



# **Roche Promotional Gateway User Guide**

*Creating Orders and Managing your Address Book*

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## Roche Promotional Gateway

### Description

The **Roche Promotional Gateway** is a web-based system for you to easily and quickly order promotional materials on line.

**Note:** Adobe Flash version 11.1 is required to use the Roche Promotional Gateway

### The Process

The ordering process takes about 5 minutes and your order will be delivered to the designated address in 3 to 5 days.

- As delivery time is 3-5 days, please ensure that you plan and place your orders accordingly.
- In cases of urgency, materials can be shipped overnight. However it will require contacting your system administrator.

### To start

New users will receive a welcome email with a link to the site. In addition you will be provided with a **temporary** password to access the program for the first time.

### Important

- You will be prompted to change your **temporary** password to a permanent one of your choice.

If you are experiencing any problems, please contact  
your **System Administrator**

**Keith Hart at:**  
**(905)-542-5039**  
**keith.hart@roche.com**

## Login

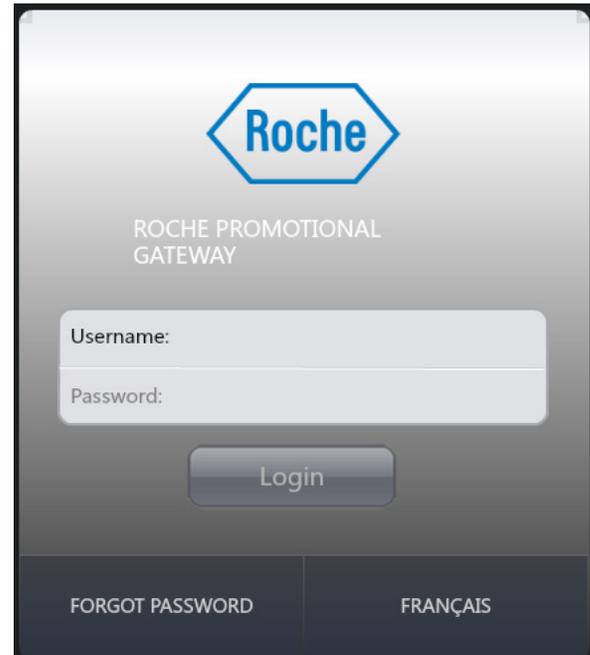
### Login to the Roche Site

- Click on the URL contained within the welcome email, to access the site.

