

# SSO

## Start Click Learn

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<a href="#">Organizations Heirarchy</a> <ul style="list-style-type: none"><li>- <a href="#">How it works</a></li><li>- <a href="#">Create new location for storeroom</a></li></ul>			
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## Inventory Management Solutions

Login ▾

### Login

Email:

email address here

Password:

••

☐ Remember me (for 30 days)

Login

← **BEGIN**

[Lost Password](#)

Select Language ▾

3.6.1.338

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Once the user logs in,  
Permissions granted when the user was created (**Manage > SSO USERS > ADD**) will display their menu bar.

### This User can Manage, Report, and Create RMAs & Purchase Orders

**Available Storerooms:** All storeroom permissions will display within the hierarchy.

- No storerooms listed? Admin must create a Storeroom permission for the user to be able to create reports.
  - **(Manage > Storeroom Permissions > ADD).**
- [See also: Manage > Storeroom Permissions](#)

## Inventory Management Solutions

My Dashboard

Manage ▼

Reports ▼

RMA ▼

Purchase Orders ▼

<- Select Option

Welcome ▼

## Available Storerooms

Select Language ▼

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# Inventory Management Solutions

My Dashboard

Manage ▾

Reports ▾

RMA ▾

Purchase Orders ▾

Welcome Lori ▾

## Available St

Search

- Organizations
- SSO Users
- Storeroom Permissions
- Storerooms
- Clone Storeroom Data

Select Language ▾

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# Inventory Management Solutions

My Dashboard Manage ▼ Reports ▼ RMA ▼ Purchase Orders ▼

Welcome \* ▼

## Organizations Hierarchy

Manage hierarchies of Company/Division/Location. To add a new item, Right Click and choose Add from the menu.



[Hierarchy - How it works](#)

[Creating a new Location](#)

Select Language ▼

\*\*

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## Hierarchy: How it works

Here's how it works.

- Each **Master Distributor** has clients;  
(Vested Companies with contractual agreements.)
- These clients are identified by **Distributors**;  
(These can be other branches within the Master Dist. Or their customers that they have)
- The Distributors have their own clients we'll call them **Companies**;  
(Master Dist Branches/ Mast Dist Customers)
- A Company may have other locations or **Divisions**;  
(Branch or Customer divisions)
- These Divisions may also have different **Locations**;  
(Branch or Customer locations)
- In these locations the **STOREROOM** resides.  
(Final destination of the Machine)

We refer to this as the hierarchy

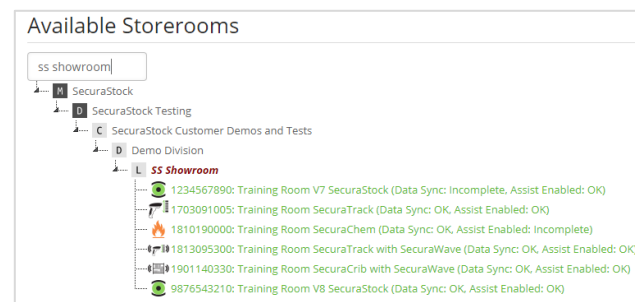
What you see in your hierarchy is defined in the **SSO User Record**.

**Parent Organization field** selection assigns the Level of Hierarchy.

- **Distributor, Company, Division, or Location.**  
Everything under the assigned level is part of your

access within the Distributor

hierarchy.



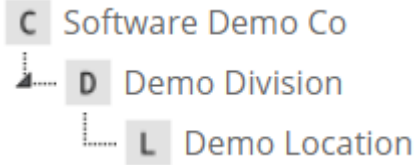
## Manage > Storerooms: Creating a New Location for Machine

**Authority Level:** ADMIN

**Location:** [access@securstock.com](mailto:access@securstock.com) Manage > Organizations

**Login:** Use your SSO login credentials

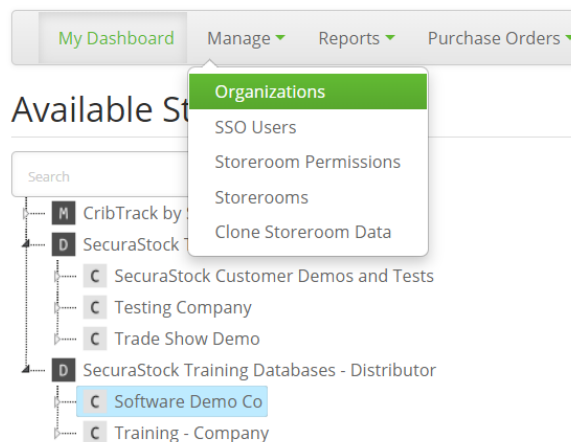
**What you need:** Prior to Creating a **New Company, Division, or Location** within your hierarchy

	Name of the Company the Machine will be located at.
	Division Name, City, State
	Company, Division, City or Street <ul style="list-style-type: none"><li>If multiple machines are at a facility department of building</li></ul>

## Managing Organizations

- Select Manage > Organizations

### Inventory Management Solutions



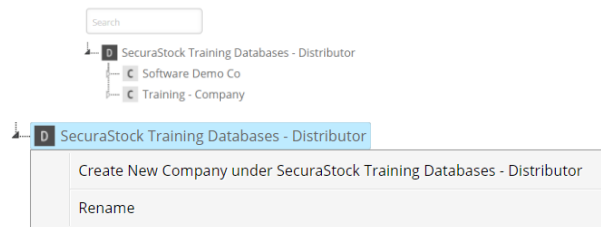
Your level of authority access will become available.

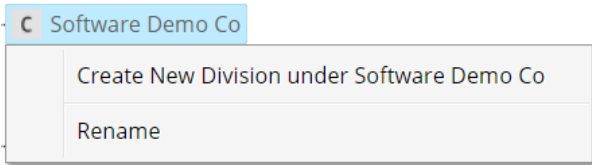
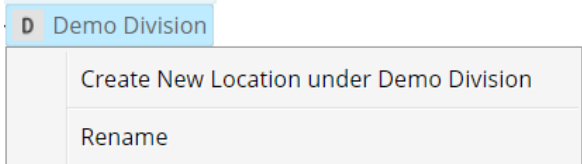
#### CREATE A NEW COMPANY:

- RIGHT CLICK on the “D” and create a new /COMPANY
  - Type in the Name of the Company that the machine will reside.

### Organizations Hierarchy

Manage hierarchies of Company/Division/Location. To add a new item, Right Click and choose Add from the menu.



<p><b>CREATE A NEW DIVISION:</b></p> <ul style="list-style-type: none"> <li>RIGHT CLICK on the “<b>C</b>” and create a new /DIVISION <ul style="list-style-type: none"> <li>Type in the Name of the DIVISION that the machine will reside.</li> </ul> </li> </ul> <p><b>It is suggested that you put the Company/City/Branch ID</b></p>	
<p><b>CREATE A NEW COMPANY:</b></p> <ul style="list-style-type: none"> <li>RIGHT CLICK on the “<b>L</b>” and create a new /LOCATION <ul style="list-style-type: none"> <li>Type in the Name of the LOCATION that the machine will reside.</li> </ul> </li> </ul> <p><b>It is suggested that you enter the Location: Company /Street or City</b></p>	

You now have a new location for the machine to be transferred to.





# Inventory Management Solutions

My Dashboard Manage ▼ Reports ▼ RMA ▼ Purchase Orders ▼

Welcome \*▼

## SSO Users

+ Add

Search Filters ▶

Display: 20

Email	First Name	Last Name	Parent Organization	Active	Manage Users	Manage Orgs	Manage Storerooms	Clone Storerooms	Reports	Purchase Orders	RMA	
sso-dashboard@outlook.com	Dashboard	Training	SecuraStock Training Databases - Distributor	Y	✓	✓	✓	✓	✓	✓	✓	
ssodemo@dxpe.com	Software	Demo	Training - Company	Y	✓	✓	✓	✓	✓	✓	✗	
steve@petsinc.net	Steve	Hinderer	Training - Company	Y	✗	✗	✗	✗	✗	✗	✗	
theresa.paetsch@merisant.com	Theresa	Paetsch	Training - Company	Y	✓	✗	✗	✗	✓	✗	✗	
Venera.arts@outlook.com	Arts	Venera	Training - Company	Y	✓	✓	✓	✓	✓	✓	✗	

Select Language ▼

\*\*

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[Roles and Permissions](#)

[Why isn't there a Heirarchy showing?](#)

## Storeroom ROLES AND SSO PERMISSIONS

---

Let's begin with an understanding the difference between roles and permissions.

