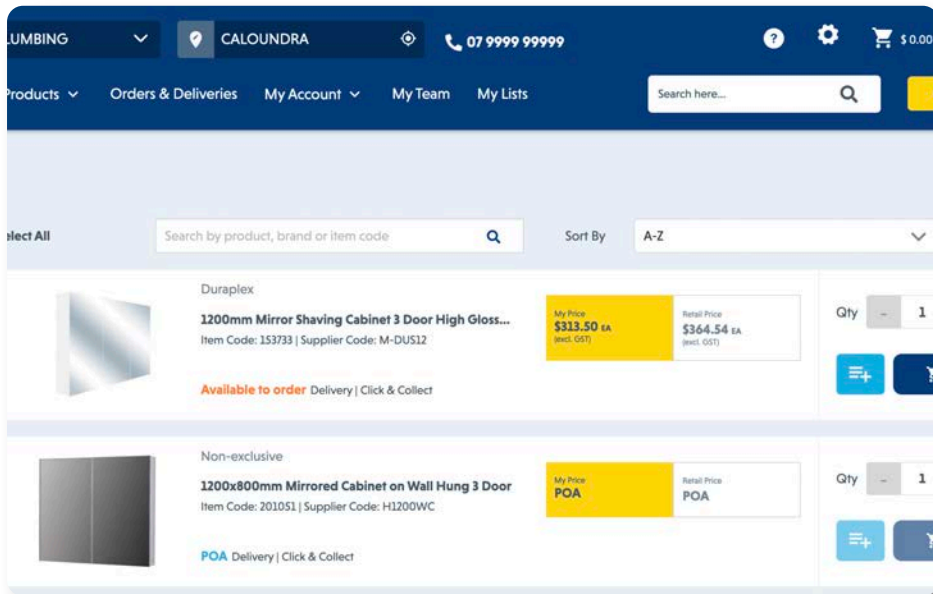
How-To

My Lists



My Lists

Welcome to the how-to guide for Tradelink's new online Trade portal. In this chapter, we will show you an overview of creating product lists.

