# **Punchout Users Guide**



### Provided by



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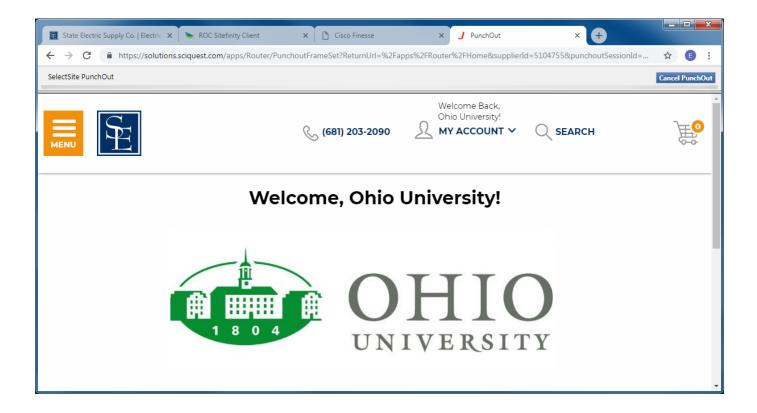
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# Punch-out Information & User's Guide for Ohio University

Welcome Ohio University to the digital version of "Service Makes State."

Launched in May 2018, the new StateElectric.com is the best blend of traditional web site information and a complete eCommerce platform and with integrated business tools. It was designed with you, our valued customers, in mind.



# Navigation—The Banner

SelectSite PunchOut Cancel PunchOu





(681) 203-2090







### Welcome, Ohio University!

### **Navigating the Website from the Banner**

Whether you are using a desktop, tablet, smart phone or other hand-held device, www.StateElectric.com is responsive to your device. You can select the banner icons from any page to facilitate your use of our site.



Click the Menu for drilling through 3 Levels of Product Groups and direct links to our most visited landing pages for Locations, Resources, Services, Markets, & Careers.



Click the SE logo for the State Electric Home Page. We recommend beginning your shopping experience on the home page to view current features and industry news. It's also a good place to go to refresh your page and start a new search.



Use the auto-dialer or call the ACT Team whenever you have a question, issue or concern. They are available M-F, 7:00-5:00 EST. If you leave a message, someone will return your call, text, or email.



The My Account drop down displays a list of the most commonly used links available to registered users. These include order management, profile information, and ordering tools. All features are not available through punch-out/procurement contracts.



Clicking the spy-glass opens the Search By bar. Keyword search is the "hot spot" to start your search to find items and product information. You can use part numbers, descriptions, manufactures, brands, product groups, and attributed data to name a few options.



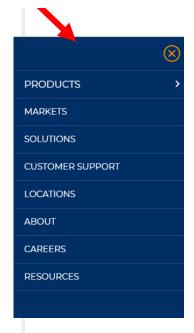
Click the Cart to view the contents of your shopping cart. The quantity number represents the total quantity of the items placed in the cart. It does not represent the number of unique line items.

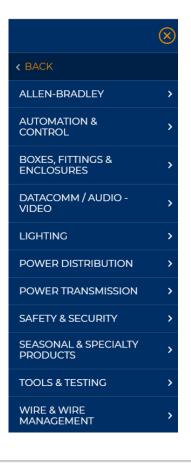
# The Menu Options—Products











The Menu icon allows you to quickly select from our most popular topics including the traditional search by product categories.

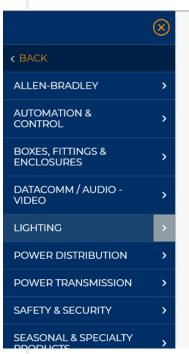
Approximately 60,000 items can be found through 10 basic product groups, each with 2 additional levels of item categories.

Select the > to display the Level 2 and Level 3 categories menu from any of the product groups.

Selecting a Title can produce a lengthy return. The use of categories can reduce lengthy search results. Use the results page tools and product attributes to further refine your search.

The Level 2 & 3 categories display by popularity.

Due to the manufacturer's defined areas of distribution, the Rockwell Automation (Allen -Bradley) products have their own tab. Availability will be restricted based on consumers ship to address.



### LIGHTING

**PORTABLE LIGHTING & FLASHLIGHTS** 

PORTABLE & TEMPORARY LIGHTING FLASHLIGHTS

**FLASHLIGHTS ACCESSORIES** 

LIGHTING FIXTURES

OUTDOOR LIGHTING TASK LIGHTING

**LIGHTING POLES-POSTS & HARDWARE** 

FLOOR & TABLE LAMPS

NON ELECTRICAL LIGHTING

RECESSED LIGHTING **EMERGENCY LIGHTING & EXIT SIGNS** 

LANDSCAPE LIGHTING

TRACK LIGHTING

INDOOR LIGHTING VIEW MORE...

#### LAMPS & LIGHTBULBS

LAMP COMPONENTS & ACCESSORIES

MINIATURE LAMPS

GAS DISCHARGE LAMPS

ENTERTAINMENT LIGHTING

LED LAMPS

**HALOGEN LAMPS** 

RECYCLING KITS

**INCANDESCENT LAMPS** SPECIALTY LAMPS

HIGH INTENSITY DISCHARGE

VIEW MORE...

#### **LIGHTING CONTROLS & BALLASTS**

**PHOTOCONTROLS** 

**BALLAST ACCESSORIES** 

DIMMERS

**BALLASTS & DRIVERS** 

LAMP TRANSFORMERS

LIGHTING CONTROLS & ACCESSORIES

**OCCUPANCY & VACANCY SENSORS** 

# The Menu Options-Topics



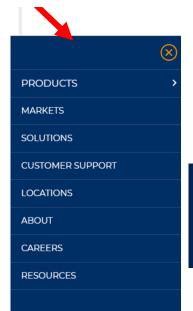












# The Menu listing includes our most frequently viewed web pages for your convenience.

Each page is host to a wealth of information such as Energy Solution for Lighting Retrofit & New Construction, or details about Stores, our professional / certified affiliations, or upcoming events.

