SAMIOS PLUMBING SUPPLIES

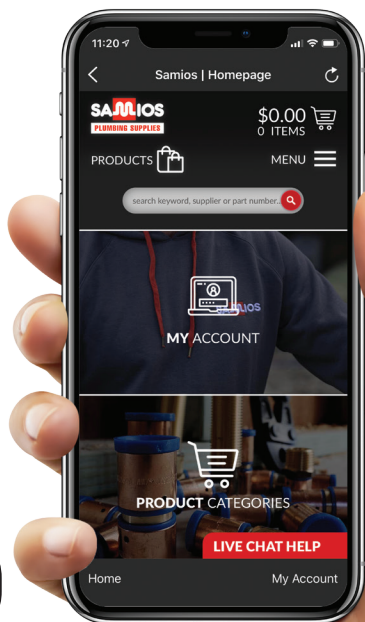# GETTING READY TO ORDER ONLINE

A guide to your online account with Samios Plumbing Supplies.

INDEX

WHAT YOU NEED TO KNOW

- Your prices are online. Any agreements setup between you and your branch for special pricing will be available on the website once you are logged into your account.
- Any products available throughout the entire Samios Plumbing network of branches will be available to you.
- If all products are available right away, your order will be ready to be picked up within a few hours.
- Online only deals will be available.
- You can change the branch you're shopping from at any time.
- You can setup users, departments and budgets for your account.
- Check the availability of products from the branch at any time.
- Any purchase, whether online, or in branch can be viewed within your online account.
- Have your invoices and statements sent to you at any time via email.

SETTING UP AN ACCOUNT

In order to begin purchasing online, you'll be required to sign up to a credit account with Samios Plumbing. Applications for credit accounts are open to organisations and businesses registered within Australia.

What details do you need to provide?
When signing up to a credit account, you will need to acknowledge that the credit provided by Samios is wholly or predominantly for business or investment purposes. Please have the following items ready:

- If you are a company or business, you will need to provide an ABN and at least two trade references (name and phone number).
- Payment details (bank details).

The online application for credit will take roughly 10 minutes to complete, whilst credit applications are processed within two to three business days. You will be contacted with your account details once your approval has been finalised.
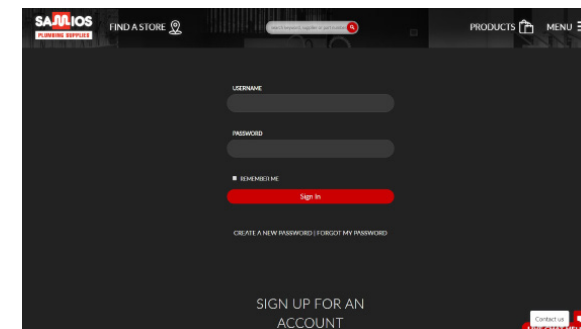
FIRST TIME LOGGING IN

The first time you login there are a few areas you need to look at first.

CHANGING YOUR PASSWORD

You will be provided with a password for your account but to ensure your account is completely secure you should change your password as soon as possible to something unique, that only you know.

Complete the following steps to change your password:

- Login to samios.net.au using your current username and password.
- Click 'My Account' in the top right of the screen.
- Under profile click 'Change your password'.
- Fill out the form with the appropriate details and click 'Update Password'.
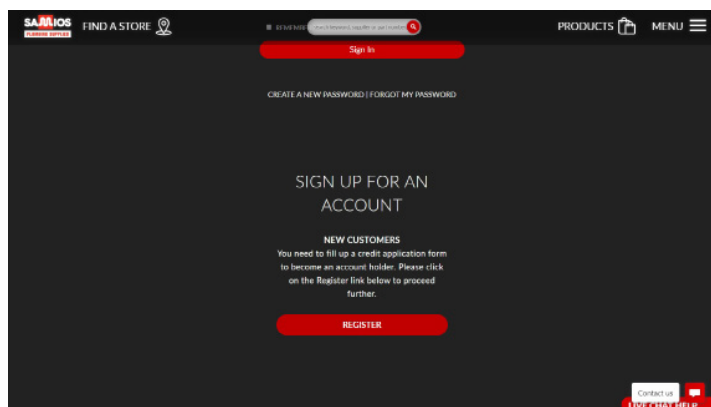
CHANGING YOUR BRANCH

Your account will be setup with a default Samios branch for the website. The branch will be chosen based on the data provided when you signed up for a credit account and is usually the one closest to you. The data from the branch will determine information such as local availability of products, pricing and expected delivery times. The location of your nominated branch is on the left of the screen.

To change your nominated branch for online shopping complete the following steps.

