

Users Manual: **Spindle Self Serve**



**Spindle
Self Serve**



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1.Registration

Sign in

Email

Password

[Log In](#)[Forgot Password?](#)[Click here to Register.](#)

①

Before logging in for the first time you must register, you can do this by clicking the link **(1)** which will take you to the following page

Registration

YOUR DETAILS

First Name

Last Name

Your Company Name

Your Account No

Optional

LOGIN DETAILS

Email

Password

Confirm Password

TERMS

I agree to the terms

☐[View Terms & Conditions](#)[Generate New Image](#)

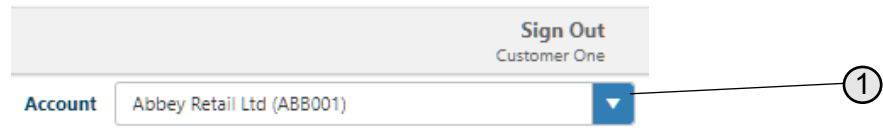
Type the code from the image

[Register](#)[Back](#)[To reset a password on an existing account, click here.](#)

Here you can enter the details that you want linked with this account. Once the account has been created it must be authorised, you will be notified by an email to the account you registered with when this has occurred. Once you have been authorised you can log into your dashboard.

2. Selecting an Account

Once you have logged in you will be taken to the dashboard page.



If you have access to more than one account, there will be a drop-down box near the top right of your browser screen **(1)**. You can use the drop-down box to switch between accounts. If you only have access to one this space will be empty.



3. Account Overview

On the left-hand side of the dashboard page there is an overview of your account displaying your current balance and the status of your invoices.

Abbey Retail Ltd	
ACCOUNT	
Account Ref.	ABB001
Status	Live
Credit Limit	£100,000.00
Balance	£20,471.86
Terms	30 Days (From document date)
INVOICES	
In Terms	2 / £3,858.95 >
Overdue	8 / £16,260.69 >
In Query	1 / £704.43 >

3.1. Basic Account Overview

The first section **(1)** is the basic account overview with; the account number linked to your account, the status of the account, the credit limit, the balance, and the terms.

ACCOUNT	
Account Ref.	ABB001
Status	Live
Credit Limit	£100,000.00
Balance	£20,471.86
Terms	30 Days (From document date)

3.2. Status of Outstanding Invoices

The second section **(2)** gives information on your outstanding invoices with the number and value of invoices which are, in terms, overdue, and in query.

INVOICES		
In Terms	2 / £3,858.95	>
Overdue	8 / £16,260.69	>
In Query	1 / £704.43	>

4. Invoice and Credit Note History

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Dashboard Invoices Order History Place Order **2** Stock Documents

Account Abbey Retail Ltd (ABB001) **1**

Abbey Retail Ltd

ACCOUNT

Account Ref. ABB001
Status Live
Credit Limit £100,000.00
Balance £20,471.86
Terms 30 Days (From document date)

INVOICES

In Terms 2 / £3,858.95
Overdue 8 / £16,260.69
In Query 1 / £704.43

INVOICES / CREDIT NOTES (LAST 5)

Status	Type	Doc Num.	Due Date	Date	Value	Outstanding	Doc.
	Credit Note	000000355		08/10/2022	£352.21	£352.21	PDF
In Terms	Invoice	0000005102	30/06/2022	30/05/2022	£352.21	£352.21	PDF
Faulty	Invoice	0000005066	04/03/2022	05/02/2022	£704.43	£704.43	PDF
In Terms	Invoice	0000005065	04/03/2022	05/02/2022	£3,506.74	£3,506.74	PDF
Complete	Payment Received	ABB001_30/07/2010		05/02/2017	£2,923.47		

ORDER HISTORY Last Two Years

ORDERS (LAST 5)

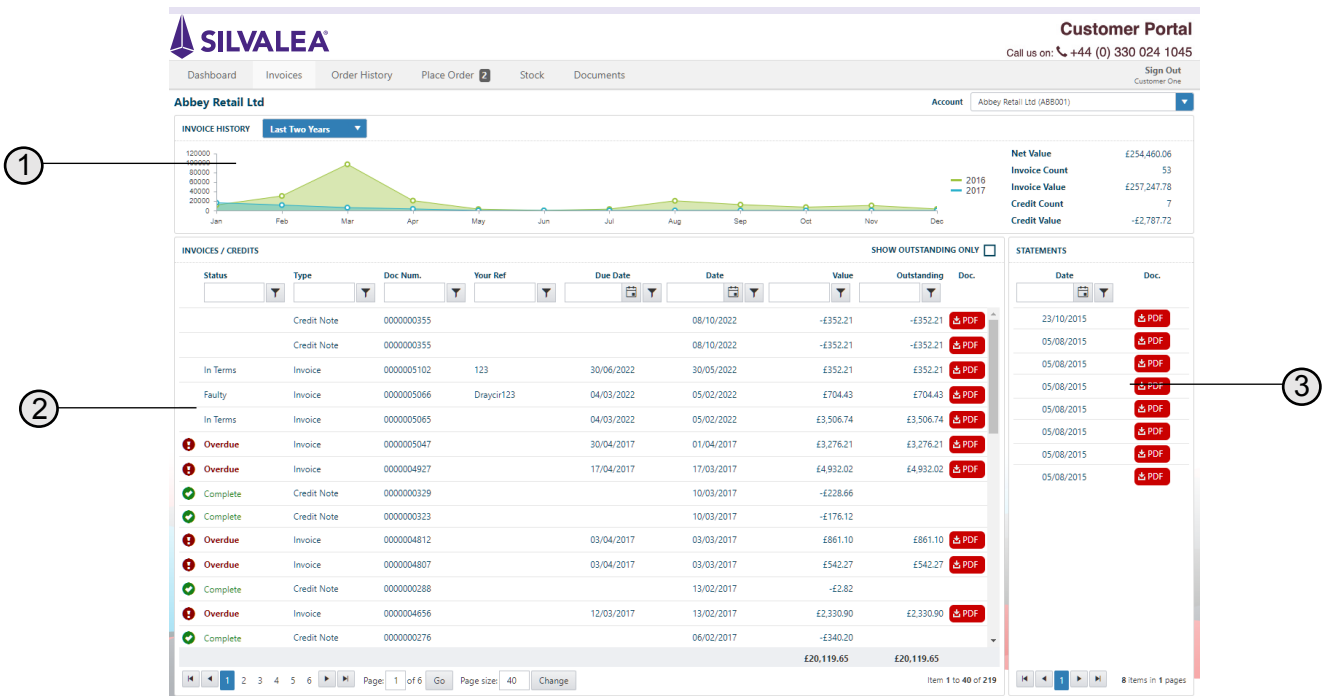
Your Ref	Order Num.	Date	Value	Type	Status
PO123ZY	0000005260	03/11/2017	£326.40	Sales Order	In Progress
	0000005259	30/10/2017	£125.00	Sales Order	In Progress
	0000005257	30/10/2017	£299.60	Sales Order	In Progress
	0000005256	30/10/2017	£156.75	Sales Order	In Progress

2

4.1. Most Recent Invoices and Credit Notes

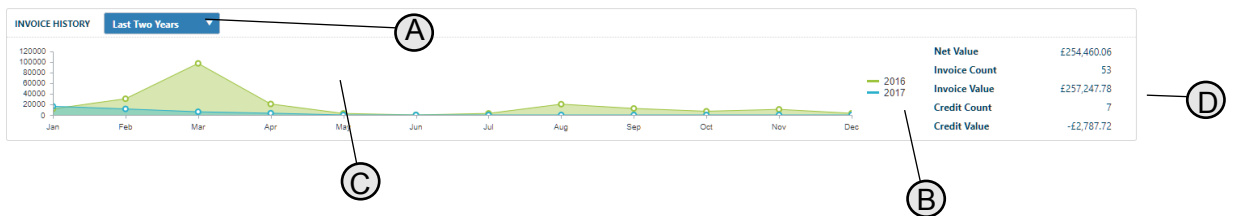
The five most recent invoices/ credit notes are displayed on the dashboard screen (1) this section gives an overview of the last five transactions, giving information on the status, type of transaction, document number, the due date of any invoices, the date filed, the full value and how much is still outstanding. You can also view the original invoice or credit as a PDF where available.

