



# Customer Portal

## Company Administrator Quick Start Guide



*The difference is the way we do business.*

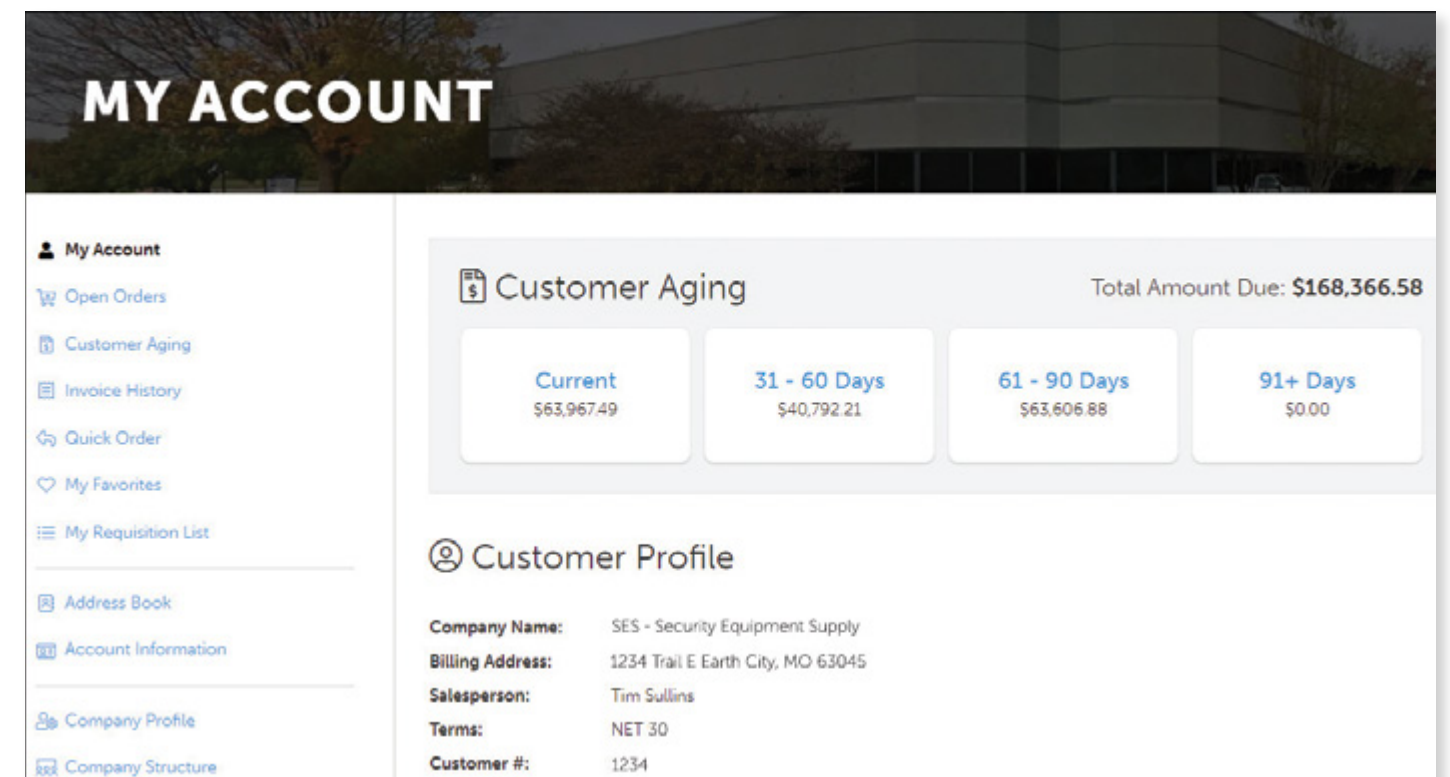
# Not a Company Administrator?

Give this guide to your company's designated administrator person or go to [help.sesonline.com/hc/quick-start](https://help.sesonline.com/hc/quick-start) to send them this guide. Once they've created a customer portal account, they can add company users and start placing online orders.

# CUSTOMER PORTAL OVERVIEW

Our online customer portal account is our all-in-one solution for your business needs. Browse our extensive catalog, see pricing and real-time stock, and place and manage orders.

Pay invoices, manage company users, create requisition lists, and update your address book anytime and anywhere.



