

# WB Mason Ordering Guide

This guide will show you how to effectively navigate and checkout using W.B. Mason website.

### Login

- 1 Open your internet browser and type: <u>https://www.wbmason.com/Login2.aspx</u>
- 2 Type in your login credentials.
- 3 Note: If this is your personal computer, click the checkbox to log you in automatically.

4 Click Login

🖉 WB Mason - Login - Internet Explorer		
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🚳 WB Mason - Login 🛛 🗙 📃		
Welcome to womsson.com Login   Register	W.B.MASON	SHOPPING CART 0 Items \$0.00 QUICK ORDER CHECKOUT
Federal Government Customers	Enter Keyword	
SHOP ★ SERVICES	SUPPORT O ORDERS & ACCOUNT CENTER	FAVORITES     Selected List <u>Create Favorites Lists</u>
LOGIN / REGISTER RETURNING CUSTOMERS - PLEASE LO EMAIL PASSWORD Commentically when I visit wit (Do not check if on a public/shared computed) Compared your password? Federal Government Customers	GIN 2 NEW CUSTOMERS - PLEASE REGISTER If you don't have a WB Mason account please register on wbmason.com now. REGISTER	CUSTOMER SERVICE ier 1-888-WBMA SON Check out our Customer Service Page for information about our site and answers to your questions.
	1	

### Login Confirmation

Once you have successfully logged in your will see your name at the top left hand corner of your screen.



### **Favorites List**

- Click on the "Favorites" tab then "UniqueSource" or "CWOPA Contract Items" to view your best value items.
  - In the favorites tab you can also create/modify personal favorites lists, which will allow easy access to items you order regularly.
- 2 CWOPA items will be noted with 🗖



# Search for Products

To search, type a keyword into the search bar or use the Shop tap to view different supply categories.



### **Search Results**

- After searching for an item, use the left hand filter tool to help you narrow down your search results.
- Click on an item to view additional images and features.



### View Item + Shopping Cart

Enter quantity

Click on "Add to Cart" to add item into your shopping cart



### **Shopping Cart**

Click your shopping cart in the
 top right-hand corner to view all items in your shopping cart

 Quick Order will allow you to
 insert multiple item numbers into your shopping cart

Checkout will bring you directly

3 to the first step of the checkout process.



### Update Shopping Cart

- Update your cart update your cart after you make modifications to items in your cart.
- 2 Empty Your Cart removes all items from your shopping cart
- Save Cart for Later will allow
   you to save your current shopping cart. You can retrieve saved carts anytime in Account Center > My Saved Carts
- Click "Continue to Checkout" to proceed to checkout.



### Checkout Shipping

- Select the appropriate shipping address
- 2 Enter Name and Phone Number
- Identify any special delivery instructions (i.e. Deliver to Copy Room)
  - Once all required information is entered, click "next"

SELECT A S	HIPPING ADD	RESS						
							Manage	e Address Book
								1234
Filters:	Name	Address	City	State	Zip Code	Filter Clear		
Selected	Name	Address	City	State	Zip Code	Attention	Phone 2	
۲	Demo	Address 1				Mary	(607) 324-6990	
0	Demo	Address 2					(724) 371-8098	
PECIAL IN:	STRUCTIONS	Identify where you	r package should l	be delivered.	3			
		(100 cha	()					

### Select / Enter GL Code (Optional)

WB Mason can display GL Codes to be selected or provide an optional free form to input

Welcome, Commonwealth of PA Demo of Commonwealth of Pennsylvania Demo Account (C2646594) Logout	Federal Government Customer
Enter Keyword	QUICK ORDERCARTCHECKOUT1 Items\$0.78
	DASHBOARD
SHOP ★ SERVICES ▲ SUPPORT ③ ORDERS ♣ ACCOUNT CENTER ♥ FAV	ORITES Selected List <u>CWOPA Contract</u>
CHECKOUT Shipping  Expense Billing Preview Order Confirmation	
SELECT EXPENSE ALLOCATION	
GL Code	
Click 'Next' to	proceed to Billing Option

### Checkout Billing

Continue through the checkout process by clicking "Next".