#### **SOLUTIONS**

State Electric Supply Co.'s motto has always been "Service Makes State". We pride ourselves on the value-added services we offer to our customers as an extension of our total electrical solution. Whether it's preventing downtime, improving safety or managing project inventory, we understand the needs of our customers and the growing demand to deliver solutions to those needs.

### **LOCATIONS**



mpany is one of the nation's largest and best-known electricar distributions, war are branching across of states. Our costomers are serviced by a local team-edgeable employees in each of our branches, with additional support from company-wide resources and specialists.

RESOURCES



# State Electric Home Page



(681) 203-2090





**Explore Our Products & Services** 

















Clicking on the SE Logo will always take you to the State Electric Home Page.

www.StateElectric.com blends the best of the traditional website information with our new eCommerce platform to best serve you with one URL and a single sign on.

Whether you are looking for product availability, a product specification sheet, a branch location, company information or more on careers— all of this and much more is conveniently accessible from the home page.

Don't see what you're looking for or have a question —the ACT Team is ready to help. Contact via phone, chat, or the Contact Us email.

Visit us often. The site is refreshed on a regular basis to showcase seasonal items, current events, our people, new products, and product specials.

#### **ABOUT US**

Beyond quality products and competitive prices, the thing that separates our company from others is our service. We believe that making an effort to provide customers with what they need, when they need it, will keep them happy and coming back.

#### SHOP BY BRAND



Security Brands.





Cable General Cable

### **MARKETS**

State Electric Supply Co. is an experienced full-line electrical, datacomm, utility, and power transmission distributor. We provide products and solutions to our valued customers across multiple market segments. Through our quality products, dedicated employees, extensive experience, and commitment to service & technical support, State Electric Supply Co. provides the best value to our customers.

COMMERCIAL DATACOMM

ENERGY

GOVERNMENT INDUSTRIAL

INSTITUTIONAL MEDICAL

MINING

POWER TRANSMISSION

RESIDENTIAL

UTILITY

#### SOLUTIONS

We Are Your Total Solution

State Electric Supply Co.'s motto has always been "Service Makes State". We pride ourselves on the value-added services we offer to our customers as an extension of our total electrical solution

VALUE-ADDED SERVICES

INVENTORY SOLUTIONS

TCO SOLUTIONS

JOBSITE SOLUTIONS

ONLINE SOLUTIONS

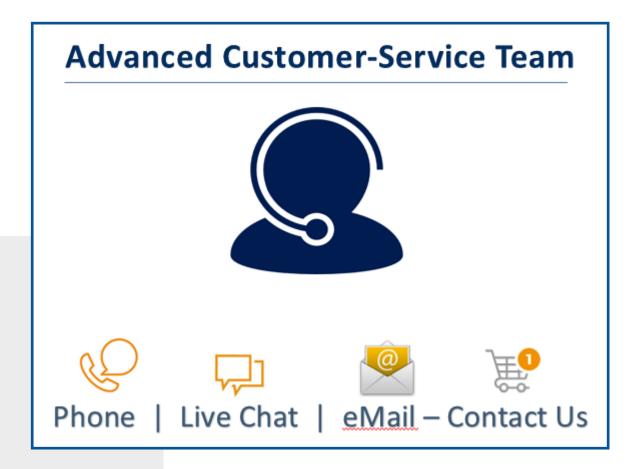
NATIONAL ACCOUNT SOLUTIONS

GOVERNMENT SOLUTIONS

### **CAREERS**

State Electric Supply Co.'s dedicated, hard-working and knowledgeable employees are the key to our success, and have helped foster a family-like culture that we are very proud of. We offer a broad range of career opportunities in a number of key market segments. Our commitment to a diverse and inclusive work environment, combined with exceptional benefits and er advancement opportunities makes State Electric Supply Co. a rewarding place to begin and grow your career.

# Online Sales, Services & Support



Help is just a phone call away at (681) 203-2090.

The ACT (Advanced Customer-Service Team) looks forward to talking with you.

This quick response team is served by four long-time
State Electric employees.
Collectively they have 150
years of electrical industry
experience from product and application specialists,
through order processing to account administration.

Don't see what you're looking for or have a question — the ACT Team is ready to help. Contact via phone, chat, or the Contact Us email.

You will find several ways throughout the website to contact our ACT team with any questions, issues, concerns or feedback that you may have.

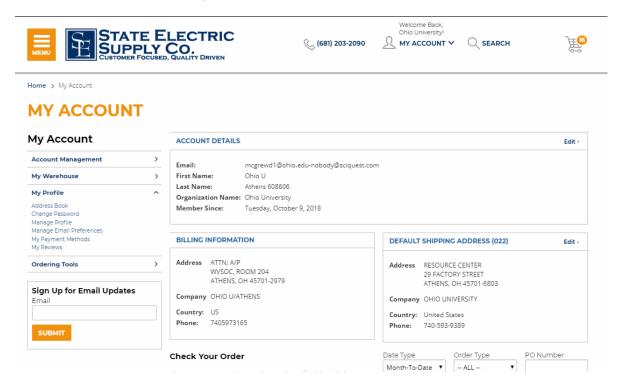
State Electric Supply believes that our people are our biggest asset. Seasoned industry professionals provide the expertise and knowledge behind the Advanced Customer-Service Team. They work hand-in-hand with your local sales representatives and branch operations to provide you with the best solutions and services possible.