**Note:** Bookmarking this URL is recommended for ease of future access.

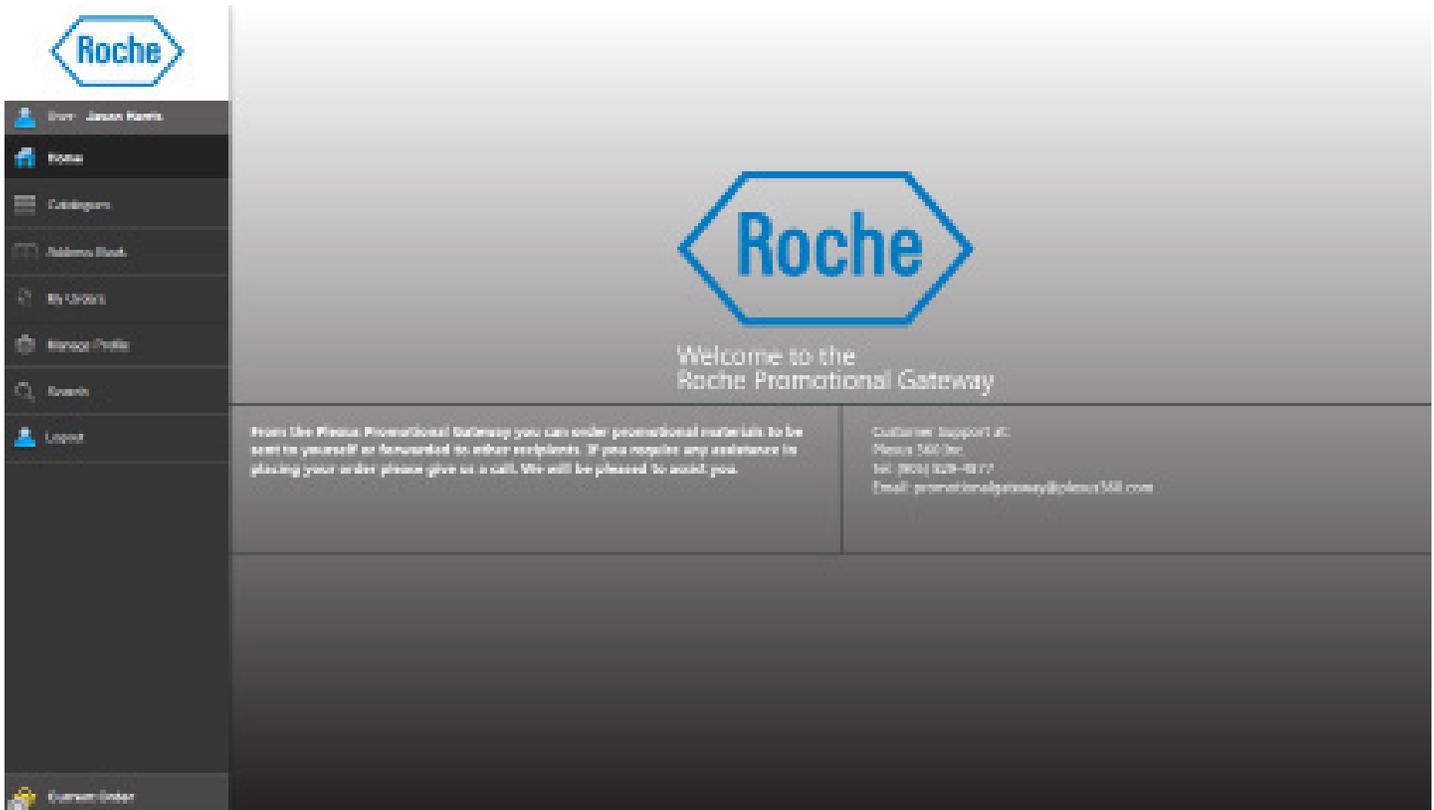
### User Login

- Enter your username (**company email**) and **password**.
- Click **Login**.



### Welcome Screen

- Upon successful login you will be greeted with the welcome screen.
- On the left you will see a menu with the following links: **Home, Catalogues, Address Book, My Orders, Manage Profile, Search** and **Logout**.



## Manage Profile

**Note:**

It is important to verify (correct and update as needed) your profile, in particular your address, or your orders will not be delivered properly.

### Manage Profile

- Select “**Manage Profile**” from the left menu.
- Verify the information in the boxes is correct. To make corrections click the boxes and make corrections.
- Once corrections are made click “**Save**” to save the changes.



### Light and Heavy Addresses

*The Light Address* is your home address.

*The Heavy Address*, if different, is usually a locker address for larger orders.

First Name :	Deene
Last Name :	Phaneuf
Email :	dphaneuf@plexus360.com
Password Created	Aug 3 2012 11:28AM <a href="#">Change Password</a>
Cell Phone :	
Telephone :	905 829 4877
Fax Number :	

Product Split  % ENG | 25 % FR

Language Preference  Eng  FR

Preferred Shipping Method

**Light Address**

Address 1 :	2902 South Sheridan w
Address 2 :	
City :	oakville
Province :	<input type="text" value="British Columbia"/>
Country :	<input type="text" value="Canada"/>
Postal Code :	v2a 3v5

**Heavy Address**

Address 1 :	29
Address 2 :	
City :	Mississauga
Province :	<input type="text" value="British Columbia"/>
Country :	<input type="text" value="Canada"/>
Postal Code :	v2a 3v5

## Placing an Order

*Allows the user to place an order for shipment to themselves and/or others.*

There are 3 steps to placing an order:



**1. Select Product(s)**



**2. Select Recipient(s)**

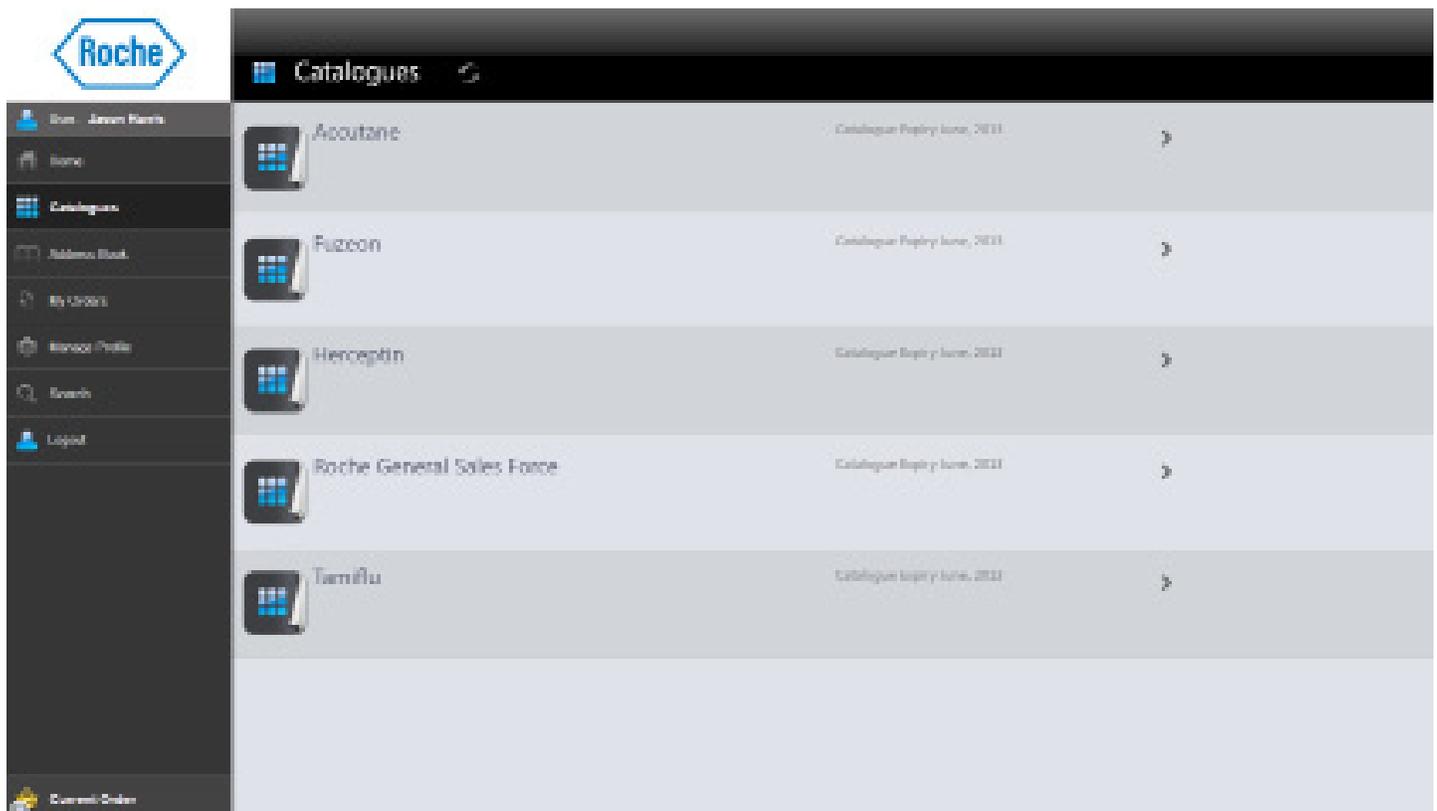
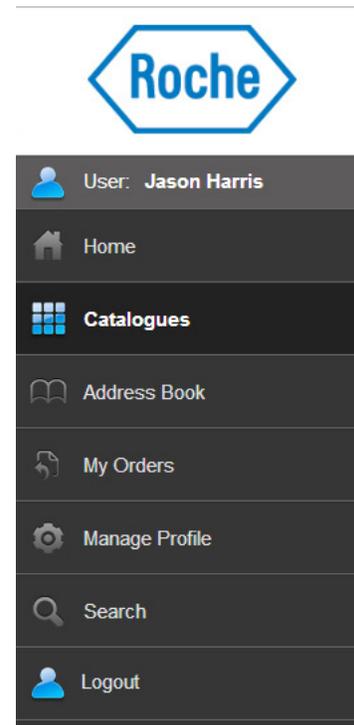