Selecting the 'Invoices' tab **(2)** takes you to the following page.

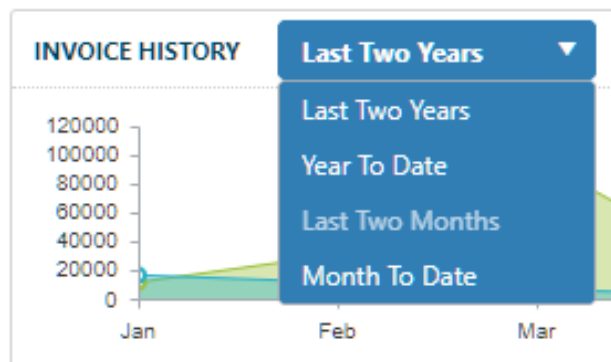


This page shows a complete history of all your invoices and credit notes .

4.2. Graphical Summary of Invoices and Credit Value

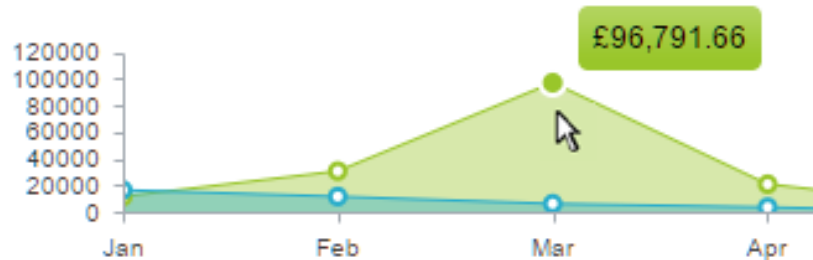


At the top of the page **(1)** there is a graphical display of your invoice history with the net worth of your invoices displayed over a certain time period.



You can click the drop-down box **(A)** to change the time period that you are looking at; the last 2 calendar years including the one you are currently in, the current year up to the current date, the last two months, and from the beginning of the current month up to the current date.

By clicking on one of the years in the key **(B)** you can remove that year from the graph or add it back in.



By hovering your mouse over one of the data points **(C)** you can see exactly what the net worth of the invoices were during that time period.

Net Value	£254,460.06
Invoice Count	53
Invoice Value	£257,247.78
Credit Count	7
Credit Value	-£2,787.72

The section in the top right **(D)** gives you a total; net value, invoice count, invoice value, credit count, and credit value for the full time period that you have currently selected.

1.1. Full List of Invoices and Credit Notes

INVOICES / CREDITS

SHOW OUTSTANDING ONLY

Status	Type	Doc Num.	Your Ref	Due Date	Date	Value	Outstanding	Doc.
	Credit Note	0000000355			08/10/2022	-£352.21	-£352.21	PDF
	Credit Note	0000000355			08/10/2022	-£352.21	-£352.21	PDF
In Terms	Invoice	0000005102	123	30/06/2022	30/05/2022	£352.21	£352.21	PDF
Faulty	Invoice	0000005066	Draycir123	04/03/2022	05/02/2022	£704.43	£704.43	PDF
In Terms	Invoice	0000005065		04/03/2022	05/02/2022	£3,506.74	£3,506.74	PDF
Overdue	Invoice	0000005047		30/04/2017	01/04/2017	£3,276.21	£3,276.21	PDF
Overdue	Invoice	0000004927		17/04/2017	17/03/2017	£4,932.02	£4,932.02	PDF
Complete	Credit Note	0000000329			10/03/2017	-£228.66		
Complete	Credit Note	0000000323			10/03/2017	-£176.12		
Overdue	Invoice	0000004812		03/04/2017	03/03/2017	£861.10	£861.10	PDF
Overdue	Invoice	0000004807		03/04/2017	03/03/2017	£542.27	£542.27	PDF
Complete	Credit Note	0000000288			13/02/2017	-£2.82		
Overdue	Invoice	0000004656		12/03/2017	13/02/2017	£2,330.90	£2,330.90	PDF
Complete	Credit Note	0000000276			06/02/2017	-£340.20		
						£20,119.65	£20,119.65	

1

2

3

4

5

6

Page: 1 of 6

Go

Page size: 40

Change

Item 1 to 40 of 219

A

The main section of the page (1) gives full information on the status, type of transaction, document number, due date, date filed, full value, and how much is yet to be paid on every transaction from the creation of your account. You can also view any invoice or credit note in PDF form.

You can also change the number of transactions shown on every page by changing the number in the box (A) and clicking change, so that you can view every transaction on one page

4.3. Financial Statements

STATEMENTS

Date

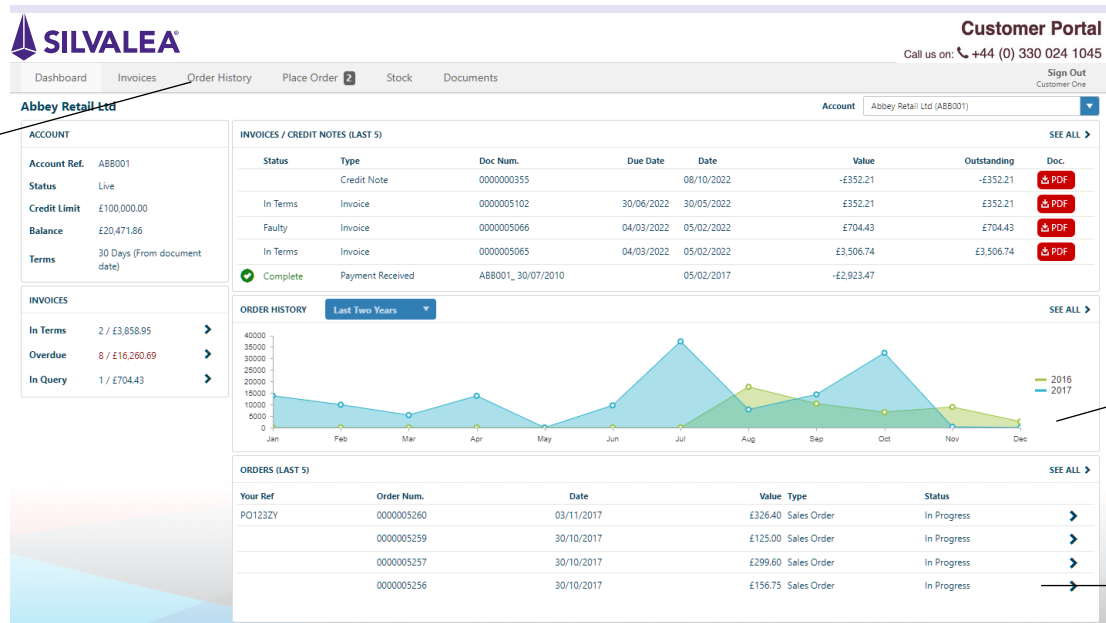
Doc.

23/10/2015

[PDF](#)

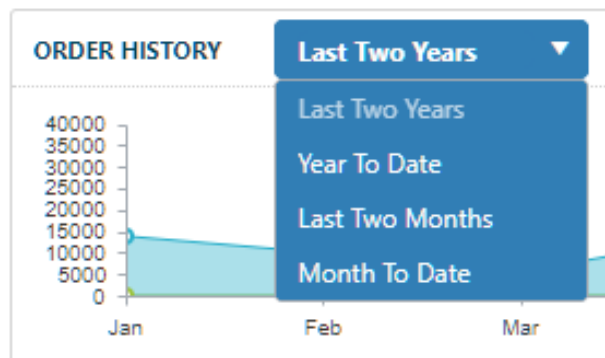
The last section on this page is (3) where you can view all your previous statements and download them in PDF form. You can also search for specific ones by date.

