

AUTOMATIONDIRECT.com

Companion Guide: Webstore Features

USER GUIDE

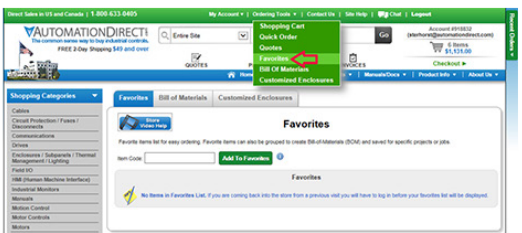
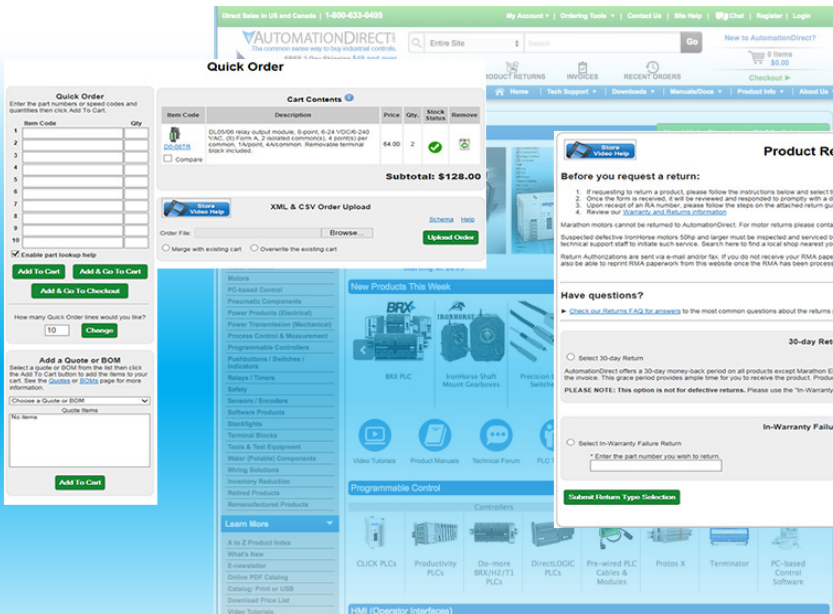
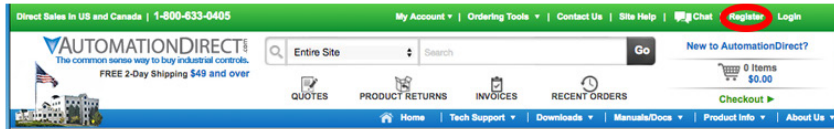




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Look for the [Click here to go now](#) button to go to directly where you need.

Introduction

The AutomationDirect Web Store has matured into a very effective tool that provides convenient service to those customers who want a quick and easy way to surf product inventory, research and learn about our products, compare prices, or to acquire a quote and place an order. Our goal and responsibility is to make the web store a pleasant, user friendly, and secure shopping experience.

Our state of the art warehouse is able to process a customer's request from our website in real time and provides same day shipping on orders placed by 6 p.m. EST (see our shipping guidelines for complete details). AutomationDirect understands the meaning of efficiency and the web store prides its ability on being functional, user friendly and secure. The Online store offers a variety of resources and makes shopping and ordering easy. No confusion or misunderstanding. A single login registration gives you access to a variety of features which are described within this guide.

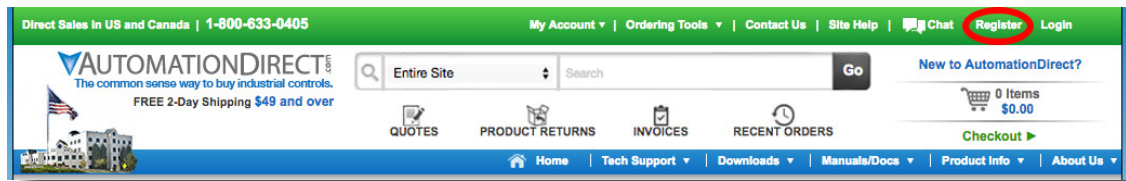
The screenshot displays the AutomationDirect website interface. At the top, there is a green navigation bar with links for 'My Account', 'Ordering Tools', 'Contact Us', 'Site Help', 'Chat', 'Register', and 'Login'. Below this is the company logo and a search bar. A secondary navigation bar includes 'QUOTES', 'PRODUCT RETURNS', 'INVOICES', and 'RECENT ORDERS'. The main content area features a 'Shopping Categories' sidebar on the left and a central 'PLC Family Overviews' section. This section highlights three product lines: 'Productivity2000 PLC Starting at \$255', 'CLICK PLC Starting at \$69', and 'Do-more BRX/H2/T1 PLCs Starting at \$199'. Below the product highlights are sections for 'New Products This Week' (featuring BRX PLC, IronHorse Shaft Mount Gearboxes, Precision Limit Switches, and Do-more BRX ZIPLink Wiring Solutions) and a 'CHECK IT OUT!' video advertisement. A row of service icons includes Video Tutorials, Product Manuals, Technical Forum, PLC Training, Tech Support, Online Catalog, Software Downloads, and Contact Us. At the bottom, a 'Programmable Control' section lists various product types like Controllers and Field I/O.