The ACT Team is available Monday—Friday from 7:00 am to 5:00 pm EST. You may leave us a message after hours and it will be returned. Should you have an EMERGENCY, please use the LOCATIONS page to find contact information for your local store or contact your sales rep.



# My Account provides registered users with access to order management tools, ordering tools, and user profile information.

You may access the My Account quick-link options from the banner page MY ACCOUNT pull-down, from the Menu selection for My Account, and from the Footer link.



#### **MY PROFILE**

The Punch-out is a Business to Business integration partnership where the user registration and authorization has been completed for you. Consequently, many of the options in My Profile have been replaced with data provided by and used with the BobcatBUY procurement integration.

For questions, please consult your Director of Procurement or the State Electric ACT Team.

**Address Book:** Displays fixed ship to accounts in the State Electric ERP system and ship to added by you during the checkout process.

**Payment Methods:** Displays stored credit card payment methods. Checkout does not require you to store your credit card payment information. It is a service of convenience.

Change Password, Manage Profiles are not applicable for Punchout Users.

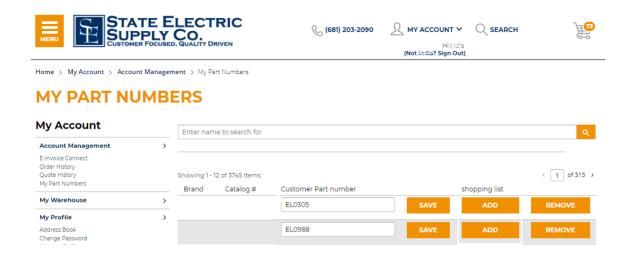
**My Reviews:** Product reviews are helpful to future buyers and management of our website. This is a record of your contribution.

### **Account Management**

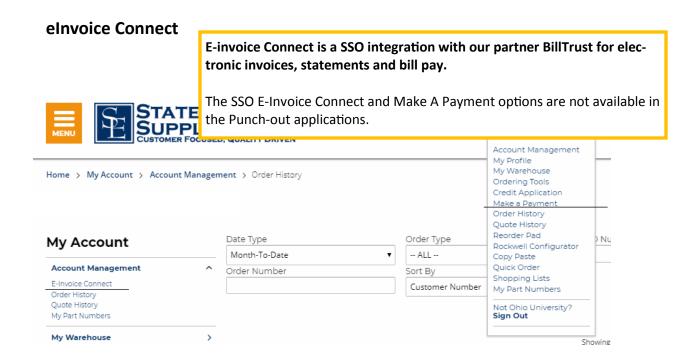
#### **My Part Numbers**

Our customers can use their own part numbers in the StateElectric.com ordering tools and keyword searches to reduce time and improve order accuracy.

The cross-reference product file is built in our ERP system with the customer's item identifier to the State Electric SKU#. The cross-referenced numbers can be printed on packing slips and/or invoices. This allows the customer to efficiently and accurately receive and post their invoices.



Maintenance to the cross-reference file is not available online at this time. Contact the <u>ACT</u> team or your local sales rep to have these records built or updated.



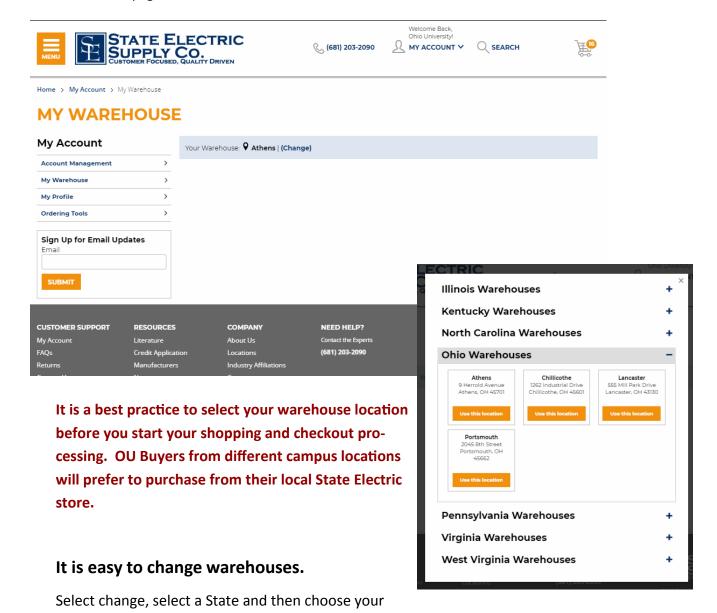
# My Warehouse

#### My Warehouse

State Electric location.

My Warehouse determines the store location where materials will be picked up or shipped from. It provides you with correct available quantities for pick up and additional quantities available within the warehouse's region.

The importance of shopping at your home warehouse is demonstrated by the frequency of options to confirm and/or change the warehouse location. My Warehouse appears in the My Account applications, the product browser results pages, product detail pages, and the Cart page.



### **OPEN ORDERS & ORDER HISTORY**

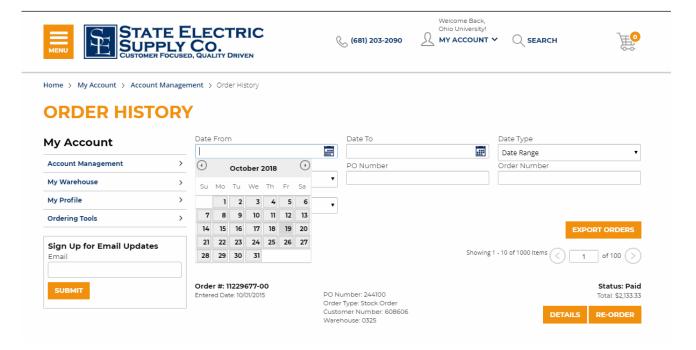
#### Looking for an Open Order or Previous Order?