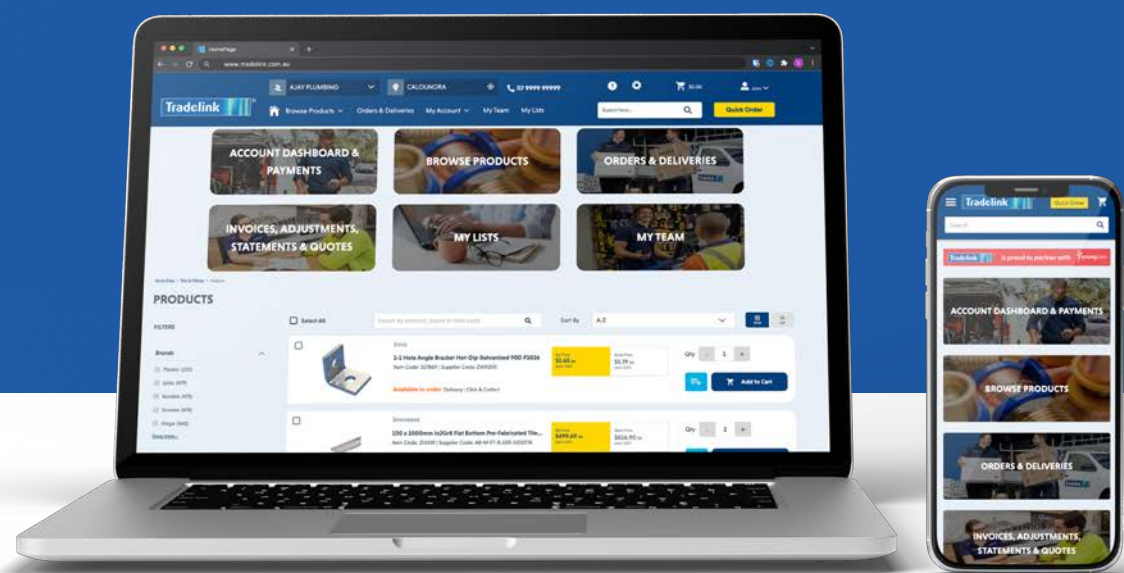


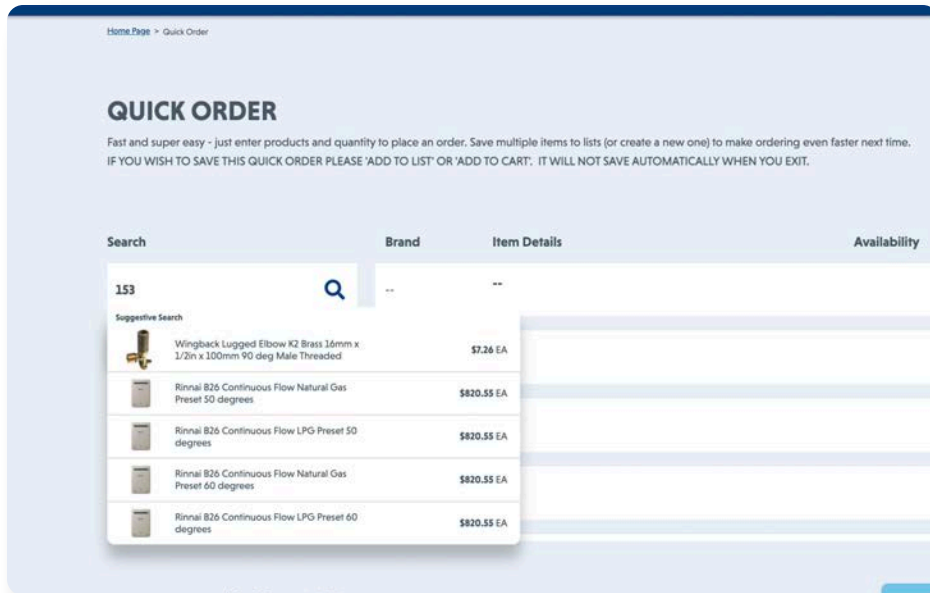
- **My Lists** can be viewed from the main menu drop-down or when adding a product to a list with the "Add to List" icon 
- When the **Add to List** icon is clicked you will be prompted to add the product to your saved lists or to create a new list.
- The list name must be created, and the check box ticked, before using the **Add** button to place products in the list.



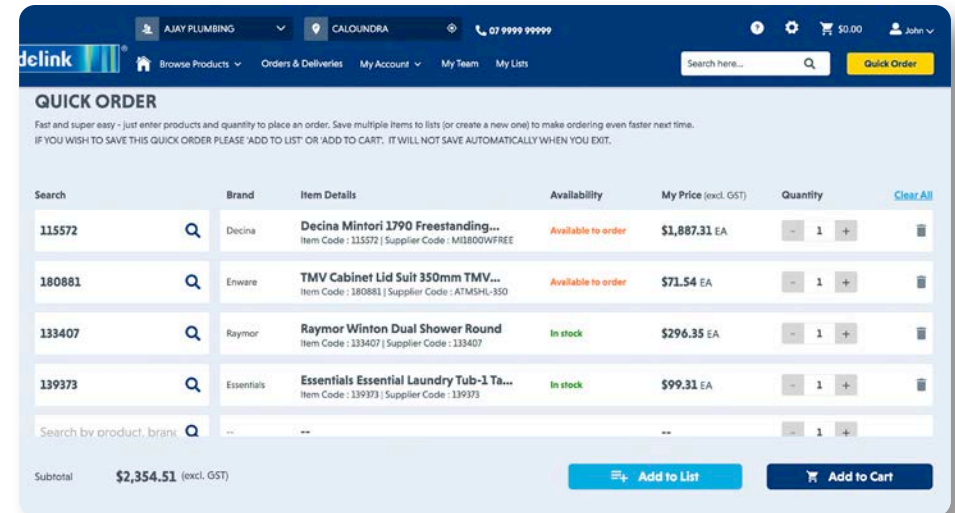
How-To

Quick Order





- **Quick Order** is accessed with the yellow button in the navigation bar.
- **Quick Order** allows you to place orders at speed using either the product Item Number or description of the product in quotation marks.
- You can scroll through the suggested items and select the desired product to add to the cart.

