NetSuite Customer Portal Training

Document Number	MRKT-10	Version	1
Document Owner	Management	Department	Management
Site	All		
Document Type	Marketing		

1 Objective

1.1 This document will be used as a training to help guide Steri-Tek customers on how to access and utilize the Steri-Tek ERP customer portal.

2 Scope

2.1 Customers need to have access to the customer portal to update customer contact and shipping information, enter orders, review orders and documentation, review invoices, and access current and historical reports.

2.2 Responsibilities

Owner	Responsibility
Management	Keep this document up to date with any changes that happen within the customer portal in the Steri-Tek ERP system.

2.3 Table of contents for section 4

3 Definitions

3.1 Service Order (SVO) – A Customer's order to Steri-Tek

3.2 Product Processing Specification (PPS) – A document created by Steri-Tek and approved by the customer on how to process a specific validated product.

3.3 Invoice (INV) – The transaction created from Steri-Tek to notify the customer of the price of an order.

4 Instructions

Granting Access

4.1.1 Customers must be given access to their customer portal from Steri-Tek. Once access has been granted, they may log into their Company account.

4.1.2 Steri-Tek will initially give one contact (Representative) at a company access to the customer portal. Customers will notify Steri-Tek of the Representative via a Customer Contact Sheet found on Steri-Tek's website. Email the Customer Contact Sheet to quality@steri-tek.com.

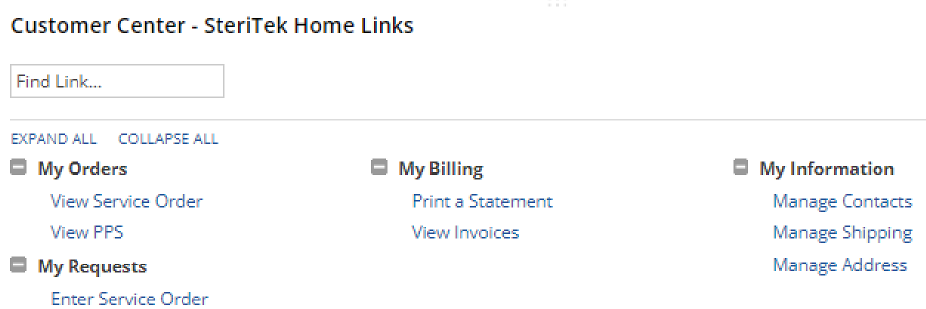
4.1.2.1 Once the Representative has been given access, they can add more contacts to the account. To add additional contacts, go to Section 4.2.

4.1.3 Once additional contacts have been added to the account, a request to gain access can be made by emailing Steri-Tek with the name(s) of contacts requiring access. Steri-Tek will activate their access and an email will be sent to the contact with login setup instructions.

4.2 Managing Contacts

4.2.1 Once customers have access to their portal they can manage their own contacts, shipping addresses, and third-party shipping information.

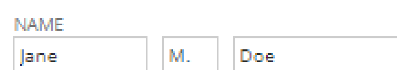
4.2.2 Go to **My Information** and select **Manage Contacts.**



4.2.2.1 A list of all current contacts will be shown and display if they have access to the company's customer portal via the **Login Access** column.

4.2.3 To enter a new contact, select New Contact and enter information described below.

4.2.3.1 **Primary Information**



- *Enter First, Middle (optional), and last name under **Name. Contact** field will auto-populate.*
- *Enter or select the **Company***
- *Enter the **Subsidiary** the contact will interact with (i.e., Steri-Tek (Dallas) or Steri-Tek (Fremont))*
- *Enter contacts **Job Title***
- *Select the contacts **Role** via the drop-down menu*

4.2.3.2 **Email | Phone | Address**

- *Enter contacts **Email***
- *Enter contacts **Main Phone** (primary)*

4.2.4 Review information and select **Save.**

4.3 Managing Addresses

4.3.1 All shipping addresses used for orders, including research laboratories, must be added to **Manage Addresses.**

4.3.2 Under **My Information** in **Manage Address** page, all current addresses are available to view or edit.

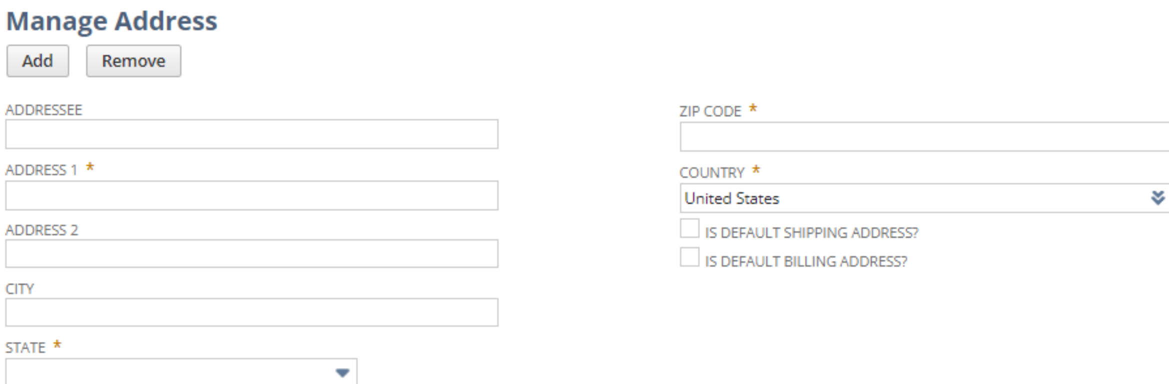
4.3.2.1 The address label will be generated from the **Address 1** field. This label will be shown when selecting addresses in the Service Order.