Use the Order History application to find either open orders or previous order placed with State Electric Supply. This lookup is not limited to orders placed online.

Order History resides in your Account Management Tools but it is accessible from the My Account drop down found on the header and at the bottom of your My Account profile page.

For your convenience, Order History defaults to a Month To Date data return. You can easily change it to Year To Date or Date Range for a specific time frame.

You may also retrieve orders by specific order number or your PO entry or order status.



The Order Status lets you identify the stage of your open orders, special orders, or backorders: Ordered, Picked (your order is in the warehouse for fulfillment), Shipped (your order has been delivered or is out for delivery), Invoiced, Paid.

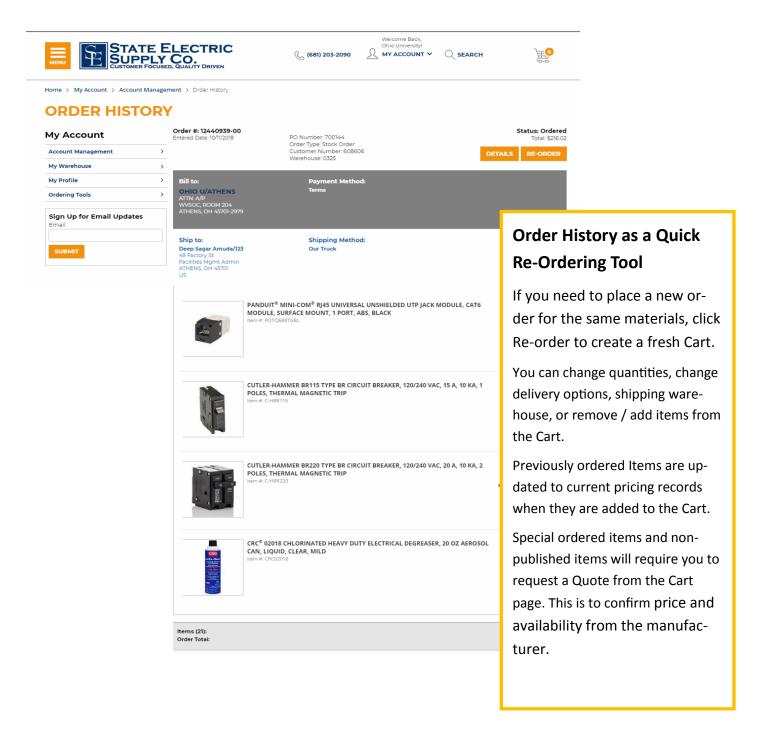
If you need to expedite an open order, please do not hesitate to contact your local sales rep. You may also contact the website sales and services support ACT Team.

Order History continued.

### **OPEN ORDERS & ORDER HISTORY**

#### **Viewing Your Order History Results**

Once you have retrieved your orders for review, the summary information may be all you need. If you are looking for more specifics, click the Details button to display the order's bill to, ship to, and product line item details.

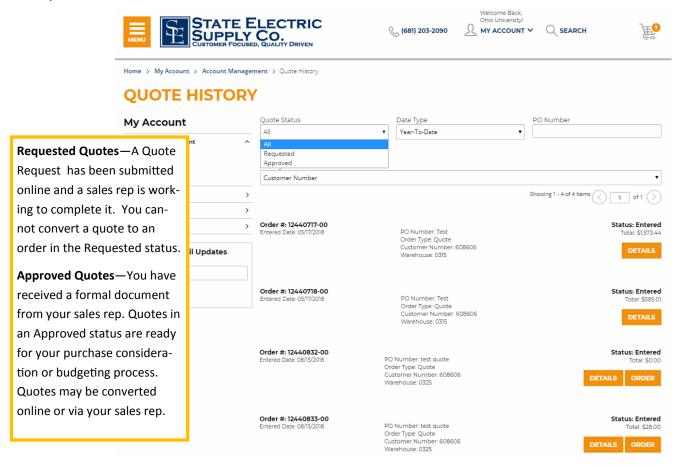


### **Quote Request-Open Quotes**

### Looking for an Open Quote?

Use the Quote History application to find either Quote Requests submitted online from the Cart page, or a quote completed by your sales rep on State Electric's ERP system. Like Order History, this lookup is not limited to quotes placed online.

Quote History resides in your Account Management Tools but it is accessible from the My Account drop down found on the header. For your convenience Quote History defaults to All quotes. You can easily change it to viewed Approved only. You may also retrieve quotes by date ranges, the PO / Job name provided.



### **Viewing Your Quote History Results**

Once you have retrieved your orders for review, the summary information may be all you need to proceed with ordering. If you are looking for more specifics, click the Details button to display the order's bill to, ship to, and product line item details.

### **Converting the Quote to an Order**

If you are ready to place an order, click the Order button to proceed to the Quote Transaction page.