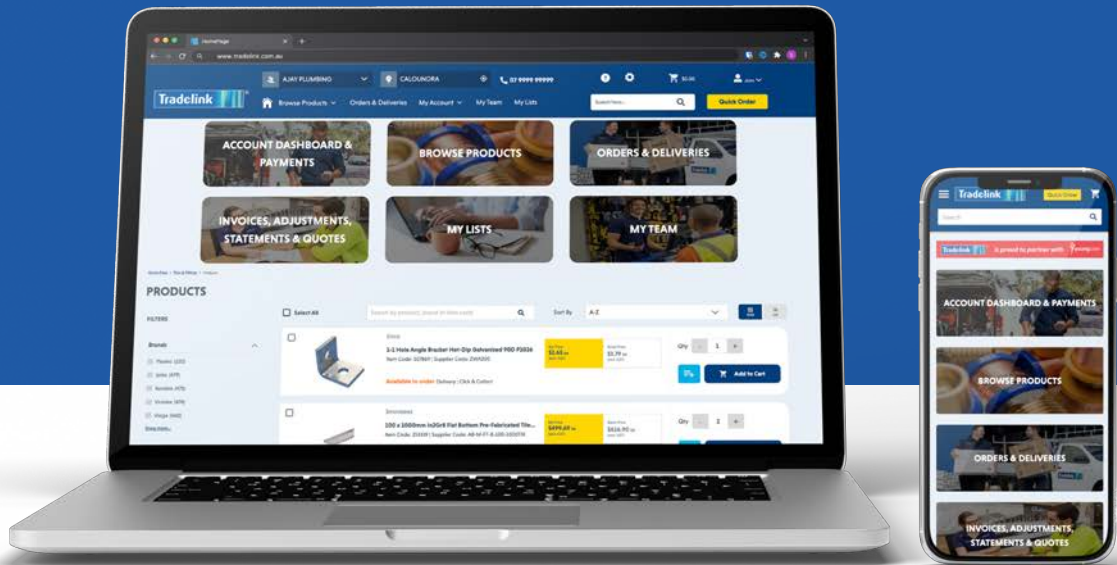


- After you have added all items to the **Quick Order** page, simply click **Add to List** if you wish to revisit this order later or **Add to Cart** if you'd like to proceed with the purchase.
- Follow the instructions from the **Shopping Cart** section to complete your order.



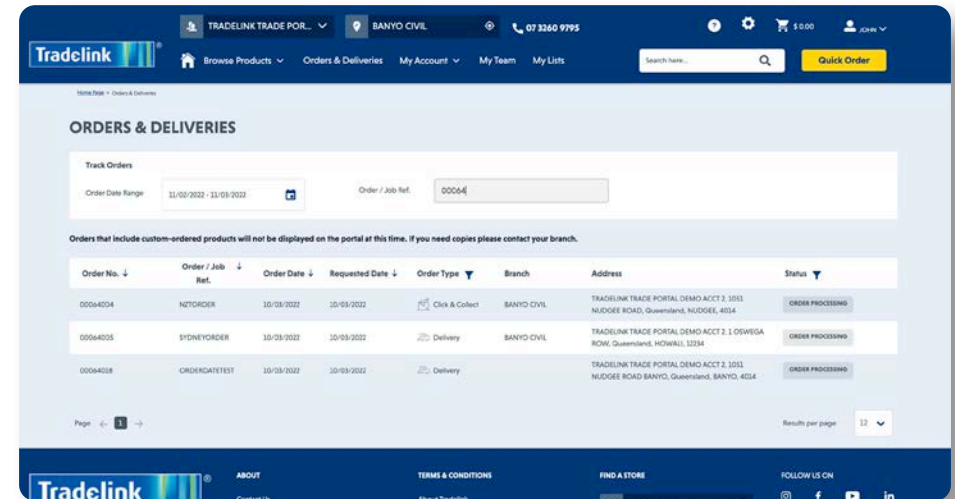
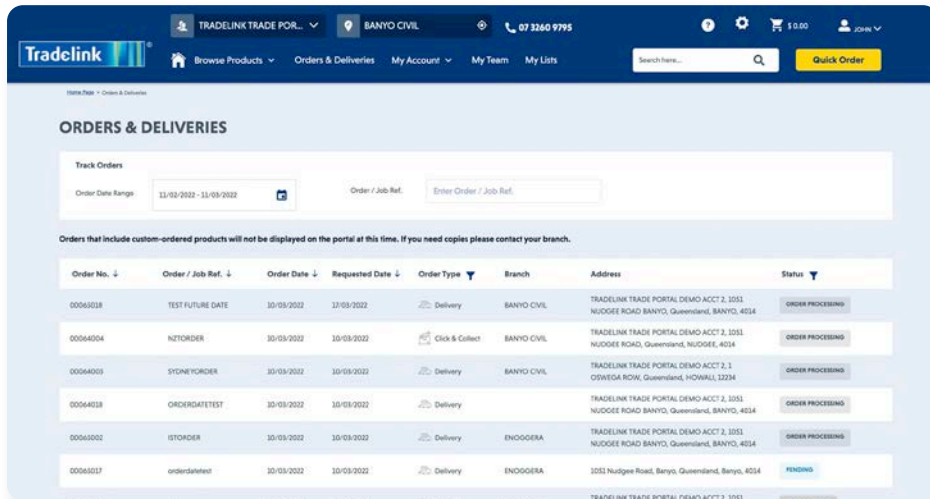
How-To