- Click either the down arrow next to the branch name at the top left of the page or click 'My Account'-> 'Change Branch'.
- Enter the town or post code for the store you want and click 'Find Store' or use the 'Find Stores Near Me' button.
- Select the store you wish to use from the list returned.
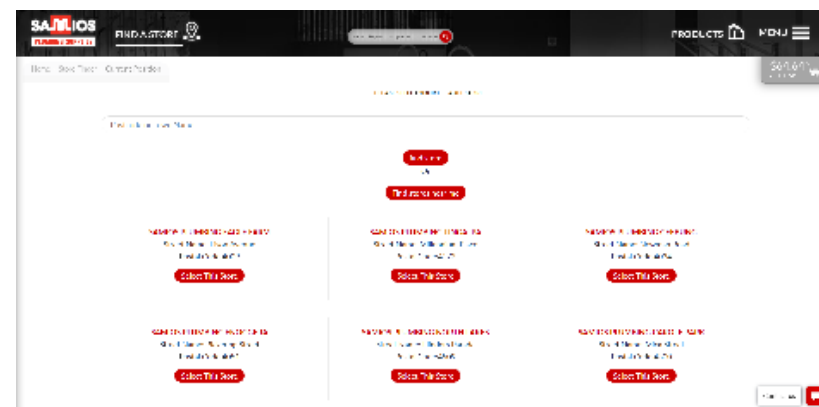
VIEWING ACCOUNT STATEMENTS

If you already have an account with Samios all of your previous account details will be available on the Samios website. If you have a new Samios account, whether you purchase online or in store, your full order history invoices, statements, etc. will be available within the account as they occur.

To view account statements
- Go to the 'My Account'-> 'Account Statements'
- To receive the current month's statement, click the 'Download'
- To have historical statements emailed to you, select the month and year you wish to receive, enter the email address and click the 'Send Email' button.
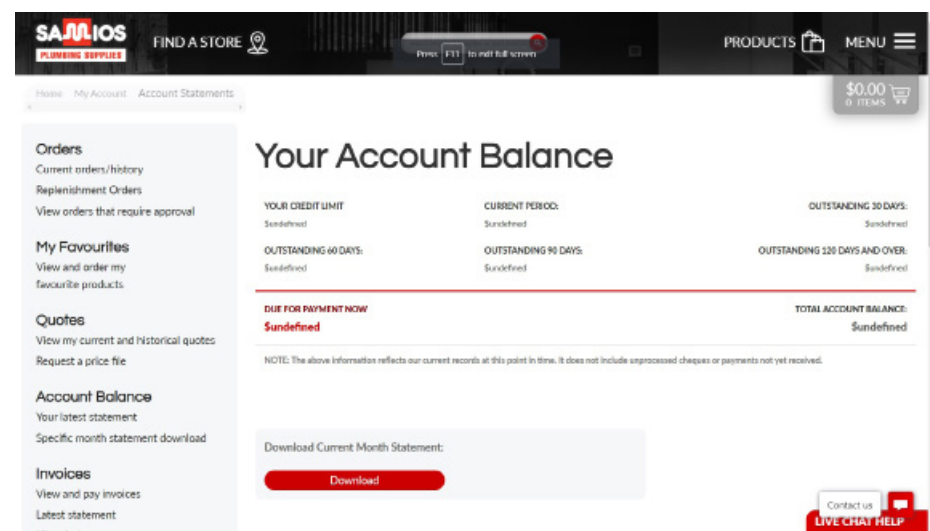

VIEWING AND PAYING OUTSTANDING INVOICES

One new feature is the ability to pay your invoices online. You can view and pay invoices by selecting 'View/Pay Invoices' within the 'My Account' page. Any outstanding payments will show the outstanding dollar value. Paid invoices will display '$0' as their value.

To pay an invoice:
- Tick the boxes in the 'Select for Payment' column for the invoices you wish to pay.
- Scroll either to the top or the bottom of the page and click the 'Make Payment' button.
- Fill in the payment details. If you have stored a credit card for future payments you may select the 'Use a Saved Card' button. The form will be automatically filled with the saved details.
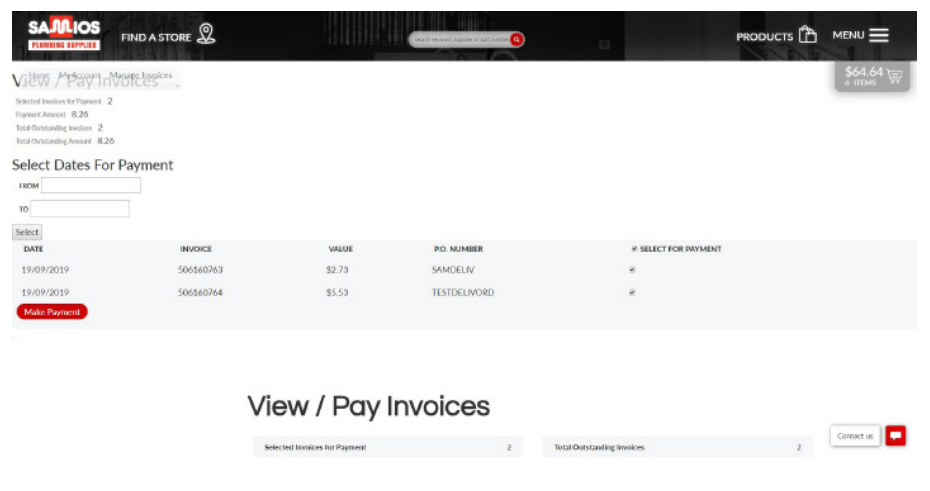
HELPFUL TOOLS IN THE ACCOUNT