**Roles** are used on the User Interface or **UI** which is the storeroom database.

It's local, you can touch it, interact with it. **User interface = physical direct contact.**

**Roles** are assigned to the machine storeroom, via the user administration record of the database.

They are unique only to that storerooms database.

The user record defines all the information that will be used to access the machine, be applied to transactions, notifications, and reporting.

Basically, at the **UI** level you are either a **user** who will only perform transactions, or an **administrator** that will be interacting with receiving, restocking, cycle counting, and alerts only at the machine.

Administrators that only interact directly with **machine level usage** need a User Administration record and assigned a Role within the storeroom database itself allowing interaction with the machine.

Administrators that will be managing inventory, ordering, receiving, reporting, and user management, anything that would require **interaction directly with the Database** will require an **SSO User Record with permission assignment.**

No user record on the machine = no access into the machine.

**An SSO User Record assignment** will create **Storeroom Permission** and a User Record to any machine within their **Parent Organization** downward through to each machine within the users hierarchy.

- It's Important to note that the removal of a user from SSO Users will not delete the User Administration record from the machine.

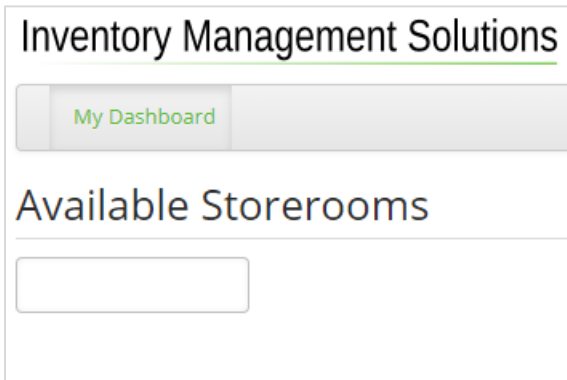
### Permissions SSO User Record / Storeroom Permission

---

There are many factors to consider in creating an SSO User record and Storeroom Permission.

1. [At which level within the Hierarchy will the user have permissions?](#)
2. [What permissions will be granted to the user?](#)
  - a. [Permission options](#)
3. [Storeroom Permission: Granting](#)
4. [Verifying the Records](#)





### So why isn't their Hierarchy tree on the Dashboard?

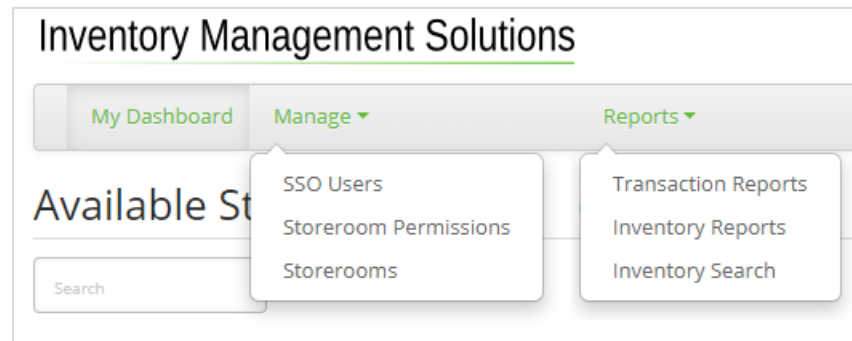
Well the reason being is they must now have at least 1 designation within the hierarchy level to be able to see the Storerooms that they must interact with.

Although their level within the organization has been established we have the ability to restrict access all the way down to a Location level if that is that is required regardless Parent Organization assignment.

#### Review:

- We created an SSO User record
  - Assigned them a position within the hierarchy
  - Granted them permissions (**Can Manage SSO users/permission and Storerooms**) based on their responsibilities.

The result is that they have access to SSO Dashboard and the permissions to Manage and Report but we Haven't told the Storerooms that the user has permission to interact with it.



## 1. SSO User Record: Create and Grant Permissions

Email	First Name	Last Name	Parent Organization	Active	Manage Users	Manage Orgs	Manage Storerooms	Clone Storerooms	Reports	Purchase Orders
SSO Login				Record	What Permissions the User has within the set Hierarchy					
email@			Hierarchy Level	Y/N	✓	X	✓	X	✓	x

- This regional access applies to your Parent Organization assignment. (Heirarchy)
- Assigned permissions only apply to your level in the hierarchy and downward.  
This is telling the system what you have permission to do within a storeroom

1. **Access:** LOGIN to [access@securastock.com](mailto:access@securastock.com)

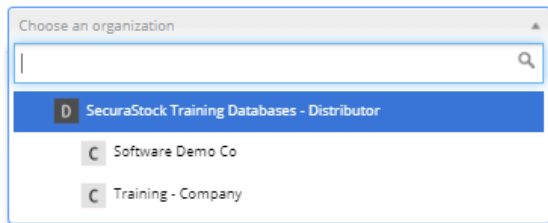
2. **Navigate to:** MANAGE > SSO USERS

3. **New User** = Select +Add button

- a. **EDIT existing user** = Select Search Filters; enter data into any or all of the search boxes to locate the user.
- b. **Select the EDIT icon** to edit the record from the Search Summary

REQUIRED fields have “**RED**” asterisk

- UserName = email address
- First Name
- Last Name
- Email address (again)
- Parent Organization
  - ✓ Define which level is applicable to this users' position within your company.
  - **Distributor** will allow interactions with all companies, divisions and locations below it.
  - **Company** will allow interaction with all Divisions and location under that company.



- Password
  - With user selected or use a standard default which can be changed by the user once the login.

## SSO Users

[Back](#)

Username \* :

The username is often set to the user's email address.

First Name \* :

Last Name \* :

Email \* :

Parent Organization \* :

The scope at which this user may administer the SSO (users/permissions/etc)

Password \* :

Can Manage SSO Users/Permissions: ☐

Can Manage Organizations: ☐

Can Manage Storerooms: ☐

Can Clone Storerooms: ☐



Can Access Reports: ☐

Can Manage/Submit Purchase Orders: ☐

Active \* :

[Create](#)

### Permissions: Options

- **Can manage SSO Users/Permissions**  
Add Users and grant permission at the same level they possess.
- **Can Manage Organizations**  
Add or Edit Organizations within their Dashboard Hierarchy.  
*Be very cautious with this permission as changes in storeroom locations can affect reporting*  
 *Organization creation errors cannot be deleted! Removal can only be obtained by issuing a support ticket request.*
- **Can Manage Storerooms**  
Confirm Online of Offline, View Description, Product Type, Location ID, Last Sync, U\*I /CUI software versions
- **Can Clone Storerooms**  
*Be very cautious with this permission*  
 *Cloning is a high-level function that is literal and cannot be undone.*
- **Can Access Reports**  
SSO Reporting (Transactions, Inventory Reports, or Inventory Searches) from the Dashboard using any or all storerooms within their hierarchy to create regional reporting.
- **Can Manage /Submit Purchase Orders**  
*Be very cautious with this permission it will bind your company to any/all purchases they generate.*

Once an SSO User Record is created and the user logs in at [access@securastock.com](mailto:access@securastock.com) the below image reflects what their Hierarchy Tree of permissions looks like.

Now, when the user logs in to:

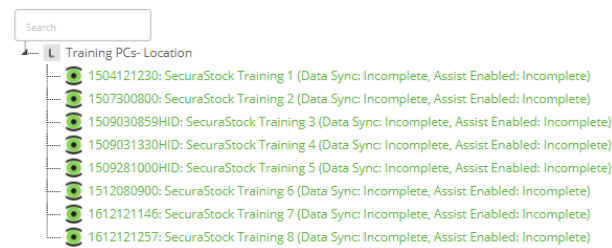
[access@securastock.com](mailto:access@securastock.com)

Their Dashboard is filled with the storeroom / databases they have access to interact with via the cloud.

*Their interactions are based on the permissions that have been granted in their SSO User Record and confirmed in the Storeroom permission.*

- SSO Users/Permissions
- Storerooms


#### Available Storerooms





#### To verify that a record has been created.

- Double click on any of the Storerooms to open it
- Navigate to: **Configuration > Users**
- Click on: **The sort icon next to Role**

You will be able to locate the record that was just added.



Username	First Name	Last Name	Email	Department	Cost Center	Role	Access ID	Active	Actions
123@somecompany.com	123	SomeCompany	123@somecompany.com	None	None	ADMIN	None	Y	 

✓ This is true for each of the Storerooms assigned in the Storeroom Permissions “**Organization**” field for that user.