**3. Checkout**

# 1. Select Product(s)

## Choosing a Catalogue

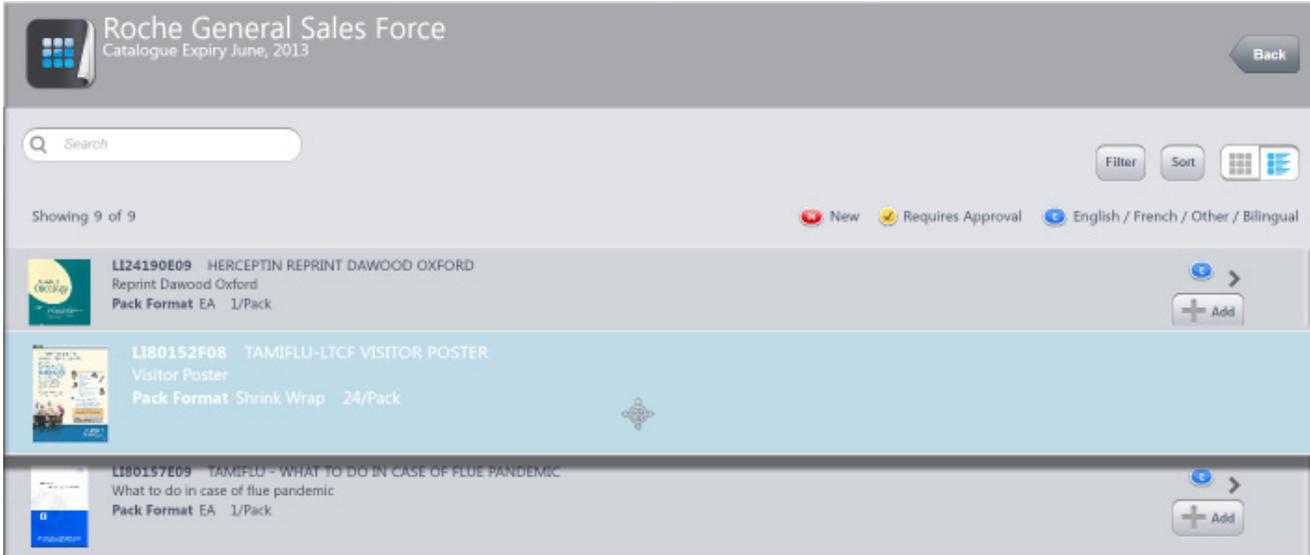
- Products are arranged in catalogues for ease of viewing.
- Only catalogues available to the user will appear.
- Select “**Catalogues**” on the left menu.
- A list of available catalogues will be displayed (see below).
- Select a Catalogue to browse for products.



# 1. Select Product(s) (continued)

## Product List

- All of the products associated with the catalogue will be displayed.



The list view of a catalogue includes:

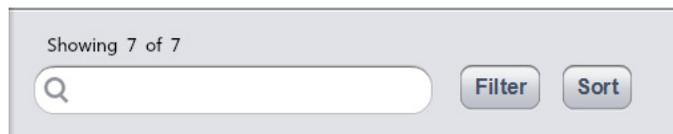
- Product Name**
- Product Code**
- Product Description**
- Package Format:** Describes how an item is packaged.  
*Example one: 10/Pack - If you order a quantity of 1, you will receive 1 pack of 10 single units.*  
*Example two: 10/Pack - If you order a quantity of 10, you will receive 10 packs of 10 single units (100 single units).*

## Viewing a Catalogue

You can view a catalogue in either “**List View**” or “**Grid View**”.