- **1** Enter P-Card Information
- 2 Check Save as Personal Card Box (if you would like to securely store your P-Card for future use)
- 3 Enter Purchase Order (Optional)

WHO BUT	Enter Kanward	CHECKOUT 1 Items
W.B.		
SHOP ★ SERVICE	ES SUPPORT © ORDERS * ACCOUNT CENTER FAVORI	Selected List CWOPA Contra
CHECKOUT Shipping	Billing     Preview     Order Confirmation	
YMENT & ADDITIONAL INFO	RMATION * Required Information	
Payment Method* Credit Card		
DESIGES CA		
Enter Credit Card Below:		
Enter Credit Card Below: Nickname		
Enter Credit Card Below: Nickname Name on Card *	2	
Enter Credit Card Below: Nickname Name on Card * Card Type *	? Select V	
Enter Credit Card Below: Nickname Name on Card * Card Type * Credit Card Number*	Image: Select     ✓	
Enter Credit Card Below: Nickname Name on Card * Card Type * Credit Card Number* Expiration Date *	Select   Credit Card Expiration   01	
Enter Credit Card Below: Nickname Name on Card * Card Type * Credit Card Number* Expiration Date *	Select   Select   Credit Card Expiration   01   2019   Manage Credit Cards   Save as Personal Card for future use.	
Enter Credit Card Below: Nickname Name on Card * Card Type * Credit Card Number* Expiration Date *	Select   Select   Credit Card Expiration   01   2019   Manage Credit Cards   Save as Personal Card for future use.   2	
Enter Credit Card Below: Nickname Name on Card * Card Type * Credit Card Number* Expiration Date *	Select   Select   Credit Card Expiration   01   2019   Manage Credit Cards   Save as Personal Card for future use.   2	
Enter Credit Card Below: Nickname Name on Card * Card Type * Credit Card Number* Expiration Date *	Select   Select   Credit Card Expiration   D1 2019   Manage Credit Cards   Save as Personal Card for future use.   2	

### Checkout Preview Order

Preview your order to confirm everything is correct and click "submit order"



### Checkout Order Confirmation

1 Sales order # will help you reference this order at a future time.



### **Order History**

- 1 Click on the Orders tab to view your order history.
- 2 The status column will tell you the live status of your order:
- 3 Click on the "Order #" to view details of each order.

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ederal Governmer	t Customers		Ent	ter Keyword		P			
SHOP	* 5	ERVICES	SUPPO	ORT O ORDERS		CENTER	FAVORITES	Selecte Create Favo	d List rites Lists
Your orders are Order or shop f column, click th sorted).	displayed t rom it, click e column he	elow. To viev the Order #. 1 ading (not all	w the details To sort by a p I columns ca	of an Filters particular Filter Orders n be Last 90 Da Order #	Columns By: ays v or	From:	To: Purchase Order #		Filter
Your orders are Order or shop f column, click th sorted). Order #	displayed to the column he column he	elow. To view the Order #. 1 eading (not all Purchase	w the details To sort by a p I columns car Order #	of an particular n be Filter Orders Order #	Columns By: or Method	From:	To: Purchase Order #	nt	Filter

\* To view an order's total amount with tax, please click on the Order # link to open the order's detail page

### Support

 The Support tab will allow you to contact your dedicated customer service representative and email them directly.

 Select appropriate subject
 matter, type message and click "Submit" to send message to your dedicated customer service.

#### Welcome, Commonwealth of PA Demo of Commonwealth of Pennsylvania Demo Account (C2646594) Logout Federal Government Customers **QUICK ORDER** CART 0 0 SO \$0.78 1 Items CHECKOUT Enter Keyword DASHBOARD Selected List ★ SERVICES **SUPPORT** SHOP **O ORDERS** ✿ ACCOUNT CENTER FAVORITES CWOPA Contract. CUSTOMER SERVICE 1-888-305-7910 HELP PDF CONTACT US Your Information: Commonwealth of PA Demo commonwealthofpademo@wbmason.com Send To: 2 customerCWOPA@wbmason.com Subject: Need help? Check out the Help Select Subject.. $\sim$ PDF for tips on how to use WBMason.com Message: (Opens a PDF in Adobe Acrobat) Download Acrobat Here SUBMIT Shopping & Browsing Placing Your Order General Information Policies Find a Product Payment Methods FAQs Privacy Policy Create an Order Sales Tax **Online Security** Terms of Use Create a Shopping List Shipping Information Accessibility **Return Policy** Item Type & Color Completing Your Order SDS Search Legend