Orders & Deliveries



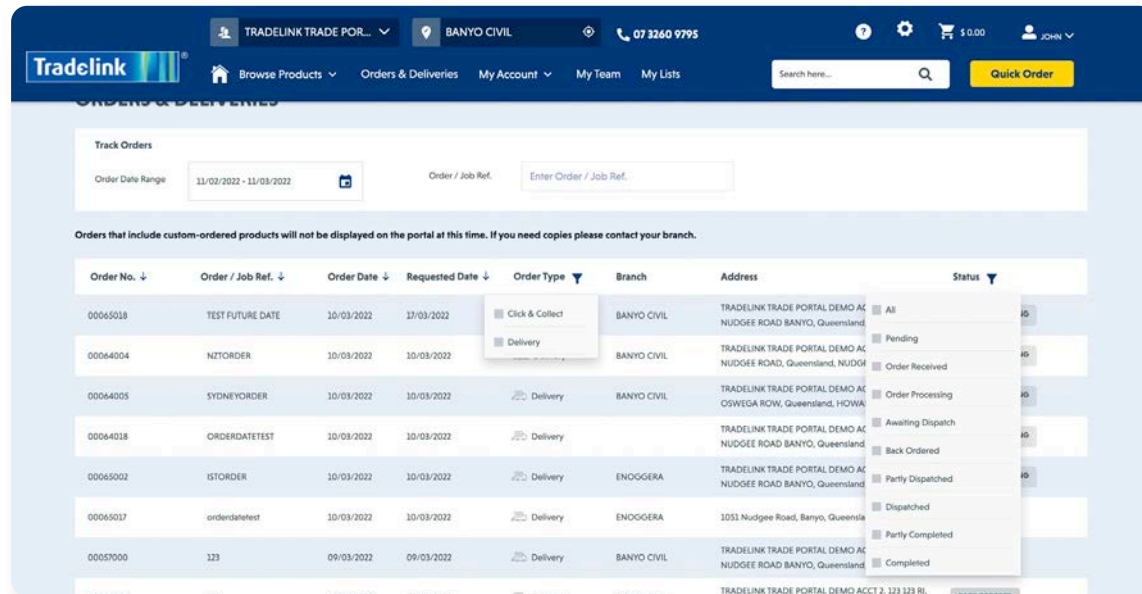
Orders & Deliveries

Welcome to the 'how-to guide' for Tradelink's new online Trade portal. In this chapter, we will learn to use the Orders & Deliveries feature.



- **Orders & Deliveries** can be accessed via the home page tile or the main navigation bar.
- All order details are listed including your order/job reference and the status of the order.
- Orders that include custom products will not be displayed but you may contact your local branch for a copy of these orders.

- Track orders using the **Order Date** Range or the **Order / Job Ref.** search field.



- Filter **Order Type** to view only Click and Collect or Delivery Orders.
- Filter **Status** to check whether your order is pending, on back order or in various stages of despatch or completion.

Pending

Order awaiting system confirmation.

Order Received

Stock is available, and order generated with branch.

Order Processing

Branch team collating order for despatch.

Awaiting Despatch

Order has been packed and ready to despatch.

Back Ordered

Stock available via supplier and has been ordered.

Partly Despatched

Available products have been despatched; there will be a split delivery/collection for the order.

Despatched

Full order has been fully despatched.

Partly Completed

Available products have been delivered/collected; there will be a split delivery or collection for the order.

Completed


Order fully completed.

Tradelink TRADE POR... BANYO CIVIL 07 3260 9795 \$ 0.00 JOHN

Tradelink Browse Products Orders & Deliveries My Account My Team My Lists Search here... Quick Order

Home Page > Orders & Deliveries

ORDER DETAILS Back



Delivery
We will deliver right to your door.

ORDER PROCESSING

Order Information
 Order Number: 00064005
 Order Branch: BANYO CIVIL
 Order Date: 10/03/2022
 Order / Job Ref.: SYDNEYORDER
 Order Taken By:

Account Information
 Account Number: 76159112
 TRADELINK TRADE PORTAL DEMO ACCT 2
 Address: 1051 NUDGEE ROAD, BANYO,
 Queensland, BANYO, 4014

Delivery Information
 Requested Date: 10/03/2022
 Requested Time: 08:30:00
 shashika Abeysuriya
 +61493402216
 TRADELINK TRADE PORTAL DEMO ACCT 2, 1 OSWEGA ROW,
 Queensland, HOWALL, 12234
Delivery Instructions: SYDNEYORDER CONTACT:SHASHIKA ABEYSURIYA

ORDER SUMMARY

Item Code	Item Description	UOM	Quantity Ordered	Quantity Shipped	Quantity Back Ordered	Status	Unit Price (excl. GST)	EXT Price (excl. GST)
010091	DWV Bend 40mm 88deg Female Plain PVC	EA	1	0	0	Order Received	\$1.02	\$1.02
093903	Heavy Duty Plain Copper Tube Type B 1/2in 12.7mm 6m 20g 0.91mm	LN	1	0	0	Order Received	\$36.65	\$36.65
Total (excl. GST)								\$37.67