You can also “**Search**”, “**Sort**” and “**Filter**” each catalogue in any combination of ways to help locate particular products for your order.



## 1. Select Product(s) (continued)

### Product Icons

As well as code, name and description, some products also have icons providing further details on the product.



New Product  
*(Added within the last 90 days)*



Orders with these products will be sent to the Product Manager for approval before shipping. All products in the same order not requiring approval, will ship immediately.



Refers to the language of the product  
*[from left to right: English, French, Both/Bilingual, Other]*

(Some products are available in multiple languages, ensure you select the correct one)

# 1. Select Product(s) (continued)

## View Product Details

- To view more details about a product simply click anywhere on the desired product in the catalogue.
- This will direct you to the product details page.
- Here you can view additional details on a product including full description and a larger image.

**Maximum** sets the maximum number of units that you can order over the life of the catalogue.

**Increment** is the number of units the “quantity” is forced to increase by when adding to an order.

**Remaining** indicates units available to the user to order until the expiry of the catalogue.

**Inventory** is the amount of inventory in the warehouse.

**Note:** Items currently out of stock will not appear in the catalogue.

Product Detail Back

**TAMIFLU-LCTF VISITOR POSTER**  
**LIB0152E08**  
 Visitor Poster

Package Format			
Shrink Wrap			
		24/Pack	
Maximum	Order increment	Remaining	Inventory
250	1	200	200