PRICE FILES

Price files can now be ordered directly through the website. These are now automatically generated and will be emailed to the address you provide. Please be patient and only send through the request once. Price files may take up to a couple of hours to be generated and emailed, depending on server loads.
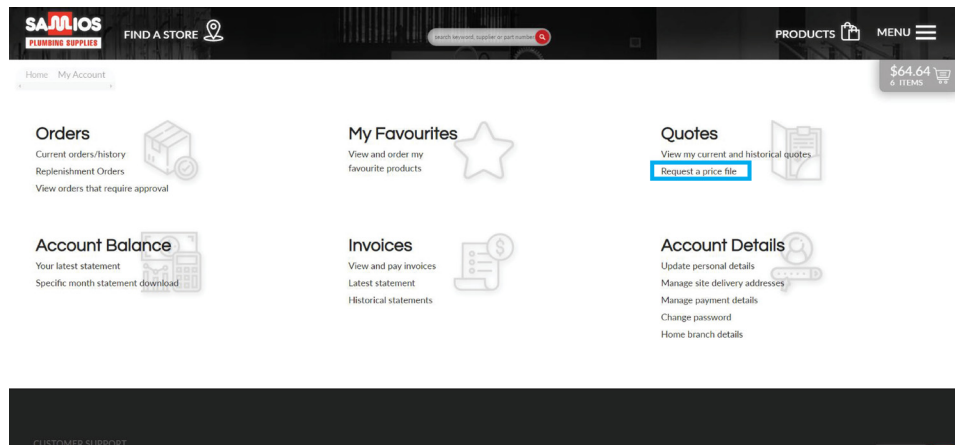
To download a Price File please complete the following steps:

• Go to 'My Account'-> 'Price File'.
• Select the branch you wish to receive the price from. Start typing in 'Samios' followed by the suburb of your branch and an auto complete will appear with all the branches available.
• Complete the rest of the details, including the format type and the number of products you want to get a price for.

FAVOURITES

Are there products you're constantly ordering? Your 'Favourites' can now be saved into different lists to help manage your product orders more effectively. Simply select your Favourite items from your list and add them into the shopping cart to create your order.

If you hit the '+Add To Favourite' within a product's details, the product will be added to your default Favourites list. The default Favourites list is selected in the 'Manage My Favourites' page, within the 'My Account' section.

To move a product from one Favourites list to another:

- Find the product you wish to move.
- Select the list you want to move the product to from the drop down box on the product.
- Click the 'Move Product' button on the product and it will move into the new list.

To create a new Favourites list, add the name and description of the list to the form at the bottom of the Favourites page and click the 'Create Favourite List' button.

To change the default Favourites list simply select the list you want as the default list from the dropdown at the bottom of the Favourites page and click "Change Default Favourite List".
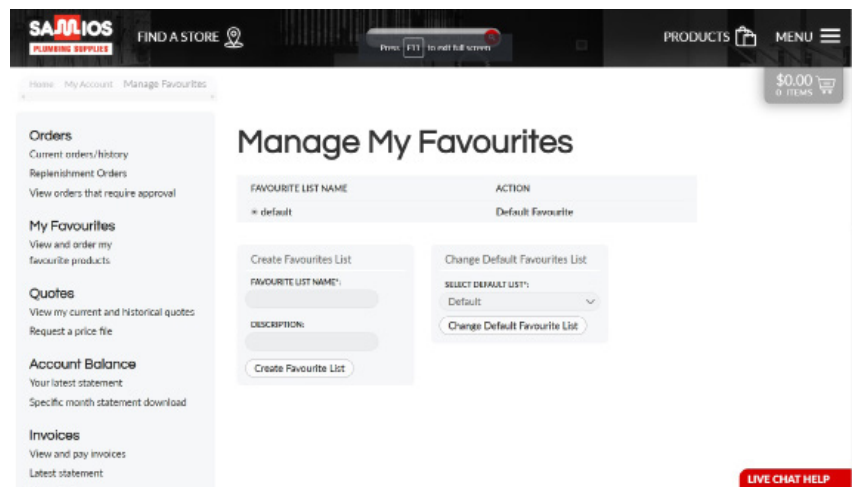
HISTORICAL INVOICES

You can now access old invoices online, you no longer have to request them from your branch. Your past invoices are in the 'Historical Invoices' section of your online account. You can select any number of them and have them sent to your email address.