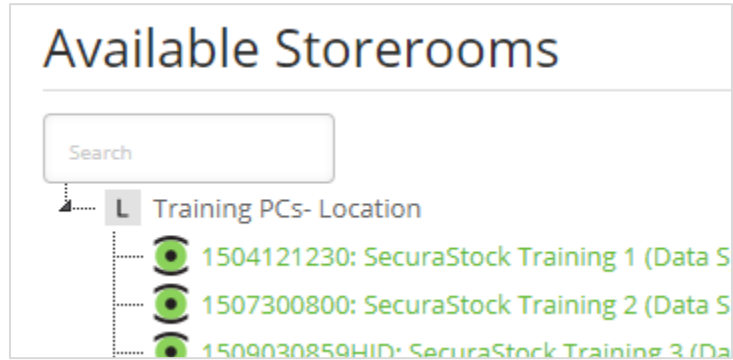
💣\* **Deleting Storeroom Permissions does NOT delete the record from the Storeroom it will only remove it from the Heirarchy on the Users Dashboard.**

If you wish to completely remove the user from the system, it is best to EDIT the **ACTIVE** field to “**N**” until all reporting has been completed

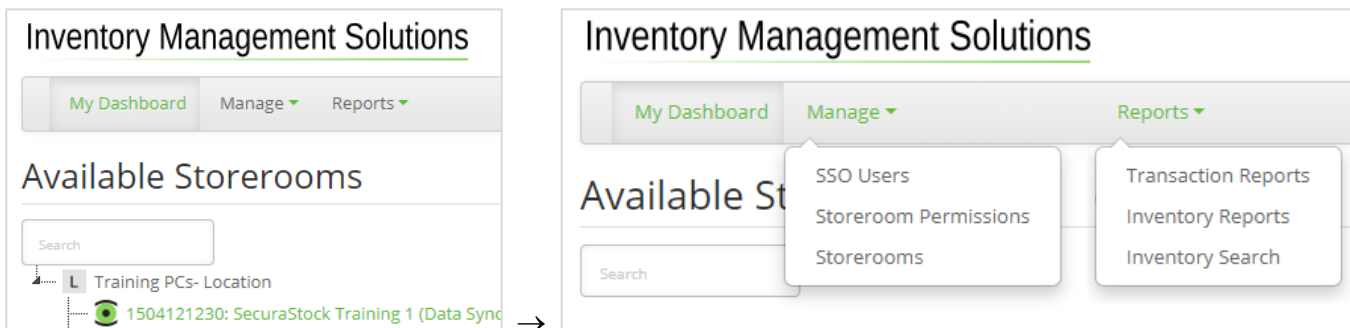
**DELETE** a user will affect TRANSACTIONS the user has in the system.

#### ↑ 4. Verify the user records that you created.

1. Login to [access@securastock.com](https://access@securastock.com) using the user record and password.
2. Verify that Hierarchy is in place.



3. Verify that the Dashboard Options are in Place.



4. Log out.







# Inventory Management Solutions

## Storeroom Permissions

+ Add

Search Filters ▶

Display: 16

User	Organization	Role for Organization	
Software Demo - ssodemo@dxpe.com	Software Demo	ADMIN	
Theresa Paetsch - theresa.paetsch@merisant.com	Training - Company	ADMIN	
Debbie Richey - debbie.a.richey@merisant.com	Training - Company	ADMIN	
Michelle Miller - michelle.miller@motion-ind.com	Training - Company	ADMIN	

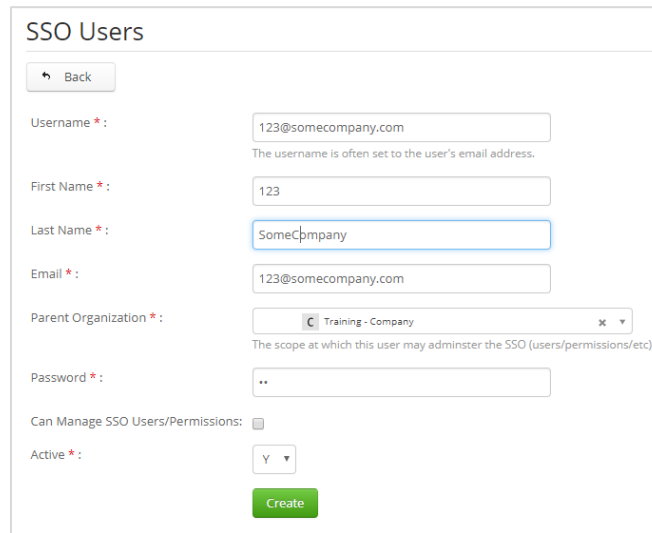
Select Language | ▼

## Assign Storeroom Permissions

When a user needs to interact with one or more storerooms to assign users, add products, notifications, reporting etc. they will need to have a Storeroom Permission themselves.

\*\* Storeroom Permission on the Dash board does not give access to the machine in its physical location unless the User Administration Record is edited to include physical access to the storeroom machine itself.

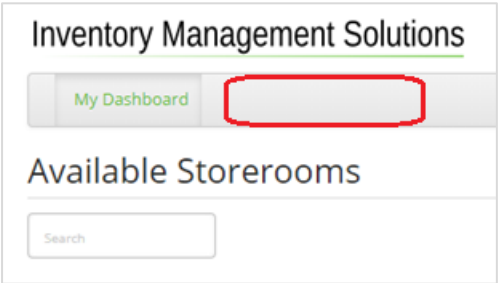
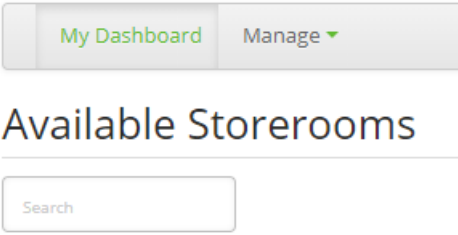
1. The user must have a Single Sign-On User Record to add Storeroom Permissions.



The screenshot shows a web form titled "SSO Users". It includes a "Back" button at the top left. The form fields are: Username (123@somecompany.com), First Name (123), Last Name (SomeCompany), Email (123@somecompany.com), Parent Organization (Training - Company), Password (masked with two dots), and Active (Y). A "Create" button is at the bottom right. A note below the Username field states: "The username is often set to the user's email address." A note below the Parent Organization field states: "The scope at which this user may administer the SSO (users/permissions/etc)".

Based on the above permission assignment this is what they see when they log in

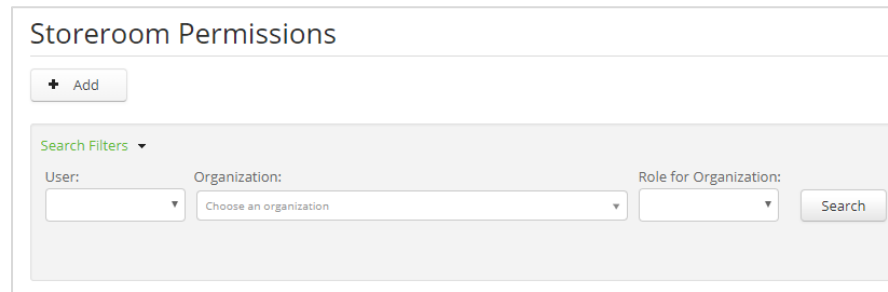
- Notice that **Manage** Option is not available.
- They do not have any administrative permissions granted regarding management of Storerooms

PERMISSION UN-CHECKED	Permission CHECKED
	

## 2. Assigning a Storeroom Permission.

Path: <https://access.securastock.com> > Login > Manage > Storeroom Permissions

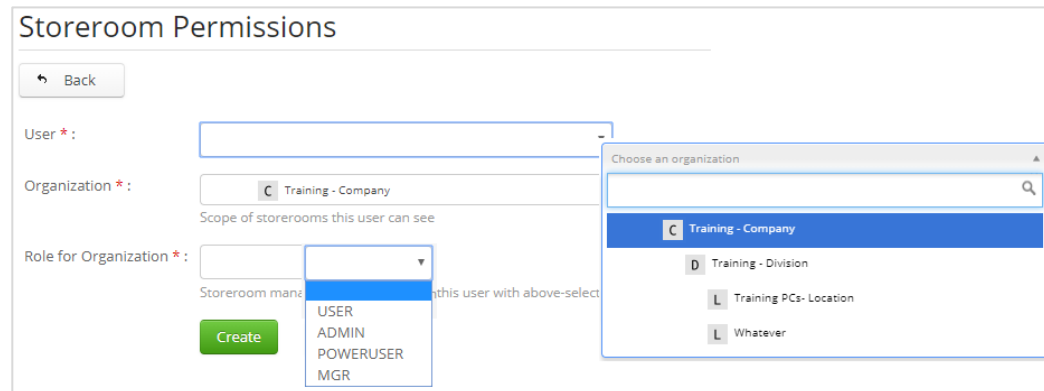
1. Its best to search for a user just in case they are already in the system you can view their current storeroom permissions.
2. Click Add to create a new Storeroom Permission.



