OpsMerchant Quick Steps

Provisioning Account Numbers

1. From the Message section of your Home tab select **New Account.**
2. <u>**Click** "Enable"</u> next to the account that you would like to enable.
3. Key in your account number for the property. If you do not use account numbers the property name can be used.
4. Check the **Close request upon save** box.
5. **Save**
6. The account will be provisioned. To view your active accounts click the **Customers** tab.

Sending Electronic Invoices

1. From the Home Screen select the **Invoices** tab**.**
2. Click on **New Invoice**.
3. Key in your invoice details. All areas marked with a red circles and white arrows are required fields.
4. To add line item details fill in the blank row at the bottom of the invoice template then click **add line**. The line item total will be added to your grand total and a new row will appear to add additional lines to your invoice.
5. Taxes and shipping charges will need to be added in the total box at the top of your invoice.
6. Review the invoice details
7. Click **Submit to Customer**.
8. The invoice will be sent to the customer and can be viewed in the **Invoices** section of your home page under **sent to customer** or by clicking the **Invoices** tab. See Invoice Search in this document for additional information.
9. **Important: Suppliers are unable to make changes to invoices once they have been submitted to the customer. Please review your invoice for accuracy before clicking submit to customer.**
10. **If you've created an invoice in error please do one of the following: 1. Tell the property to ignore the invoice and submit an email to <u>equityvendors@eqrworld.com</u> to request the invoice be voided. 2. Submit a credit memo in Ops to offset the expense of the incorrect invoice.**

Confirming Orders

1. From the Home Screen select **Orders**.
2. Select the order that you would like to confirm.
3. Key in your order number. This is any number that your system generates to identify the order. If you do not use orders numbers the WTN# can be used.
4. If your order includes a service date field, please select the service date before confirming the order. This is the date/time frame for which you will provide the services to the property.
5. If applicable, add any notes you wish to send to your customer in the **CSR Notes** field.
6. Click **Confirm**
7. The order status will change from new to confirmed.

Accepting Invitations from new customers

1. From the Home Screen under Messages select **New Customer.**
2. Review the terms and conditions and select **Process Request**.
3. Click **Buy Now** below the available subscription type.
4. Review the Supplier Agreement, **Check the I Agree to the Terms and Conditions box**, click **Next Step**, update any applicable credit card information, and click **Next Step**.
5. A completed registration message will appear.
6. If you are a managed catalog supplier see submitting your catalog in this document.

Order/WTN Search

1. From the Home Screen, select **Orders.**
2. Mouse over Show Options
3. Enter the criteria in the given filters to find the WTN(s) you need to review.
4. Change the status and cancel filters to –select--
5. Select **Search**.
6. Select the **WTN** or **Order #** to view details.

Invoice Search

1. From the Home Screen, select **Invoices.**
2. Mouse over **Show Options**
3. Enter the criteria in the given filters to find the invoice(s) you need to review.
4. Select **Search**
5. Select the **WTN** or **Invoice number** to view details

Creating an Invoice from an Order/WTN

1. Locate the confirmed order using the steps in Order/WTN Search above.
2. At this screen click the **WTN#** that you are creating an invoice for.
3. Select **Create Invoice.**
4. Key in the invoice details.
5. To edit a line item from the original order, select **edit** at the end of the line, update the information, and select **refresh**.
6. To add line item details fill in the blank row at the bottom of the invoice template then click **add line**. The line item total will be added to your grand total and a new row will appear to add additional lines to your invoice.
7. Review the invoice details
8. Click **Submit to Customer**.
9. The invoice will be sent to the customer and can be viewed in the **Invoices** section of your home page under **sent to customer** or by clicking the **Invoices** tab. See Invoice Search in this document for additional information.
10. **Important: Suppliers are unable to make changes to invoices once they have been submitted to the customer. Please review your invoice for accuracy before clicking submit to customer.**

Credit Memos

1. Locate the invoice following the steps outlined in the Invoice search section of this document.
2. Select **Issue Credit**.
3. Key in the credit memo invoice details.
4. Adjust the line item details and refresh to update the grand total to reflect the amount that you would like to credit to the customer.
5. Update the Qty to 0 for items that should not be credited back.
6. Review the Credit Memo details
7. Select **Submit to Customer**

Rejecting an Order/WTN

1. Locate the order following the steps outlined in the Order/WTN Search section of this document.
2. Key in your order number.
3. Select **Edit** next to Notes to Buyer.
4. Type in the reason for rejecting the order in the Notes to Buyer section.
5. Select **Reject**

** When rejecting orders they will be canceled.

Updating Account Numbers

1. From the Home Screen select **Customers**.
2. Click **edit** next to the account that should be updated
3. Update the information
4. **Save**

View the online catalog/Create a shopping list

1. From the Home Screen, select **Products**
2. Select the customer and account
3. Click **Search**
4. The catalog categories will appear below. Click the category displayed, then subcategory, the catalog items will be displayed next to the categories.

OpsMerchant Quick Steps

Reports

1. From the Home Screen select Reports.
2. Select a report category
3. Run the available reports by clicking on the report name
4. View the details or chose from the available icons to download the report in another format.

Updating Account Information

1. From the Home Screen select Account & Settings.
2. Click Edit next to company profile
3. Click change logo to locate and add a company logo
4. Update the company information and click Save

** To update your service area
1. From Account & Settings
2. Click locations
3. Add service cities, States

** To update your products/services offered
1. From account & Settings
2. Click Services
3. Select services from available services in the dropdown list.

** The company information visible to all property management companies using the OpsTechnology application can be viewed by clicking My Public Profile. Logos added to the company profile will be displayed on various OpsTechnology sites.

Updating Payment Information

1. From the Home Screen select Account & Settings.
2. Click edit next to the Account Information area
3. Select add new card from the drop down list
4. Add the card information
5. Click Save

Upgrading invoice packages

1. From the Home Screen select Account & Settings
2. Click upgrade in the Invoice transmission subscription services section.
3. Chose from the available invoice packages
4. Click Upgrade

Submitting your Catalog

1. From the Home Screen select Help
2. Select and download a template from the list under catalog template downloads. The template will download in an excel file.
3. The template may contain examples of items commonly in a catalog. Add, edit, or delete information from the template to create your customer catalog.

   Column information is as follows:
   Product Name: 150 character field stating the name of the product.
   Product Description: 350 character field that provides a more detailed description of the product than provided in the name field.
   Category: A unique reference to help OpsTechnology determine the OpsTechnology category for each SKU. Refer to the Taxonomy file.
   Manufacturer: 50 character field naming the manufacturer of the product.
   Supplier SKU: 25 character field listing your SKU number
   UOM: 25 character field indicating the Unit of Measure in which this product is sold (e.g.: EA, BX, SY, PKG, EA, etc.)
   Package Quantity: Use integers only in this field. This is the number of items in each UOM (e.g.: 2 ice cube trays per BX, 1 SY of carpet, etc.)
   Image Name: 100 character field listing the name of the image file associated with this SKU. NOTE: the image must be sized to 200x200 pixels, gif or jpeg format. Images can be sent separately, but we need the image file name listed in the template
   Price: Price of the SKU per UOM

4. **Email the completed catalog file to catalogs@opstechnology.com**

5. The catalog will be processed and loaded for your customer. An email will be sent to you once the catalog has been completed.

Online Training

1. From the Home Screen select Help.
2. Select from the available training videos by clicking on the name of the video.

OpsTechnology Contact Information

OpsTechnology Service Request Team – servicerequests@opstechnology.com

Phone: 800-704-0154 opt 7