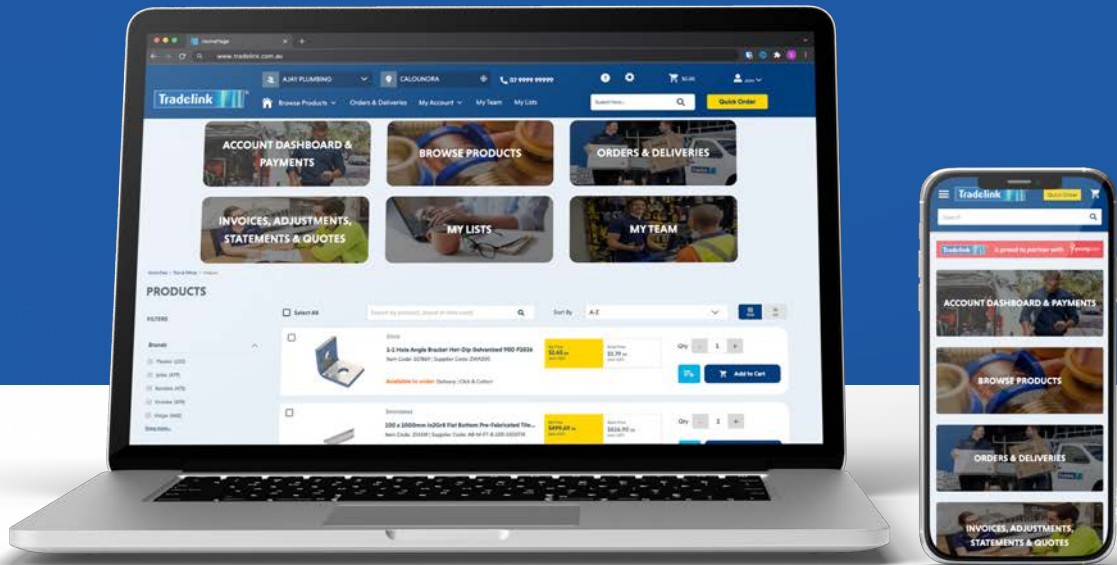
* All prices shown exclude GST
 * All information is subject to change without notice
 * This order does not include delivery fees, if applicable.

- Click on any order line and the full order summary will be displayed.