4.3.3 To add an address, fill out **Address 1**, **City**, **State**, **Zip Code,** and **Country** fields.

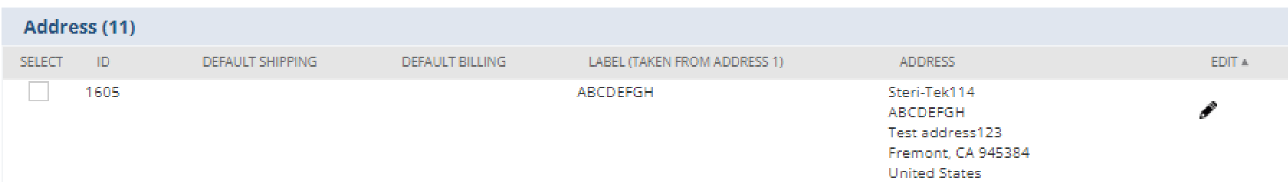
4.3.3.1 **Addressee** and **Address 2** are optional fields

4.3.3.2 Select the checkboxes if the address is default for shipping and/or billing.

4.3.3.3 Select **Add** button.



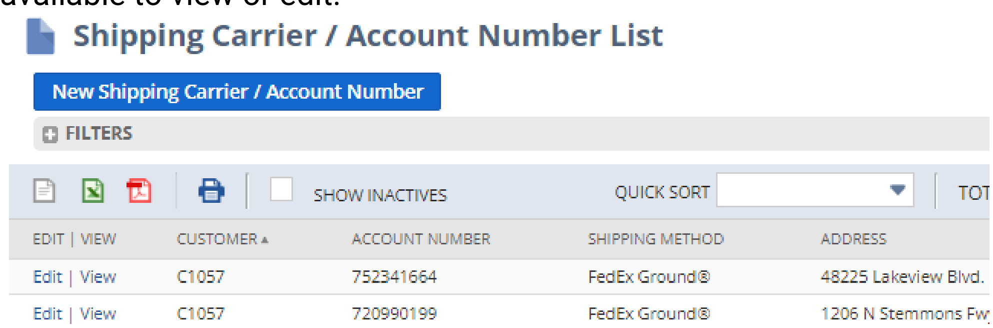
4.3.4 To remove an address from the **Address** list, select the address checkbox and click the Remove button.



4.3.5 To edit, select the pencil icon next to the address. **Edit Address** window will pop up where one can edit fields and select **OK** when complete.

4.4 Managing Shipping Accounts

4.4.1 Under **My Information** in **Manage Shipping** page, all current addresses are available to view or edit.



4.4.2 To add an account, select **New Shipping Carrier / Account Number**

4.4.2.1 Note, an account number must be attached to a shipping address. Ensure the shipping address already exists in **Manage Address**, see section 4.3**.**

4.4.2.1.1 Each shipping address that is added to the customer portal must have an account number attached for order submission. Multiple entries can be made to properly link an account number to varies shipping address or vice versa.

4.4.2.1.2 *To easily copy an address, select **Edit** for an existing account number and click **Save & Copy** to add a different account number for the shipping address.*

4.4.2.2 Enter the **Account Number**

4.4.2.3 Select **Address** from drop-down menu. Drop-down shows all addresses entered in **Manage Address.**

4.4.2.4 Select the **Subsidiary** (i.e., Steri-Tek (Dallas) or Steri-Tek (Fremont))

4.4.2.5 Select the **Shipping Method** used with the account number.

4.4.3 To inactivate an account number, select **Edit** and click the **Inactive** checkbox**.**

Placing an Order

4.4.4 Prior to entering an order, ensure that necessary contacts, address, and shipping account information are entered in the customer portal. This information cannot be entered during initiation of service order without losing one's progress.

4.4.5 Refer to MRKT-11 *NetSuite – Submitting a Service Order* for instructions on how to place an order.

4.4.5.1 It is preferred that the SVO is entered before the product is shipped to streamline the process.

Managing Invoices

4.4.6 Under **My Billing**, select **View Invoices** to view list of current and previous invoices. Select **Print** to PDF of invoice.

4.4.7 A statement based on a date range can be generated by selecting **Print a Statement** under **My Billing**.

4.4.7.1 Select the **Subsidiary,** enter date range and select **Print**. Note: If you send product to multiple Steri-Tek facilities, they will be charged separately.

Tips and Tricks of NetSuite

4.4.8 If one does not know what a field is, they can click the field name and a tool tip will appear with additional information.

4.4.9 When picking from a drop-down menu, one can start typing into the field and available options will pop up and be selectable.

4.4.9.1 If there is only one available option, pressing "tab" after a few letters will automatically choose the selected option.

5 Appendix

5.1 None

MRKT-10 (DOC-1905) Ver. 1

Approved By:

(CO-1763) NetSuite MRKT Documents

Description

Revise MRKT-10 to cover Customer Portal training topics only. Remove the Order Submission section and Job Status tracking. Update Managing Contacts, Addresses, and Shipping account information to align with new Portal format. Initial Release of MRKT-11 "NetSuite - Submitting a Service Order" to include Order Submission instructions for customers.

Justification

For clarity and ease of information, MRKT-10 was split into two separate documents (MRKT-10 "NetSuite Customer Portal Training" and MRKT-11 "NetSuite - Submitting a Service Order"). Changes made to MRKT-10 are made to align with developments done during Phase 1 of NetSuite implementation conducted by Supplier Jobin & Jismi. Updating instructions to the current process will improve documentation and customer understanding of the customer portal and SVO submission processes.

Assigned To:	Initiated By:	Priority:	Impact:
Angelica Polo	Angelica Polo	High	Minor

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