User Registration

Online access is the fastest, most efficient way to obtain a quotation or to place an order. Orders placed online will receive an order confirmation sent to the e-mail address you have provided. In addition, a shipment confirmation email is generated when your order has shipped (if you have chosen this option online under “My Account - Preferences”).

Single-user Registration

From the top of the home page - on the green shopping tool bar – click on “Register”, shown in the red oval below:



You will have two options to register for the type of account you are interested in:
New account: I will be the Account Owner.

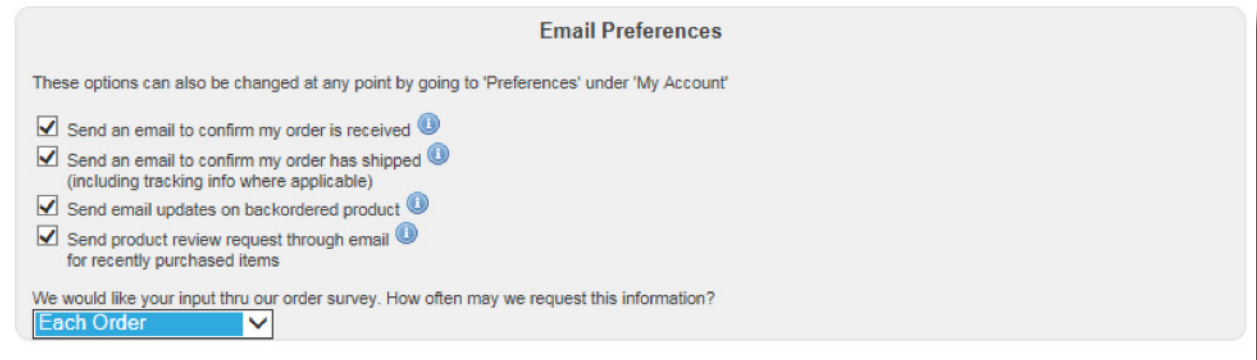
- **Register me as a new user of this existing account.**

For 1st time registration (with administrator privileges):

Select the radio button “New Account: I will be the Account Owner”

Enter your Contact and Login information, Billing Address, and Shipping Address.

During the registration process your Email preferences may be established in five key areas:

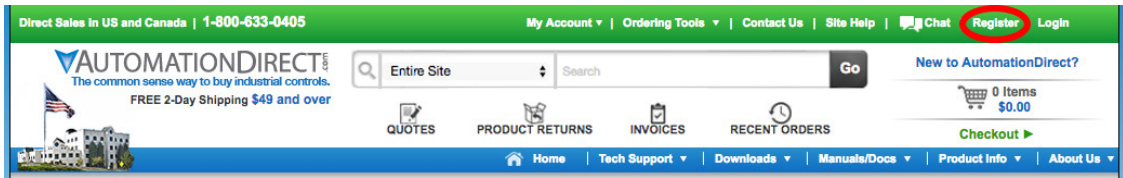


Multi-user Registration

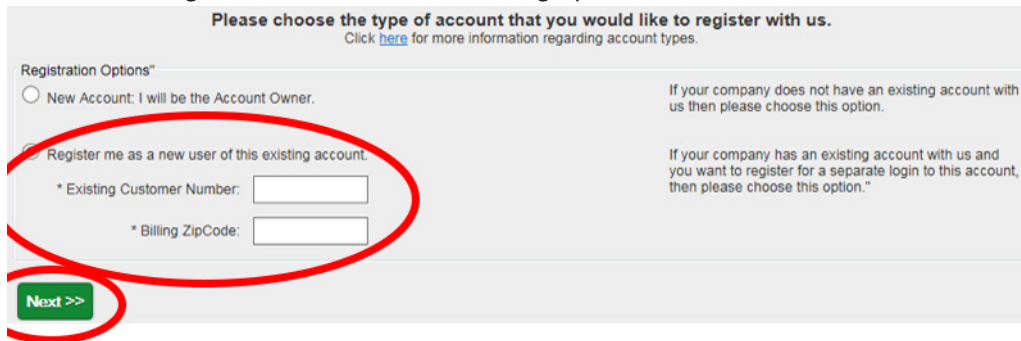
Additional users may be added at any time. With approval from the account administrator, new users may be added and settings may be put into place for each new user. You can add yourself to an existing account however your access will be limited until the account administrator approves you as a user on the account.