5. Your Order History

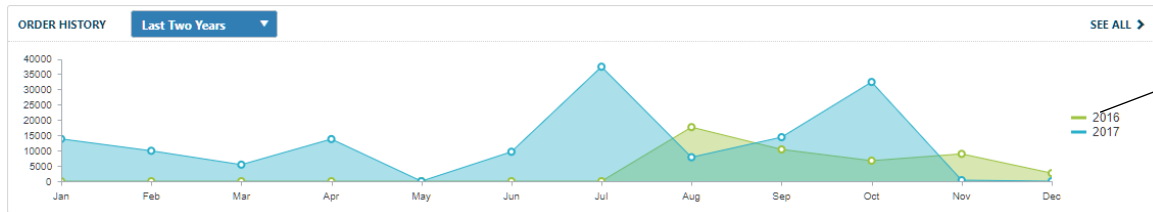


5.1. Graphical Overview of Previous Orders

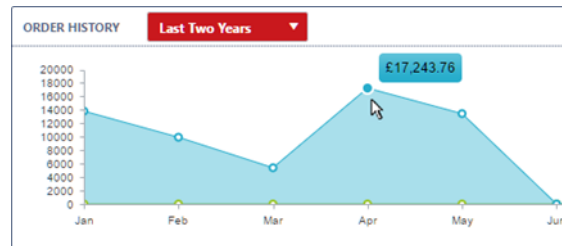
The quickest way to see an overview of your order history is on the dashboard (1) where you can see your order history over a given time period displayed graphically.



You can click the drop-down box to change the time period that you are looking at; the last 2 calendar years including the one you are currently in, the current year up to the current date, the last two months, and from the beginning of the current month up to the current date.



By clicking on one of the years in the key **(A)** you can remove that year from the graph or add it back in by clicking again.



By hovering your mouse over one of the data points you can view the total value of orders during that time period.

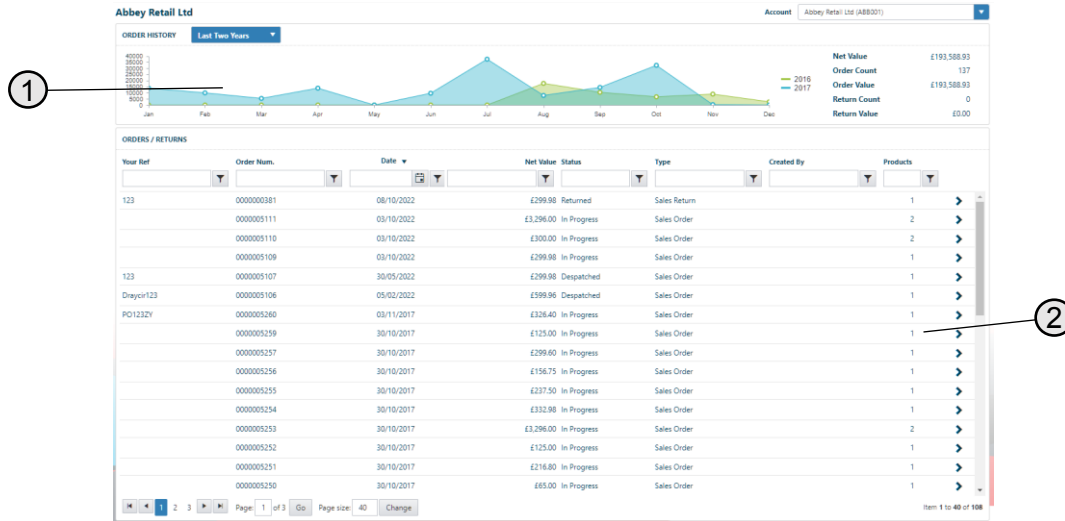
5.2. Most Recent Orders

For details on your most recent orders, the lower section of the screen **(2)** gives you all the details on your 5 most recent orders.

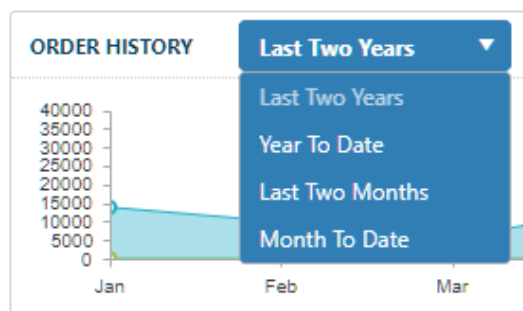
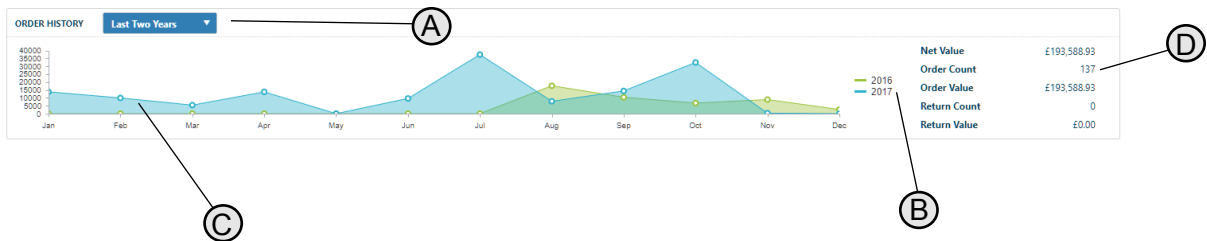
ORDERS (LAST 5)					SEE ALL >
Your Ref	Order Num.	Date	Value	Type	Status
PO123ZY	0000005260	03/11/2017	£326.40	Sales Order	In Progress >
	0000005259	30/10/2017	£125.00	Sales Order	In Progress >
	0000005257	30/10/2017	£299.60	Sales Order	In Progress >
	0000005256	30/10/2017	£156.75	Sales Order	In Progress >

It gives you; the reference (if you added one), the order number, the date ordered, the value of the order, and the status of the order. By clicking the chevron **(A)** at the end of each line you will be taken to that specific order on the history page, or you can get there by clicking the 'History' tab **(3)**

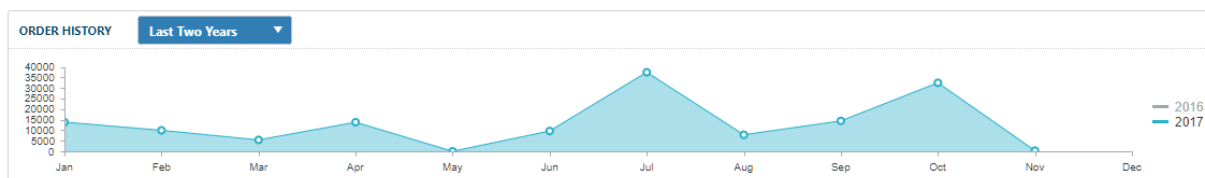
5.3. Full Overview of Orders



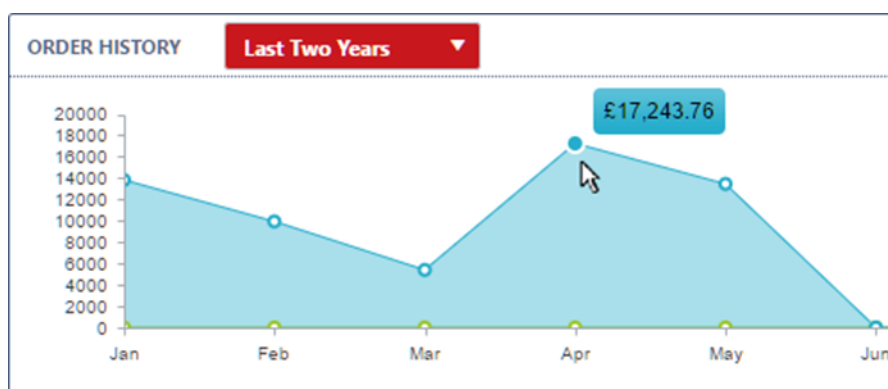
At the top of the page (1) there is a graphical display of your invoice history with the net worth of your invoices displayed over a certain time period.



You can click the drop-down box (A) to change the time period that you are looking at; the last 2 calendar years including the one you are currently in, the current year up to the current date, the last two months, and from the beginning of the current month up to the current date.