### FAQ / Contract Highlights

#### Q. What do I do if I need assistance with a W.B. Mason delivery or product question?

A. Contact CWOPA Customer Service (888-305-7910); <u>customerCWOPA@wbmason.com</u>) or click the "Support" button on the W.B. Mason website.

#### Q. How do I find "UniqueSource" items?

 A. All UniqueSource items are housed under "Favorites" within the Account List "UniqueSource".

#### Q. Can I order an item equivalent to the listed UniqueSource product?

A. The Commonwealth of Pennsylvania has instructed W.B. Mason to restrict any item with a UniqueSource equivalent. (See non-core waiver process for ordering UniqueSource equivalent products or other restricted items)

#### Q. How do I know if an item is on the Commonwealth of Pennsylvania's core list?

A. Core list items can by identified by the Commonwealth of Pennsylvania Keystone icon and will be first in your search results.

#### Q. What should I do if I do not have a log-in for W.B. Mason?

A. Visit <u>https://m.marketing.email-wbmason.com/webApp/APP43</u> and complete a brief registration survey or contact <u>customerCWOPA@wbmason.com</u> for more information.

### FAQ / Contract Highlights (cont.)

#### Q. How will my order be delivered?

A. Most deliveries are made using W.B. Mason trucks, by a W.B. Mason delivery specialist. \*Some orders within the Capitol Complex and immediate vicinity will be made by the DGS, Bureau of Supplies and Surplus Operations (BSSO / Last Mile)

#### Q. When do I need to place my order by to get Next-Day Delivery?

A. Orders submitted and approved (approval is based on each agencies guidelines) by 5pm, will be delivered on the next business day.

#### Q. What should I do if I need an item that is not on the W.B. Mason site?

A. Please continue to follow the Non-Core waiver request process

#### Q. Is there a minimum order size for free delivery?

A. No, there is never a minimum order size for free next-day delivery.

#### Q. How do I process a return?

 A. Contact CWOPA Customer Service (888-305-7910); <u>customerCWOPA@wbmason.com</u>) or click the "Return Center" under the "Orders" tab on the W.B. Mason website.

## **Instructions for Order Approvals**

### E-Mail Notification

You will receive an e-mail notification when you need to approve an order.

- Use this link to login to wbmason and review and/or edit the order.
- 2 Click this link to instantly approve (without needing to login and approve online).