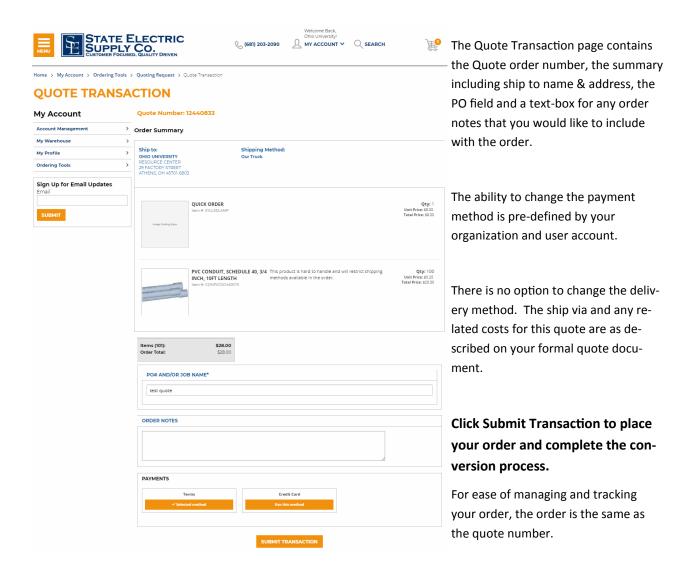
# **Converting Quotes to Orders**

### **Converting the Quote to an Order Transaction**

When you are ready to place the order, from the Quote History page click the Order button to proceed to the Quote Transaction page.

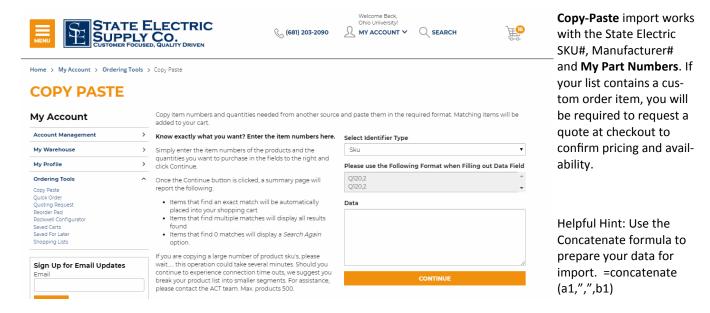
### **Placing the Quote Order**

The Quote Transaction page is very similar to the Checkout page.



#### What is Copy-Paste?

The **Copy-Paste** ordering tool allows you to efficiently and accurately import your data lists. Whether you have a short bill of materials or a complete storeroom list, import your data list (item number and quantities) for Stock and Custom Order items.



#### What is Reorder Pad?

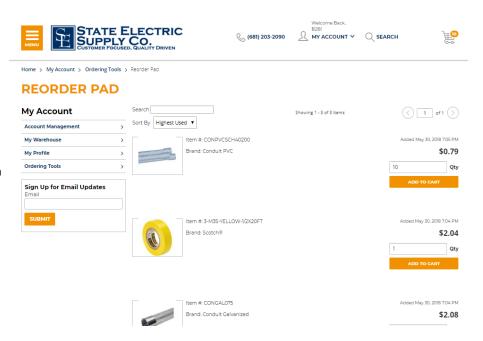
**Reorder Pad** displays all unique items purchased on StateElectric.com in the last 365 days. It also includes a date/time stamp for the original purchase as point of reference.

#### **Features include:**

**Search By** - enter part or all of a specific item number, brand or brand prefix

**Sort By** - Brand, SKU, Oldest/Newest, or by Usage

**Select an item**, update the minimum order to your buy quantity Click the image to go to the product detail page.

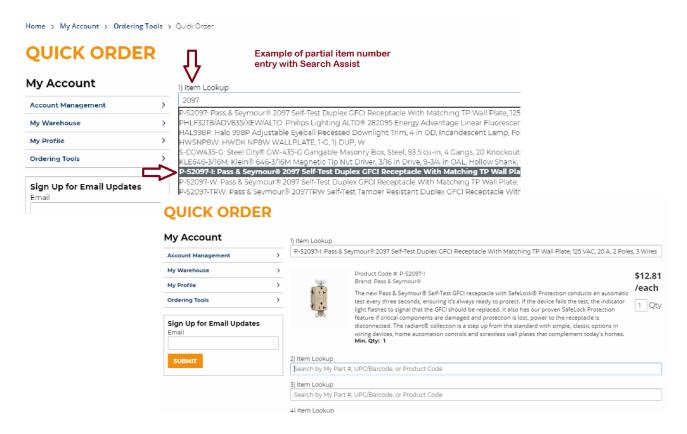


#### What is Quick Order?

If you already know what you want and list has 10 items or less – use **Quick Order** to quickly add the item(s) and the quantity you need to your cart. Don't know the exact State Electric SKU#? Our key word search assist displays products as you type them in the search bar. You can also search by Manufacturer#, UPC or **My Part Numbers**.

Still not sure? Select **Custom Product**, add some details in a note and submit it for a quote where one of our product experts will help you select the right product for your job.

Note: Items not stocked at your local warehouse can be added to cart and submitted for a quick quote to confirm price and availability.



### What is the Rockwell Configurator?

The **Rockwell Configurator** tool is a portal to Rockwell Automation and their vast catalog of items and product information. Use the configurator to build out your product components for purchase or submit it for quote directly from your cart.

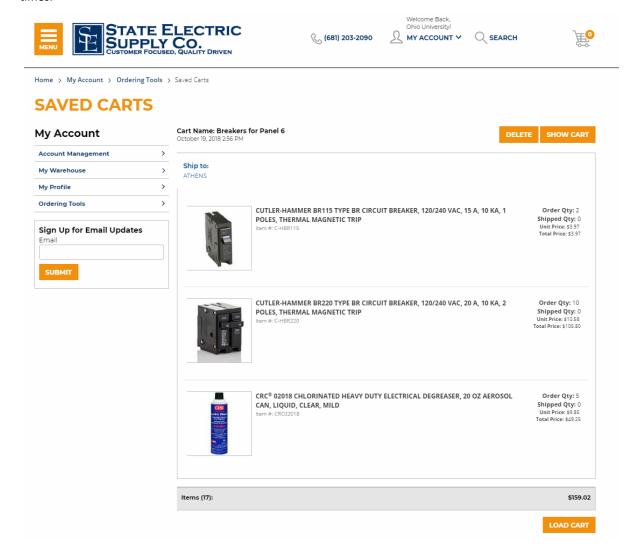
#### What is Saved for Later?