By clicking on one of the years in the key **(B)** you can remove that year from the graph or add it back in.



By hovering your mouse over one of the data points **(C)** you can see exactly what the net worth of the orders were during that time period.

Net Value	£193,588.93
Order Count	137
Order Value	£193,588.93
Return Count	0
Return Value	£0.00

The section in the top right **(D)** gives you a total for the; net value, order count, order value, return count, and return value for the full time period that you have currently selected

The main section on the page **(2)** gives you a full history of all your orders since your account was created telling you; the reference (if you added one), the order number, the date ordered, the value of the order, and the status of the order for every order you have placed.

ORDERS / RETURNS							
Your Ref	Order Num.	Date	Net Value	Status	Type	Created By	Products
123	000000381	08/10/2022	£299.98	Returned	Sales Return		1
	0000005111	03/10/2022	£3,296.00	In Progress	Sales Order		2
	0000005110	03/10/2022	£300.00	In Progress	Sales Order		2
	0000005109	03/10/2022	£299.98	In Progress	Sales Order		1
123	0000005107	30/05/2022	£299.98	Despatched	Sales Order		1
Draycir123	0000005106	05/02/2022	£599.96	Despatched	Sales Order		1
PO123ZY	0000005260	03/11/2017	£326.40	In Progress	Sales Order		1
	0000005259	30/10/2017	£125.00	In Progress	Sales Order		1
	0000005257	30/10/2017	£299.60	In Progress	Sales Order		1
	0000005256	30/10/2017	£156.75	In Progress	Sales Order		1
	0000005255	30/10/2017	£237.50	In Progress	Sales Order		1
	0000005254	30/10/2017	£332.98	In Progress	Sales Order		1
	0000005253	30/10/2017	£3,296.00	In Progress	Sales Order		2
	0000005252	30/10/2017	£125.00	In Progress	Sales Order		1
	0000005251	30/10/2017	£216.80	In Progress	Sales Order		1
	0000005250	30/10/2017	£65.00	In Progress	Sales Order		1

Page: 1 of 3 Go Page size: 40 Change Item 1 to 40 of 108

5.4. Details of Individual Orders

Clicking the chevron **(A)** at the end of each line you will display a breakdown of the order on that line, including; item codes, a description of each item, the quantity of each item purchased, how many have been dispatched, the value of the items you purchased and, the value, VAT and total cost of your order.

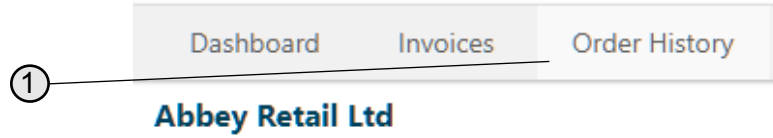
0000003190		26/09/2016	£920.30	Despatched	Sales Order	4
Item Code	Description	Qty	Despatched	Net Value	Summary	Options
IR/NAIL/OVAL/25mm	Nails Oval 25mm	1.00	1.00	£5.50	Value	(A1) Contact Us
FT/HANDLE/128/BRUSH	Brushed Steel Handle 128mm	2.00	2.00	£4.80	VAT	Order Again
ABPSG/13/20/2	AB Freestanding Gas 3-Ring/500mm/White	5.00	5.00	£750.00	Total	(A2) View Documents
WT/WHITE/LAM/120	White Laminated Worktop 120cm Length	5.00	5.00	£160.00		Track

There is also a link you can use to send any enquires you might have about the order to the seller **(A1)** and view any documents that have been sent between you and the seller **(A2)**.

You can also change the number of orders shown on every page by changing the number in the box **(B)** and clicking change, so that you can view every order on one page.

5.5. How to Find an Order

Firstly, you will need to be on the 'Order History' tab, which you can get to by clicking the link at the top of the dashboard page **(1)**.



That will take you to the following page.

5.6. Filtering for Orders

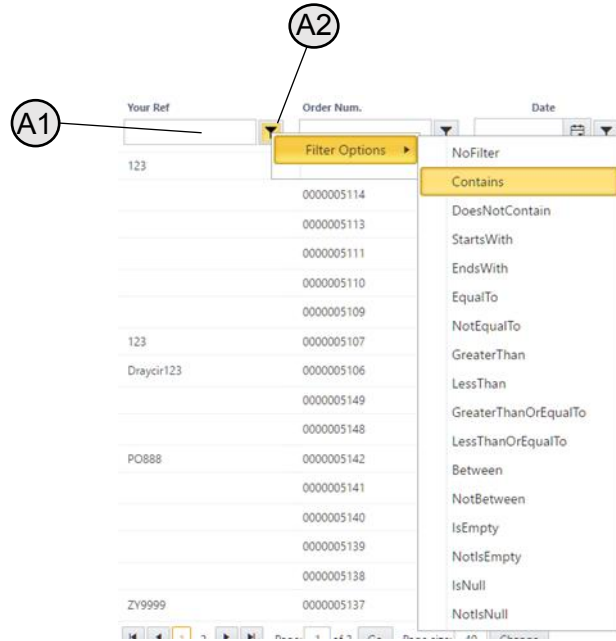
ORDERS / RETURNS

(A) Your Ref: Order Num.: Date: Net Value: Status: Type: Created By: Products:

123	000000381	08/10/2022	£299.98	Returned	Sales Return	1	>
	0000005111	03/10/2022	£3,296.00	In Progress	Sales Order	2	>
	0000005110	03/10/2022	£300.00	In Progress	Sales Order	2	>
	0000005109	03/10/2022	£299.98	In Progress	Sales Order	1	>
123	0000005107	30/05/2022	£299.98	Despatched	Sales Order	1	>
Draycir123	0000005106	05/02/2022	£599.96	Despatched	Sales Order	1	>
PO123ZY	0000005260	03/11/2017	£326.40	In Progress	Sales Order	1	>
	0000005259	30/10/2017	£125.00	In Progress	Sales Order	1	>
	0000005257	30/10/2017	£299.60	In Progress	Sales Order	1	>
	0000005256	30/10/2017	£156.75	In Progress	Sales Order	1	>
	0000005255	30/10/2017	£237.50	In Progress	Sales Order	1	>
	0000005254	30/10/2017	£332.98	In Progress	Sales Order	1	>
	0000005253	30/10/2017	£3,296.00	In Progress	Sales Order	2	>
	0000005252	30/10/2017	£125.00	In Progress	Sales Order	1	>
	0000005251	30/10/2017	£216.80	In Progress	Sales Order	1	>
	0000005250	30/10/2017	£65.00	In Progress	Sales Order	1	>

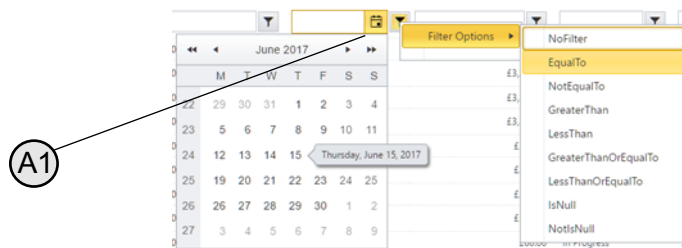
Page: 1 of 3 Go Page size: 40 Change Item 1 to 40 of 108

You can then use the filters at the top of the page **(A)** to find a specific order or a group of orders which share a common characteristic.