Click Here to Approve this Order Now 'As - Is'         Use One Click Approval only if you want to instantly approve this order.         Copy and Paste the following link into your browser if necessary         http://www2.wbmason.com/ApprovalResults.aspx?GUID={DE608A4C-9324-42CF-AE85-9D4199A74DA6}         Shipping Address:       W.B. Mason Company 53rd West 23rd Street, 10th Floor New York, NY 10010         Attention:       Hillary Homick         Billing Address:       W.B. Mason Company 53rd West 23rd Street, 10th Floor New York, NY 10010         Payment Method:       On Account         PO Number:       123456789         Cost Center:       1234 – Marketing Dept.	Use this link to login to W Copy and Paste the follow http://www2.wbmason.col	BMason.com to review or edit this order. ving link into your browser if necessary m/OrdersAwaitingApproval.aspx		
Shipping Address:       W.B. Mason Company 53rd West 23rd Street, 10th Floor New York, NY 10010         Attention:       Hillary Homick         Billing Address:       W.B. Mason Company 53rd West 23rd Street, 10th Floor New York, NY 10010         Payment Method:       On Account         PO Number:       123456789         Cost Center:       1234 – Marketing Dept.	Click Here to Approv Use One Click Approval of Copy and Paste the follow http://www2.wbmason.com	ove this Order Now 'As - Is' only if you want to instantly approve this order, wing link into your browser if necessary m/ApprovalResults.aspx?GUID={DE608A4C-932	4-42CF-AE85-9D4199A74DA6}	
Attention:       Hillary Homick         Billing Address:       W.B. Mason Company 53rd West 23rd Street, 10th Floor New York, NY 10010         Payment Method:       On Account         PO Number:       123456789         Cost Center:       1234 – Marketing Dept.	Shipping Address:	W.B. Mason Company		
Billing Address:       W.B. Mason Company 53rd West 23rd Street, 10th Floor New York, NY 10010         Payment Method:       On Account         PO Number:       123456789         Cost Center:       1234 – Marketing Dept.		53 <sup>rd</sup> West 23 <sup>rd</sup> Street, 10 <sup>th</sup> Floor New York, NY 10010		
Payment Method:       On Account         PO Number:       123456789         Cost Center:       1234 – Marketing Dept.         Item Number       Description       Otyle Price       Total	Attention:	53rd West 23rd Street, 10th Floor New York, NY 10010 Hillary Homick		
PO Number: 123456789 Cost Center: 1234 – Marketing Dept.	Attention: Billing Address:	53rd West 23rd Street, 10th Floor New York, NY 10010 Hillary Homick W.B. Mason Company 53rd West 23rd Street, 10th Floor New York, NY 10010		
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Item Number Description Oty Price Total	Attention: Billing Address: Payment Method: PO Number:	<ul> <li>West 23rd Street, 10th Floor New York, NY 10010</li> <li>Hillary Homick</li> <li>W.B. Mason Company</li> <li>53rd West 23rd Street, 10th Floor New York, NY 10010</li> <li>On Account</li> <li>123456789</li> </ul>		
	Attention: Billing Address: Payment Method: PO Number: Cost Center:	<ul> <li>Wild West 23rd Street, 10th Floor New York, NY 10010</li> <li>Hillary Homick</li> <li>W.B. Mason Company</li> <li>53rd West 23rd Street, 10th Floor New York, NY 10010</li> <li>On Account</li> <li>123456789</li> <li>1234 – Marketing Dept.</li> </ul>		
	Attention: Billing Address: Payment Method: PO Number: Cost Center: Item Number	53rd West 23rd Street, 10th Floor New York, NY 10010 Hillary Homick W.B. Mason Company 53rd West 23rd Street, 10th Floor New York, NY 10010 On Account 123456789 1234 – Marketing Dept. Description	Qty Price	Total
WBM1234 Item Description \$1.00 \$1.00	Attention: Billing Address: Payment Method: PO Number: Cost Center: Item Number WBM1234	March West 23rd Street, 10th Floor         New York, NY 10010         Hillary Homick         W.B. Mason Company         53rd West 23rd Street, 10th Floor         New York, NY 10010         On Account         123456789         1234 – Marketing Dept.         Description         Item Description	Qty Price \$1.00	<b>Tota</b> \$1.00
WBM1234 Item Description \$1.00 \$1.00	Attention: Billing Address: Payment Method: PO Number: Cost Center: Item Number WBM1234	Street, 10th Floor         New York, NY 10010         Hillary Homick         W.B. Mason Company         53rd West 23rd Street, 10th Floor         New York, NY 10010         On Account         123456789         1234 – Marketing Dept.         Description	Qty Price \$1.00	<b>Tota</b> \$1.00
WBM1234         Item Description         \$1.00         \$1.00           Product Subtotal:         \$1.00	Attention: Billing Address: Payment Method: PO Number: Cost Center: Item Number WBM1234	Mash Company         53rd West 23rd Street, 10th Floor         New York, NY 10010         Hillary Homick         W.B. Mason Company         53rd West 23rd Street, 10th Floor         New York, NY 10010         On Account         123456789         1234 – Marketing Dept.         Description         Item Description	Qty Price \$1.00 Product Subtotal:	<b>Tota</b> \$1.00 \$1.00
WBM1234         Item Description         \$1.00         \$1.00           Product Subtotal:         \$1.00           Tax Subtotal*:         \$1.00	Attention: Billing Address: Payment Method: PO Number: Cost Center: Item Number WBM1234	Mile Mest 23rd Street, 10th Floor         New York, NY 10010         Hillary Homick         W.B. Mason Company         53rd West 23rd Street, 10th Floor         New York, NY 10010         On Account         123456789         1234 – Marketing Dept.         Description	Qty Price \$1.00 Product Subtotal: Tax Subtotal*:	<b>Total</b> \$1.00 \$1.00 \$1.00
WBM1234         Item Description         \$1.00         \$1.00           Product Subtotal:         \$1.00           Tax Subtotal*:         \$1.00           Order Total:         \$1.00	Attention: Billing Address: Payment Method: PO Number: Cost Center: Item Number WBM1234	<ul> <li>Multi West 23rd Street, 10th Floor New York, NY 10010</li> <li>Hillary Homick</li> <li>W.B. Mason Company</li> <li>53rd West 23rd Street, 10th Floor New York, NY 10010</li> <li>On Account</li> <li>123456789</li> <li>1234 – Marketing Dept.</li> </ul> Description	Qty Price \$1.00 Product Subtotal: Tax Subtotal*: Order Total:	<b>Total</b> \$1.00 \$1.00 \$1.00 \$1.00