New additional users initially will not be able to place orders using a PO number; payment with credit card or I-Check is allowed for each new user. The account administrator may establish new users' abilities with the feature called "Manage Accounts" found within the "My Account" tab.

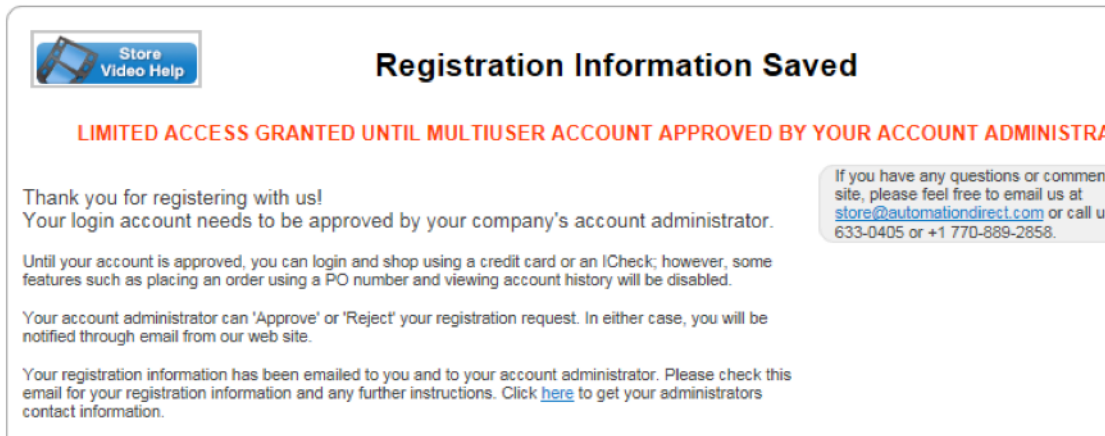
To register additional users, click on "Register", found at the top of the AutomationDirect.com homepage.



Select the radio button "Register me as a new user of this existing account"
 Enter the existing account number and the billing zip code then select: Next>>

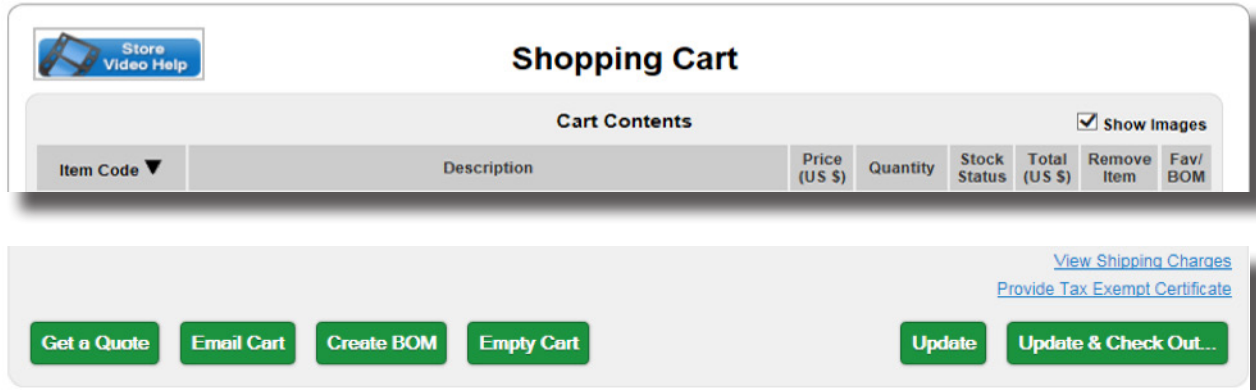


Upon successful addition of new users you will see the following:



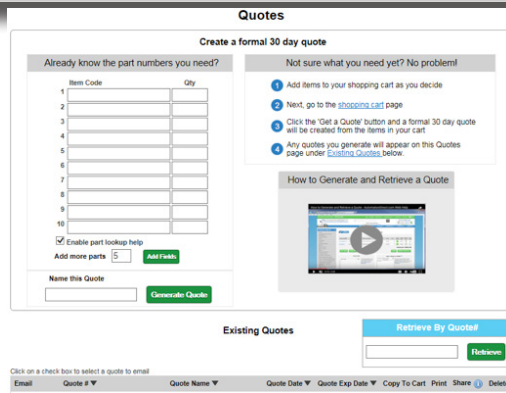
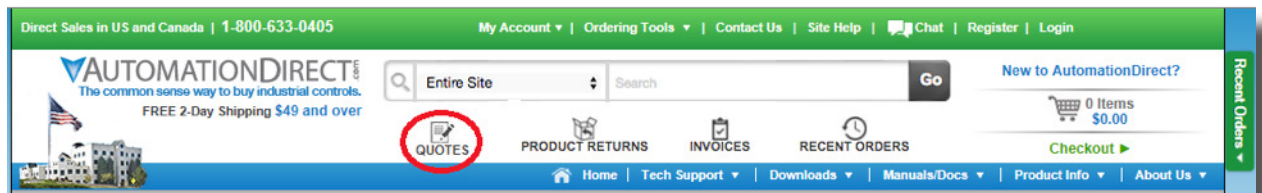
Shopping Cart

The shopping cart is designed to be informative and functional. Several columns were created to help display your information. You can create a quote, Email your cart content, create a BOM, acquire shipping estimates, and even enter your tax exempt information if applicable.



Quotes [Click here to go now](#)

Acquiring a quote online is fast and easy, available 24/7 via our webstore. Our new Quotes icon is now easily found at the top of our homepage. Stock Status is even provided within the quote!



Your quote can be interactive allowing for the addition or removal of items as you see fit. Enter a quote name to help identify your quote. Quotations are valid for 30 days and may be updated if they expire. With one click you can copy your quoted items into your shopping cart for easy ordering. You can also email or share your quote with other users of your company's account.

Click on a check box to select a quote to email

Email	Quote # ▼	Quote Name ▼	Quote Date ▼	Quote Exp Date ▼	Copy To Cart	Print	Share	Delete
<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="button" value="Update"/>	Mar 17, 2017	Apr 17, 2017			<input type="checkbox"/>

USER GUIDE

Bill of Material [Click here to go now](#)

Spend less time ordering parts, and more time focusing on your business!

For our customers who have more than one machine type or project, this feature offers the ability to save all items needed together under one BOM heading. A BOM may be generated per machine #1, machine #2, and machine #3 etc. Even for projects or manufacturing line upgrades that might be duplicated or simply when it is just handy to know what all was used on a project, the BOM feature may be utilized.

You can create a Bill of Materials from your shopping cart list or you can generate a Bill of Material by using the BOM tool. Existing BOMs can be copied, allowing for adjustments and renaming at any time. Export the BOM to XLS or CSV format and share with other users.



Select "Create BOM" from the shopping cart page, enter a BOM name and note. Then enter item codes you wish to be included within the BOM; part number lookup is available to assist you.

BOM Name

Create a BOM ⓘ


To add a new BOM, enter the BOM name and note, and the part numbers and quantities to be associated with it, and then click Create BOM button. You can add more items after the BOM has been created.

Note

	Item Code	Fav	Qty
1	<input type="text"/>		<input type="text"/>
2	<input type="text"/>		<input type="text"/>
3	<input type="text"/>		<input type="text"/>

[More items...](#)

Enable part lookup help



Shipping Estimates

No need to wait on the phone - get shipping estimates to your location straight from our webstore. Remember, we offer free 2-day Best-Way shipping on orders over just \$49, shipped the same day if received before 6 p.m. EST. Few restrictions apply; see our terms and conditions for complete details.

Express Checkout

Express checkout makes checkout even easier. This feature works best when you plan on using the same shipping address, the same shipping method and the same payment method.

Quick Order [Click here to go now](#)

Quick Order offers a fast and convenient way to add items to your shopping cart. At the top of the store on the green banner, select "Ordering Tools" then select "Quick Order." If you have a long list, use the quick order where you can enter up to 50 line items.

Quick Order

Quick Order

Enter the part numbers or speed codes and quantities then click Add To Cart.

Item Code	Qty
1	
2	
3	
4	
5	
6	
7	
8	
9	
10	

Enable part lookup help

Add To Cart
Add & Go To Cart

Add & Go To Checkout

How many Quick Order lines would you like?

Change

Add a Quote or BOM

Select a quote or BOM from the list then click the Add To Cart button to add the items to your cart. See the [Quotes](#) or [BOMs](#) page for more information.