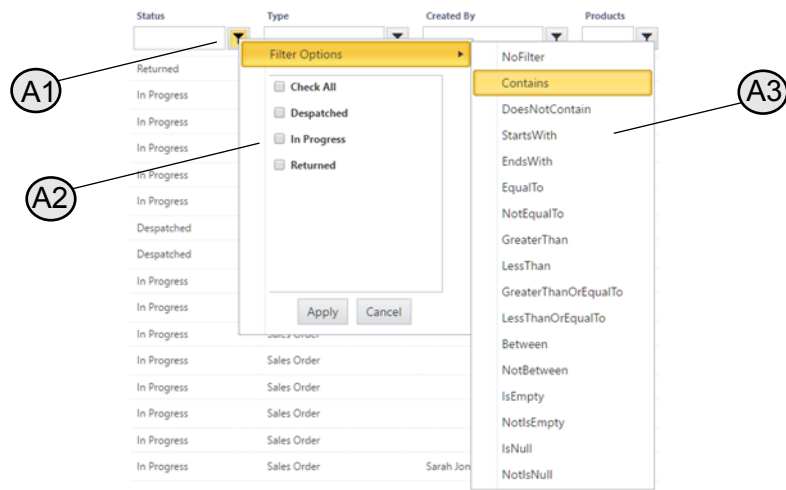


First you can filter for your order references, you can do this by typing a code into the box (A1) and then clicking the filter button (A2). You can then chose if you want to filter for references that; contain that code, does not contain that code, starts with that code, ends with that code, is exactly that code, is not exactly that code, is more than the numerical value of the code, is less than the numerical value of the code, greater or equal to the numerical value of the code, less than or equal to the numerical value of the code, between two values, not between two values, is empty, is not empty, is noll, or is not null.

You can repeat this process in as many of the filters as you need to find a particular order or group of orders.



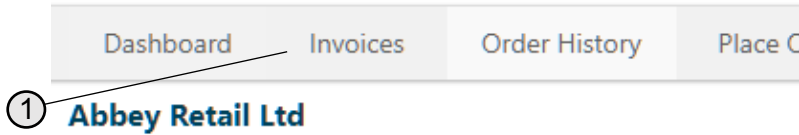
When filtering for a date you can type the desired date into the box directly or use the date selection tool by clicking the icon (A1) and then use the filter options drop-down box to filter as needed.



You can also filter status by clicking on the filter icon **(A1)** and then checking the box next to any desired status **(A2)**. You can still further filter your results using the filter options drop down box **(A3)**.

6. How to Find an Invoice

Firstly, you will need to access the 'Invoices' tab which you can get to by clicking the link at the top of the dashboard page **(1)**.



That will take you to the following page.

6.1. Filtering Invoices

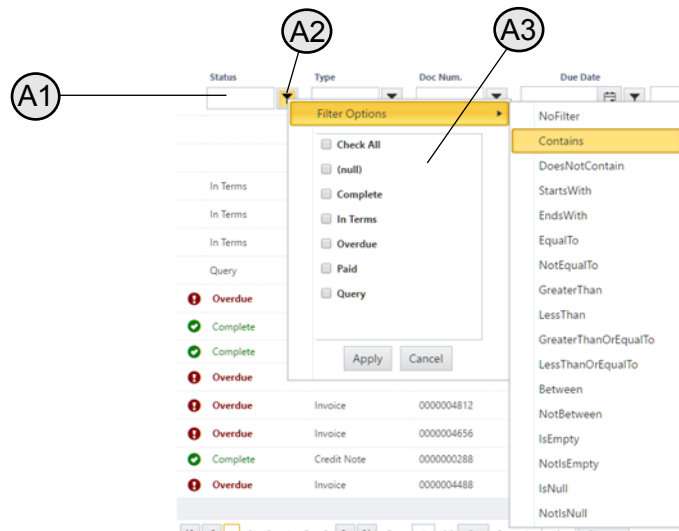
INVOICES / CREDITS SHOW OUTSTANDING ONLY ☐

(A) Status Type Doc Num. Your Ref Due Date Date Value Outstanding Doc.

	Credit Note	0000000355			08/10/2022		-£352.21	-£352.21	
	Credit Note	0000000355			08/10/2022		-£352.21	-£352.21	
In Terms	Invoice	0000005102	123		30/06/2022	30/05/2022	£352.21	£352.21	
Faulty	Invoice	0000005066	Draycir123		04/03/2022	05/02/2022	£704.43	£704.43	
In Terms	Invoice	0000005065			04/03/2022	05/02/2022	£3,506.74	£3,506.74	
Overdue	Invoice	0000005047			30/04/2017	01/04/2017	£3,276.21	£3,276.21	
Overdue	Invoice	0000004927			17/04/2017	17/03/2017	£4,932.02	£4,932.02	
Complete	Credit Note	0000000329				10/03/2017	-£228.66		
Complete	Credit Note	0000000323				10/03/2017	-£176.12		
Overdue	Invoice	0000004812			03/04/2017	03/03/2017	£861.10	£861.10	
Overdue	Invoice	0000004807			03/04/2017	03/03/2017	£542.27	£542.27	
Complete	Credit Note	0000000288				13/02/2017	-£2.82		
Overdue	Invoice	0000004656			12/03/2017	13/02/2017	£2,330.90	£2,330.90	
Complete	Credit Note	0000000276				06/02/2017	-£340.20		
							£20,119.65	£20,119.65	

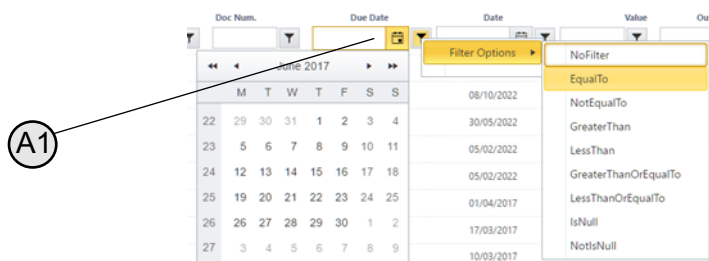
Page: 1 of 6 Go Page size: 40 Change Item 1 to 40 of 219

You can then use the filters at the top of the page **(A)** to find a specific invoice or a group of invoices which share a common characteristic.



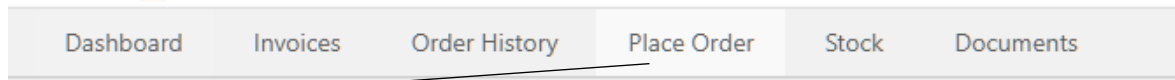
First you can filter for the status of your invoice, you can do this by either typing the status of the invoice you are looking for into the filter box (**A1**), or by clicking on the filter icon (**A2**) and then checking the box of the desired status. You can further filter these results by typing a code into the filter box and using the filter options (**A3**) to look for any statuses that contain that code, does not contain that code, starts with that code, ends with that code, is exactly that code, is not exactly that code, is more than the numerical value of the code, is less than the numerical value of the code, greater or equal to the numerical value of the code, less than or equal to the numerical value of the code, between two values, not between two values, is empty, is not empty, is null, or is not null.

You can repeat this process in as many of the filters as you need to find a particular invoice or group of invoices which share a common set of factors.



When filtering for a date you can type the desired date into the box directly or use the date selection tool by clicking the icon (**A1**). You can still further filter your results using the filter options drop down box (**A3**).

7. How to Place a New Order



① **Abbey Retail Ltd**

First you will need to access the 'Place Order' tab which you can get to by clicking the link at the top of the dashboard page (1).

SILVALEA Customer Portal
Call us on: +44 (0) 330 024 1045

Dashboard Invoices Order History **Place Order** Stock Documents

Abbey Retail Ltd

Code / Description Unit Qty Unit Cost Total Add +

No products selected

Account: Abbey Retail Ltd (AB8001)

SUMMARY

NET	£0.00
DELIVERY	£0.00
VAT	£0.00
TOTAL	£0.00

Clear Place Order

DETAILS

Your Ref. Date Required 09/11/2017

OPTIONS

Special instructions for delivery of this order.

Order / Quote Create Order Bulk Upload

DELIVERY

Select Head Office (Default)

Name Abbey Retail Ltd

Address 16 Church Lane
Lochside
Edinburgh
Midlothian

City

County

Postcode EH12 1WE

Country Great Britain

Tel 0131 621 9900

0 items in 1 pages

7.1. Adding a Product to an Order

The first section (1) is where you can add individual items to your order.

Code / Description Unit Qty Unit Cost Total Add +

A Start typing to search B C D E F

To order an item you first need to search for its product code or a description of the product in the search box **(A)**.