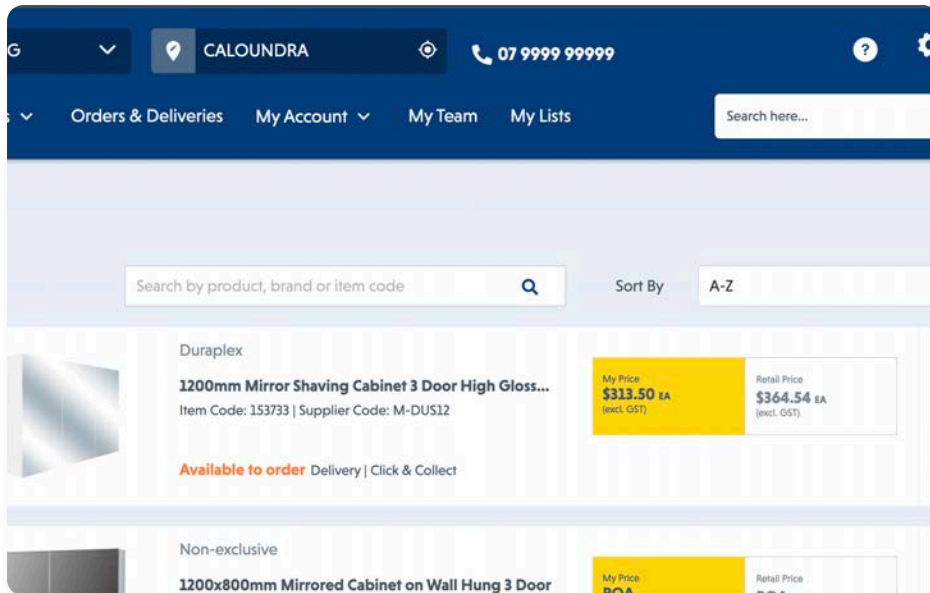
How-To

Use My Team

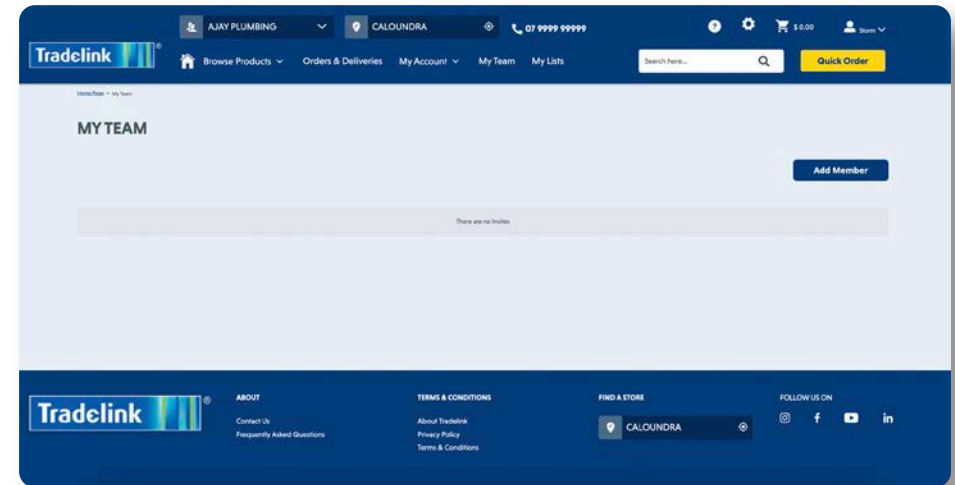


My Team

Welcome to the 'how-to guide' for Tradelink's new online Trade portal. In this chapter, we will learn to use the My Team feature.

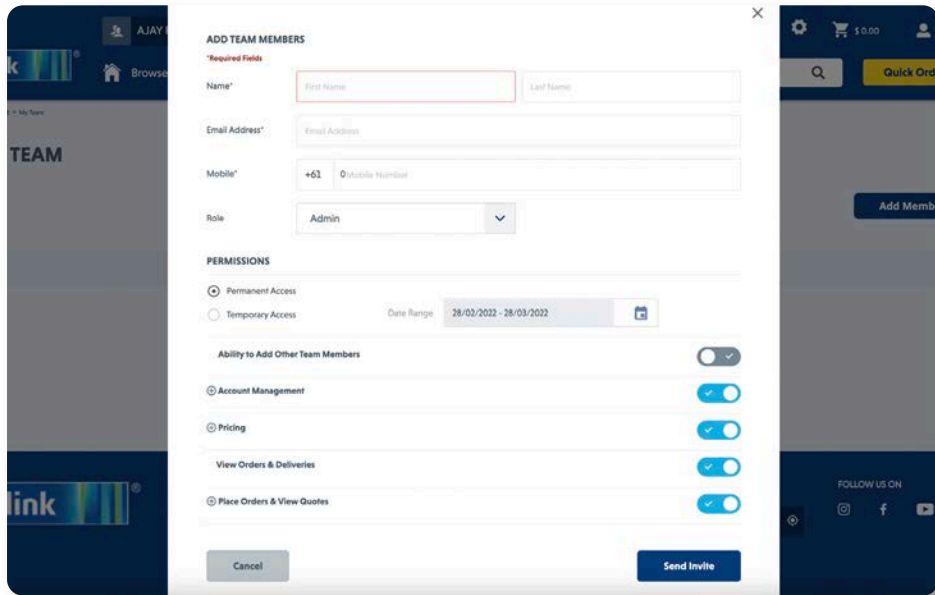


- The **My Team** option can be accessed from the navigation bar at the top of the screen from any page.

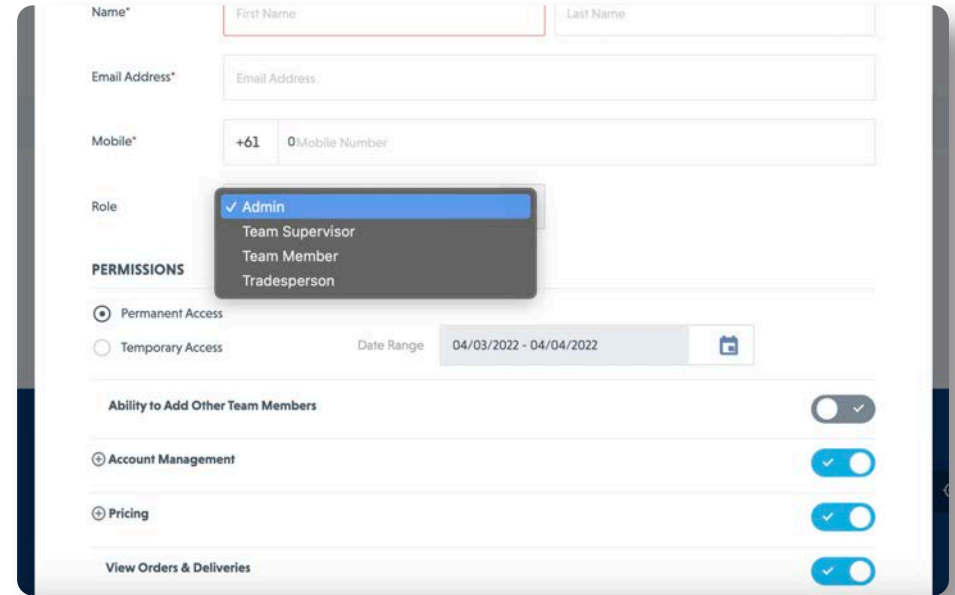


- When using **My Team** for the first time, there will be no team members listed as you are yet to send an invitation.
- Click **Add Member** to send an invitation for someone to join the team.