Choose a Quote or BOM ▼

Quote Items

No items

Add To Cart

Cart Contents

Item Code	Description	Price	Qty.	Stock Status	Remove
DL05/06 <input type="checkbox"/> Compare	DL05/06 relay output module, 8-point, 6-24 VDC/6-240 VAC, (8) Form A, 2 isolated common(s), 4 point(s) per common, 1A/point, 4A/common. Removable terminal block included.	64.00	2	✓	
Subtotal: \$128.00					

XML & CSV Order Upload

[Store Video Help](#)

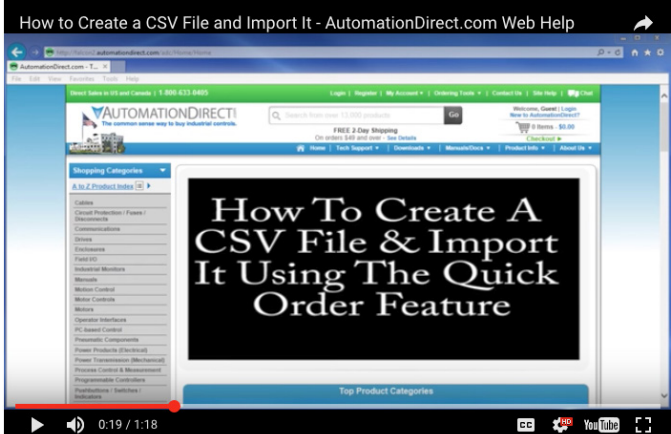
Order File: Browse...

Upload Order

Merge with existing cart Overwrite the existing cart

[Schema](#) [Help](#)

You can also select from your list of Quotes or BOM, or import a XML or CSV file. [Watch the video](#)

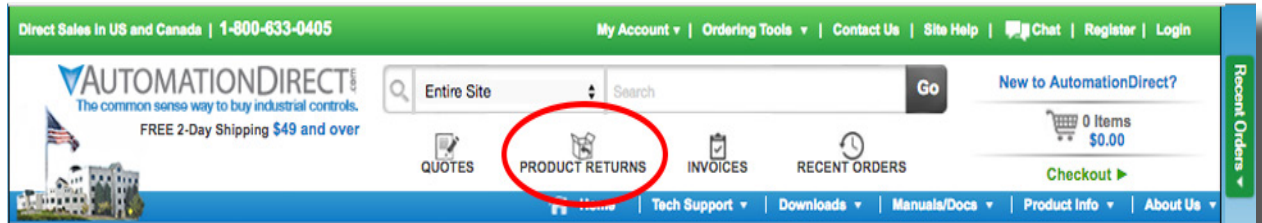


Click here to go now


USER GUIDE

Returns [Click here to go now](#)

Returns can easily be done online with a few mouse clicks. Process your 30-day and In-warranty returns and check your return status online. To start the returns process simply click on the Product Returns icon now found at the top of our homepage.



Be sure to be logged in under your account to properly initiate an RMA request.



Product Returns

Before you request a return:

1. If requesting to return a product, please follow the instructions below and select the appropriate type of return.
2. Once the form is received, it will be reviewed and responded to promptly with a disposition.
3. Upon receipt of an RA number, please follow the steps on the attached return guidelines.
4. Review our [Warranty and Returns information](#)

Marathon motors cannot be returned to AutomationDirect. For motor returns please contact Marathon Electric Sales and Support: [Marathon Electric Support](#)

Suspected defective IronHorse motors 50hp and larger must be inspected and serviced by an EASA-approved motor shop. This requires authorization from our technical support staff to initiate such service. Search here to find a local shop nearest you: <http://www.easa.com>.

Return Authorizations are sent via e-mail and/or fax. If you do not receive your RMA paperwork shortly, please check your e-mail "spam" folder and settings. You also be able to reprint RMA paperwork from this website once the RMA has been processed.

Have questions?

▶ [Check our Returns FAQ for answers](#) to the most common questions about the returns process.

30-day Return

Select 30-day Return

AutomationDirect offers a 30-day money-back period on all products except Marathon Electric motors and refurbished products, beginning 10 days after the invoice. This grace period provides ample time for you to receive the product. Products must be returned in the original boxes in like-new condition.

PLEASE NOTE: This option is not for defective returns. Please use the "In-Warranty Failure Return" option below for defective items.

In-Warranty Failure Return

Select In-Warranty Failure Return

* Enter the part number you wish to return.

USER GUIDE

Invoices [Click here to go now](#)