These are individual items that were **Saved for Later** from a shopping cart. These items appear on the cart page, on the bottom-left. A complete list of your **Saved for Later** items also conveniently appears in **Ordering Tools**.

#### What is Saved Cart?

**Saved Carts** are convenient when you need to sign out and return later to finish your purchasing work. Save your cart with a unique name for easy identification. You may save multiple carts.

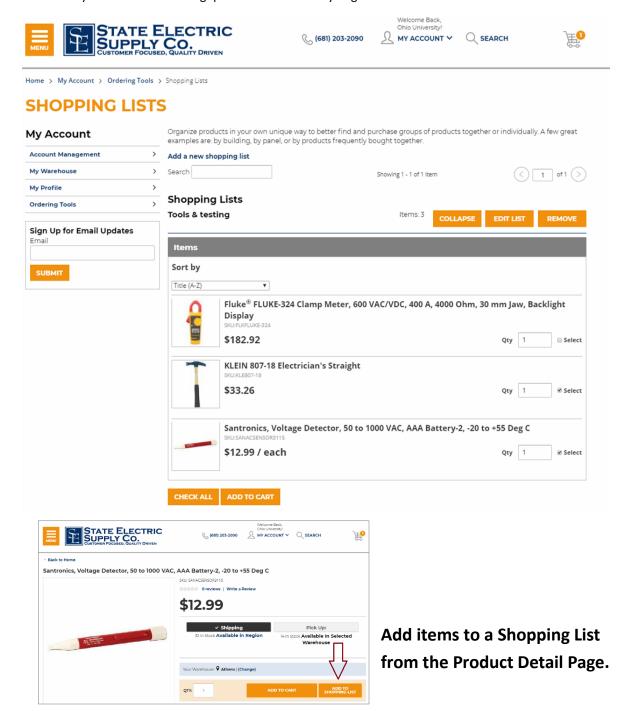
Note: A **Saved Cart** can be placed for order once. A saved shopping list can be ordered/re-ordered multiple times.



#### What is Shopping List?

**Shopping List** is an efficient re-ordering tool and a great replenishment template. A saved shopping list can be ordered/re-ordered multiple times. You can easily organize groups of products by job, work site, material type, etc. It's our customers' favorite tool for storeroom and bin management.

- Sort your shopping lists by title, SKU#, or My Part Number
- Unlike a Saved Cart, you can select one or all items to Add to Cart
- Pre-set your standard ordering quantities or enter as you go.

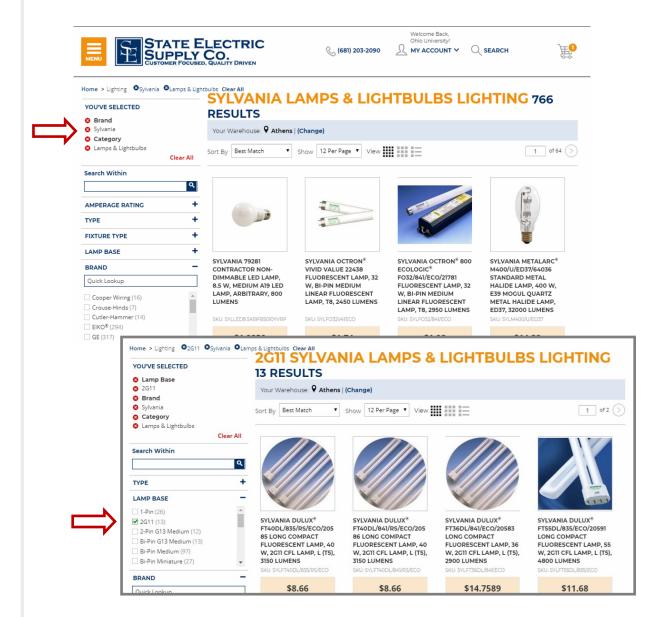


# When you use the Shop By Brand directory or use the manufacturer name or brand in the Keyword Search, many of the browser search results will be very large.

You will use the Attributes or Search Within options to narrow browser results. In the example below you can see there are 766 Sylvania published items in the Lamps & Lightbulbs category.

**Helpful Hint:** You can change your browser display from small to large grid, or display as a line list. You may also find it helpful to change the number of items to display per page.

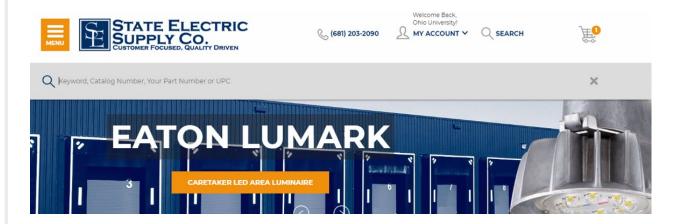
Adding the Lamp Base attribute 2G11 narrowed my search results to 13 items, making my selection process easy.