TIP: Each of your transacting accounts has separate Teams - make sure you are transacting against the correct account for the team member before sending an invite.



- Complete the contact details for the Team Member you wish to add to **My Team**.
- From the drop-down, select the **Role** that you will provide the new team member; this enables you to see the various permissions available on the toggles to the right of the page.



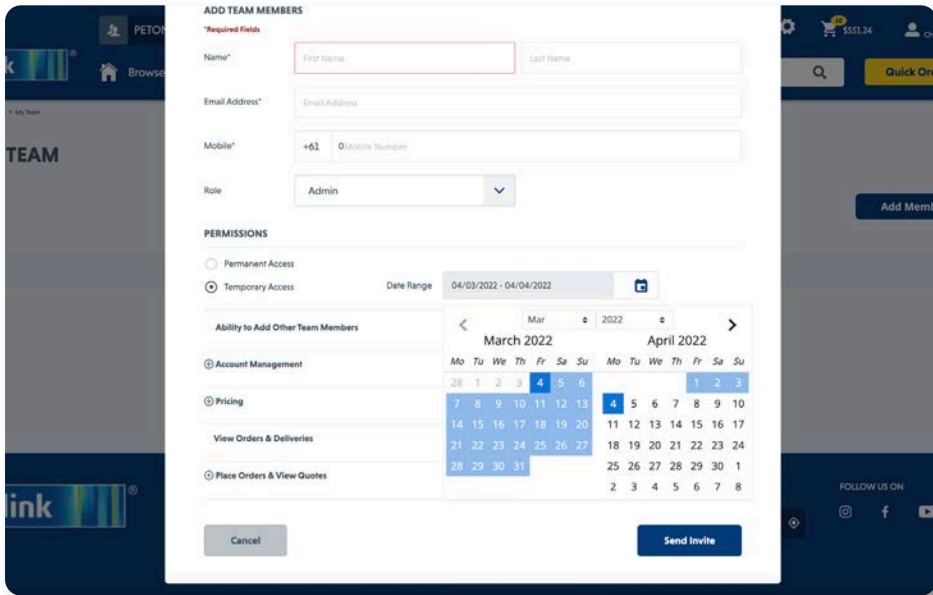
- Control the different access levels you can provide team members defined by the **Role** you assign.

Admin: Full access by default but you can use the toggle buttons to remove permissions. This is the only role that has permission to **Add Team Members**.

Team Supervisor: Account Management access is not granted.

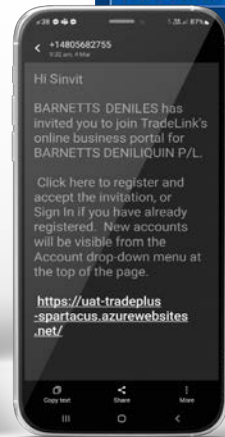
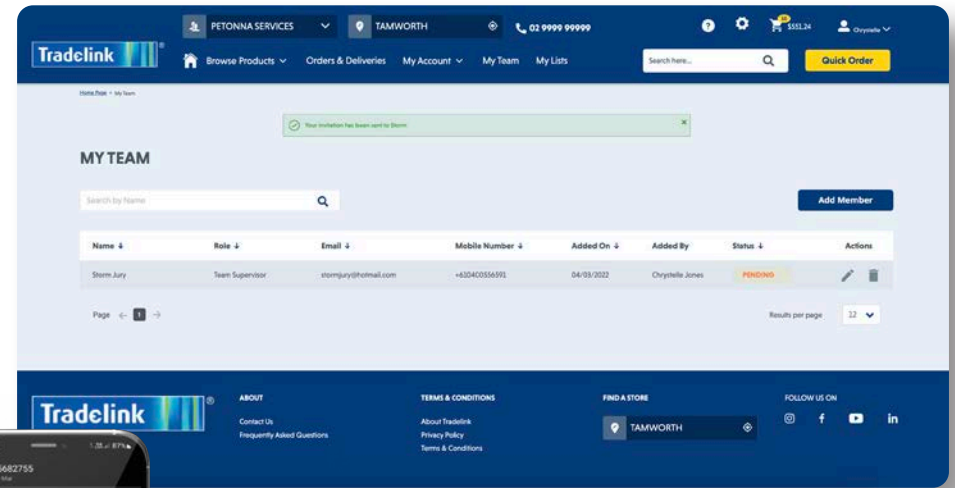
Team Member or Tradesperson: Access only to Orders & Deliveries.

Click on  to see the extended permissions each role provides.