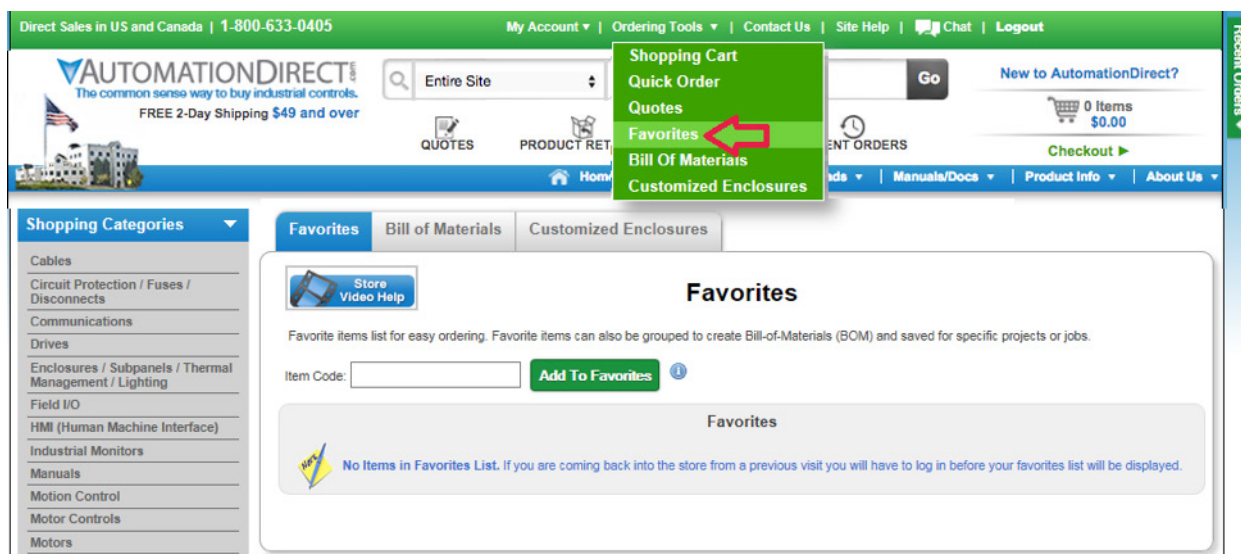
Invoices can be accessed online within the My Account dropdown menu found at the top of our home-page. Get easy access to your order history and review or print your invoices. Look up invoices by part number, order number, or PO number. If you need to reorder an invoice, import your invoice into your shopping cart. Review open invoices. Conveniently pay open invoices online with a credit card.

Favorites [Click here to go now](#)

Found within the Ordering Tools dropdown menu is our Favorites feature which allows you to save items you order often as favorites. Conveniently transfer your favorite items to your shopping cart or to your BOM at any time.

Useful for frequently ordered items such as: DIN rail, relays, wire, and sensors etc.

Add these types of items to your favorites list to allow for easy ordering in the future.



Did you know we have an entire series of video how-to's to help you?

Online Shopping Help Videos

[Awsomer Webstore](#)

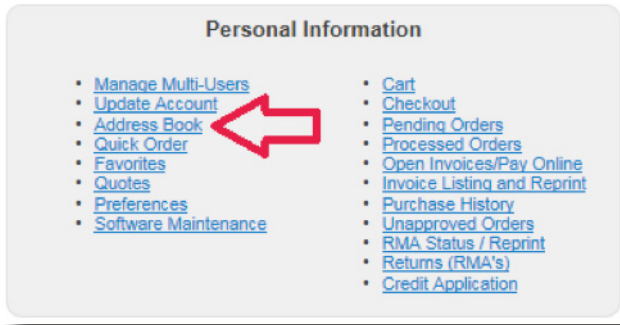
Account Management | **How To's** | Tools

- [In-Warranty Returns](#)
- [30-Day Returns](#)
- [How to Create a Bill of Materials from your Shopping Cart](#)
- [How to Create a Bill of Materials using the BOM Tool](#)
- [How to Generate and Retrieve a Quote](#)
- [Navigating AutomationDirect.com Shopping Cart](#)
- [How To Email Your Cart Content](#)
- [How to Create a CSV File and Import It](#)
- [How To Access Your Software License](#)
- [How To Update Your Credit Card](#)
- [How to Search the AutomationDirect.com Store](#)
- [How To Access The Country of Origin Documents](#)
- [How To Create A CSV File](#)
- [How To Compare Products](#)

[Click here to go now](#)

Address Book [Click here to go now](#)

Located on the My Account page within the Personal Information section we have an address book feature that allows you to create and save different addresses. Give the address a nickname so you can quickly determine different ship to locations. You can also share your address book with other users on your account.



Select an address to edit: (DS) SHIPPING ADDR Create New

* Nickname

* Company (or your name)

* Country

Attention

* Address

* City * State or Province * Zip or Postal Code

* Phone Number (xxx-xxx-xxxx) FAX Number (xxx-xxx-xxxx)

Email Address

LTL Shipping Information
 The following optional information is helpful in calculating shipping costs for any purchases that must ship via LTL freight (heavy items). If this information is not provided here, you will be prompted again during checkout if you ever place an order containing any such items.