The screenshot shows the 'Storeroom Permissions' form. At the top, there is a '+ Add' button. Below it is a 'Search Filters' section with three dropdown menus: 'User:', 'Organization:', and 'Role for Organization:'. The 'Organization:' dropdown is currently set to 'Choose an organization'. A 'Search' button is located to the right of the dropdowns.

### 3. Using the drop-down options for each field

- **Select the user.**
- **Organization:** This will reflect the Permission YOU have within the Heirarchy. You will be able to assign the new permission by Company, Division, or Location.
  - The level of Organization encompasses that level and below.
    - **COMPANY** > will see all Divisions, Locations and Storerooms within the Locations.
    - **DIVISION** > will see all Locations and Storerooms within the Locations.
    - **LOCATION** will see all the Storerooms within that Location



The screenshot shows the 'Storeroom Permissions' form with several dropdowns open. The 'User' dropdown is empty. The 'Organization' dropdown is set to 'Training - Company'. The 'Role for Organization' dropdown is open, showing options: USER, ADMIN, POWERUSER, and MGR. A 'Create' button is visible. To the right, a search results panel is open, showing a list of organizations: 'Training - Company', 'Training - Division', 'Training PCs- Location', and 'Whatever'.

- **Role for Organization:** This will generate a User Administration Record within the Storeroom(s) using the rights of the Role Selection and the level within the Organization.

### Roles

- **USER:** Basic user – The majority of users will be assigned this role
- **ADMIN:** Data management user – This role is reserved for those that maintain the data. Most sites will have no more than two Admins.
- **POWERUSER:** Reporting user – needs access to reports. Examples: managers, supervisors or analysts
- **MANAGER:** Inventory management user – This role is only assigned to those that directly manage inventory data. Examples: Purchasing Manager or Inventory Analyst
- **CREATE** the Record.

---- IT IS IMPORTANT TO NOTE THAT THIS DOES NOT GIVE THEM PERMISSION TO ACCESS THE PHYSICAL LOCATION OF THE STOREROOM. ----

## ↑ 3. Storeroom Permission: Granting

1. **Access:** LOGIN to [access@securastock.com](mailto:access@securastock.com)
2. **Navigate to:** MANAGE > STOREROOM PERMISSIONS
3. **Search Filters:** click to Open.
  - a. **User:** Use the drop down arrow to locate and select the user
  - b. Click Search to locate any Permissions that have already been granted for the user.
    - i. If no permissions exists,
      1. Select the +add button

### FIELDS

- **User:** select user from the drop down menu.
- **Organization:** (We will assign a permission down to a Location).

✓ *All storerooms within the Location will have a User Record added to it.*

### Storeroom Permissions

Back

User \*: 123 SomeCompany - 123@somecompany.com

Organization \*: Choose an organization

Role for Organization \*: SecuraStock Training Databases - Distributor

Software Demo Co

Demo Division

Demo Location

Training - Company

Training - Division

Training PCs- Location

Whatever

Select Language





# Inventory Management Solutions

My Dashboard Manage ▼ Reports ▼ RMA ▼ Purchase Orders ▼

Welcome \*▼

## Storerooms

+ Add

Search Filters ▶

Display: 9

Serial Number	Description	Product Type	Location ID	Last Sync	UI Version	CUI Version	Active	
1812180725	Clone Slave	SecuraStock	CLONE FOR TRAINING	7 months ago	8.3.0.1325	8.4.0.1334	Y	
1507300800	SecuraStock Training 2	SecuraStock	Training PCs- Location		0	8.4.0.1334	Y	
1612121146	SecuraStock Training 7	SecuraStock	Training PCs- Location	2 years ago	8.3.0.1325	8.4.0.1334	Y	
1612121257	SecuraStock Training 8	SecuraStock	Software Demo	5 months ago	8.3.0.1325	8.4.0.1334	Y	
1509281000HID	SecuraStock Training 5	SecuraStock	Training PCs- Location		0	8.4.0.1334	Y	
1509031330HID	SecuraStock Training 4	SecuraStock	Training PCs- Location		1.1.0.986	8.4.0.1334	Y	
1509030859HID	SecuraStock Training 3	SecuraStock	Training PCs- Location		0	8.4.0.1334	Y	
1512080900	SecuraStock Training 6	SecuraStock	Training PCs- Location		1.1.0.922	8.4.0.1334	Y	
1504121230	SecuraStock Training 1	SecuraStock	Training PCs- Location		0	8.4.0.1334	Y	



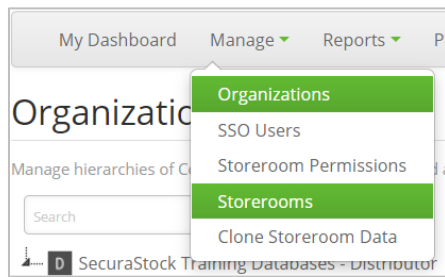
## Manage > Storerooms: Move Machine Location

**Authority Level:** ADMIN

**Location:** [access@securstock.com](mailto:access@securstock.com) Manage > Storerooms

**Login:** Use your SSO login credentials

**What you need:** You will need the SERIAL NUMBER FOR THE MACHINE



## SEARCH FOR THE SERIAL NUMBER

### Storerooms


[+ Add](#)

[Search Filters](#) ▼

Serial Number:  Product Type:  Description:  Last Sync:  UI Version:  CUI Version:

SSO Enabled:  Access Control:  Scanner:  UPS:  Heartbeat Monitoring:  Location ID:  Active:  [Search](#)

## Edit Storeroom information

Serial Number	Description	Product Type	Location ID	Last Sync	UI Version	CUI Version	Active	
1507300800	SecuraStock Training 2	SecuraStock	Training PCs- Location		0	8.4.0.1334	Y	

You will need to edit the following fields:

- **Edit Description:**
- **Edit Location**
- Click on the edit icon within the summary line for the machine.

- **Type in the Description of the Machine.**

Company and physical address of the machine is helpful.

- **Select the LOCATION ID using the drop down arrow**

Location ID * :	Training PCs- Location ▼
Active * :	Demo Location
Check to delete::	Training PCs- Location
	Whatever

- **Click on Update to complete the move of the machine.**

## Storerooms

↩ Back

Serial Number \* : 1507300800  
Managed by system manufacturer

Product Type: SecuraStock

Description \* : Company Name, Physical Location address  
Name of the system visible on the dashboard

Last Sync:

UI Version: 0

CUI Version: 8.4.0.1334

SSO Enabled \* : Y  
Whether this system authenticates through SSO

Access Control: ?

Scanner: ?

UPS: ?

Heartbeat Monitoring \* : Enabled ▼

Location ID \* : Training PCs- Location ▼

Active \* : Y

Check to delete:: ☐

Update



# Inventory Management Solutions

## Clone Machine

▼ Source - Step 1 of 4

Error, you have no available machines

▸ Destinations - Step 2 of 4

▸ Data Sets - Step 3 of 4

▸ Confirmation - Step 4 of 4

Select Language ▼







# Inventory Management Solutions

## Available Storerooms

Search

- Transaction Reports
- Inventory Reports
- Inventory Search

Select Language ▾





## Inventory Management Solutions

[My Dashboard](#) [Manage ▼](#) [Reports ▼](#) [RMA ▼](#) [Purchase Orders ▼](#)

Welcome \* ▼

## Transaction Reports

Choose a report ▼

Load Selected Report

Delete Selected Report

Locations to include

Select Locations. Leave blank for all locations

Transactions to include

Issues, Returns, Goods Receipts, Cycle Counts ▼

Summarize by

None ▼

Then Summarize by

None ▼

Then Summarize by

None ▼

Then Summarize by

None ▼

Then Summarize by

None ▼

Then Summarize by

None ▼

Then Summarize by

None ▼

Time Period

TODAY ▼

Generate Report

Select Language ▼

\*\*

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# Inventory Management Solutions

