


Optimal Portal User Guide

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Login

1. Go to portal.optimalmax.com on web browser.
2. On top right of screen click on [Login](#).

[Request a Quote](#) [Quick Order](#) [Login](#) [Register](#)  0

3. On next screen enter [Registered Email Address](#) and [Password](#)
[Log In](#) | [Register](#)

Returning Customer

Login below to checkout with an existing account

Required *

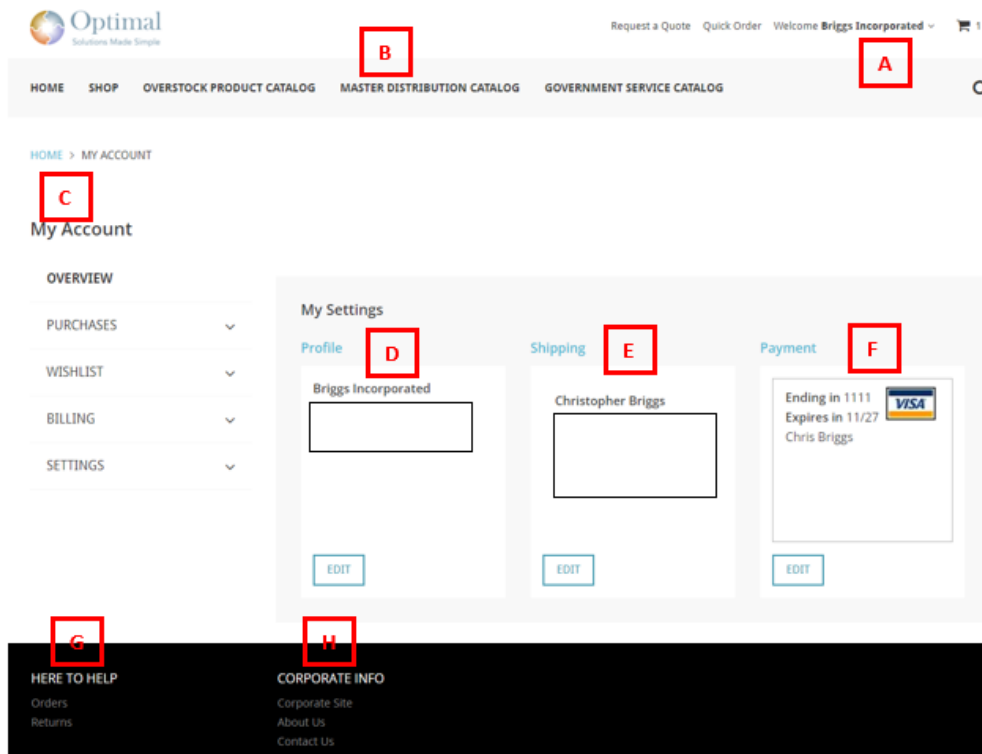
Email Address *

Password *

[LOG IN](#) [Forgot password?](#)

Main Page Account View

1. Main Screen will show.



- a. Company Name
- b. Available Product Catalogs based on customer profile
- c. Customer Account Info
- d. Profile
 - i. Company
 - ii. User Email logged in
 - iii. Phone number
- e. Shipping
 - i. Main shipping address is shown
- f. Payment
 - i. Credit Card on File
- g. Help Info
- h. Links to OptimalMax Website

2. My Account

My Account

A	OVERVIEW	
B	PURCHASES*	▼
C	WISHLIST	▼
D	BILLING	▼
E	SETTINGS	▼

- a. Overview
 - i. Profile
 - ii. Shipping
 - iii. Payment
- b. Purchases
 - i. Purchase History
 - ii. Returns
 - iii. Reorder Items
 - iv. Quotes
- c. Wishlist
- d. Billing
 - i. Account Balance
 - ii. Invoices
- e. Settings
 - i. Profile information
 - ii. Email Preferences
 - iii. Address Book
 - iv. Credit cards
 - v. Update Password