Address location type: Residential Commercial Unknown
 Lift gate required for unloading: Yes No Unknown

Share this address with all account multi-users
 Set as my Default Shipping Address

Submit Copy

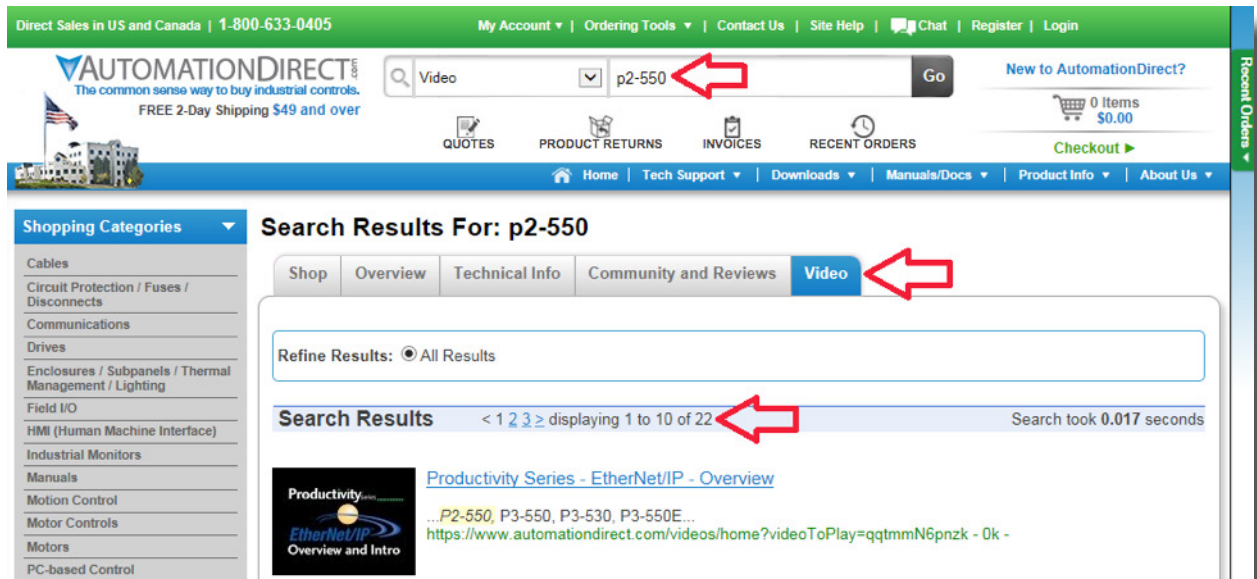
Additional Resources

Our website offers many helpful resources to assist with your online shopping experience. From our extensive library of online Video Tutorials, Customer Forums, Product Manuals and Images, PLC Selector Tool, as well as our recently enhanced product Compare Tool; we aim to provide you with all the instruments necessary to make an informed purchase.

Video Tutorials [Click here to go now](#)

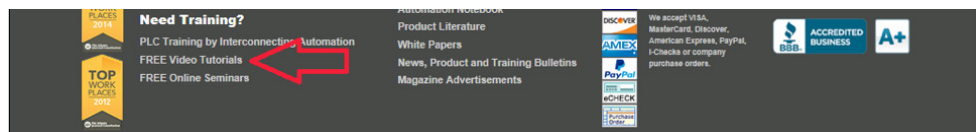
Have a part number of ours that is of interest to you? Remember to do a search of it from our homepage to gather all of its related resources, including our Video Tutorials.

Here is an example of when a search is done on our part # P2-550:



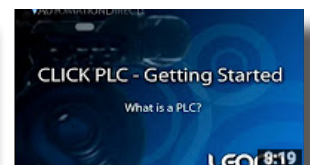
If you do not have a part number of interest, found at the bottom of our homepage is a link to a complete listing of the countless informative videos available. Our video types include: Meet the Products, U Can Do It, How To, Tech Tips, In Depth, and our Automation Cookbook videos.

[Click here to go now](#)



Another option to easily locate the vast array of over 750 plus videos that are available is to visit the AutomationDirect.com channel on YouTube. Here you can search for the video content you are looking for and find links to other helpful resources.

YouTube + [AUTOMATIONDIRECT.com](#) [Click here to go now](#)



USER GUIDE

Product Comparison

Now available on our site is a handy Product Comparison tool which allows you to view up to 5 products side-by-side to easily see the difference between them. We even have a video available to help illustrate how to get the most from this unique feature.