### **Keyword Product Search**

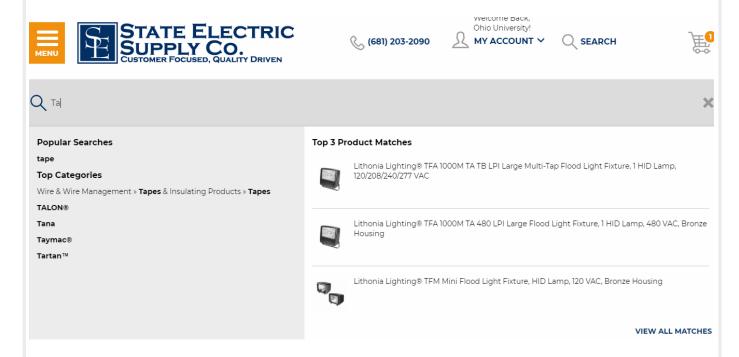
### The Keyword Search is the "hot spot" of the website for finding items and product information.

The Spy Glass opens your search bar where you can enter key information about the product item number, product category, manufacturer, brand, or key words describing the product.

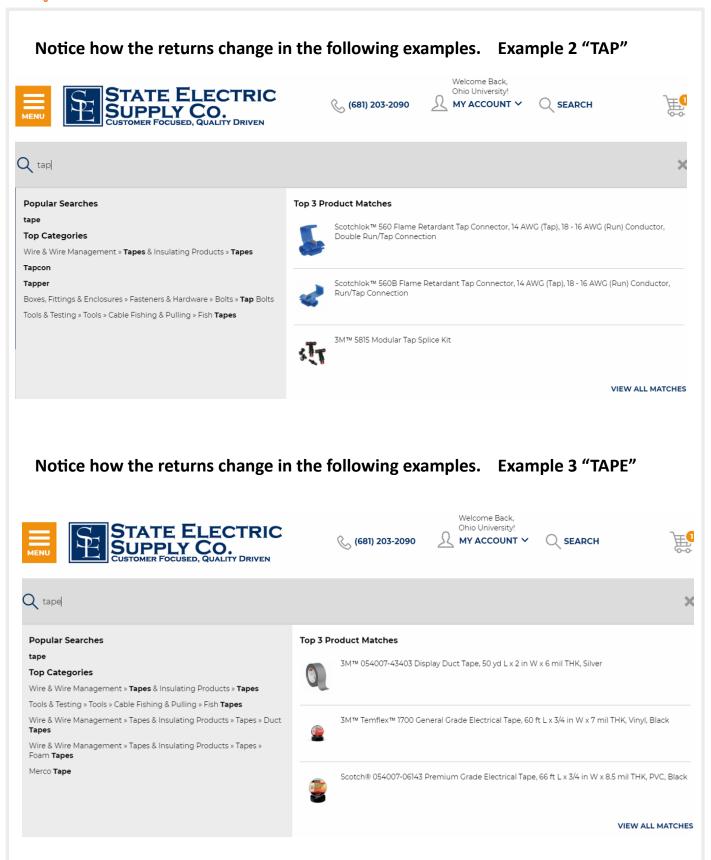


As you enter your keyword(s) in the Search Bar, the system will return suggested Search By's and the Top 3 Product Matches. Suggested Search By could be popular searches, top categories, manufacturer or brands. If you see what you're looking for, click the link. If not, enter more letters, numbers or words to your entry on the Search Bar.

Notice how the returns change in the following examples. Type "TA" "TAP"



# **Keyword Product Search**



# Narrowing Your Search Results

Home > tape

Search Within

TEMPERATURE RATING

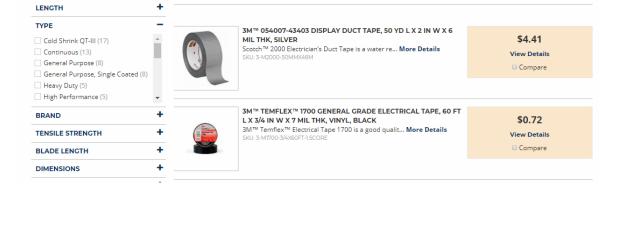
# The Keyword Search for the entry "TAPE" resulted in 525 products. | Welcome Back, Ohio University! | Welcome Back, Ohio University! | MY ACCOUNT > O SEARCH

**525 RESULTS** 

Sort By Best Match

+

Your Warehouse: ♥ Athens | (Change)



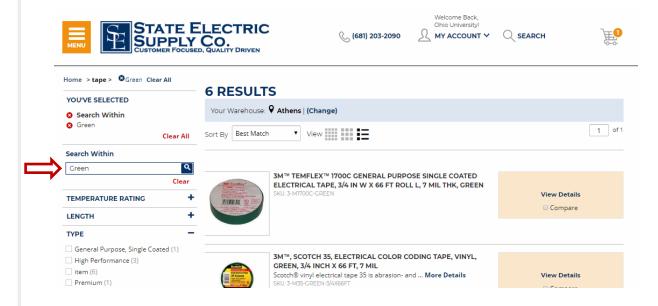
▼ Show 12 Per Page ▼ View

Œ0

1 of 44 (>

There are multiple attributes on each product group that you can use to narrow the browser search results. There is also a "Search Within" option that searches on through your results.

I am looking for Green Tape. I could use the attribute for "Color" or use the Search Within for "Green". The search options are numerous from Menu drill downs to Keyword and Attributes to entering an exact part number. If you cannot find your product, please let our ACT Team help you.