To have Historical Invoices sent to your email:

- Go to 'My Account'-> 'Historical Invoices'.
- Tick the boxes in the 'Select' column for all the invoices you would like emailed.
- Scroll to the bottom and click the 'Send Email' button.
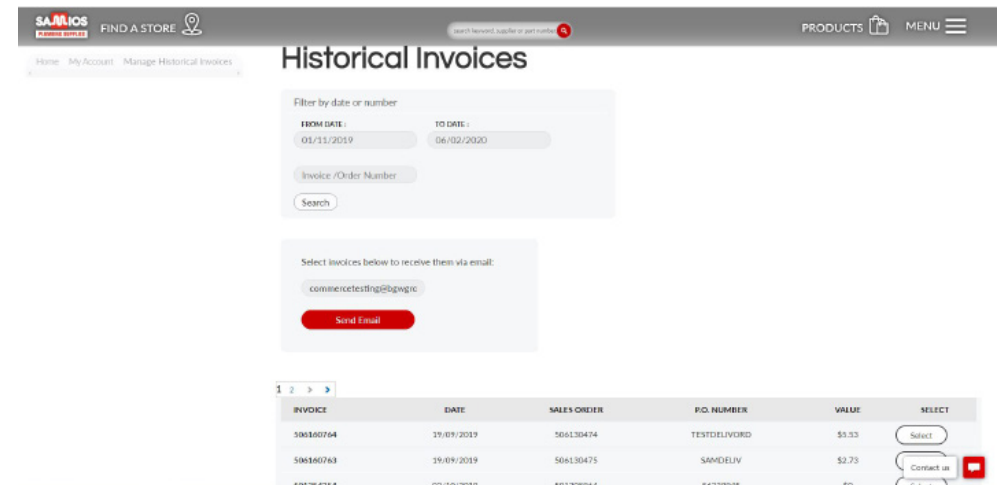
SETTING UP YOUR COMPANY

WHAT'S THIS SECTION?

The Samios Plumbing Supplies website now gives businesses the ability to create a hierarchical user structure, giving business manager's control over the amount of money a department or a single person is able to spend with Samios. This means the business will be able to watch the bottom line without having the micro-manage every transaction.

Company features include the ability to:

- Create an overall budget for the company;
- Manage the amount a user can spend on an order or in a time period; and
- Create a company hierarchy, departments and user groups.

Not all the features within the 'My Company' section are required for setting up your Samios account, however if you do wish to setup the features listed above the following booklet contains the steps required to implement them.

WHO IS THIS INTENDED FOR?

The functions available within the 'My Company' account area have been targeted towards medium to large sized businesses, primarily companies that have multiple divisions or departments that require different levels of ordering permissions.

Smaller businesses will also benefit if they need to block employees from seeing account details but still allow them to order stock.
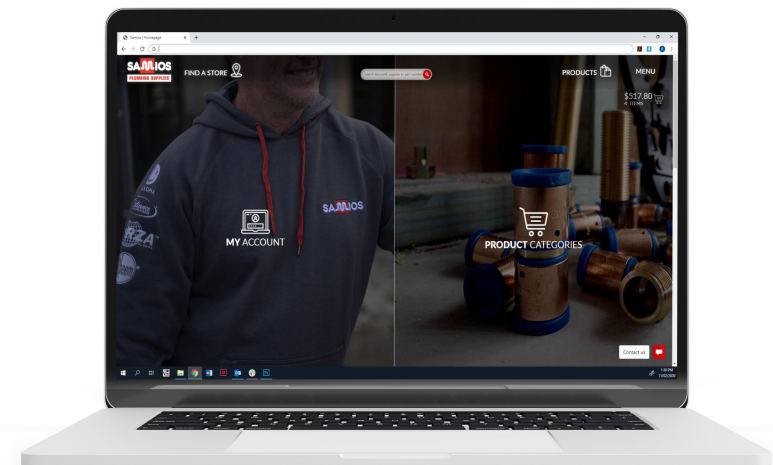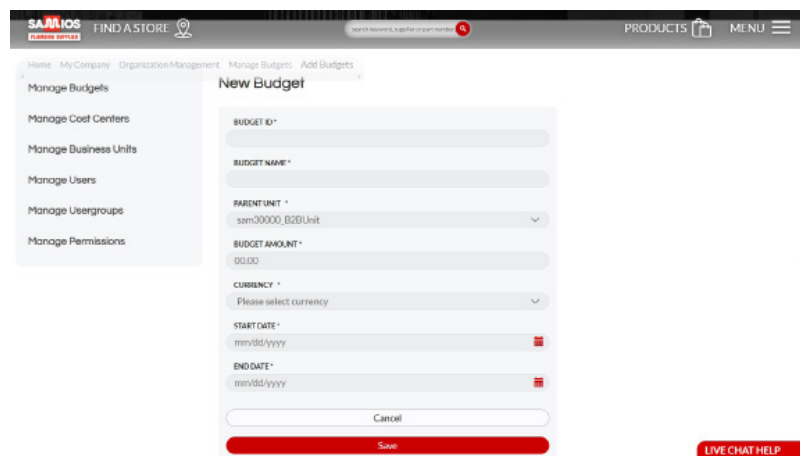
STEP 1
BUDGET

The budget you set, limits the amount your entire organisation can spend via the Samios website in a given period. The budget can also be assigned to each business unit via the cost centre.