Customer Aging	Total Amount Due: \$168,366.58
Current	\$63,967.49
31 - 60 Days	\$40,792.21
61 - 90 Days	\$63,606.88
91+ Days	\$0.00

**Customer Profile**

**Company Name:** SES - Security Equipment Supply  
**Billing Address:** 1234 Trail E Earth City, MO 63045  
**Salesperson:** Tim Sullins  
**Terms:** NET 30  
**Customer #:** 1234


## Registration

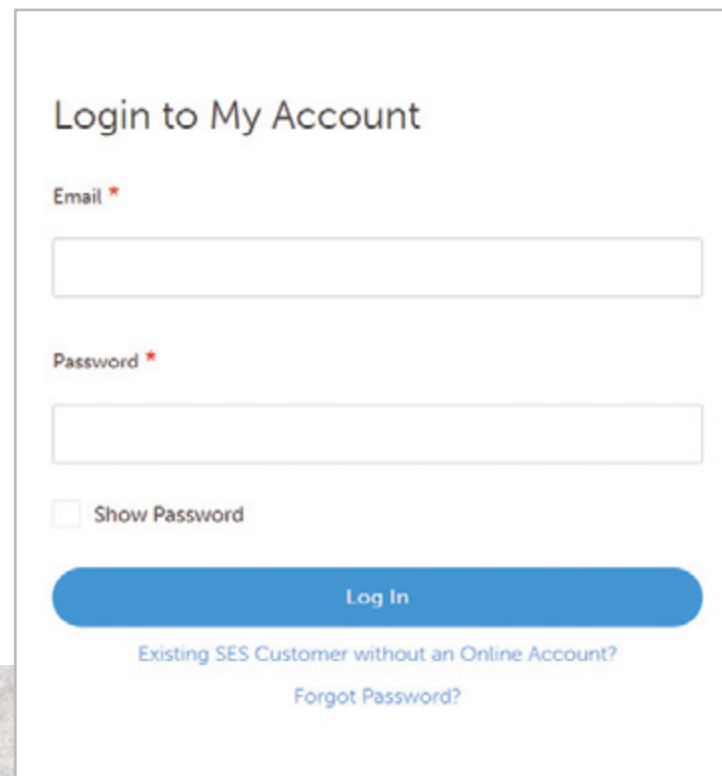
1. Go to [www.sesonline.com/registration](http://www.sesonline.com/registration)
2. Fill out and submit the form.
3. You'll receive an email to verify and set up a password for your account.  
**NOTE:** You won't be able to login until you receive an email stating "Your company account is active."
4. Click the verification link in the email.
5. Set your password.

### QUICK TIPS

As a company admin, you must set up your account before adding company users.

## Logging In

1. Go to [www.sesonline.com](http://www.sesonline.com)
2. In the header, click **Log In**  
*Mobile users:* Tap the  account icon.
3. Enter your username and password.
4. Click **Log In**.

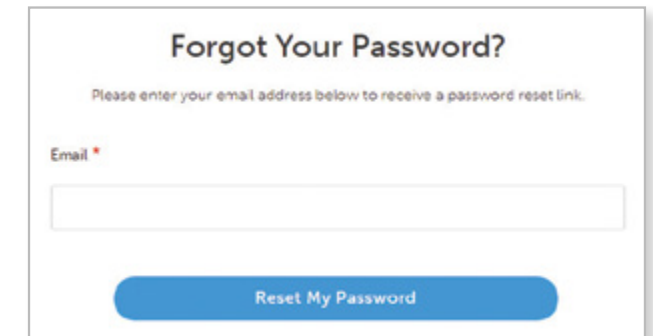


### QUICK TIPS

Even if you have an existing SES account, you won't be able to login with your credentials from our old ecommerce website. You must register for a customer portal account.

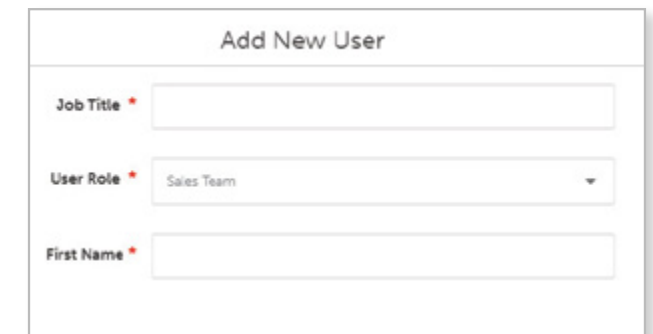
## Resetting Your Password

1. Go to [www.sesonline.com/login](http://www.sesonline.com/login)
2. Under the login button, click **Forgot Password**.
3. Enter the email associated with your account.
4. Click **Reset My Password**.
5. You'll receive an email to reset your password from SES Customer Support.
6. Follow the instructions in the email to set a new password.
7. You'll receive an email confirmation after you've changed and confirmed your password.