My Dashboard Manage ▼ Reports ▼ RMA ▼ Purchase Orders ▼

Welcome \*▼

## Inventory Reports

Choose a report ▼

Load Selected Report

Delete Selected Report

Locations to include

Select Locations. Leave blank for all locations

Summarize by

None ▼

Then Summarize by

None ▼

Then Summarize by

None ▼

Then Summarize by

None ▼

Then Summarize by

None ▼

Generate Report

Select Language ▼

\*\*

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# Inventory Management Solutions

## Inventory Search

Search Filters ▼

Prod ID:

Description:

Location:

On Hand:

Pack/Min Order Qty:

On Order:

Min:

Max:

Item Cost:

Default Issue Qty:

UoM:

Category:

OEM:

OEM Number:

Customer P/N:

Product Package Barcode:

Consignment:

Master Distributor:

Distributor:

Company:

Division:

Location:

Storeroom:

Serial Number:

Active:

Search

Display: 1 - 25 of 436

Prod ID	Description	Location	On Hand	Item Cost	Category	Location	Storeroom	Serial Number	Active
10001			15	1.0000	None	Training PCs- Location	1507300800	SecuraStock Training 1	Y
80529-11011	DISC GRIND T27 A30Q-BFX 6X9/32X7/8IN		0	0.0001	None	Training PCs- Location	1509031330HID	SecuraStock Training 4	Y





# Inventory Management Solutions

RMA Requests

## Available Storerooms

Search

Select Language ▾





# Inventory Management Solutions

My Dashboard   Manage ▼   Reports ▼   RMA ▼   Purchase Orders ▼

Welcome \*▼

## RMA

New RMA Request

Search Filters ▶

Display: 0

⌵	RMA Number	⌵	Status	⌵	Requested By	⌵	Distributor Name	⌵	Machine Serial Number	⌵	Defective Part		
---	------------	---	--------	---	--------------	---	------------------	---	-----------------------	---	----------------	--	--

Select Language ▼

\*\*

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# SSO RMA CUSTOMER FORM

In a web browser, navigate to: <https://access.securastock.com/sso/rma>

If you are not already logged into the SSO, you will be prompted for your credentials before the RMA page will appear.

## RMA SCREEN

The RMA Screen shows all the RMAs associated with your organization and their status.

### Inventory Management Solutions

My Dashboard

Manage

Reports

Purchase Orders

Welcome Apyrle

New RMA Request

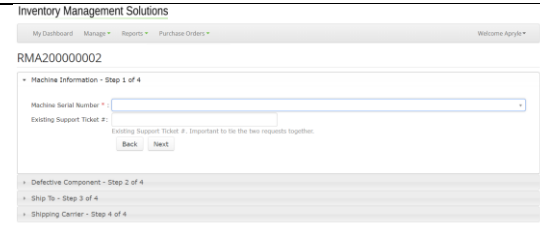
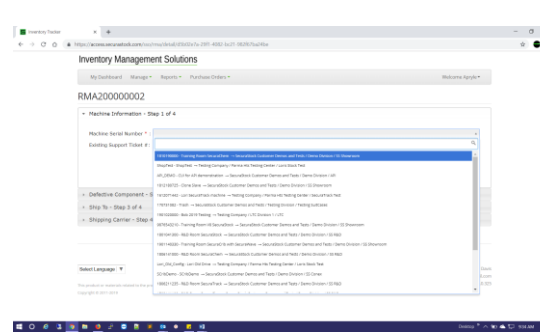
Search Filters

RMA Number	Status	Requested By	Distributor Name	Machine Serial Number	Defective Part	
RMA200000002	Submitted	Apyrle Davis	Distributor - SecuraStock Testing	1801041300	PCP329953	<div>Enter Return Shipping Info</div> <div>Print</div>
RMA200000001	Started	Apyrle Davis	Distributor - SecuraStock Testing			<div>Edit</div> <div>Delete</div> <div>Enter Return Shipping Info</div>

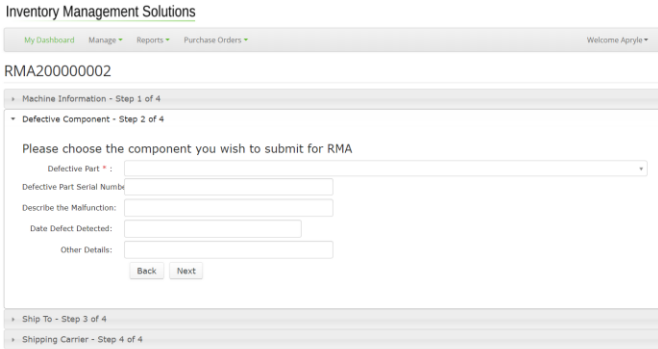
Display: 2

## NEW RMA

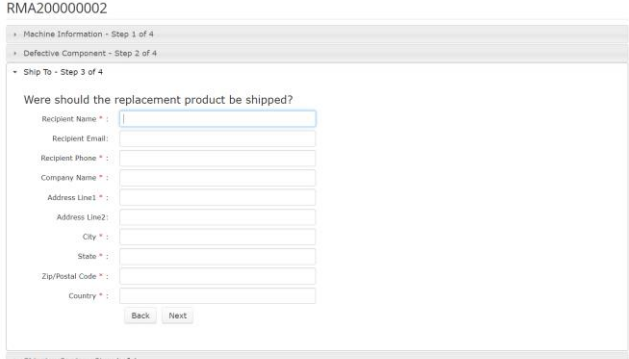
### MACHINE INFORMATION - STEP 1 OF 4

1	Create New RMA	Click on the “New RMA” button
2		A NEW RMA WILL GENERATE
3		<p><b>MACHINE SERIAL NUMBER</b> <b>*REQUIRED FIELD*</b></p> <p>Select the relevant machine from the dropdown list.</p> <p><b>EXISTING SUPPORT TICKET #</b></p> <p>If there is a ticket already addressing this issue enter the ticket number here.</p> <p><b>NOTE: This is important so that support can tie the two requests together.</b></p> <p>Click “Next” to proceed.</p>

## DEFECTIVE COMPONENT - STEP 2 OF 4

	<b>DEFECTIVE PART</b> <b>*REQUIRED FIELD*</b> Select the part you need to replace from the dropdown list.
	<b>DEFECTIVE PART SERIAL NUMBER</b> Enter the serial number of the defective part.
	<b>DESCRIBE THE MALFUNCTION</b> Briefly describe how the part is malfunctioning. If there is an existing ticket, copy a sentence regarding the problem from it and paste it here.
	<b>DATE DEFECT DETECTED</b> Select the date when the malfunction was noticed.
	<b>OTHER DETAILS</b> Enter anything else that is relevant.  Click "Next" to proceed.

## SHIP TO – STEP 3 OF 4

<p>This information must be completed for the person that will be receiving the new part. You may be receiving the part, but you could also be sending the part to a Branch Manager, Field Representative, Customer, etc.</p>	
---	---

FIELD NAME		INFO NEEDED
RECIPIENT NAME	<b>*REQUIRED FIELD*</b>	Name of person to receive the new part.
RECIPIENT EMAIL		Email address of person to receive the new part. Must be completed for recipient to receive RMA status updates. Also, international shipments require this information for customs documents.
RECIPIENT PHONE	<b>*REQUIRED FIELD*</b>	Phone number of person to receive the new part. Shipping companies require this information in case they need to contact someone regarding the delivery.
COMPANY NAME	<b>*REQUIRED FIELD*</b>	Company Name where new part will be shipped.
ADDRESS LINE1	<b>*REQUIRED FIELD*</b>	Address where new part will be shipped.
ADDRESS LINE2		Additional address information, if necessary.
CITY	<b>*REQUIRED FIELD*</b>	City where new part will be shipped.
STATE	<b>*REQUIRED FIELD*</b>	State/Province where new part will be shipped.
ZIP/POSTAL CODE	<b>*REQUIRED FIELD*</b>	Zip/Postal Code where new part will be shipped.
COUNTRY	<b>*REQUIRED FIELD*</b>	Country where new part will be shipped.

After completing the ship to information, click "Next" to proceed.



## SHIPPING CARRIER - STEP 4 OF 4

Select the shipping method for the new part delivery.

**Note: Urgent requests must be submitted and approved by Support by 2:00PM Eastern for same day shipment.**

### Inventory Management Solutions

My Dashboard Manage Reports Purchase Orders Welcome Ayple

RMA200000002

Machine Information - Step 1 of 4

Defective Component - Step 2 of 4

Ship To - Step 3 of 4

Shipping Carrier - Step 4 of 4

**Note: Urgent requests must be submitted by 2:00PM Eastern for same day shipment.**

Urgency \* : Ground

Shipping Carrier:

Shipping Account #:

Include Prepaid Return Label: No

Note: You will be invoiced after the label is generated.