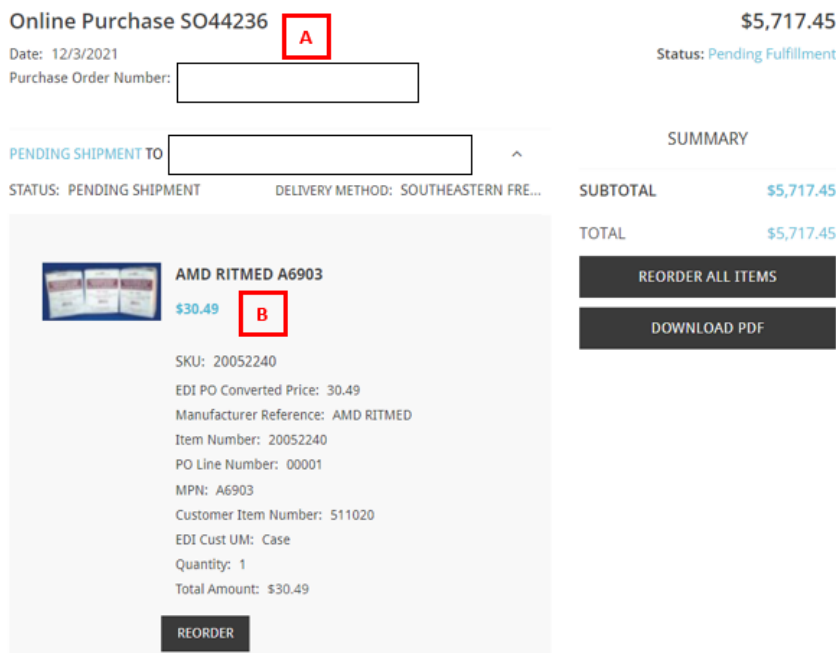
My Account Details

Purchases

Purchase History



1.
 - a. Able to sort and filter multiple ways
 - i. Open or All
 - ii. Date Range
 - iii. Sort by Date, Sales Order No, or amount
 - b. Sales Order No. – Number assigned to order by NetSuite (Optimal ERP System)
 - c. Purchase Order No – Customer PO Number
 - d. Date – Date order entered NetSuite
 - e. Amount – Total of order
 - f. Status of Order
 - g. Tracking Info
2. Click on Sales Order No. and it will open the detail of the order

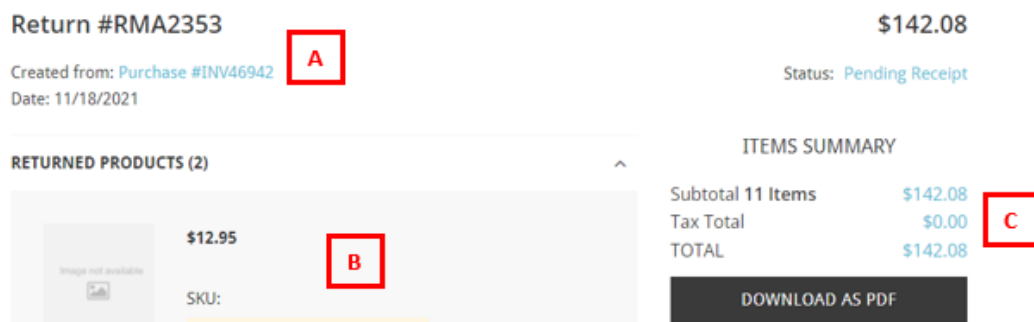


- a. Sales Order info
- b. Line Detail Information
- c. Totals and link to print PDF

Returns



1.
 - a. Able to sort and filter multiple ways
 - i. Date Range
 - ii. Sort by Date or Return No
 - b. Return No – RMA number assigned by NetSuite
 - c. Date – date entered
 - d. Items – Total qty of items returned
 - e. Amount – total of the RMA
 - f. Status of RMA
 - g. Customer PO Number
2. Click on the Return No and it will open detail of the RMA



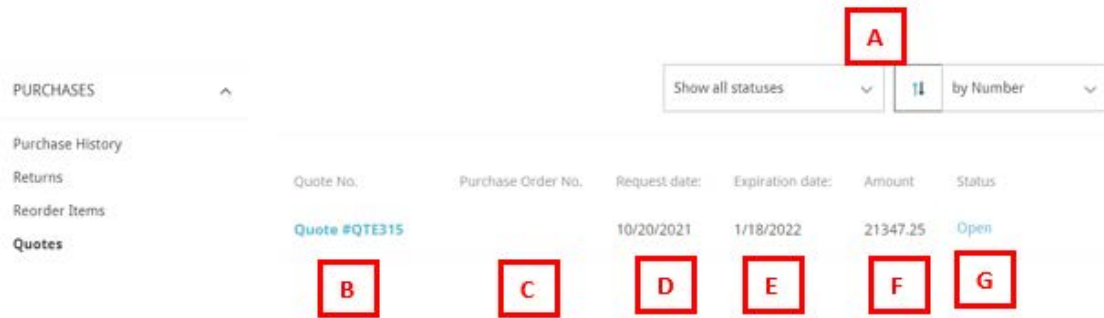
- a. RMA Info
- b. Line Detail info
- c. Totals and link to print PDF

Reorder Items



1. This shows items previously ordered based on filter.
 - a. Filter by 15, 30, 60, 90, and 180 days
 - b. Sort by Name, Price, Most Recently Purchased, and Frequently Purchased

Quotes



Quote No.	Purchase Order No.	Request date:	Expiration date:	Amount	Status
Quote #QTE315		10/20/2021	1/18/2022	21347.25	Open

1.
 - a. Able to sort and filter multiple ways
 - i. Filter by different status
 - ii. Sort by Number, Request or Expiration date, and Amount
 - b. Quote No – Assigned number by NetSuite
 - c. Purchase Order No – Customer PO Number
 - d. Request Date
 - e. Expiration date
 - f. Amount
 - g. Status
2. Click on Quote No and it will open detail

Quote QTE315 A \$21,347.25
 Request date: 10/20/2021 A Status: Proposal
 Expiration date: 1/18/2022

ITEMS (6)

\$19,320.75

Image not available

SKU:

This item is no longer available

B

Quantity: 1
Amount: \$19,320.75

\$1,204.00

Image not available

SKU:

This item is no longer available

Quantity: 1

SUMMARY

SUBTOTAL	\$21,347.25
Shipping	\$0.00
Tax Total	\$0.00
TOTAL	\$21,347.25

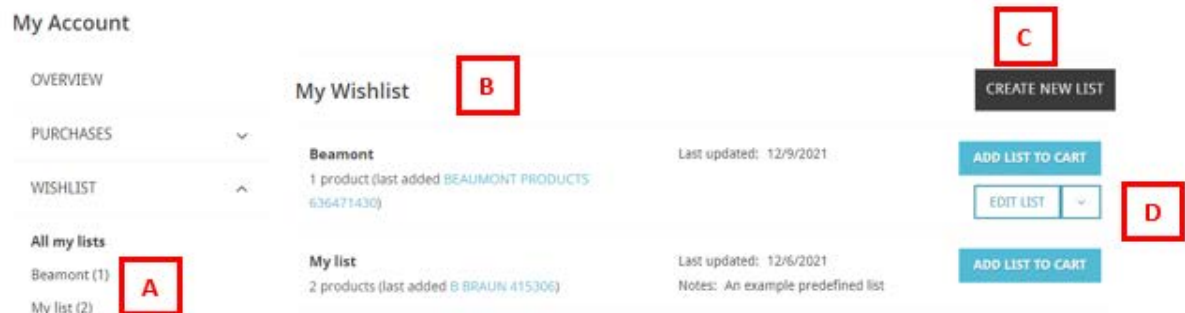
C

REVIEW AND PLACE ORDER

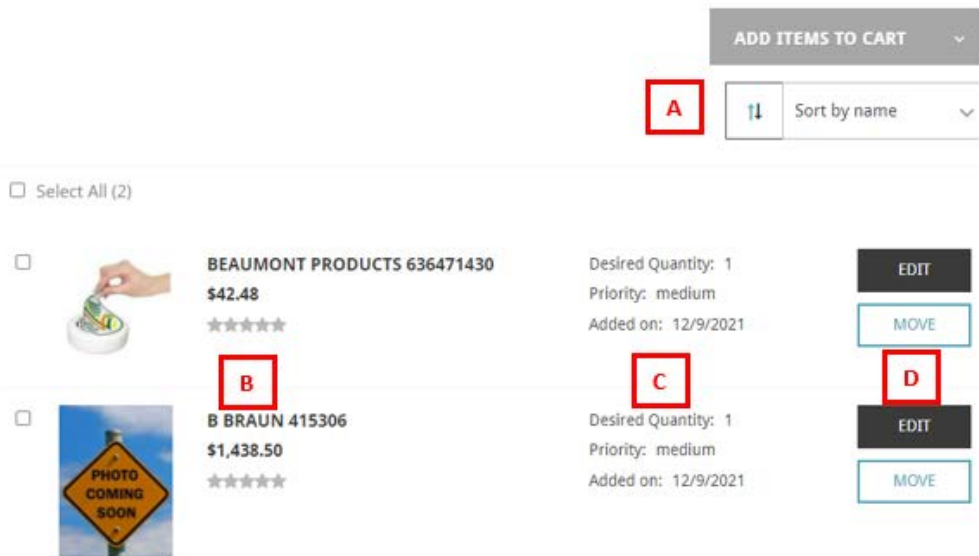
DOWNLOAD AS PDF

- a. Quote Info
- b. Line-Item info
- c. Totals, Print PDF copy, and Review and Place Order once approved

Wishlist




1.
 - a. Shows All list that have been created
 - b. All Wish List
 - c. Create new List
 - d. You can add whole list to cart or edit/delete list with drop down menu
2. Click on list to open detail info



- a. Sort by Name, Date added, Price, or Priority
- b. Basic Product Info (Click on product for more detailed Information)
- c. Wish List Product Detail
- d. Can move to another list or edit the Wish List Product Detail

- Click on Edit to update the Wish List Product Detail
Edit Item

×



BEAUMONT PRODUCTS 636471430
Added on: 12/9/2021 10:35 am
\$42.48

Desired Quantity

Priority

Notes for this item (optional)

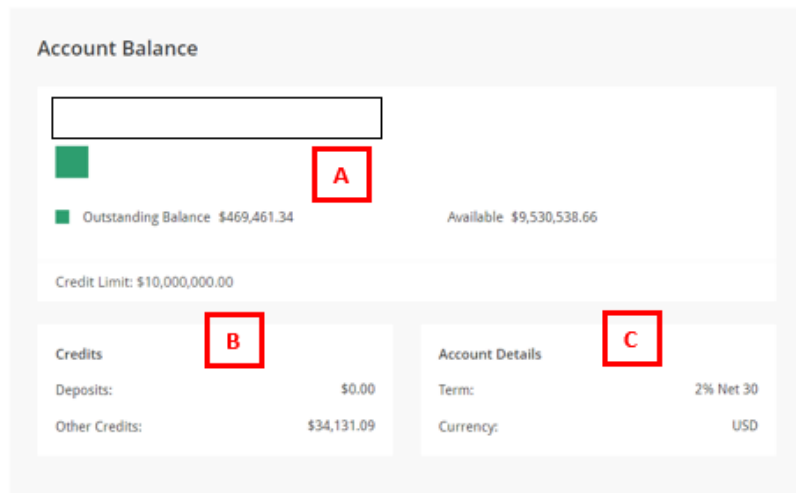
- Here you can update the Qty, Priority, or add any notes