## Managing Company Users

1. Go to your **Account Dashboard**.
2. In the sidebar, go to **Company Users**.
3. **To see your active users and inactive users:** Toggle between **Show All Users** and **Show Inactive Users**.
4. **To add users:**
  - a. Click **Add New User**.
  - b. Enter the new user's information.
  - c. Click **Save**.
  - d. The new user will receive an email from SES to set up their account.
5. **To delete or deactivate users:**
  - a. In the list, select **Delete** for the appropriate user.
  - b. Select **Delete** or **Set Inactive**.



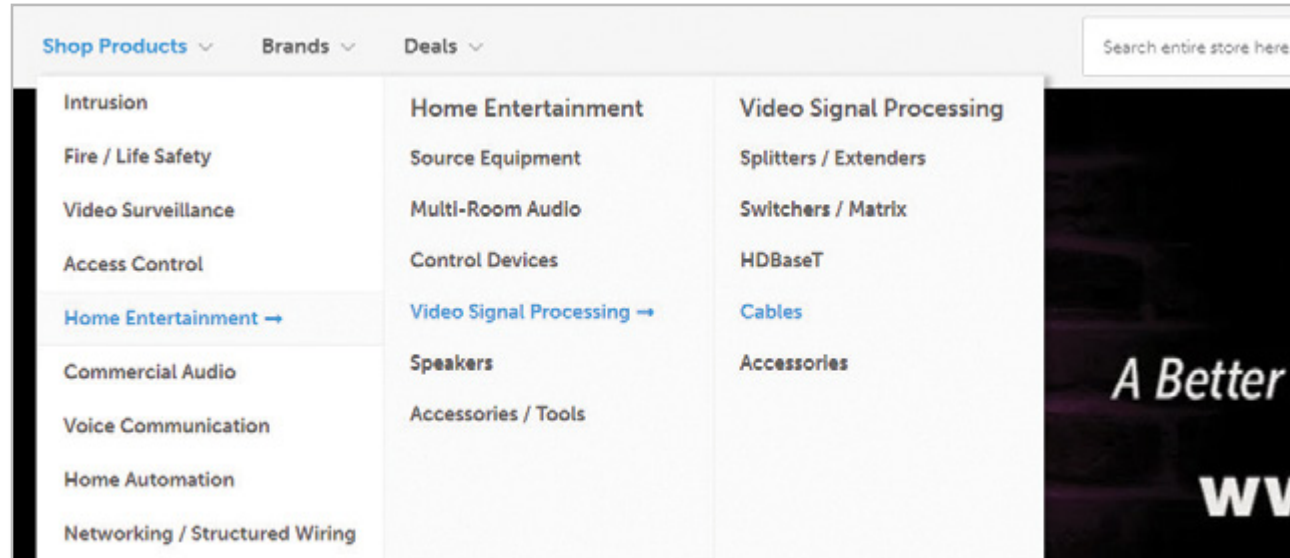
### QUICK TIPS

Only company admins can manage users. Deleting users is permanent and can't be undone. Inactivating users temporarily locks the account.