Product	DWA-S-500-MP	AHS-CP-3A	AELAN-3A
Description	Continex inductive proximity sensor. Tubular, 5mm diameter x 20mm body, nickel silver housing, PNP, N.C. output, 2.5mm sensing distance, shielded, 3 kHz switching frequency, IP67, 3pin M8 quick-connect.	Inductive proximity sensor. Tubular, 6.5mm diameter x 22.5mm body, stainless steel housing, PNP, N.C. output, 2mm sensing distance, shielded, 3 kHz switching frequency, IP67, pigtail.	Inductive proximity sensor. Tubular, 5mm diameter x 40mm body, nickel-plated brass housing, SPN, N.D. output, 1.5mm sensing distance, shielded, 3 kHz switching frequency, IP67, pigtail.
Price	\$79.50	\$24.50	\$21.00
Availability	✓	✓	✓
Vendor / Manufacturer	Continex	Micro Detectors	Micro Detectors



[Click here to go now](#)

Order Documents / Compliance Documents [Click here to go now](#)

We have the document(s) you need to stay compliant with regulations. You can produce NAFTA Certificates of Origin as well as Manufacturers Affidavits from existing orders.

Generate Country of Origin Documents

You can produce NAFTA Certificates of Origin as well as Manufacturer Affidavits from an existing order below.

NAFTA Certificates of Origin are issued for items originating from the United States, Canada, or Mexico.
Manufacturer Affidavits are issued for items originating from all other nations.

Documents by Order Number

Order Number

Create Documents By Order Number

Compliance Documents [Click here to go now](#)

Within the Manuals/Docs dropdown on the top of our homepage, compliance documents can be easily obtained by entering the desired part number.

Part Number Lookup

Enter an AutomationDirect part number below to view the UL/CUL, CSA, CE, and RoHS information for that item.

Newsletter: Volume 19 – Issue 6







Hope you are enjoying your summer. In this month's issue we have some great articles focusing on Ethernet. You can download the free whitepaper on Industrial Ethernet, and there's another article on getting Ethernet into your operation. There is also an informative article on how to protect your PLC against the threat of hackers. Check out how AutomationDirect is growing and view the new warehouse expansion. You will also want to view the video of the month from the president of HOTT Engineering, which gives you an insider's look into why the 800 PLC were needed, what makes them special, and how the design came about. Hope you enjoy!

In the Hacker Age, how secure is your PLC?
Let's face it, we are living in the age of the cyber-attack and in the call-and-rotate game of cyber-warfare, hackers have found an easy way to compromise your PLC. In this white paper, product manager Jonathan Griffin explains the reasons and implications when an industrial managed Ethernet switch should be used and when an industrial unmanaged Ethernet switch is sufficient. Get the free whitepaper on Industrial Ethernet.

Whitepaper on Industrial Ethernet
Knowing when to choose an managed Ethernet switch instead of an unmanaged Ethernet switch for your application is a key decision. In this white paper, product manager Jonathan Griffin explains the reasons and implications when an industrial managed Ethernet switch should be used and when an industrial unmanaged Ethernet switch is sufficient. Get the free whitepaper on Industrial Ethernet.

Supplier Profile: Roxburgh EMC
After many decades in the business, Roxburgh has developed significant knowledge and understanding of the specific requirements and regulations within a wide variety of manufacturing industries. Specializing in shielding within the HVAC, industrial, machine tool, IT, lighting, medical, military, aerospace, transportation, and security industries. Learn more about Roxburgh EMC.

Now Available

 Wire Area Sensors starting at \$250.00	 Adjustable Industrial Temperature Controller starting at \$99.00	 Camera Viewers with Built-in Ethernet starting at \$199.00
 Ethernet Unmanaged PLC	 Ethernet Switch	 Precision Limit Switches

Enjoy doing business with AutomationDirect?

If so, sign up to receive our newsletter and stay up to date on all of our latest news.

Here's what to expect:

- Applications – Industry articles & customer stories
- Tech Tips – FAQs, discussions & technical info.
- Videos – How-to and What's-New videos
- Product Views – New products, specs, prices
- Online Features – Newest web features, helpful tips
- Company News – The latest from AutomationDirect
- The Lighter Side – Just for fun

We promise to keep our emails short and sweet! Also, we respect your privacy and will never share your address with anyone.

[Click here to go now](#)

About AutomationDirect

In business since 1994, AutomationDirect is a distributor offering thousands of industrial automation products for electrical control systems, including PLCs, operator interfaces, AC drives, motors, stepper systems, sensors, motor control, enclosures and more. Our prices are typically well below the list price of more traditional automation companies because of our model and focus on efficiency and the majority of our products are stocked for same-day shipping. Plus, get free two-day delivery on orders over \$49; some limitations apply.

For more information, contact us at 800-633-0405 or visit www.AutomationDirect.com



Voted #1 mid-size company to work for in Atlanta . . . again!

[Click here to go now](#)



See what customers think in our online reviews

[Click here to go now](#)

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