Billing

Account Balance

My Account

- OVERVIEW
- PURCHASES
- WISHLIST
- BILLING
- Account Balance
- Invoices
- SETTINGS



- Shows Credit Limit, Outstanding Balance, and Available Credit
 - Shows pending Deposits and other Credits available
 - Shows Customer Terms

Invoices

My Account

OVERVIEW

Invoices

PURCHASES Open Paid in Full **A**

WISHLIST

BILLING

Account Balance

Select All (20)

Show All By Due Date

Invoice No.	Purchase Order No.	Due Date	Date	Amount
B	C	D	E	F

1.
 - a. Able to sort and filter multiple ways
 - i. Open and Paid in Full
 - ii. Due date next 7, 30, 60, 90, and all days
 - iii. Sort By Invoice date, Due date, Amount Due and Invoice Number
 - b. Invoice Number – Assigned by NetSuite
 - c. Purchase Order No – Customer PO
 - d. Due Date
 - e. Date – Date invoice created
 - f. Amount – Original Due
2. Click on Invoice No to see detail

Invoice #INV29095 **\$1,179.90**

Invoice Date: 6/1/2021 Status: **Open**

Created from: [Purchase #5029310](#) **A**

Due date: 7/1/2021

PRODUCTS (2)

\$43.70

SKU:

This item is no longer available **B**

Quantity: 27

Amount: **\$1,179.90**

\$1,252.50

SKU:

This item is no longer available

SUMMARY

Subtotal 28 Items **\$2,432.40**

Tax Total **\$0.00**

Shipping **\$0.00** **C**

Handling **\$0.00**

TOTAL \$2,432.40

ADJUSTMENTS

Credit Memo #CM3086 **(\$1,252.50)**

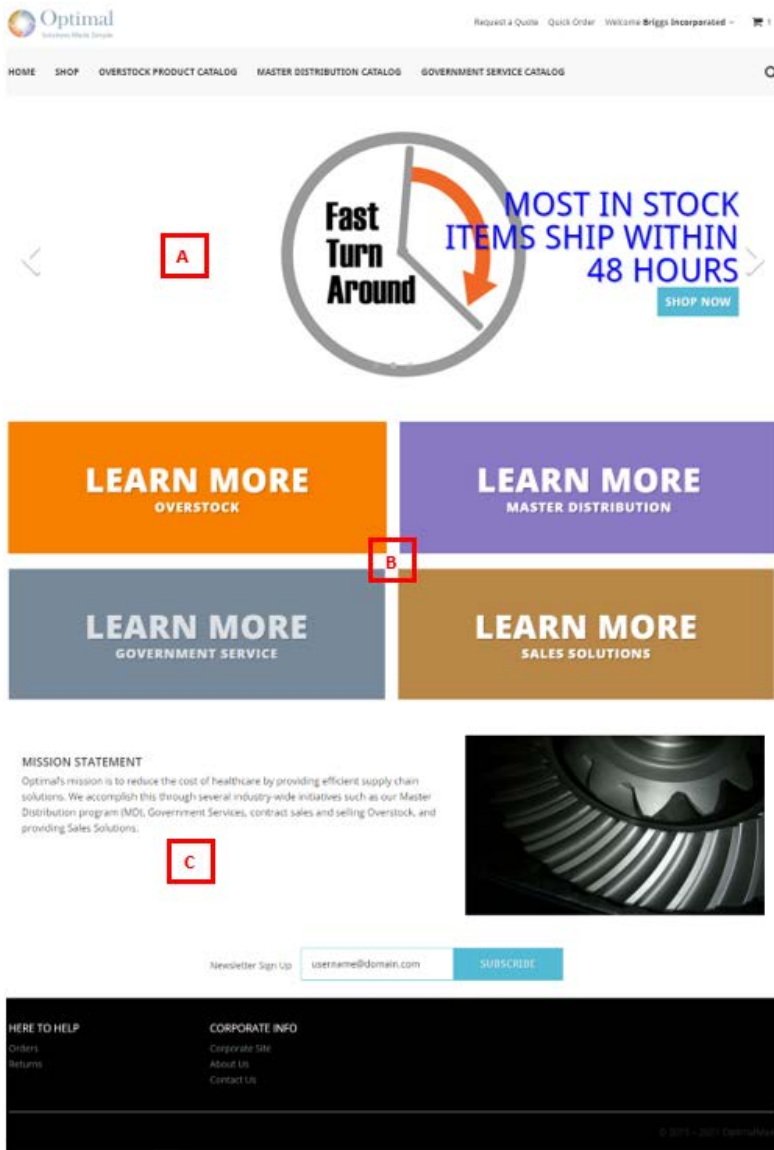
Amount Due **\$1,179.90**

DOWNLOAD AS PDF **D**

- a. Invoice Detail
- b. Line-Item Detail
- c. Invoice Summary

d. Link to Print PDF

Home Screen



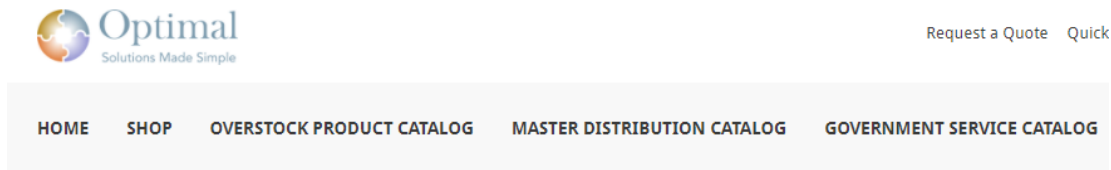
1.