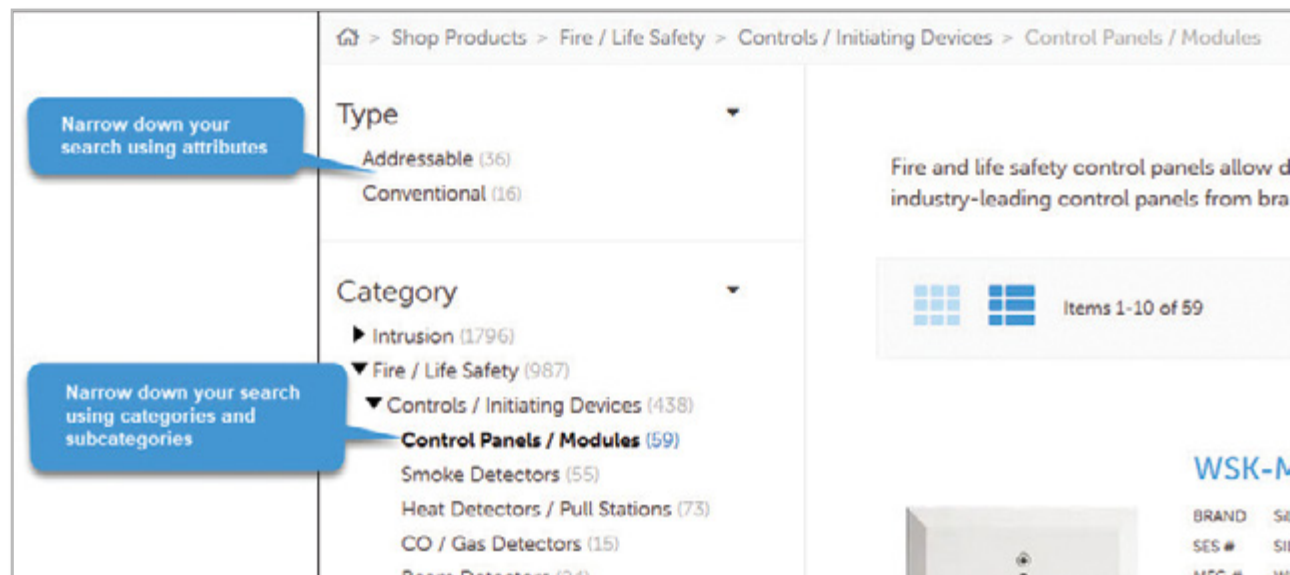
# SEARCHING FOR PRODUCTS

## Search By Product Categories And Subcategories

- Hover over **Shop Products** to drill down by categories and subcategories.



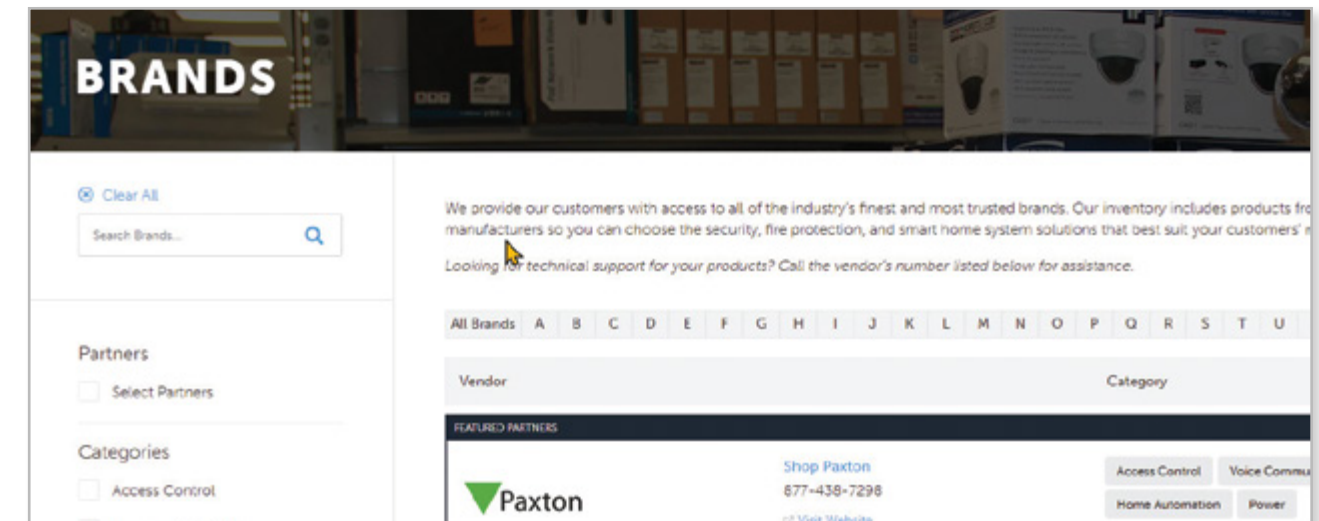
- To narrow down your search on a product listing page, use the sidebar to filter by subcategories and product attributes.



