Training Guide

University of Massachusetts
Your Local, Dedicated Team

<table>
<thead>
<tr>
<th>Customer#</th>
<th>WB ACCOUNT EXECUTIVE</th>
<th>WB CUSTOMER SERVICE</th>
</tr>
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<tbody>
<tr>
<td>C2169125</td>
<td>Andrew Lane [<a href="mailto:Andrew.Lane@wbmason.com">Andrew.Lane@wbmason.com</a> or x1965]</td>
<td>Amy Joyal [<a href="mailto:Amy.Joyal@wbmason.com">Amy.Joyal@wbmason.com</a> or x1973]</td>
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</tbody>
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Call 1-888-926-2766 to be connected to a local member of our team.
Verify your login details

1. When you have successfully punched out, make sure that you see the custom home page for your UMass location.

2. Check that your email address appears in the top left corner of the website. This is important for order history, delivery notifications, and other features to work properly.
Preferred Items

1. Click on the Favorites tab then Preferred Items List to view your best value items.

2. Preferred items will be noted with a red checkmark.
Favorites List / My W.B.

From this page you can view, add, modify, and delete your existing personal lists.

1. To view and manage your personal favorite's list(s) online you can click on the Favorites tab, which will bring you to this overview page.

2. My W.B. contains a list of products you have purchased previously. This list will grow as you place orders for new products.

3. To create a new list insert the new list name, select the page sorting preference and click Submit.
Filter Search Results

REFINE SEARCH RESULTS
Use the left hand column to refine any search results.

SORT BY
Use the Sort By dropdown and select your product sorting preference.

RESULTS PER PAGE
Click on the dropdown menu next to Results Per Page to select the amount of items you would like to populate per page in your search results.
Customer Support

CONTACT CUSTOMER SERVICE

Select the Support tab to contact your dedicated customer service representative. Select appropriate subject matter, type message and click Submit to send message to your dedicated customer service.

LIVE CHAT

Select the Live Chat icon on the right hand side of the screen to open up a live chat with a WB Mason Customer Service Representative.

YOUR TEAM

Each UMass location has a dedicated support team. See the last slide for your location specific contacts.
Quick Order Tool

QUICK ORDER MULTIPLE ITEMS
Select *Quick Order* located in the top right hand corner of the screen. This tool will allow you to enter in multiple items and load them into your shopping cart and/or favorites list.
Shopping Cart

Update your cart – update your cart after you make modifications to items in your cart.

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

Continue to Checkout – Click this icon to proceed to checkout.
Order History

Click on the Orders tab to view your order history.

ORDER STATUS

The status column will tell you the live status of your order.

VIEW ORDER DETAILS

Click on the “Order #” to view details of each order.

RE-ORDER ITEMS

Once you view an order you can select the Re-order Items button on the page to easily re-order items.
1. Select Return Center from the drop down under the Orders tab. Use the filter tool to help you find the sales order or purchase order from which you would like to initiate a return.

2. Click on Return Item(s) to begin processing a return and don’t forget to print the return label to set aside with product for your driver to pickup next-day.

Note: Due to the PO/Punchout system, you will only be able to RETURN items. Re-orders through the website will not be available. A new PO must be created.
Delivery Notifications

After you place an order you can easily check on your delivery status.

Delivery notifications will be highlighted above the Orders tab. To view updates, just click on the green notification on your homepage. Most items will be delivered the day after W.B. Mason receives the PO.
Thank you for choosing W.B. Mason for your office supply needs. We appreciate your loyalty to our family owned business. If you have any questions, please do not hesitate to contact your dedicated account manager or customer service. We are always happy to help!

- The WB Mason Team