- Click 'Manage Budgets '-> 'Create New Budget'.
- Fill out the Create Budget form.

(*Note you can set a start date any day after the current day, allowing you to plan out your budgets over a period of time. For example, if you want to set up budgets on a monthly basis, you can set them all up at the same time.)
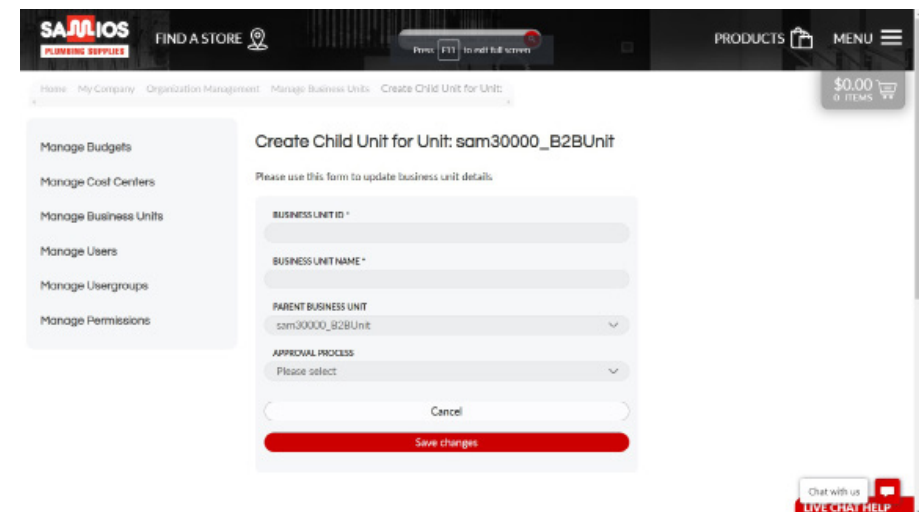
STEP 2
BUSINESS UNITS

Business Units are the groups or departments within your organisation. These units are primarily used in assigning budgets to individual departments and limiting the total amount that can be spent by the company. To set up a business unit complete the following:

- Click 'Manage Business Units'-> 'Create New Unit'.
- Fill in the appropriate sections of the form.
- Select the parent unit of the group.
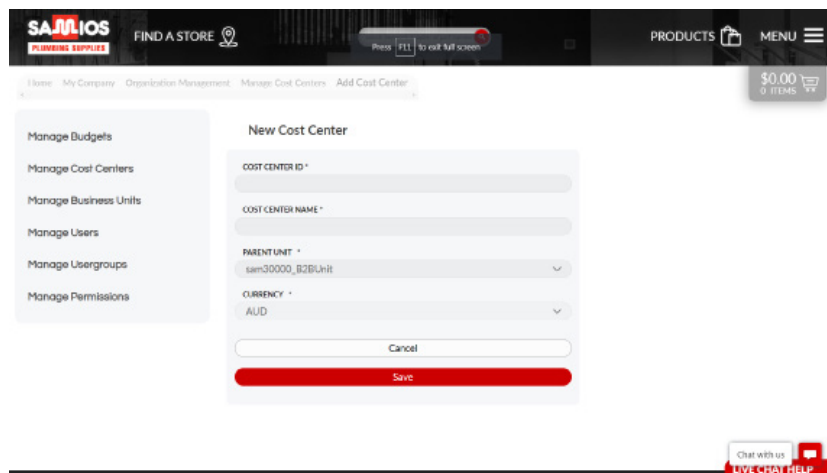- Click 'Save Changes'.

STEP 3
COST CENTRES

All orders purchased on credit must be registered against a cost centre because the cost centre links to departments within the organisation's structure.

This allows you to control the amount each department can spend by creating a budget and attaching it to a cost centre.