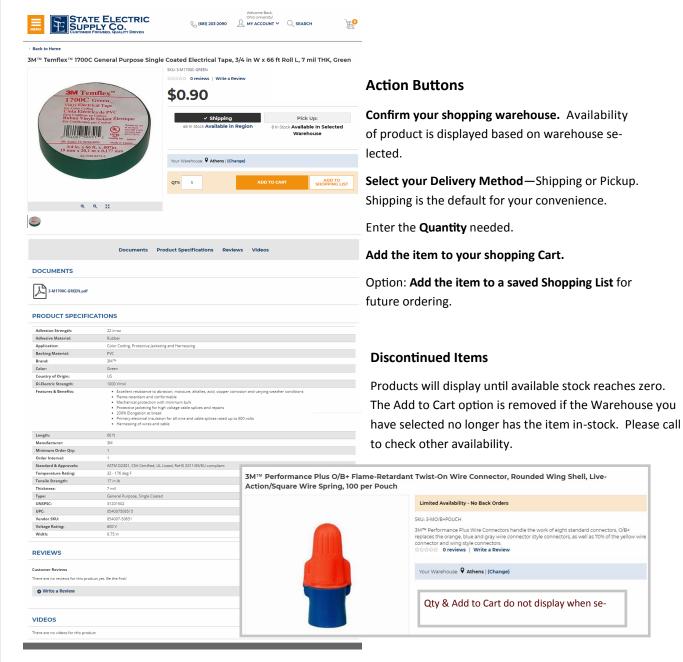


### **Product Detail Page**

#### The Product Detail Page

#### Information

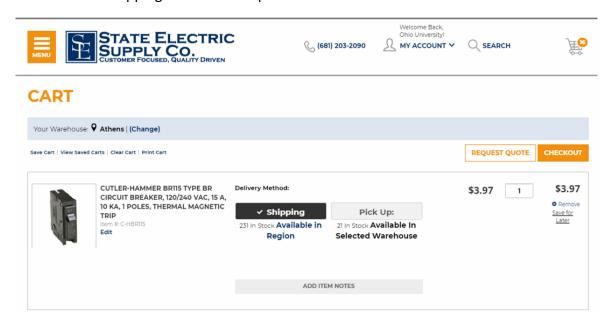
On the product detail page you will find the description, image, the State Electric SKU#, the customer's My Part Number (if applicable), the price, the mfg. product specification sheets. Many products also have extended product descriptions, documentation, videos, 2nd images, or reviews.



### The CART Page

#### The Cart page displays all of the items you have added to your Shopping Cart.

Items can be added to cart from the Product Detail pages, Order History, and Ordering Tools—Quick Order, Re-order Pad, Copy/Paste, Shopping Lists, Saved Carts, Saved for Later, or the Rockwell Configurator. You can place an order, request a quote, and it is a handy tool to save entire shopping carts or save specific items for later.



Best Practice: Confirm your warehouse location first.

**Review the Items.** At the item level you can change the Delivery Method between Shipping or Pickup, add a Note specific to an item, change the Quantity, Save the item for later work or consideration, or simply Remove the item from the Cart.

#### Checkout, Request a Quote, or Save the Cart:

Use the Checkout button when you're ready to place the order.

When to use Quote Request? Quotes are not just for pricing.

Do you need unusual item quantities kept in-stock for a project? Do you need a delivery method/ship via not listed? Do you need a quote for budget purposes? This is a great tool to start your project needs.

Note: If your cart contains a special order, custom product, or non-published item, you will be directed to the Request Quote. Your local sales rep will check stock availability and current pricing.

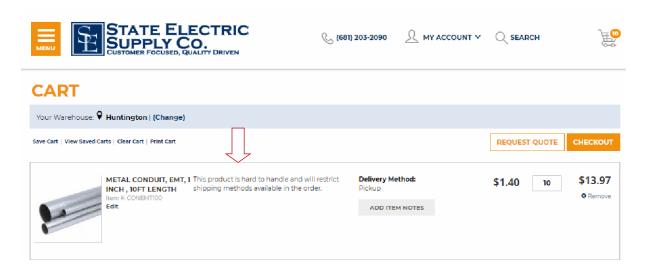
**Save and Name Carts, Clear the Cart content, Print the Cart.** Use Save Cart when submitting Bill of Materials (BOM) for a PO or authorization to buy or to save your research work for later.

# Hard2Handle, Returns Made Easy

#### Hard to Handle Items

Hard to Handle Items consist of products that cannot be shipped via parcel services such as UPS or FedEx because of weight, length or dimensional weights. These items are restricted to delivery by a State Electric fleet vehicle, Customer Pickup with appropriately-sized vehicle, or by special 3rd party delivery arrangements.

Routine delivery services are made to Ohio University campus locations by a State Electric delivery truck or van. Hard to Handle items should rarely impact your checkout process.



#### The Footer

From the Footer you can access quick links to the most frequently visited pages. We have also added FAQ's and Returns for customer convenience. Returns information is available from the Cart and Customer Support pages.



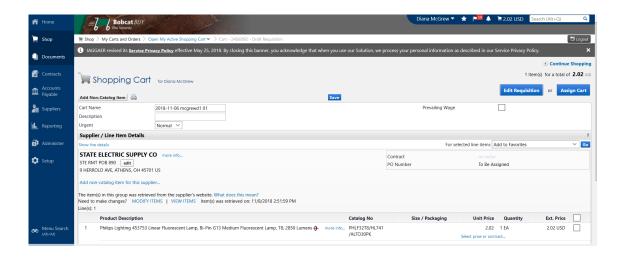
### **Returns Made Easy**



# **Checkout Page**

When you selected the Checkout button from the Cart Page, you returned to your procurement site to complete the order.

Follow your normal procedures, or consult your OU Procurement Manager.



The Sales and eCommerce staff of State Electric Supply Company wishes to "Thank You" for your business and the opportunity to provide your electrical products and related items.