- a. Scrolling Banner
- b. Links to OptimalMax Programs
- c. OptimalMax Mission Statement

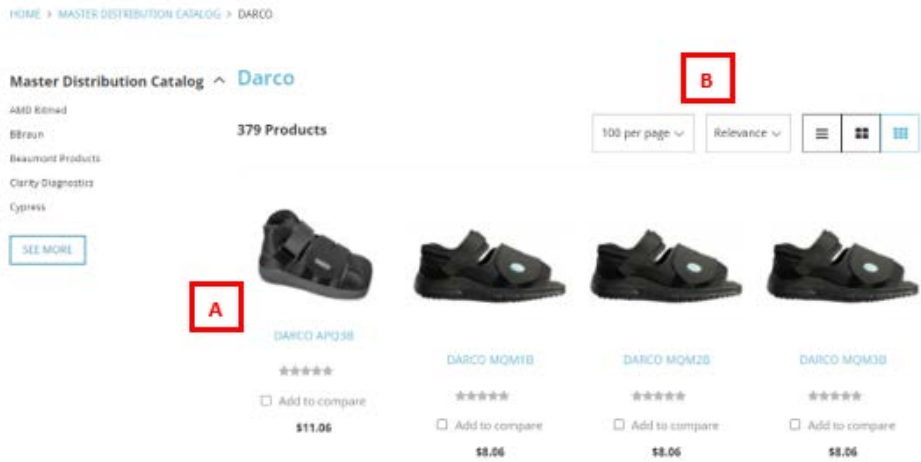
Product Pages

Catalogs

1.
 - a. OptimalMax has three Main Catalogs that can viewed based on customer profile
 - i. Overstock Product Catalog
 - ii. Master Distribution Catalog
 - iii. Government Service Catalog
2. Each Catalog is broke down further by Category/Manufacture



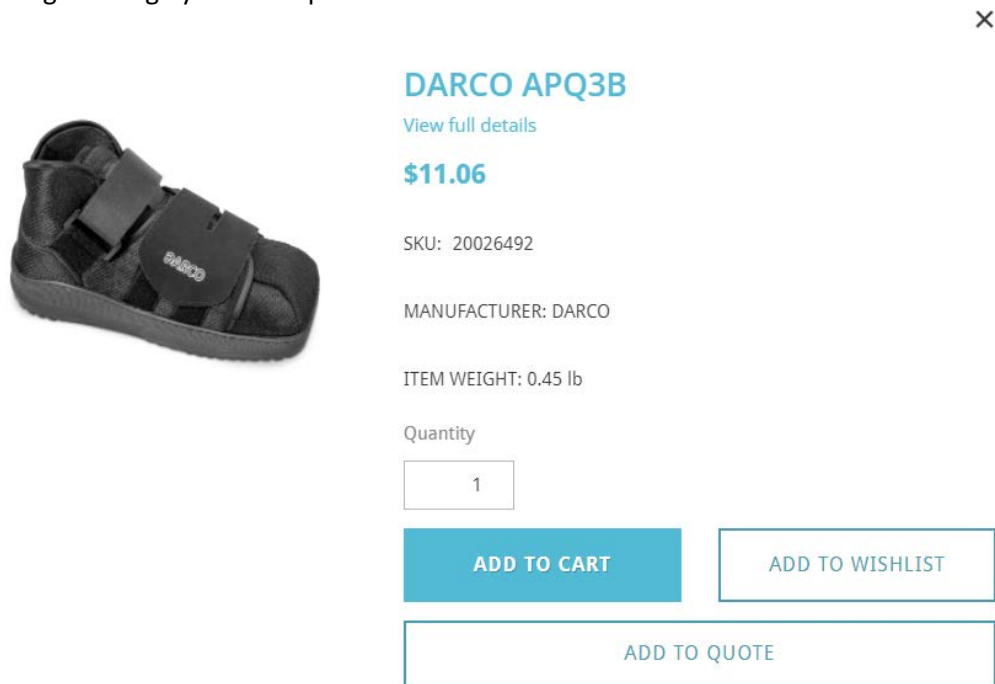
3. Clicking on the Category/Manufacture will open list of items that fall under that umbrella.



- a. Product image, MFG/MFG Part Number , and Customer Price
- b. Different views available
 - i. Number per page 12,24,48, and 100. 100 is default
 - ii. List view, Table View, and Grid view. Grid is default on Desktop device.