Back Submit RMA

FIELD NAME		INFO NEEDED
URGENCY	<b>*REQUIRED FIELD*</b>	<p>Select from the dropdown:</p> <ul style="list-style-type: none"> <li><b>Ground:</b> [default] Standard shipping, SecuraStock pays for shipment.</li> <li><b>Next Day Air (US only):</b> Customer must provide Shipping Carrier and Shipping Account # for expedited shipments.</li> <li><b>Air (Other Countries):</b> Customer must provide Shipping Carrier and Shipping Account # for expedited shipments.</li> </ul>
SHIPPING CARRIER		<b>Required</b> for Next Day Air or Air shipments.
SHIPPING ACCOUNT #		<b>Required</b> for Next Day Air or Air shipments.
INCLUDE PREPAID RETURN LABEL	<b>*REQUIRED FIELD*</b>	<p>Select from the dropdown:</p> <ul style="list-style-type: none"> <li><b>No:</b> [default] New item shipment will not include a return label.</li> <li><b>Yes:</b> A return label will be included in the new item shipment for the return of the defective part. You will be invoiced for the return shipment after the label is generated.</li> </ul>

After completing the shipping information, click "Submit RMA" to proceed. The RMA will begin processing and a Support Ticket will be created.

## SUPPORT TICKET CREATED BY RMA SUBMISSION

As soon as the “Submit RMA” button is clicked, a ticket is created. If there is an existing ticket SecuraStock Support will merge the tickets together. The new ticket will include all of the information you completed in the SSO RMA.

NOTICE: You will be charged for the replacement parts if these steps are not completed.

To receive credit for returned items, you must:

- ship the defective items to the SecuraStock RMA Center
- include a copy of this RMA form within the shipment
- update the online RMA request with the return tracking number.

Return Address: RMA Center, 4400 Renaissance Pkwy, Ste 5 Warrensville Hts, OH 44128

RMA			
Create Date	2019-03-19 09:33:56	Part Needs Sent Back	Yes
RMA Number	RMA200000002	Date Part Must Be Sent Back By	2019-04-02
Status	Submitted	Part Was Returned	No
Authorized By	-	Part Return Approval Status	
Requested By	Apryle Davis	Part Return Approval/Reject Reason	
Distributor Name	Distributor - SecuraStock Testing		
Existing Support Ticket #			
Machine and Defective Component Details			
Machine Serial Number	1801041300	Defective Part	PCF329553 ROUTER
Machine Type	SecuraStock	Defective Part Serial Number	test_serial_number
Machine Model Version		Describe the Malfunction	It won't connect to the computer
Machine Color		Date Defect Detected	2019-03-01 00:00:00
		Other Details	
Shipping Info			
Recipient Name	Apryle Davis	Urgency	Ground
Recipient Email	apryle.davis@securastock.com	Shipping Carrier	
Recipient Phone	440-999-9999	Shipping Account #	
Company Name	SecuraStock	Include Prepaid Return Label	No
Address Line1	4400 Renaissance Pkwy	Shipping Tracking Number	
Address Line2	Suite 5	Returned Part Tracking Number	
City	Warrensville Hts		
State	OH		
Zip/Postal Code	44128		
Country	USA		

The Support Team will review the RMA and approve or reject it for shipment.

## RETURN DEFECTIVE PART

Once the RMA is created it will be visible on the RMA screen. When you are ready to ship the defective item back to SecuraStock, you need to return to this screen and locate the RMA.

## PRINT THE RMA FORM

Click on the “Print” button to download a PDF of your completed RMA form. You need to print this document and include it in the box with the defective item. Failure to include this paperwork with the defective item could result in your item not being properly credited.

## ENTER RETURN SHIPPING INFO

Once the defective item is properly packaged and ready to ship, you should enter the shipment's Tracking information so all parties are aware that the item is on its way.

Click on the “Enter Return Shipping Info” button to open this section of the RMA. Enter the tracking information, then click “Submit.”

### Inventory Management Solutions

My Dashboard Manage Reports Purchase Orders Welcome Apryle

RMA200000002

Back to RMA List

History

#### RMA INFO

RMA Number RMA200000002  
Status Submitted  
Create Date 2019-03-19 09:33:56  
Created By Apryle Davis  
Requested By Apryle Davis  
Authorized By  
Distributor Name Distributor - SecuraStock Testing  
Existing Support Ticket #

#### ENTER RETURN SHIPPING INFO

Returned Part Tracking Number

Submit Cancel



## Inventory Management Solutions

[My Dashboard](#)[Manage ▼](#)[Reports ▼](#)[RMA ▼](#)[Purchase Orders ▼](#)

Welcome Lori ▼

Orders

### Available Storerooms

Select Language ▼

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# Inventory Management Solutions

## Purchase Orders

New Purchase Order

Search Filters ▶

Display: 1

SecuraStock Sales Order Number	Customer PO Number	Status	Short Order Description	Submitted By	Approved By	Requested Approver	Create Date				
502379038	1	Started	SecuraCRIB in green w/ component encl...	-	-	-	2019-03-21 15:39:55		Copy	Continue	Delete

Select Language ▼

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[Purchase Order Workflow](#)

# SSO: Purchase Orders > Orders



The Online Purchase Order feature allows Distributors to order machines and accessories on their time table.

1.

Login to the Single Sign On (SSO)

https://access.securastock.com

2.

Select Purchase Orders drop down

Select Orders

Inventory Management Solutions

My Dashboard

Manage

Reports

RMA

Purchase Orders

Available Storerooms

Search

D Training - Division

L Software Demo

L Training PCs- Location

1504121230: SecuraStock Training 1 (Data Sync: Incomplete, Assist Enabled: Incomplete)

3.

Purchase Orders:

Create New Purchase Order

Search for a previous order

Resume work on a Purchase order

Inventory Management Solutions

My Dashboard

Manage

Reports

RMA

Purchase Orders

Welcome

Purchase Orders

New Purchase Order

Search Filters

Display: 1

SecuraStock Sales Order Number

Customer PO Number

Status

Short Order Description

Submitted By

Approved By

Requested Approver

Create Date

502379038

1

Started

SecuraCRIB in green w/ component encl...

-

-

-

2019-03-21 15:39:55

Copy

Continue

Delete

4.

New Purchase Order:

Walk through process and requirements for Purchase orders.

5.

Search Filters:

Search by any relevent element of a Purchase Order to locate.

Search Filters

SecuraStock Sales

Customer PO Number:

Status:

Short Order Description:

Submitted By:

Approved By:

Requested Approver:

:

Create Date

-

Search

## SSO: Purchase Orders > Orders

### 6. Summary Table Elements

- SecuraStock Sales Order Number
- Customer PO
- Status
- Short Order Description
- Submitted by
- Approved by
- Requested Approver
- Create Date
- **Actions:** Print, Copy, Continue, Delete

[Next](#)

SecuraStock Sales Order Number	Customer PO Number	Status	Short Order Description	Submitted By	Approved By	Requested Approver	Create Date				
502379186	*	Started	*	-	-	-	2019-07-18 22:56:17		Copy	Continue	Delete
502379038	1	Started	SecuraCRIB in green w/ component end...	-	-	-	2019-03-21 15:39:55		Copy	Continue	Delete

### 7. Step 1 - ORDER

#### Customer PO

##### ▼ Order - Step 1 of 10

Create Date: 2019-07-18 22:56:17  
SecuraStock Sales Order Number: 502379186  
Customer PO Number \*:   
Short Order Description \*:   
Require Approval: ☒  
Requested Approver:   
Order Type \*:   
Customer Attachment:  No file chosen  
Distributor Name \*: Distributor - SecuraStock Training Databases - Distributor

Red Asterisk indicates required fields

- Enter Purchase Order number
- Short Order Description:
  - Identify your machine or Customer account that the machine is being placed at.
- If this order requires approval keep the check box checked.
- Enter the approved from the drop down list.
- If none is required then uncheck.
- Order type: Select from the drop down menu
- Attach the Purchase order to this order

[NEXT](#)

# SSO: Purchase Orders > Orders

8.

STEP 2 - Machine

Confirm selection by selecting [NEXT](#)

Customer PO

▶ Order - Step 1 of 10

▼ Machine - Step 2 of 10

Machine Type: 

Accessory ▼

Back

Next

9.

STEP 3 - Product Form

**Machines:** Select the quantity of machines you want to order.  
Select any accessories you wish to add to the order.  
le: extra bins, access items, cards, fobs, stickers, etc.