Code / Description	Unit	Qty	Unit Cost	Total
cabinet				<button>Add +</button>
Code	Name	Alt. Code	Your Code	
CA/BASE/DBL/BEECH	Beech Base Double Cabinet H58cm			
CA/BASE/DBL/OAK	Oak Base Double Cabinet H58cm			
CA/BASE/SNG/BEECH	Beech Base Single Cabinet H58cm			
CA/BASE/SNG/BEECH	Beech Base Single Cabinet H58cm	Global123		
CA/BASE/SNG/BEECH	Beech Base Single Cabinet H58cm		Abb1138	
CA/BASE/SNG/OAK	Oak Base Single Cabinet H58cm			
CA/WALL/H70/BEECH	Beech Wall Cabinet H70cm			
CA/WALL/H70/OAK	Oak Wall Cabinet H70cm			
CA/WALL/H92/BEECH	Beech Wall Cabinet H92cm			
CA/WALL/H92/OAK	Oak Wall Cabinet H92cm			

This will bring up a list of products that fit the code or description that you put into the search box and then you can pick from this drop-down list.

Code / Description	Unit	Qty	Unit Cost	Total
CA/BASE/DBL/BEECH - Beech Base Double Cabinet H58cm	Each	1.00	£236.00	£236.00
<button>Add +</button>				
No products selected				

You will then need to choose a unit type for the product you have chosen by using the unit drop-down box **(B)**, most products will only have one unit type but some can be sold in different forms.

Qty	Unit Cost	Total
10.00	£219.48	£2,194.80
<button>Add +</button>		

You can then enter the number of that product that you would like to purchase in the quantity box **(C)**.





The cost of the product **(D)** is the price per unit, which may change if the seller gives a discount depending on the number of units purchased.

The value **(E)** is the price of the entire sale for this product so the cost multiplied by the number of units.

Once you have entered all the information for your desired purchase you can click the 'Add' button **(F)** to add it to your current order.




7.2. Reviewing Your Current Order

The second section (2) is a summary of all the products in you current order.

<p>(A) CA/BASE/DBL/BEECH - Beech Base Double Cabinet H58cm</p>	<p>(C)  Each</p>	<p>(D) 10.00  £219.48</p>	<p>(B) £2,194.80  </p>
--	---	--	--

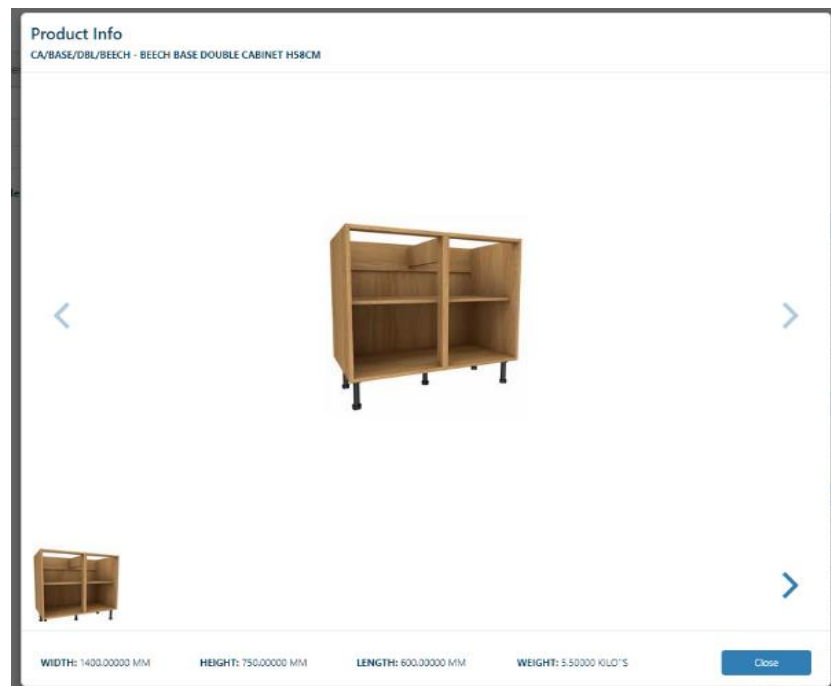
Each row **(A)** describes a product you have ordered with; a description, a unit type, a quantity, a cost per unit, and the value of that part of the order.

You can delete the order by pressing the bin icon **(B)** at the end of the row.

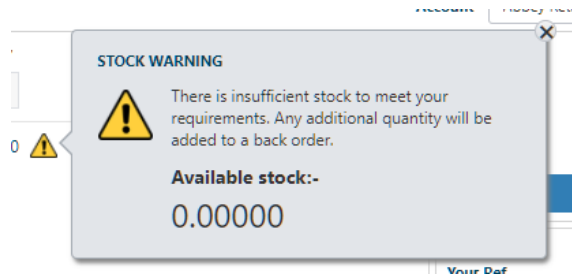
CA/BASE/DBL/BEECH - Beech Base Double Cabinet H58cm	 Each	10.00	£219.48	£2,194.80	 	(A1)
---	--	-------	---------	-----------	---	------

You can also edit your order by pressing the pencil icon **(B)** which allows you to change the unit type and quantity of that product, you can keep these changes or discard them by pressing the tick or cross buttons at the end of the row **(A1)**.

You can view an image of the product with a more detailed description by clicking the camera icon in the middle of the row **(C)**.



If there is not enough of the product currently available in stock, then a warning triangle will appear next to the quantity **(D)**. You can see how to resolve the problem by clicking on the warning, which will show you a message written by the seller on how they will proceed with an order that is not currently available.



7.3. Entering Delivery Details

Once you have added all the products you require to your current order you will need to add your details. First you can add a reference code to your order and a date you require your order by in the box on the right hand side of the screen **(3)**.

You can select a date by either typing one into the box **(A)** or by clicking on the date icon and selecting one using the tool.

Section **(4)** will automatically have your default address entered

DETAILS

Your Ref. Date Required 09/11/2017

OPTIONS

Special instructions for delivery of this order. (B)

Order / Quote Create Order Bulk Upload

DELIVERY

Select Head Office (Default) (A)

Name Abbey Retail Ltd

Address 16 Church Lane
Lochside
Edinburgh
Midlothian

City

County

Postcode EH12 1WE

Country Great Britain

Tel 0131 621 9900

You can select from any saved addresses or edit/enter a new one.

You can also add any delivery instructions as required using the text box **(B)**.

7.4. Placing a Bulk Order

You can also place bulk orders that you have created using the 'Bulk Upload' button (5) which will bring up the following screen

Bulk Order Upload

Use this page to upload items to order. Please use the template provided to ensure the file is in the correct format.

Download: [Bulk Upload Template](#) (A)

Options: ☒ First Line Contains Headers (B)

File: Browse (C)

Please Note
The import routine will clear all existing products from your order. (D)

Cancel Ok (E)

First you will need to download a template for the bulk order **(A)** to ensure that the file is in the right format.

	A	B
(A1)	ProductCode	Qty (A2)
2	ACS/BLENDER	3
3	CA/WALL/H70V	10
4	5d	7
5		

You will now have an excel file where you can enter a column of product codes **(A1)** and a column of quantities **(A2)** so you can save an order with as many products as needed.

Once you have created your file you can choose whether you keep the headings, if you do keep the option (B) ticked otherwise untick it.

You can now upload your file by either typing in the address of the file into the box **(C)** or clicking the 'Browse' button and finding it in your files (it should be in the downloads folder).

Bulk Order Upload

Use this page to upload items to order. Please use the template provided to ensure the file is in the correct format.

Download: [Bulk Upload Template](#)

Options: ☒ First Line Contains Headers

File: SpindleSelfServeTemplate (2).csv Remove

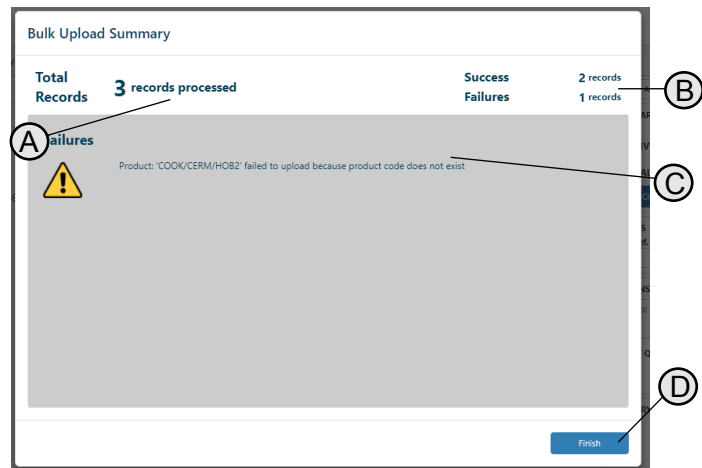
Please Note
The import routine will clear all existing products from your order.