Products

1. Clicking on image you see a quick view



2. Clicking on MFG/MFG Number gives you full view.

DARCO APQ3B
 ★★★★★ No Reviews yet
\$11.06
 SKU: 20026492
 MANUFACTURER: DARCO
 ITEM WEIGHT: 0.45 lb
 ✓ This item is IN STOCK.
 Current Stock: 65
 Quantity: 1
 ADD TO CART ADD TO WISHLIST
 ADD TO QUOTE

Details
 APQ3B: +POST-OP BOOT LG SQ TOE BLK 1/EA 12/8X 36/CA

Ratings & Reviews
 No Reviews Available
 Be the first to **WRITE A REVIEW**

CUSTOMERS WHO BOUGHT THIS ITEM ALSO BOUGHT

DARCO MQM2B \$8.06 ★★★★★	DARCO APQ1B \$11.06 ★★★★★	DARCO APQ2B \$11.06 ★★★★★	DARCO SLO3NF \$9.08 ★★★★★

- a. Product Image
- b. Product General Information
 - i. NetSuite Item Number
 - ii. MFG
 - iii. Item Weight
 - iv. Whether product is in stock
 1. If shows in stock Qty available is shown

✓ This item is IN STOCK.
 Current Stock: 65

2. If out of stock shows Lead time

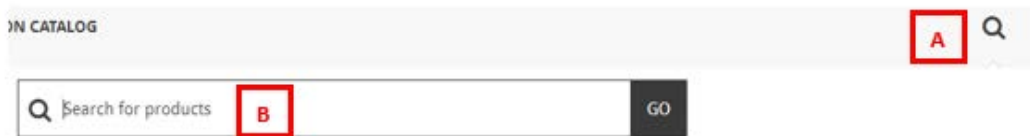
i This item is currently in back order but can still be purchased. Please note lead time detail below

Back in stock in 37 days.

- c. MFG Number/ Description
- d. Can add to Cart,Wishlist, or Quote along with Qty
- e. May show reviews that have been done and/or products that have been purchased with this one in the past.

Product Search

- 3. You can search multiple ways if you know what you may be looking for.
 - a. MFG
 - b. MFG Number
 - c. Description
 - d. NetSuite Number
- 4. To search



- a. Click On Spy Glass
- b. Enter search criteria in search box
- c. Click go or hit enter

Placing Orders

There are a couple of ways to create orders.

Quick Order

- 1. Click on Quick order on the top right of the page



[Request a Quote](#) [Quick Order](#)

2. Window opens and you enter the product information and qty. **Note: this requires you to know specific product information such as NetSuite Number or MFG part number.**

[HOME](#) > [SHOPPING CART](#)

Your Shopping Cart Is Empty

Continue Shopping on our [Home Page](#) or use the Quick Add below to add items to your cart.

QUICK ADD

Which item(s) would you like to add?

Quantity

Enter SKU or Item Name

Enter quantity

ADD ITEM

Begin typing SKU to select an item

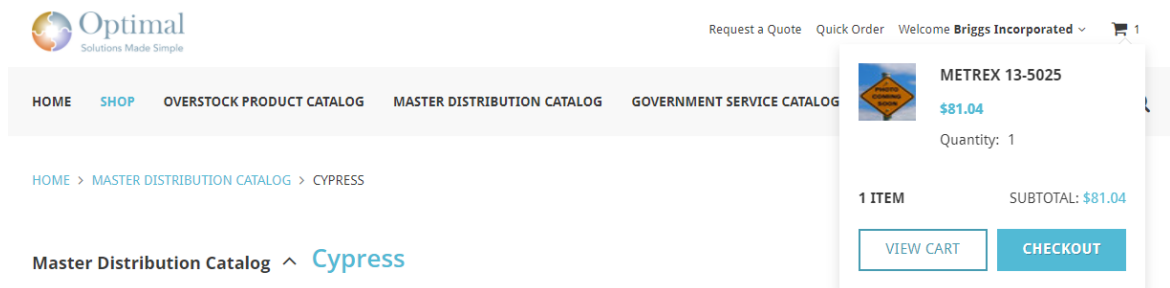
3. Click add item until all items you would like to order are in your cart.

Add via Product Detail Page

1. While viewing the product detail you can add to the cart.

Shopping Cart

1. Once all product you would like to order are in the shopping cart you can [View Cart](#) or [Check Out](#) via link top right corner



