Account Manager Cheat Sheet

Schweigen Pro Forma Portal

1) **Check on Sales**
    a. Log in as an Account Manager.
    b. View all store accounts under your charge, along with their MTD/YTD sales.
    c. Search or sort as required.

2) **Login as a Store**
    a. Log in as an Account Manager.
    b. Click any of the listed stores under you to login as an admin of that store.
    c. Upon login, you can perform any function that an admin for that store can.
    d. To get back to your store listing, click *Account Manager* Home at top.

3) **Add a User Login**
    a. Log in as an Account Manager.
    b. Click a store on Account Manager Home.
    c. Click *My Account* and then *Manage Logins*.
    d. Follow instructions to Add a new user or to Edit/Delete an existing one.
    e. Under User Group, select only Standard User.
    f. Full notes available on Pg 7 of the User Guide.

4) **Add a Salesperson**
    a. Log in as an Account Manager.
    b. Click a store on Account Manager Home.
    c. Click *My Account* and then *Salespeople*.
    d. Follow instructions to Add a New Salesperson or to Edit/Delete an existing one.
    e. Full notes available on Pg 8 of the User Guide.

5) **Create & Find a Quote**
    a. Add preferred item to Cart.
    b. Click *Shopping Cart* on top right and then *Create Quote*.
    c. Enter Customer Details and click Save Changes when done.
    d. Quote will be available from the Quotes tab in your Account Menu
    e. Full notes available on Pg 13 of the User Guide.

6) **Specify Delivery Date or Instructions**
    a. Enter preferred delivery date and notes in the *Delivery Date & Instructions* box during Checkout.
    b. Full notes available on Pg 21 of the User Guide.

7) **Making a Partial Payment**
   a. Portal only tracks partial payments by credit card.
   b. Select *Credit Card* payment option during Checkout.
   c. Select *Partial Payment (minimum 20%)*.
   d. Enter Credit Card information and *Place Order*.
   e. Full notes available on Pg 24 of the User Guide.

8) **Making Balance Payment**
   a. Portal only facilitates deposit payments by credit card.
   b. To make balance payments, stores Click *Order History* and then *Previous Orders*.
   c. Click *Order ID* of choice to view payment details under its *Notes*.
   d. Call *1300 881 693* (select option 2 or 4) with customer's credit card details when ready to pay the balance outstanding.
   e. Alternatively, stores may also choose to wire the money to our bank account (*BSB: 0331181 | Account number: 390407*) - referencing the Order ID.
   f. Full notes available on Pg 26 of the User Guide.

9) **Find an Order or Tax Invoice**
   a. Click *Order History* and then *Previous Orders*.
   b. Click the *Order ID* of choice to view full transaction details.
   c. PAID tax invoice will appear under *Order History/Invoices* after an order ships.
   d. Full notes available on Pg 28 of the User Guide.

Helpful Resources

1) Latest User Guide
2) Latest AM Cheat Sheet
3) Home Delivery Policy
4) Portal Terms & Conditions