# SEARCHING FOR PRODUCTS

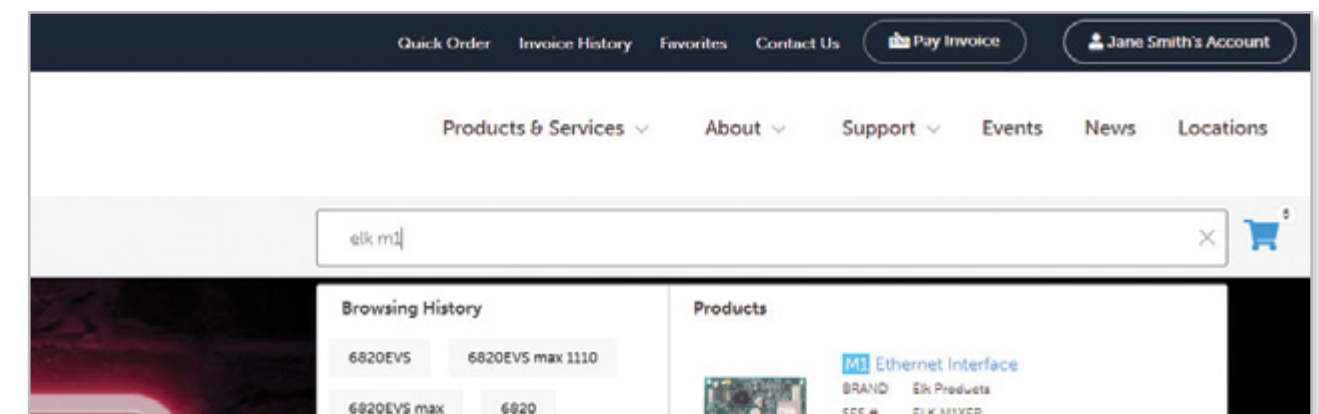
## Search By Brand

- Hover over **Brands** to select a brand from the dropdown list. To see all brands, click **All Brands**.
- On the Brands page, you can:
  - Search for a brand.
  - Browse the list alphabetically by selecting a letter.
  - Select categories to narrow down your search.



## Search By Item Keywords Or Numbers

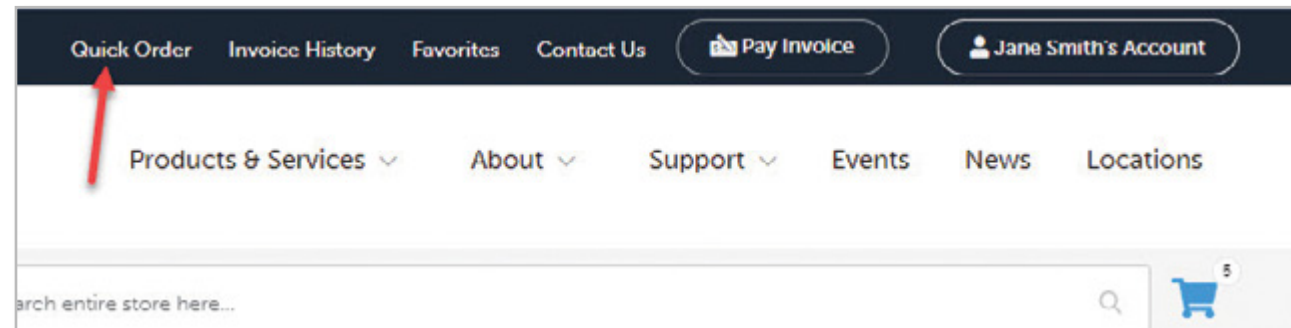
- If you're uncertain of the exact brand and model of the product you're searching for, entering an item keyword can help you browse relevant products.
- If you're searching for a specific item, enter the item number.
  - Immediate search results will show relevant products, categories, and product suggestions, and recent and popular searches.