Request a Quote Quick Order Welcome **Briggs Incorporated** 1

HOME SHOP OVERSTOCK PRODUCT CATALOG MASTER DISTRIBUTION CATALOG GOVERNMENT SERVICE CATALOG

HOME > MASTER DISTRIBUTION CATALOG > CYPRESS

Master Distribution Catalog ^ **Cypress**

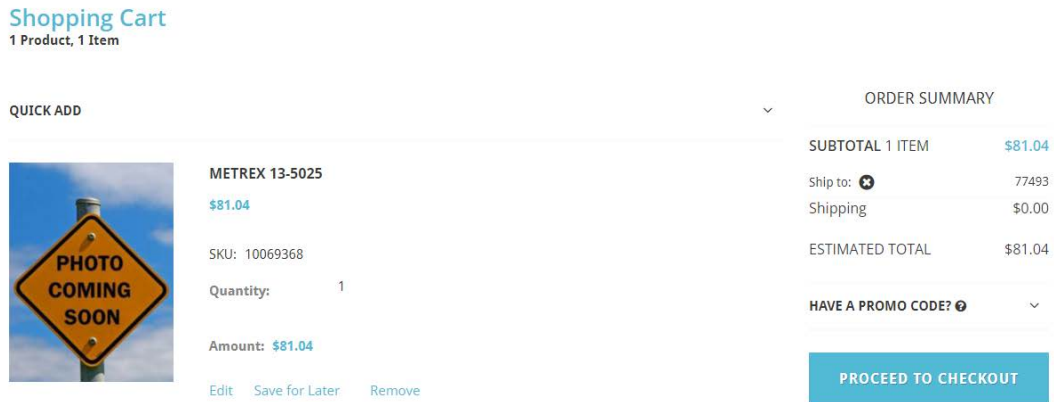
METREX 13-5025
\$81.04
Quantity: 1

1 ITEM SUBTOTAL: \$81.04

VIEW CART CHECKOUT


View allows you to review what is in the cart

1. You can edit the Qty, save for later, or remove the product before checking out.



Shopping Cart
1 Product, 1 Item

QUICK ADD



METREX 13-5025
\$81.04

SKU: 10069368

Quantity: 1

Amount: \$81.04

[Edit](#) [Save for Later](#) [Remove](#)

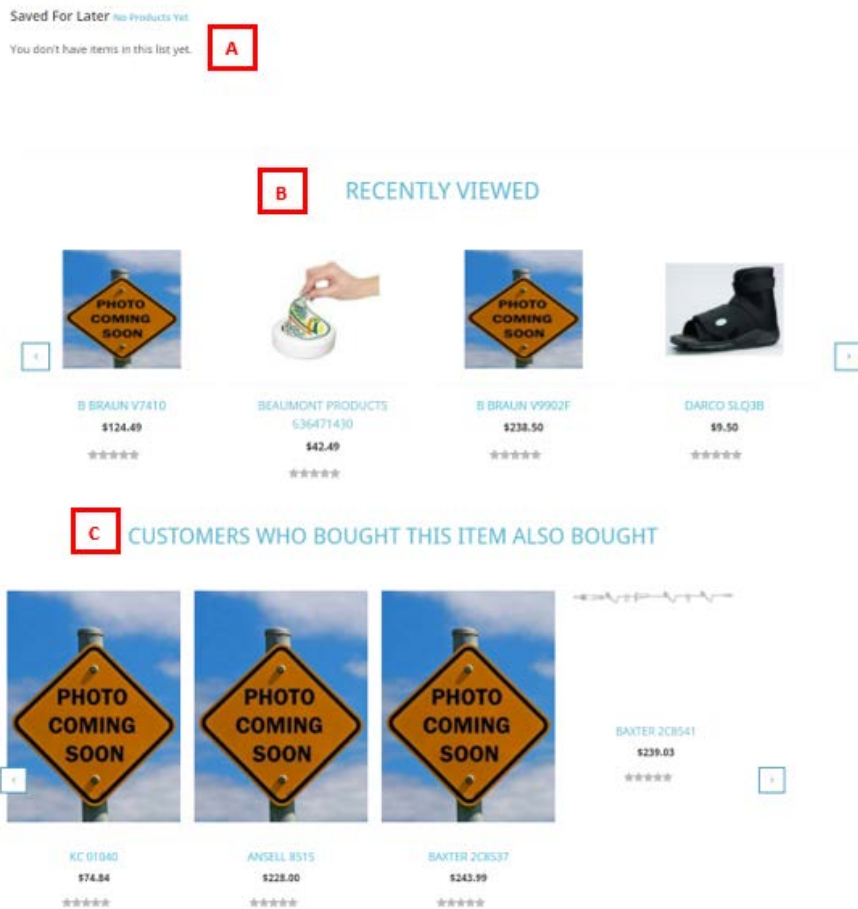
ORDER SUMMARY

SUBTOTAL 1 ITEM	\$81.04
Ship to: 📍	77493
Shipping	\$0.00
ESTIMATED TOTAL	\$81.04

HAVE A PROMO CODE? 🏷️

PROCEED TO CHECKOUT


2. Along the bottom of the review cart page, you will also see




Saved For Later No Products Yet.

You don't have items in this list yet. **A**


B **RECENTLY VIEWED**




B BRAUN V7410
\$124.49
★★★★★



BEAUMONT PRODUCTS
636471430
\$42.49
★★★★★




B BRAUN V9902F
\$238.50
★★★★★




DARCO SLQ3B
\$9.50
★★★★★


C **CUSTOMERS WHO BOUGHT THIS ITEM ALSO BOUGHT**




KC 01040
\$74.84
★★★★★



ANSELL R515
\$228.00
★★★★★



BAXTER 2CR537
\$243.99
★★★★★



BAXTER 2CR541
\$239.03
★★★★★

- a. Items you may have saved for later
- b. Recently viewed items
- c. Products that were bought with items you are buying

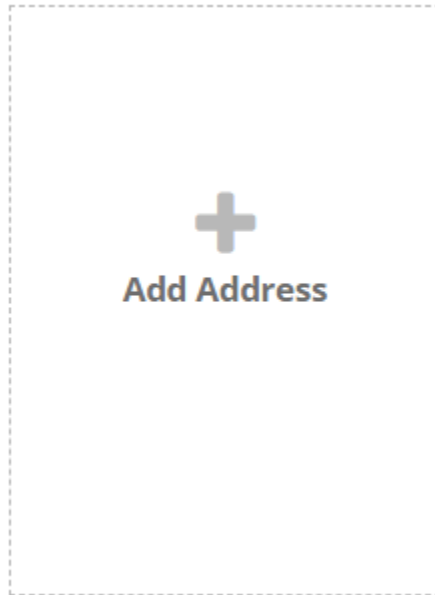
Check Out

1. Choose Shipping Address
 - a. If multiple are available check the one it needs to ship to.

Shipping Address

<input checked="" type="radio"/> Selected	<input type="radio"/> Select	<input type="radio"/> Select
<div style="border: 1px solid black; height: 40px; width: 100%;"></div>		
ROGERS Minnesota 55374 United States Edit Remove	29730 United States Edit Remove	United States Edit Remove