**Accessories:** Select Accessories

[Next](#)

▼ Product Form - Step 3 of 10

Product ID	Description	Distributor Price	Quantity
PCPLI4278	SCANNER V2.0	\$ 480.47	<div>0 ▼</div>
POWERBAR12	POWER STRIP 12-OUTLET	\$ 80.00	<div>0 ▼</div>
CRATE	Shipping, Custom non-wooden crate, STOCK, CHEM	\$ 99.00	<div>0 ▼</div>
PCPHIDCARD	HID PROX CARD	\$ 6.06	<div>0 ▼</div>

10.

STEP 4 – Order Summary

- Review and confirm your order.
  - Back to add or delete items.

[Next](#)

▼ Order Summary - Step 4 of 10

Product ID	Descriptions	Price	Quantity	Item Total
Storage Total				\$0.00
Grand Total				\$0.00

Back

Next

## SSO: Purchase Orders > Orders

### 11. STEP 5 – Distributor Accounts Payable Information

Red Asterisk indicates required fields

- Complete the form.

[Next](#)

#### ▼ Distributor Accounts Payable Information - Step 5 of 10

Company Name \* :

Address Line1 \* :

Address Line2:

City \* :

State \* :

Zip/Postal Code \* :

Country \* :

AP Contact Name \* :

AP Contact Email \* :

AP Contact Phone \* :

Back

Next

### 12. STEP 6 – Distributor Branch

Red Asterisk indicates required fields

Who needs to be contacted regarding this order.

- Complete the form.

[Next](#)

#### ▼ Distributor Branch - Step 6 of 10

Company Name \* :

Branch ID:

Contact Name \* :

Contact Email \* :

Contact Phone \* :

Back

Next



## SSO: Purchase Orders > Orders

### 13. STEP 7 - Shipping

Red Asterisk indicates required fields

- Complete the form.

[Next](#)

#### ▼ Shipping - Step 7 of 10

Company Name \* :

Address Line1 \* :

Address Line2:

City \* :

State \* :

Zip/Postal Code \* :

Country \* :

Contact Name \* :

Contact Email \* :

Contact Phone \* :

Requested Ship Date:

Planned Install Date:

Shipment Method \* :

Delivery Instructions:

Shipping Notes:

Back

Next

## SSO: Purchase Orders > Orders

14	<b>STEP 8 – End User</b>	<p>Red Asterisk indicates required fields</p> <p>Where is the part going contact information.</p> <ul style="list-style-type: none"><li>Complete the form.</li></ul> <p><a href="#">Next</a></p>
		<div><div>▼ End User - Step 8 of 10</div><div><div>Company Name * :</div><div><input type="text"/></div></div><div><div>Address Line1 * :</div><div><input type="text"/></div></div><div><div>Address Line2:</div><div><input type="text"/></div></div><div><div>City * :</div><div><input type="text"/></div></div><div><div>State * :</div><div><input type="text"/></div></div><div><div>Zip/Postal Code * :</div><div><input type="text"/></div></div><div><div>Country * :</div><div><input type="text"/></div></div><div><div>Contact Name * :</div><div><input type="text"/></div></div><div><div>Contact Email * :</div><div><input type="text"/></div></div><div><div>Contact Phone * :</div><div><input type="text"/></div></div><div><div>New Customer * :</div><div><input type="text"/></div></div><div><div>Site ID:</div><div><input type="text"/></div></div><div><div>Account Number:</div><div><input type="text"/></div></div><div><div>Back</div><div>Next</div></div></div>
15.	<b>STEP 9 - Configuration</b>	<p>Red Asterisk indicates required fields</p> <p>Not required to complete</p> <ul style="list-style-type: none"><li>Complete the form.</li></ul> <p><a href="#">Next</a></p>
		<div><div>▼ Configuration - Step 9 of 10</div><div><div>Intended Authentication Method:</div><div><input type="text"/></div></div><div><div>Badge Test Required:</div><div><input type="text"/></div></div><div><div>Implementation Included:</div><div><input type="text"/></div></div><div><div>Days On Site:</div><div><input type="text"/></div></div><div><div>Replenishment Cycle:</div><div><input type="text"/></div></div><div><div>Back</div><div>Next</div></div></div>

## SSO: Purchase Orders > Orders

---

16.	<b>STEP 10- Notes</b>	<ul style="list-style-type: none"><li>• Add a note to the ordering department.</li><li>• Back to review through screens.</li><li>• Submit Order – Complete</li></ul>
	<div>▼ Notes - Step 10 of 10</div> <div>Notes: <input type="text"/></div> <div><input type="button" value="Back"/> <input type="button" value="Submit Order"/></div>	



# Purchase Order Workflow

**Overview:** This introduction to ordering your Securastock products through the Purchase Order feature will get you familiar with the Steps to completion, editing, and copying and printing your orders.

## Shortlist - You will need:

Step		Required								
1	<a href="#">Order</a>	<ul style="list-style-type: none"><li>- Purchase Order number</li><li>- Short Description of order</li><li>- Machine Type</li><li>- Any file attachments for the order</li></ul>								
2	<a href="#">Machine Information</a>	<ul style="list-style-type: none"><li>- Confirm Machine and Color</li></ul>								
3	<a href="#">Product Form</a>	<ul style="list-style-type: none"><li>- Bins: All bin sizes, color, and part numbers</li><li>- Badge Reader type: 805 is the Standard, 800 is used if Badge Test request indicates it is required.</li><li>- List of accessories if desired.</li></ul>								
4	<a href="#">Order Summary</a> Review	n/a								
5	Distributor <a href="#">Accts Payable Info</a>	<ul style="list-style-type: none"><li>- Distributor (Your company) / branch address</li><li>- Accounts Payable Contact information Name, Email address, phone number.</li></ul>								
6	Distributor <a href="#">Branch info</a>	<ul style="list-style-type: none"><li>- Distributor Branch Contact for machine: Name, Email address, phone number</li></ul>								
7	<a href="#">Shipping information</a>	<ul style="list-style-type: none"><li>- Shipping method option<ul style="list-style-type: none"><li>- <i>Prepay, collect, schedule your own.</i></li></ul></li><li>- Where is machine being delivered. Company Name, Ship to address Contact name, email, phone</li></ul>								
8	<a href="#">End User information</a>	<ul style="list-style-type: none"><li>- Final Destination Location for machine Full address</li><li>- Local Machine level administrator to be loaded into database.</li></ul>								
9	<a href="#">Machine Configuration info</a>	- Which method will you use to access the machine?								
		<table><tr><td>PIN</td><td>Default</td></tr><tr><td>Biometrics</td><td>Facial Recognition</td></tr><tr><td>Universal Badge Reader</td><td>Badge Test Request to be completed and sent in for testing and programming of the Access Reader.</td></tr><tr><td>Standard RFID</td><td>RFID Fob, Card, Sticker</td></tr></table>	PIN	Default	Biometrics	Facial Recognition	Universal Badge Reader	Badge Test Request to be completed and sent in for testing and programming of the Access Reader.	Standard RFID	RFID Fob, Card, Sticker
		PIN	Default							
		Biometrics	Facial Recognition							
Universal Badge Reader	Badge Test Request to be completed and sent in for testing and programming of the Access Reader.									
Standard RFID	RFID Fob, Card, Sticker									
10	<a href="#">Order Notes</a>	-								

**LOCATION:** Access: <https://access.securastock.com>

**Login:** Login with your Single Sign-On Credentials.

Once you are logged in. Your Dashboard will appear, the Menu options will reflect your level of permissions.

## Purchase Order Table - Overview

**Location:** On the Dashboard Menu Options select: **Purchase Orders** > then from the submenu: **Orders**

The Purchase Orders Table displays a summary list of all Purchase Order entries.

Some of the key fields of interest are:

- Status of Order
- Customer PO
- Submitted by
- Approved by
- Created Date

There are several action options:

- **Print:** Print the current purchase order will download a pdf version of the Order Summary for printing  
✓ Be aware that incomplete POs will not contain all information.
- **Copy:** Copy the selected PO use as a base for a new PO order.  
✓ Advance through the steps and complete blanks areas and edit other fields as needed.
- **Continue:** Pick up where you left off
- **Delete:** Delete the order.

**Search Filters** ▶ Search any field or combination of fields to locate previous orders.

## Entering an Order

New Purchase Order

Select the Purchase order icon to begin a new order.