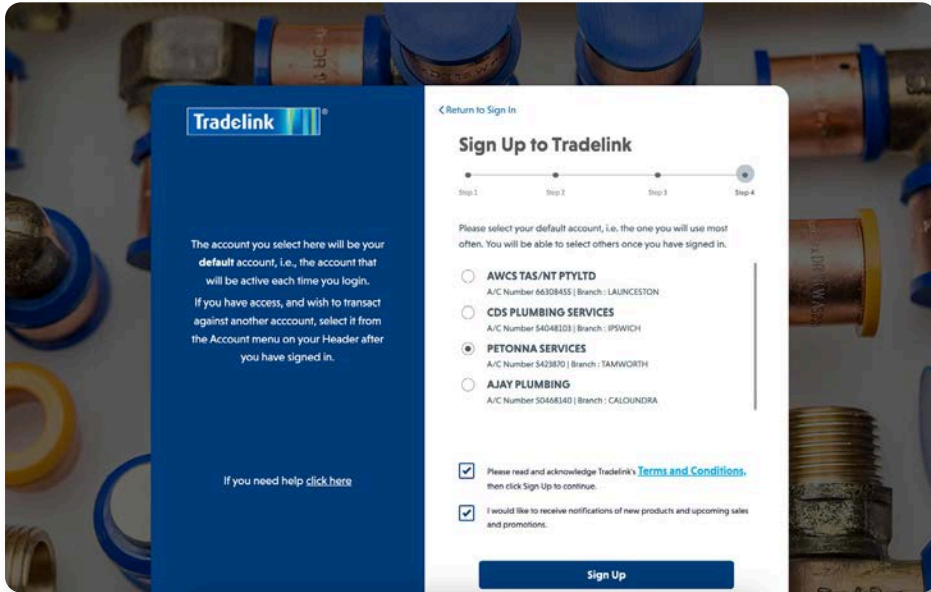


- Under **Permissions** you may select **Permanent Access** or **Temporary Access** with a defined date range which may only be a single day.

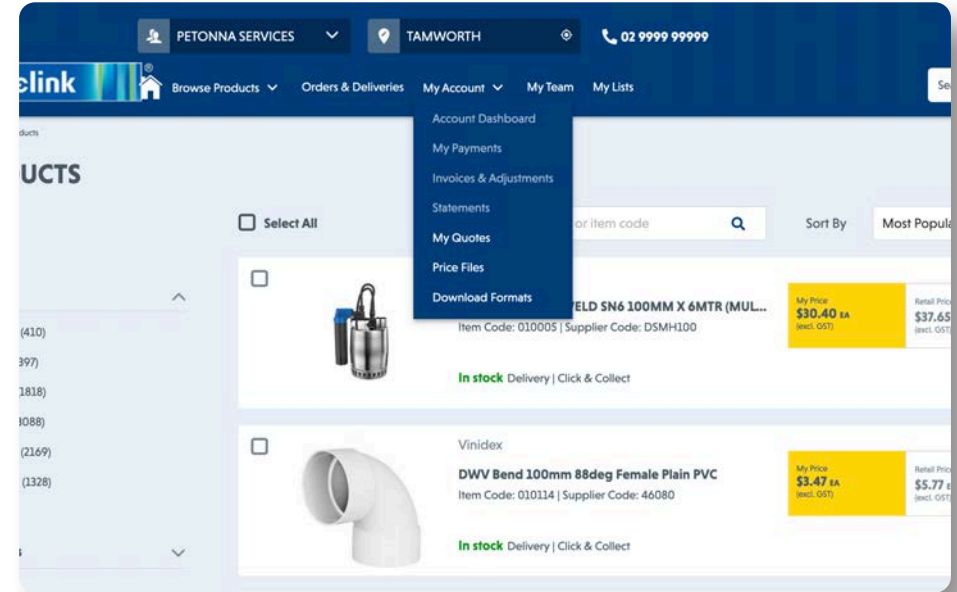
TIP: The **Temporary Access** in **My Team** is useful if you have a sub-contractor on a job who requires access to your account only for the duration of the job.



- After you click the **Send Invite** button, the new member will receive a text message with a link to **Register** and **Sign In** to the portal.
- You will see on **My Team**, the invited member's details and the status will change from **Pending** to **Accepted** when they have registered.
- Team member access can be edited or deleted using the Pen or Trash icons under **Actions**.



- The invited team member must click on the link sent via text message and they will be prompted to **Register** or **Sign In** (see Register & Sign In chapter).
- The team member must **Register** if it is their first use of the portal using your Account.
- If they have already registered against an alternate account, they may simply **Sign In** using their email address and password.



- The **Role** selected for the team member will determine what they see in the Tradelink portal. In the example above, the **Team Supervisor** cannot access the **Account Management** options in the drop down, and on the home page the **Account Dashboard** will be disabled.

Thank you for completing the Trade Portal education material and welcome to the future of Plumbing Online.

This isn't the end but only the beginning, as we continue to add functionality that will assist your business.

Reach out to your Tradelink representative if you have suggestions on how we can improve your online experience.