- b. You may also add an address is not available



2. Choose Delivery Method

Delivery Method

<input type="radio"/> FedEx 2DA	\$13.86
<input checked="" type="radio"/> FedEx GRD	\$9.29
<input type="radio"/> FedEx SOV	\$23.84

- a. Delivery Method options are based off product weight/dimension and address zip code.
 - b. Cost is an estimate and is not guaranteed.
 - c. Required field – delivery method must be chosen
 - d. Shipping cost that should be zero will be removed at time of check out.
3. Payment Method

Payment

Payment Method

Credit / Debit Card Invoice

Terms 2% Net 30	Available Balance \$9,530,538.66
---------------------------	--

I agree to pay with my current Invoice [Terms & Conditions](#)

- a. If customer has terms it will default to Invoice with customer terms
 - b. There is also an option to choose Credit/Debit Card and pay
4. Purchase Order Number

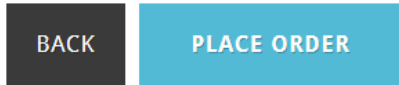
Purchase Order Number

Enter Purchase Order Number (Optional)

- 5. Click Continue
- 6. Page comes up to review
 - a. If all good you are ready to place order
 - b. If not, you are able to edit

7. Check box for “I agree to the Terms & Conditions” and Place Order

I agree to the [Terms & Conditions](#)



8. Window will show NetSuite sales order number for reference and a summary of total

Thank You For Shopping With Us!

Your order number is #SO44584.
 We received your order and will process it right away.
 You will receive an email with this confirmation in a few minutes.

CONTINUE SHOPPING
DOWNLOAD PDF

SUMMARY

SUBTOTAL 1 ITEM	\$11.96
<small>Subtotal Does Not Include Shipping Or Tax</small>	
SHIPPING	\$0.00
TOTAL	\$11.96

a. You can print s PDF copy as well

Requesting Quotes

There are a couple of ways of creating quotes

Request a Quote

1. Click on Request a Quote on top right corner of page



2. Window opens and you enter the product information and qty. **Note: this requires you to know specific product information such as NetSuite Number or MFG part number.**

[HOME](#) > [MY ACCOUNT](#) > [REQUEST A QUOTE](#)

Request A Quote

[SUBMIT QUOTE REQUEST](#)

No Items Yet

Once your quote has been submitted, a Customer Service representative will contact you in **1 business days**. For immediate assistance call us at (832)-886-5300 or email us at customer@optimalmax.com

Add Items

Which item(s) would you like to add? Quantity

ADD ITEM

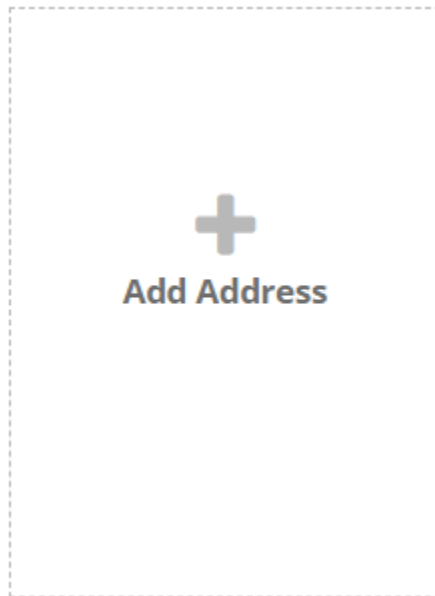
3. Click add item until all items you would like a quote for are added
4. Choose Shipping Address

- a. If multiple are available check the one it needs to ship to.

Shipping Address

<input checked="" type="radio"/> Selected	<input type="radio"/> Select	<input type="radio"/> Select
<div style="border: 1px solid black; height: 40px;"></div>		
ROGERS Minnesota 55374 United States Edit Remove	29730 United States Edit Remove	United States Edit Remove

- b. You may also add an address is not available



5. Add Comments

Comments

Do you have any remarks or comments with this quote request? (Optional)

Maximum 999 characters.

6. Submit Quote Request
7. Page will open with Quote Number

Thank You!

Your Quote Request #QTE345 was successfully placed.
A Customer Service representative will contact you in **1 business days**.
For immediate assistance contact **Contact Customer Service** at (832)-886-5300 or send an email to customercare@optimalmax.com

[REQUEST A NEW QUOTE](#) [SEE YOUR QUOTES](#)

Add Via Product Detail Page

1. While on a Product Detail Page you can add to quote.
2. Once all product you want are added go to Request a Quote top right corner of page
3. Quote page will open for review
 - a. You can adjust Qty or remove items
4. Select Address
5. Add comments
6. Submit