### Begin. Step 1:

**Mandatory Fields:** All mandatory fields are noted with an asterisk.

Order - Step 1 of 10

Create Date: 2019-03-14 10:27:06

SecuraStock Sales Order Number: 502379010

Customer PO Number \* : 1963900

Short Order Description \* : Stock GRN/grn

Require Approval: ☐

Requested Approver: ▼

Order Type \* : SecuraStock ▼

Customer Attachment: Choose File No file chosen [file] [delete]

Distributor Name \* : Distributor - Agora Edge

Back Next

- \* **Customer PO Number:** Your Company Purchase Order ID
- \* **Short Order Description:** Its common to use the machine type and color
- \* **Order Type:** Drop down selection of the Machine
- \* **Distributor Name:** Defaults to the assigned Distributor Level of your SSO User record.
- ✓ **Customer Attachment:** You may include a copy of your Purchase order if desired.
- ✓ **When editing:** Previously attached files will show options to the right of the **Choose** file button [file] [delete].
  - **file:** Click on **file** to download the file for viewing.
  - **delete:** Click on the **checkbox** to **delete** the attachment.

Select **Next** to continue.



## Step 2: Machine

Machine - Step 2 of 10

Machine Type:
SecuraSTOCK v9 in white, with universal badge reader, shipping crate

Back
Next

**Machine Type:** Click the drop-down arrow to select the Machine Type and color you wish to configure an order for.

✓ **Review the machine/color selection is correct.**

Select **Next** to continue.

## Step 3: Product Form

In this section you will select the machine and additional items you wish to add on to your order.

- ✓ When selecting the machine, all the items that come with your machine package will auto select.
- ✓ **Re: Securastock machine orders:** Bins, dividers, and fences will be noted as storage, any overage will be calculated and adjusted as needed once it is submitted.

Product Form - Step 3 of 10

Product ID	Description	Distributor Price	Quantity
SecuraStockV9GREEN	SecuraSTOCK V9 in Green, with universal badge reader, shipping crate	\$ 7557.00	0
POWERBAR12	12-OUTLET CONFIGURABLE POWER STRIP OPTION	\$ 80.00	0
DUSTPROTECTIONKIT	DUST PROTECTION KIT; 2 FILTERS, 12 MAGNETS, W/INSTRUCTIONS	\$ 49.00	0
C5101-8015	15FT Cat5e 350MHz UTP SNAGLESS ETHERNET NETWORK PATCH CABLE, WHITE	\$ 9.00	0
PW104-1215	15FT OUTLET SAVER POWER EXTENSION CORD	\$ 24.00	0
FENCEGR	FRONT FENCE, 26" X 6", GREEN	\$ 22.00	0
FENCERED	FRONT FENCE, 26" X 6", RED	\$ 22.00	0
FENCEWH	FRONT FENCE, 26" X 6", WHITE	\$ 22.00	0
DIVIDERGR	SHELF DIVIDER, 23" X 10", GREEN	\$ 35.00	0
DIVIDERRED	SHELF DIVIDER, 23" X 10", RED	\$ 35.00	0

**Quantity:** Select quantity from the drop-down list.

Select **Next** to continue.

## Step 4: Order Summary

Review your order summary.

**Note:** Current Lead times on machine builds are noted below the order summary. Lead times are updated often and may vary between machine types.

- ✓ Note that the first year of software and support fees are prorated.  
Fees will be due again each January for the year.

▼ Order Summary - Step 4 of 10

Product ID	Descriptions	Price	Quantity	Item Total
SecuraStockV9GREEN	SecuraSTOCK V9 in Green, with universal badge reader, shipping crate	\$7557.00	1	\$7557.00
Support Fees	Software and Support Fees, First Year	\$540.00	1	\$540.00
POWERBAR12	12-OUTLET CONFIGURABLE POWER STRIP OPTION	\$80.00	1	*included
FENCEGR	FRONT FENCE, 26" X 6", GREEN	\$22.00	4	*storage
FENCERED	FRONT FENCE, 26" X 6", RED	\$22.00	4	*storage
PCP30220GR	PLASTIC PARTS BIN, GREEN, SIZE B, 7-3/8 X 4-1/8 X 3", W/ MAGNET	\$4.62	7	*storage
PCP30164GR	PLASTIC PARTS BIN, GREEN, SIZE J, 23-5/8 X 6-5/8 X 4 ", W/ MAGNET	\$15.38	8	*storage
BADGEREADER-805	MULTI-RANGE BADGE READER 805	\$295.00	1	\$295.00
Storage Total				\$726.38
Grand Total				\$9118.38

\*Lead time on a machine order is currently 6 weeks.

Select **Next** to continue.

## Step 5: Distributor Accounts Payable Information

All invoicing by SecuraStock is completed via email to your company AP.

Enter the Mandatory "\*" information regarding Accounts Payable for your company in this section.

- **Company, Full Address**
- **AP Contact name, email, and phone number**

▼ Distributor Accounts Payable Information - Step 5 of 10

Company Name * :	<input type="text" value="Your company NAME"/>
Address Line1 * :	<input type="text" value="Company Address"/>
Address Line2:	<input type="text"/>
City * :	<input type="text" value="City"/>
State * :	<input type="text" value="State"/>
Zip/Postal Code * :	<input type="text" value="12345-0000"/>
Country * :	<input type="text" value="United States"/>
AP Contact Name * :	<input type="text" value="Name of AP Contact here"/>
AP Contact Email * :	<input type="text" value="Contact@@your company.com"/>
AP Contact Phone * :	<input type="text" value="555.555.1212"/>

Select **Next** to continue.



## Step 6: Distributor Branch

Enter the Mandatory “\*” information regarding Company Branch information.

▼ Distributor Branch - Step 6 of 10

Company Name \* :

Your Company

Branch ID:

Branch ID if applicable

Contact Name \* :

Who is the contact regarding this order

Contact Email \* :

Their email address

Contact Phone \* :

Their Phone number

Select **Next** to continue.

## Step 7: Shipping

Enter the Mandatory “\*” information regarding: Shipping to information.

You may also request a ship date; and include the planned installation date to your record.

▼ Shipping - Step 7 of 10

Company Name \* :

Address Line1 \* :

Address Line2:

City \* :

State \* :

Zip/Postal Code \* :

Country \* :

Contact Name \* :

Contact Email \* :

Contact Phone \* :

Requested Ship Date:

2019-04-15

Planned Install Date:

Shipment Method \* :

Prepay and Add ▼

Delivery Instructions:

Shipping Notes:


Select **Next** to continue.

## Step 8: End User

The end user information is used to build a location for the machine to reside within your company hierarchy.

Note: **New Customer = Yes** This indicates that a location does not currently exist and will be built

**New Customer = No** This indicates that a location already exists for this end user and the site ID will indicate the location that you would like the machine placed into.

 If no site is indicated machine will be placed into “Unassigned” Location within your heirarchy.

▼ End User - Step 8 of 10

Company Name \* :

End user company name

Address Line1 \* :

address of company

Address Line2:

City \* :

City

State \* :

state

Zip/Postal Code \* :

zip code

Country \* :

Country

Contact Name \* :

Machine Administrator at the location

Contact Email \* :

Admins email address

Contact Phone \* :

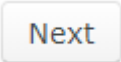
their contact phone number.

New Customer \* :

▼

Site ID:

Account Number:

Select  to continue.

## Step 9: Configuration

▼ Configuration - Step 9 of 10

Intended Authentication Method:

PIN ▼

Badge Test Required:

▼

Implementation Included:

▼

Days On Site:

▼

Replenishment Cycle:

▼

Which method will you use to access the machine? **PIN, Biometrics, Universal Badge Reader, or Standard RFID (fob, card)**

- **The default is PIN/PWD.**
- **Universal Badge Reader** requires a Badge Test Request to be completed and to be sent with a sample badge for testing and programming for the reader.
- ✓ **Badge test request forms can be obtained from support@securastock.com**

Select **Next** to continue.

## Step 10: Notes

Enter any notes regarding the sale that have not been covered in the steps.

**Submit Order**

## Purchase Orders

New Purchase Order

Search Filters ▶

Display: 15

Short Order Description	Status	SecuraStock Sales Order Number	Customer PO Number	Submitted By	Approved By	Requested Approver	Create Date	
SecuraCRIB in green w/ component encl...	Submitted to Securastock for Fulfillment	502379024	1	laurie.jee@securastock.com	-	-	2019-03-15 07:56:49	Print Copy Edit

Once the order is submitted, you will be directed to the summary. Verify Status of submitted.

You may Print a PDF of the order details, Copy the details to a new order, or Edit this order and re submit.