# QUICK ORDERS

## Placing Quick Orders

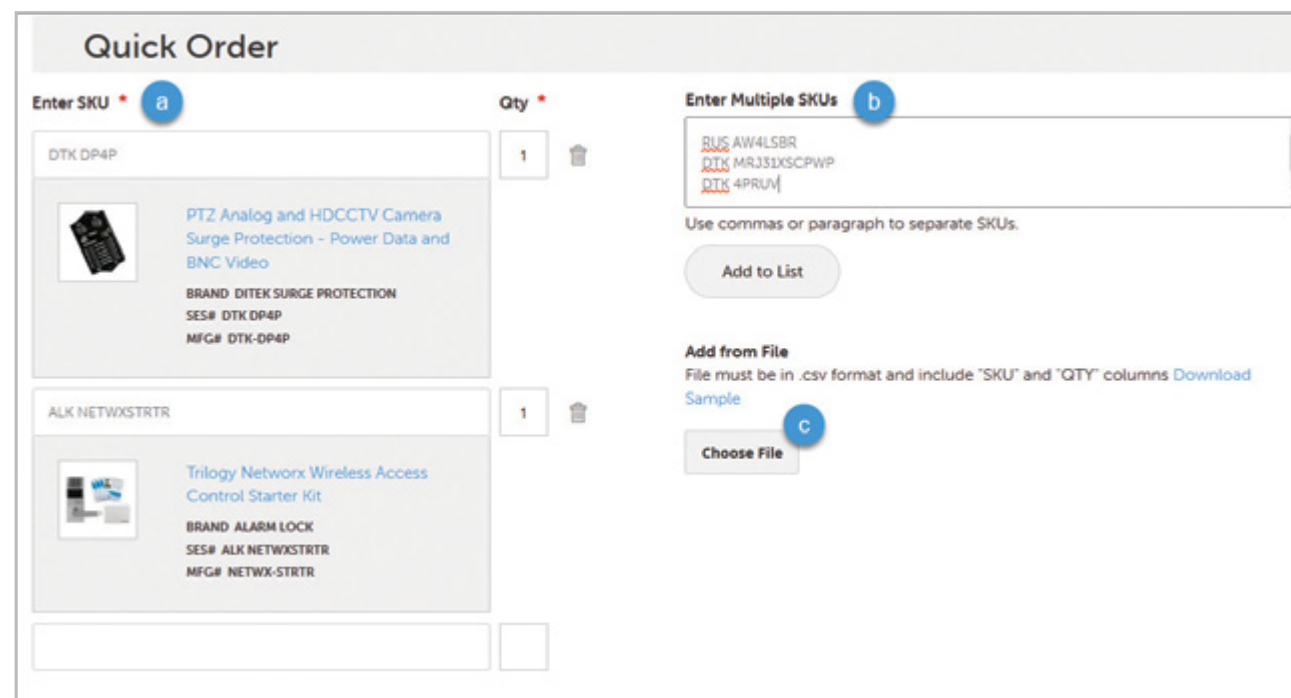
1. When logged in, click **Quick Order** in the header.



2. There are three ways to enter your order. Choose the method that best suits your needs.

- Enter SKUs (item number or "SES numbers") and their quantities.**
- Entering multiple items at once:** Enter SKUs (separated by commas or paragraph) into the textbox on the right.
- Uploading SKUs by CSV file:** Choose and upload a CSV file containing SKUs and quantities.

3. Click **Add to Cart**.



# REQUISITION LISTS

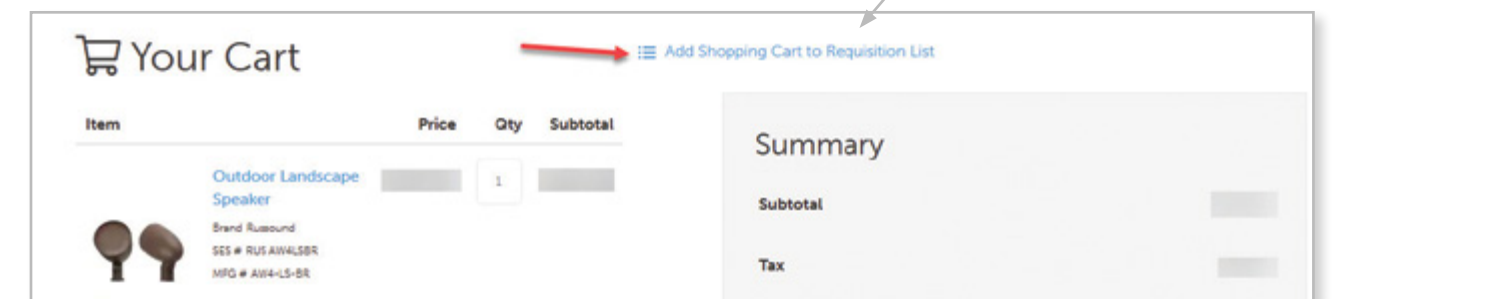
## Adding Items To Requisition Lists From Product Pages

- On product pages, click **Add to Requisition List**.
- Add the item to an existing list or click **Create New List**.