To create a cost centre, complete the following:

• Click 'Manage Cost Centres' -> 'Create New Cost Centre'.
• Fill in the appropriate sections of the form.
• Select the parent unit of the group.
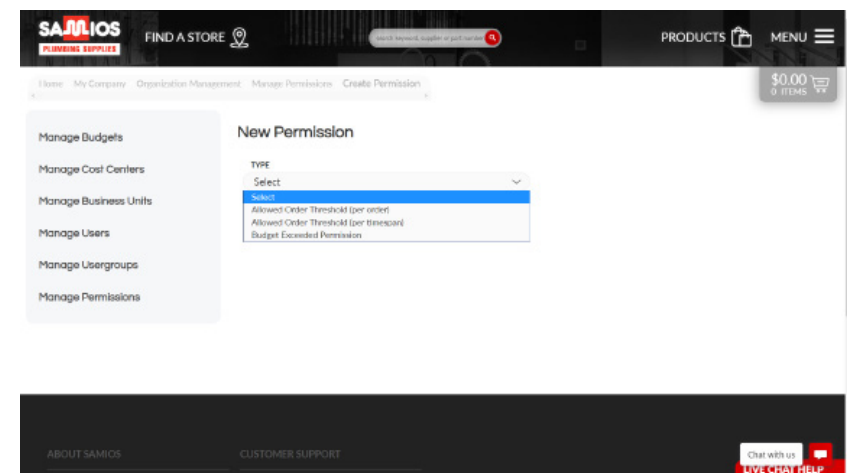• Click 'Save Changes'.

STEP 4
PERMISSIONS

There are three types of user permissions which define the amount a user can spend:

Allowed Order Threshold (per order): Sets a maximum limit a user with this budget can spend in one order.
Allowed Order Threshold (per Sets a maximum limit a user with this budget can spend within a period.
Budget Exceeded Permission: Gives the user the permission to exceed any budgets created.

To create a new permission complete the following steps:

- Click 'Manage Permissions'-> 'Create Permission'.
- Select the permission type (style of budget) you require then click
- Fill out the form with the relevant details and click 'Save' once completed.

If a user creates an order that exceeds the permissible amount the order will be forwarded onto an approver for completion.

STEP 5
SETTING UP USERS

There are four roles that can be assigned to a user, each with levels of access and permissions.

Administrator: Has control over the Samios account, can create users, set up users and assign cost centres.

Manager: Has access to the 'My Company' for the purpose of updating user items. A Manager can also be assigned as an Approver.

Approver: An approver has 'My Account' permissions with an extra tab for any (pending overspend which requires approval). No access to the 'My Company'

Customer: Base level access only. Can (view orders they have placed).

OPTIONAL STEP 6
USERGROUPS

Assigning a User Group gives a specific user permissions they wouldn't otherwise have within their business unit, i.e. it overrides the usual business unit permissions.
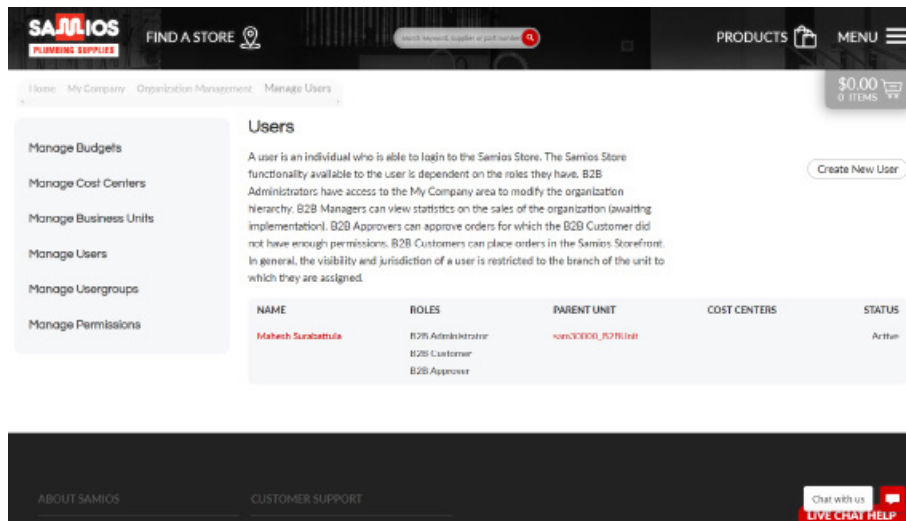
In order to create a new User Group please complete the following steps:

- Click 'Manage Usergroups'-> 'Create New Usergroup'.
- Fill out the appropriate user group details.
- Select the parent unit of the group.
- Click on the newly created user group within the 'Manage Usergroups' page.
- Edit the permissions of the user group by clicking the 'Select Usergroup' button and select what level of permissions you want the group to have.
- Select which users to add to the user group by selecting them, and clicking 'Edit' from the users second of the usergroup details.
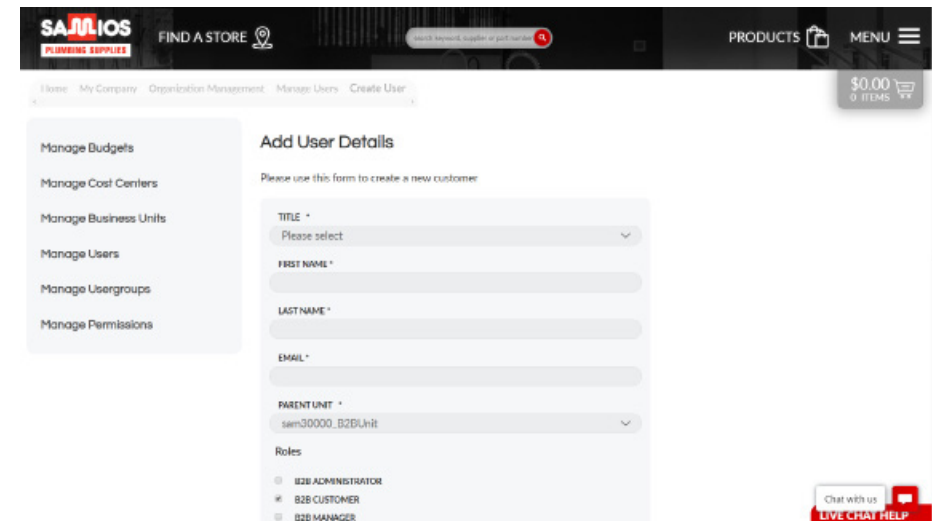
OPTIONAL STEP 7
EDITING A USER

Once you've created a user you may want to add them to a user group, change their parent business unit, or give them a permission level. This can be done by clicking 'Manage Users' within the 'My Company' section.

Approvers

You can add an extra person to be an approver for individual users. Approvers are users that have been assigned the approver role.

Permissions

This is where you can add or edit the financial limits for a user. The limits can be either per-order or per-timespan. See Step 4 for setting up permissions.

User Groups

You can also add the user to a specific user group here. User groups give the user permissions they wouldn't otherwise have within their business unit. See 'Optional Step 6' for creating user groups.
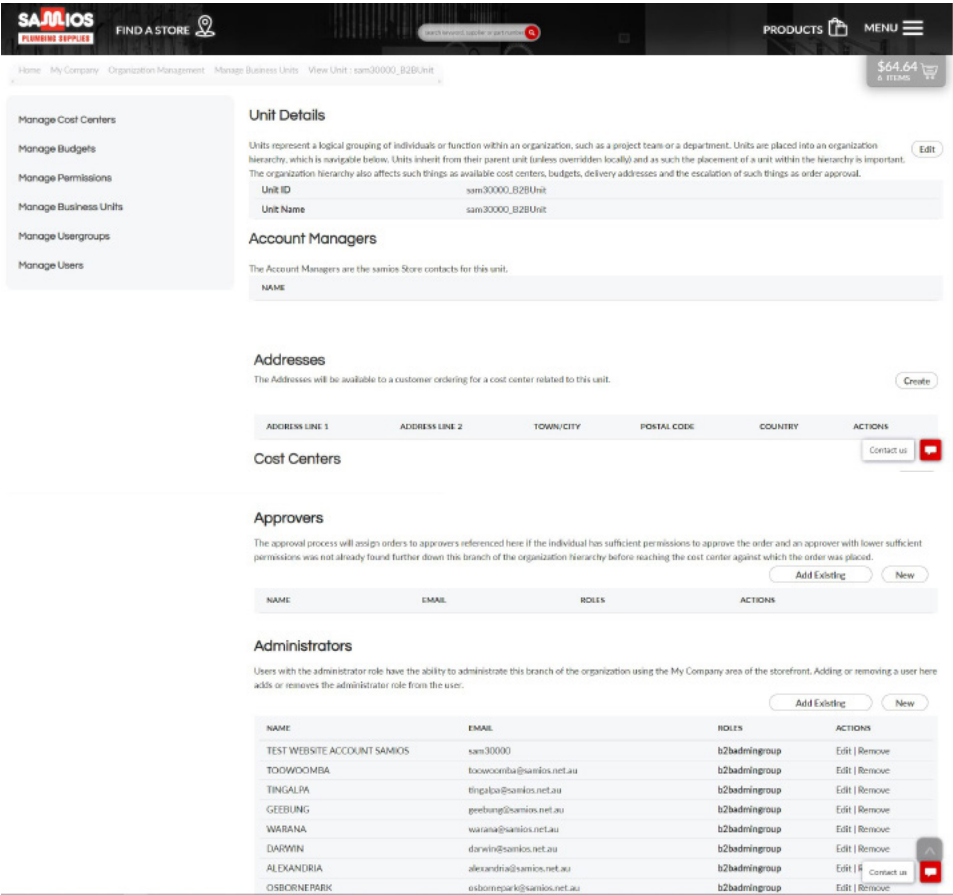
CLOUD INVOICE INTEGRATION

SIMPRO AND LINK4

We continuously update and improve the Samios Plumbing Supplies website and now our customers can integrate with third party, cloud software systems, such as simPRO and Link4. The integration is seamless as it will allow you to connect your online Samios account to simPRO and cloud accounting software such as MYOB or Xero using Link4, in relatively simple steps.