### Login Online

Once you login you see a notification box highlighted in yellow (above the Account Center Tab) reflecting the amount of orders in the que.

Click on the Account Center Tab to view all orders awaiting approval.

Federal Government Customers       Enter Keyword       Provide Contractions	CROOT
ORDERS AWAITING APPROVAL	lata
The below orders are awaiting your review. Check the box to the right of the orders you wish to update and click either Approve or Reject. If you would like to view or edit an order, click on the Order Number.	
Order # Purchase Order # Date Address Ordered By Account/Group Total APPRO	E
S045777962         Edit         2/23/2017 - 2:57 PM         123WB Mason Street Brockton, Mass 12345         Foster Maki         C2525134         \$60.38	
Message to Orderer:	
S045873684         Edit         2/21/2017 - 3:55 PM         123WB Mason Street Brockton, Mass 12345         Hillary Homick         C2525134         \$75.93	
Message to Orderer:	
APPROV	E

### View Orders Awaiting Approval

- Send a message to the orderer (if necessary)
- 2 Click on the check box and then click either "Approve" or "Reject"
- 3 Click "Edit" to view full order and make modifications to the order.

		WHO BUT	ASO			0 Items	SHOPPING CART \$0.00 RDER CHECKOUT
Federal Government Customers	Enter Key	word			2		
SHOP ★ SERVICE	S SUPPORT	() ORDERS	(2 NO @ ACC(	TIFICATIONS) DUNT CENTER	♥ FAVORITE	S <u>Crei</u>	Selected List ate Favorites Lists
ORDERS AWAITING APP	ROVAL						
The below orders are awaiting you the right of the orders you wish to u Approve or Reject. If you would like click on the Order Number.	r review. Check the box to update and click either e to view or edit an order,	D Orders that	you have pre	eviously approved	are now in your Or	der History	2
Order # Purchase Order #	Date	Address		Ordered By	Account/Group	Total	APPROVE
5045777962 Edit	2/23/2017 - 2:57 PM	123WB Mason S Brockton, Mass	Street 12345	Foster Maki	C2525134	\$60.38	2
Message to Orderer:							
<u>S045873684</u> Edit	2/21/2017 - 3:55 PM	123WB Mason Brockton, Mass	Street 12345	Hillary Homick	C2525134	\$75.93	
Message to Orderer:							APPROVE REJECT

### Accept/Reject Order

- Click "edit" in the section in which you would like to modify.
- <sup>2</sup> "Quick Entry" will allow you to add an item to this order

Adjust the quantity of each item or delete will remove each item

- or delete will remove each item from the order
- Send message back to orderer
- **5** Reject or Approve this order





### Thank You

If you have any questions please contact your

dedicated CWOPA Customer Service Representative:

- By Phone: 1-888-305-7910
- By Email: customerCWOPA@wbmason.com