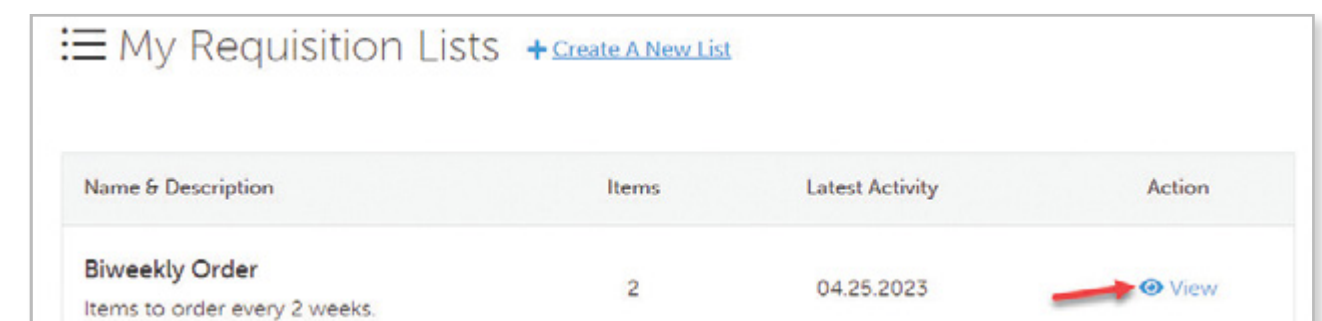
## Adding Items to Requisition Lists from Your Cart

- Click your cart. Then, click **View & Edit Cart**.
- Click **Add Shopping Cart to Requisition List**.
- Select an existing list or click **Create New List**.



## Viewing Your Requisition Lists

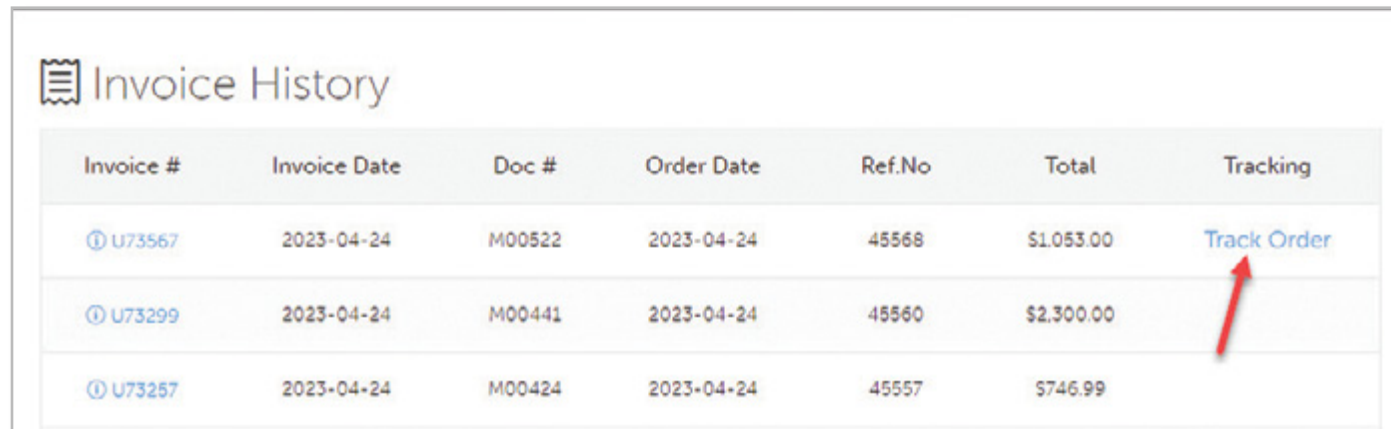
- When logged in, click your account button.
- In the dropdown, select **My Requisition List**.
- Click **View** on the list you want to see.



# TRACKING ORDERS

## Tracking Orders

1. When logged in, click your account button.
2. In the dropdown, select **Invoice History**.
3. Click on any blue **Track Order** link.