Cancel Ok

Once you have uploaded your file it should appear next to the browse button. The green circle signifies it is in the correct format.

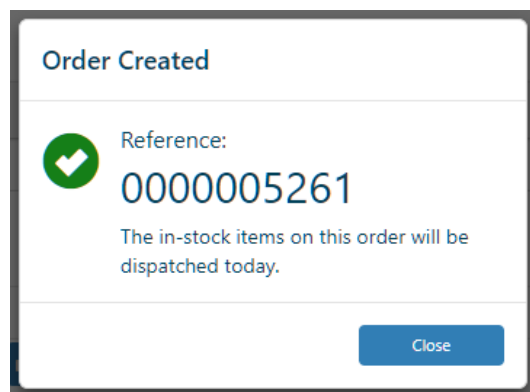
(D) warns you that if you do a bulk upload it will delete any product orders you currently have in the waiting list **(2)**.

Once you have uploaded the file you can press the 'Ok' button **(E)** to add the bulk order.



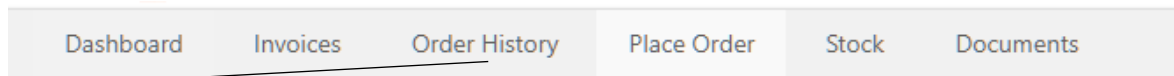
A bulk order summary should now appear with the total number of products ordered (A) the number that have successfully been uploaded and the number that have failed to upload (B). The reasons for any failures will be given in the main section (C) when you have reviewed this information press 'Finish' (D) to upload the products.

When you are happy with your full order you can review the; net value, the delivery cost, the VAT, and the total cost of the order in section (6). From here you can also either clear your order completely to start over or click the 'Place Order' button to send the order through. When the order has been placed, the following box should appear telling you your order number.



You can review your order, contact the seller, order again, or view any documents in the history tab.

8. Repeat a Previous Order



1 **Abbey Retail Ltd**

8.1. Finding an Order and Adding it to Your Current Order

First you will need to go into the 'Order History' tab which you can get to by clicking the link at the top of the page (1).

ORDERS / RETURNS

Your Ref	Order Num.	Date	Net Value	Status	Type	Created By	Products
123	000000381	08/10/2022	£299.98	Returned	Sales Return		1
	0000005111	03/10/2022	£3,296.00	In Progress	Sales Order		2
	0000005110	03/10/2022	£300.00	In Progress	Sales Order		2
	0000005109	03/10/2022	£299.98	In Progress	Sales Order		1
123	0000005107	30/05/2022	£299.98	Despatched	Sales Order		1
Draycir123	0000005106	05/02/2022	£599.96	Despatched	Sales Order		1
PO123ZY	0000005260	03/11/2017	£326.40	In Progress	Sales Order		1
	0000005259	30/10/2017	£125.00	In Progress	Sales Order		1
	0000005257	30/10/2017	£299.60	In Progress	Sales Order		1
	0000005256	30/10/2017	£156.75	In Progress	Sales Order		1
	0000005255	30/10/2017	£237.50	In Progress	Sales Order		1
	0000005254	30/10/2017	£332.98	In Progress	Sales Order		1
	0000005253	30/10/2017	£3,296.00	In Progress	Sales Order		2
	0000005252	30/10/2017	£125.00	In Progress	Sales Order		1
	0000005251	30/10/2017	£216.80	In Progress	Sales Order		1
	0000005250	30/10/2017	£65.00	In Progress	Sales Order		1

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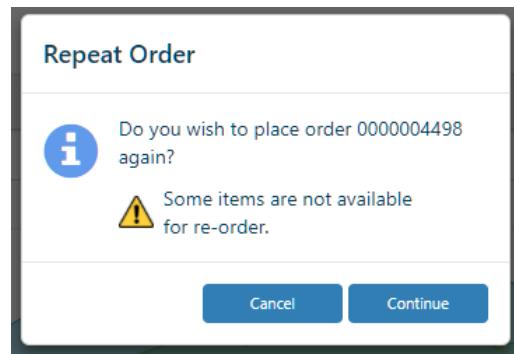
Then you can use the filters at the top of the page (A) to look for the order that you are interested in.

Once you have found it click on the chevron (B) at the end of the line to open more options.

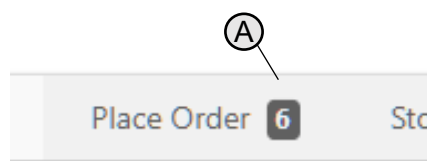
0000003190		26/09/2016		£920.30 Despatched		Sales Order		4	
Item Code	Description	Qty	Despatched	Net Value	Summary		Options		
IR/NAIL/OVAL/25mm	Nails Oval 25mm	1.00	1.00	£5.50	Value £920.30		Contact Us		
FT/HANDLE/128/BRUSH	Brushed Steel Handle 128mm	2.00	2.00	£4.80	VAT £160.25		Order Again		
ABFG/13/20/2	AB Freestanding Gas 3-Ring/500mm/White	5.00	5.00	£750.00	Total £1,080.55		View Documents		
WT/WHITE/LAM/120	White Laminated Worktop 120cm Length	5.00	5.00	£160.00			Track		

B1

You can then place a duplicate order by clicking the 'Order Again' button (B1) you will then be prompted to confirm the new order.

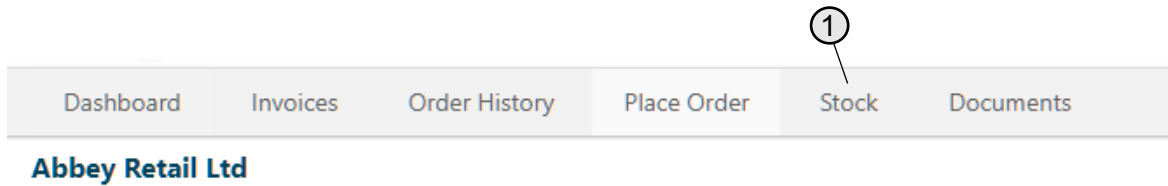


By pressing 'Continue' you will add the products in that order to your current order



If the duplicate order was processed successfully then a banner will appear at the bottom of the screen **(A)**. You can then review this order by going to the 'Order' tab **(B)**.

9. Checking Stock Availability & Prices



Firstly, you will need to go to the 'Stock' tab (1)

9.1. Searching for a Stock Item

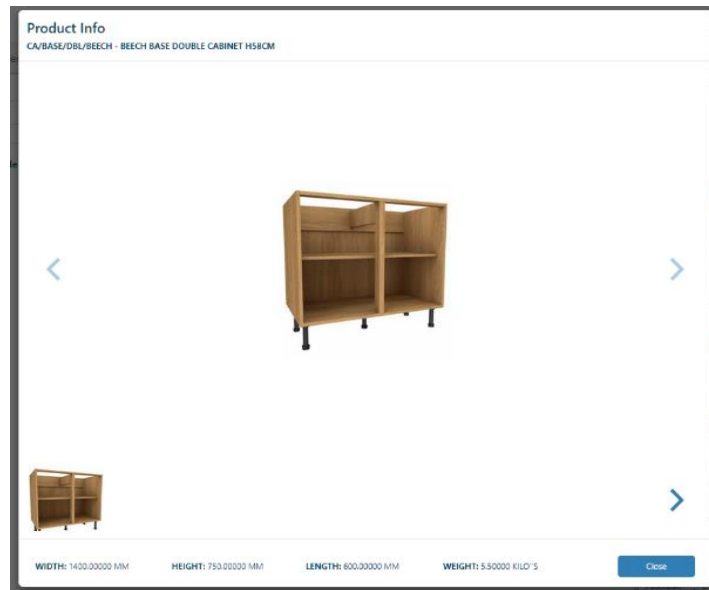
The screenshot shows the 'Stock' page for Abbey Retail Ltd. The page has a header with the company name and an account dropdown. Below the header is a table of stock items. Annotations are placed on the page: (1) points to the search filters at the top; (2) points to the 'Free Stock' column; (3) points to the pagination controls at the bottom; and (4) points to the 'Order' button in the table.