SIMPRO

AUTOMATED CATALOGUE UPDATES (PRICING AND PART NUMBERS)

The Samios-simPRO integration enables you to automate updates to your catalogue price and part number files. To link your Samios catalogue to simPRO:

- Log into your simPRO account.
- Click 'Utilities'-> 'Import'.
- From the 'Imports' Menu on the left, click 'Catalogue'-> 'Samios'.
- Enter your Samios account username (sam12345) and password.
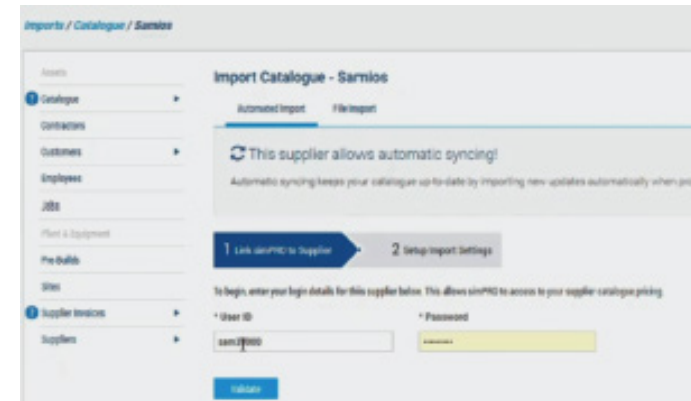
Once you have validated using your credentials, select your supplier in the 'Select Supplier' field. Click the 'Activate Automated Imports' button. A success message will be displayed: 'Automated imports are active for this supplier'.

SIMPRO

AUTOMATED INVOICING

To enable automatic invoicing for your Samios-simPRO integration:

- Log into your simPRO account.
- Click 'Utilies'-> 'Import'.
- From the 'Imports' Menu, select 'Supplier Invoices'-> 'Samios'.
- Enter your Samios account username (sam12345) and password.
- Select your supplier from the 'Select Supplier' field.
- Click the 'Activate Automated Imports' button.
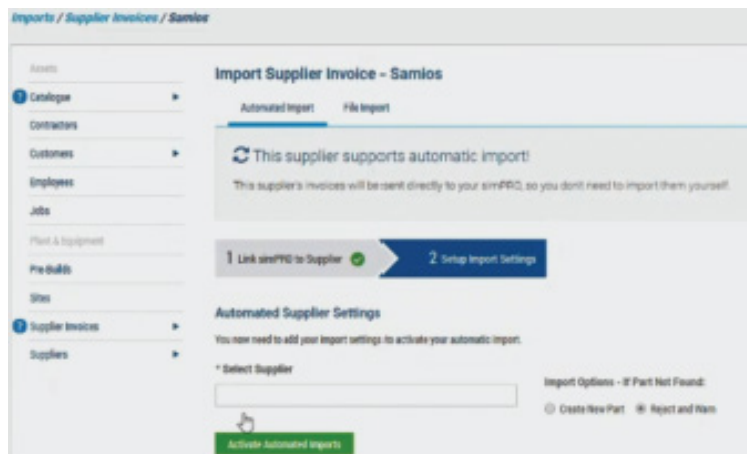
For a comprehensive video tutorial, use the following link: https://samios.net.au/simpro

LINK4

SEAMLESS INVOICE DELIVERY

Introducing seamless invoice delivery with the Samios-Link4 integration. If your business uses cloud accounting software such as MYOB and   Xero you can activate the e-invoicing service using Link4. Receive   invoices straight into your accounting software (MYOB or Xero), at no cost to you or your business.

LINK4

HOW TO ACTIVATE LINK4

You can activate your e-invoicing service with Link4 in three steps:

- Enter the following link to open the Samios-Link4 portal. https://secure.link4.cloud/samios_signup.php
- Input all the required information, including your Samios account number.
- Inform your local Samios branch/store that you would like your invoices to be sent to Link4.

For more information, visit the Samios website and check out the Link4 page at https://samios.net.au/sam/en/AUD/samios-link4

MOVING PURCHASING TO

ECOMMERCE

POWERFUL SEARCH AND RICH PRODUCT INFORMATION.
*****

LIVE CONTRACT PRICING AND PRODUCT AVAILABILITY.
*****

FULL ORDER AND DISPATCH
HISTORY FOR ALL ONLINE AND OFFLINE ORDERS.
*****

SELF-SERVICE ORGANISATION
AND PURCHASING
MANAGEMENT.

*****

ORDER APPROVAL WORKFLOW.
*****

PURCHASING OR ACCOUNT
PAYMENT SECURELY FOR ALL
MAJOR CREDIT CARDS.

LEARN MORE AT
samios.net.au/faqorhelp