Invoice History

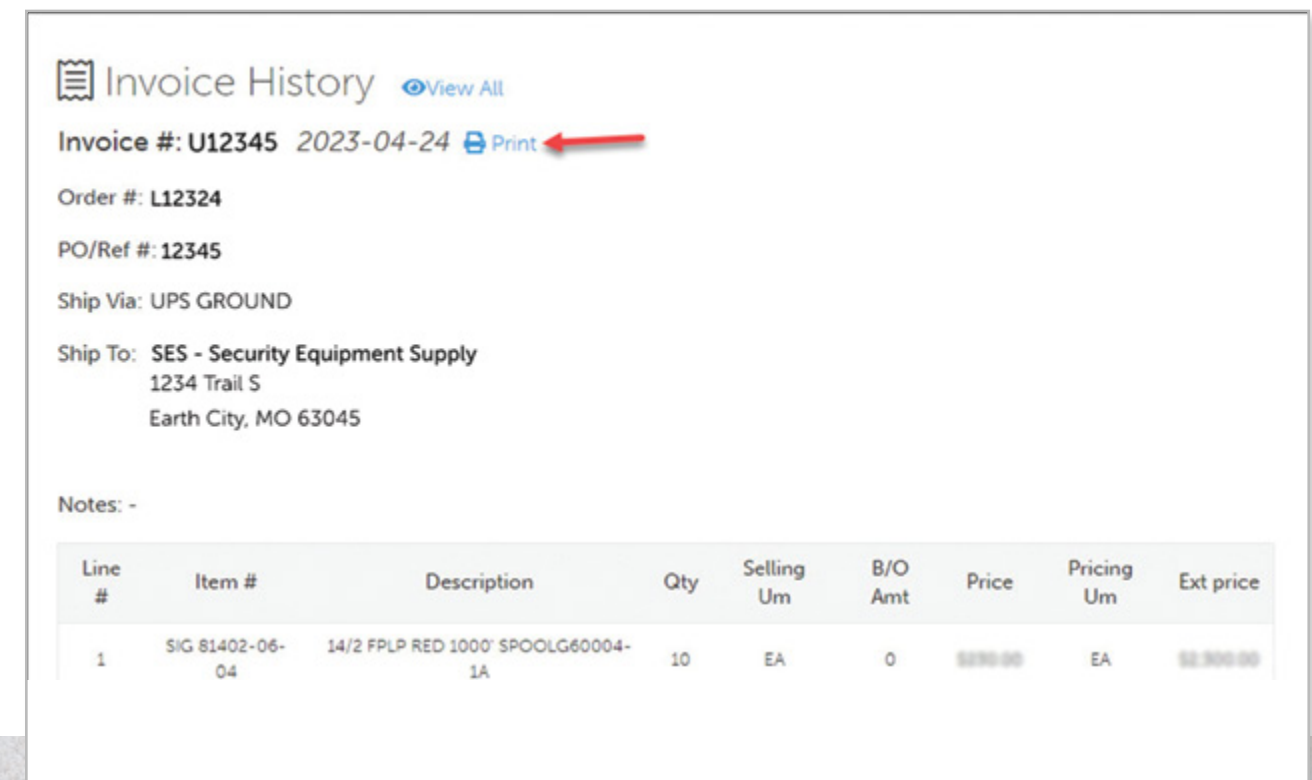
Invoice #	Invoice Date	Doc #	Order Date	Ref.No	Total	Tracking
<a href="#">U73567</a>	2023-04-24	M00522	2023-04-24	45568	\$1,053.00	<a href="#">Track Order</a>
<a href="#">U73299</a>	2023-04-24	M00441	2023-04-24	45560	\$2,300.00	
<a href="#">U73257</a>	2023-04-24	M00424	2023-04-24	45557	\$746.99	



# PRINTING INVOICES

## Printing Invoices

1. When logged in, click your account button.
2. In the dropdown, select **Invoice History**.
3. There are two ways to print invoices:
  - a. Click **Print** on the appropriate invoice in the list view.
  - b. Select an invoice and then click **Print** on the details page.
4. In the invoice details page, click **Print**.



Invoice History [View All](#)

Invoice #: **U12345** 2023-04-24 [Print](#)

Order #: **L12324**

PO/Ref #: **12345**

Ship Via: **UPS GROUND**

Ship To: **SES - Security Equipment Supply**  
1234 Trail S  
Earth City, MO 63045

Notes: -

Line #	Item #	Description	Qty	Selling Um	B/O Amt	Price	Pricing Um	Ext price
1	SIG 81402-06-04	14/2 FPLP RED 1000' SPOOLG60004-1A	10	EA	0	\$230.00	EA	\$2,300.00



## More Resources

Check out our help center at [help.sesonline.com](https://help.sesonline.com) for detailed articles on navigating and troubleshooting your account.

*Need more help?* Reach out to us at [ecomm@sesonline.com](mailto:ecomm@sesonline.com).



[sesonline.com](https://sesonline.com)

*The difference is the way we do business.*