SKU	Name	Free Stock	Unit	Product Group	Base Price	Docs.
CA/BASE/SNG/BEECH	Beech Base Single Cabinet H58cm	0.00	Each	Cabinets	£163.20	(1) Order
CA/BASE/DBL/BEECH	Beech Base Double Cabinet H58cm	0.00	Each	Cabinets	£236.00	(2) Order
CA/WALL/H70/BEECH	Beech Wall Cabinet H70cm	8.00	Each	Cabinets	£192.10	Order
CA/WALL/H92/BEECH	Beech Wall Cabinet H92cm	0.00	Each	Cabinets	£215.90	Order
CA/BASE/SNG/OAK	Oak Base Single Cabinet H58cm	6.00	Each	Cabinets	£176.80	Order
CA/BASE/DBL/OAK	Oak Base Double Cabinet H58cm	0.00	Each	Cabinets	£260.10	Order
CA/WALL/H70/OAK	Oak Wall Cabinet H70cm	0.00	Each	Cabinets	£209.10	Order
CA/WALL/H92/OAK	Oak Wall Cabinet H92cm	3.00	Each	Cabinets	£234.50	Order
TILE/WHT/10x10	Tiles White 10cm x 10cm	5.00	100 Pack	Tiles	£55.00	Order
TILE/COL/10x10	Tiles Coloured 10cm x 10cm	0.00	100 Pack	Tiles	£60.00	Order
TILE/WHT/20x20	Tiles White 20cm x 20cm	0.00	100 Pack	Tiles	£54.00	Order
WW/FRIGDE/289/WHT	Fridge Freezer White 289 Litre	0.00	Each	Whiteware	£187.00	Order
WW/FRIGDE/265/RET	Fridge Freezer Retro 265 Litre	5.00	Each	Whiteware	£165.00	Order
WW/WASH/1600	Washing Machine 1600 spin	0.00	Each	Whiteware	£305.00	Order
WW/WASHDRY/1200	Washer Dryer 1200 spin	8.00	Each	Whiteware	£380.60	Order
COOK/FAN-OVEN	Built In Fan Oven	0.00	Each	Cookers - Ovens	£216.80	Order
COOK/CERM/HOB	Ceramic 4 Plate Hob	0.00	Each	Cookers - Ovens	£151.30	Order
ACS/TOASTER	Polished Steel 4 Slice Toaster	87.00	Each	Accessories	£209.00	Order
ACS/BLENDER	Professional Blender 5 Speed	94.00	Each	Accessories	£136.50	Order
ACS/MIXER	Professional Mixer 3 Speed	80.00	Each	Accessories	£135.00	Order
ACS/MEAT-SLICER	Commercial Meat Slicer	94.00	Each	Accessories	£230.00	Order

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Once you are on the stock page you can search for specific products using the filters at the top of the page (1) to look for products with specific characteristics.

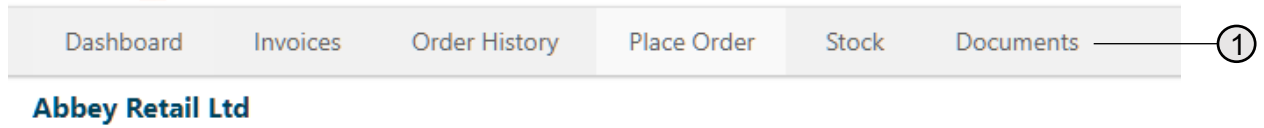
9.2. Stock Item Details



You can find more specific product information by clicking on the camera icon on the row of the product you are interested in **(2)** you will also see a picture of the product.

You can see the amount of available stock of a product and the base price for that product by looking at their corresponding columns **(3)**, **(4)**.

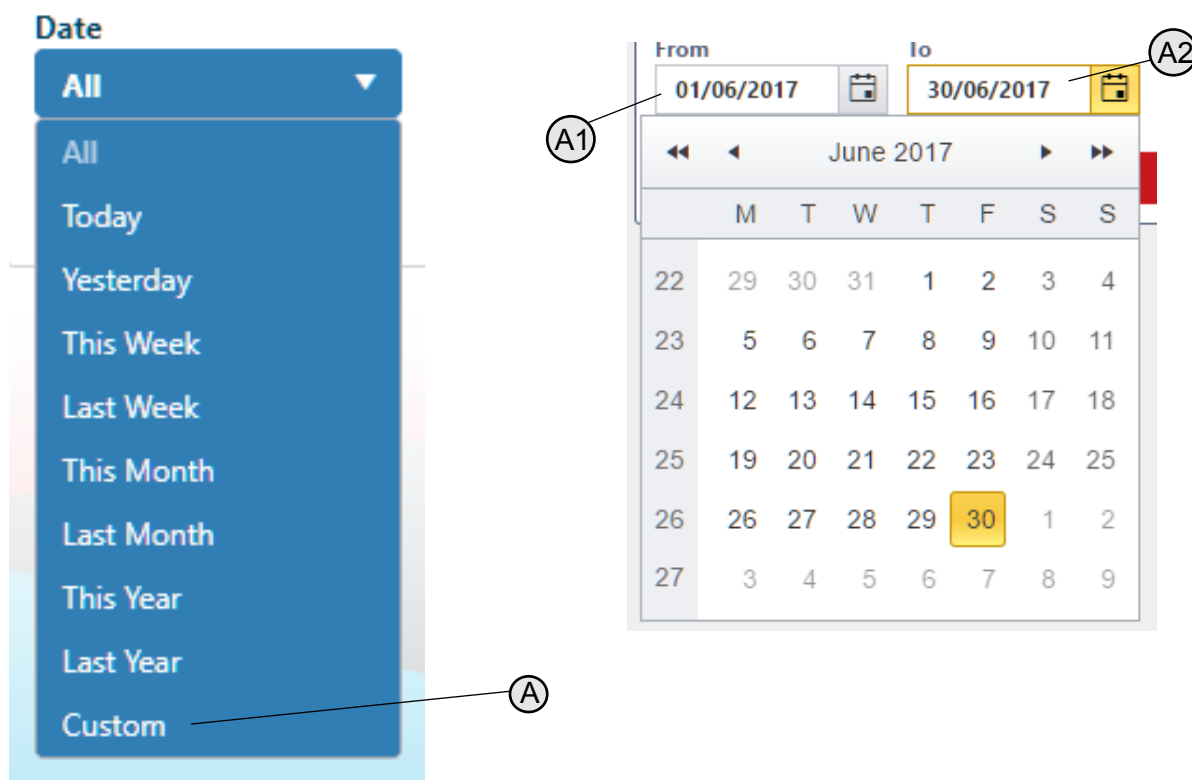
10. View Documents



Firstly, you will need to go to the 'Documents' tab (1).

10.1. Searching for a Document

This will take you to the page where you can find all your previous documents you have received. You can filter these results to look for specific documents or document types. The first way to achieve this is by checking document types and file formats that you are looking for (1) or by searching for documents by date (2).



You can also search between two specific dates by clicking on the 'Custom' button **(A)**.

You can then choose two dates by either typing them into the date boxes **(A1)** or using the drop-down date tool **(A2)**. Once you are happy with the filters you have chosen click the 'Apply' button to filter the documents.

You can also filter the documents by using the reference search at the top of the page **(3)**.

Once you have found the documents that you are looking for you can view them as PDF files by clicking the link on their row on the right **(4)**.

You can also change the number of documents that appear on a page by changing the number in the 'page number' text box and then clicking change **(5)**.