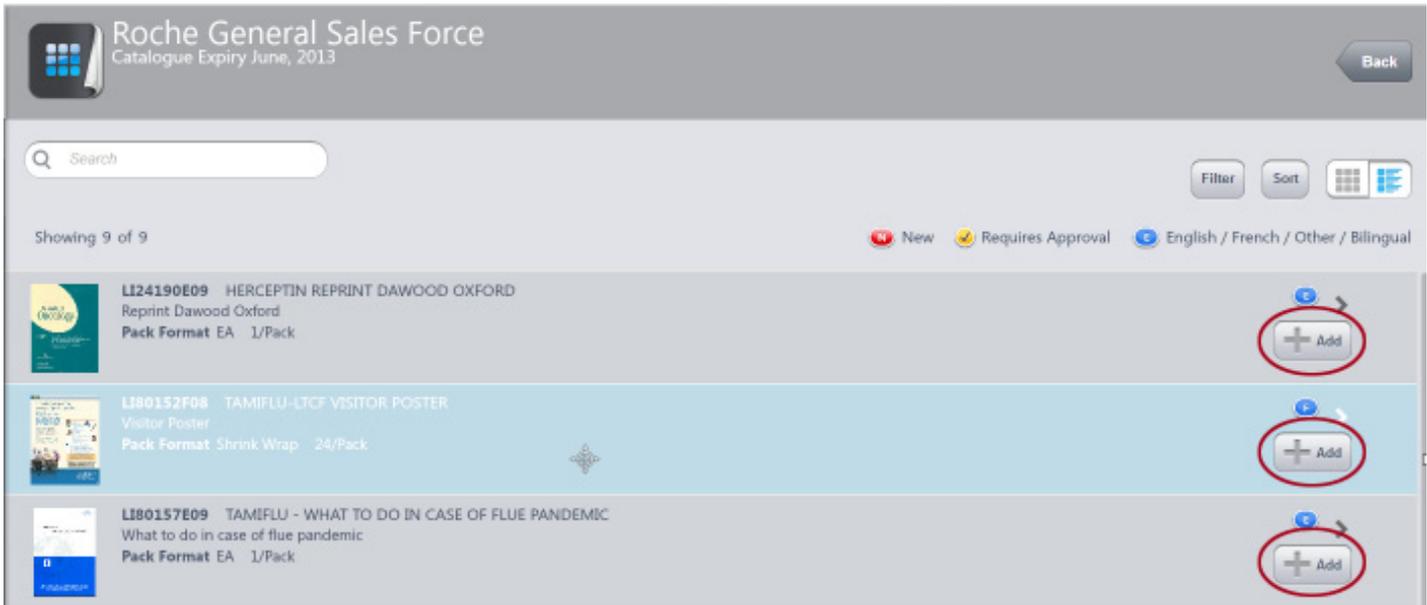
+ Add to Order
↓



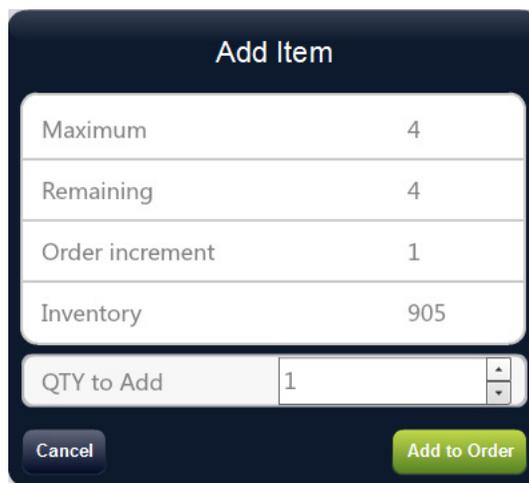
# 1. Select Product(s) (continued)

## Add a Product to Cart

- To add a product to your shopping cart simply click the “**Add**” button next to the desired product in the catalogue list view or product detail view.



- This will prompt the “**Add to Order**” popup to appear.
- Select the quantity of the given product and click “**Add to Order**”



- You may notice that the product counter on the “**Cart**” icon in the bottom left was incremented by the quantity added when you added the product to your order.
- You can click the “**Cart**” icon at any time to view the products in your current cart. We will discuss the cart screen more in the “**Check Out**” section.



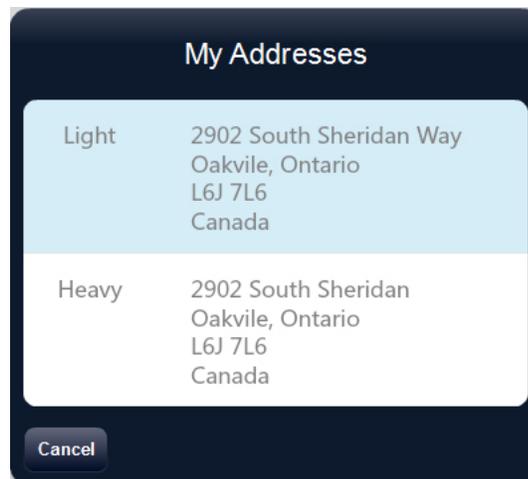
## 2. Select Recipient(s)

### Choosing Recipients

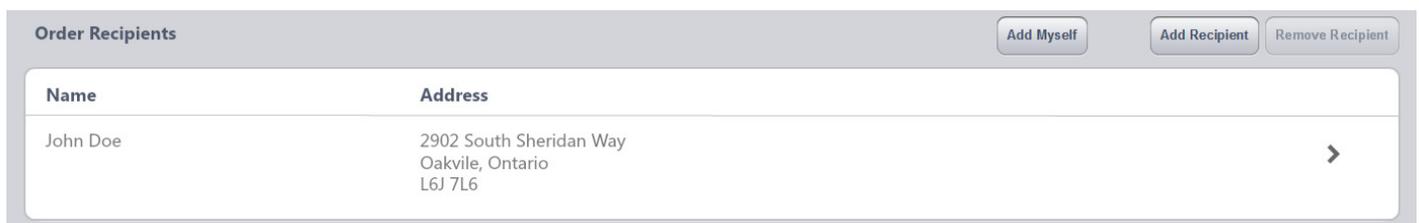
- Select the “**Cart**” icon on the left menu.



- To add yourself to the order select “**Add Myself**”.
- If you have a different “**Light**” and “**Heavy**” address for your profile a prompt will appear for you to select which address you wish to add. If both your “Light” and “Heavy” addresses are the same, you won’t see the prompt and your address will simply be added to the recipients list.

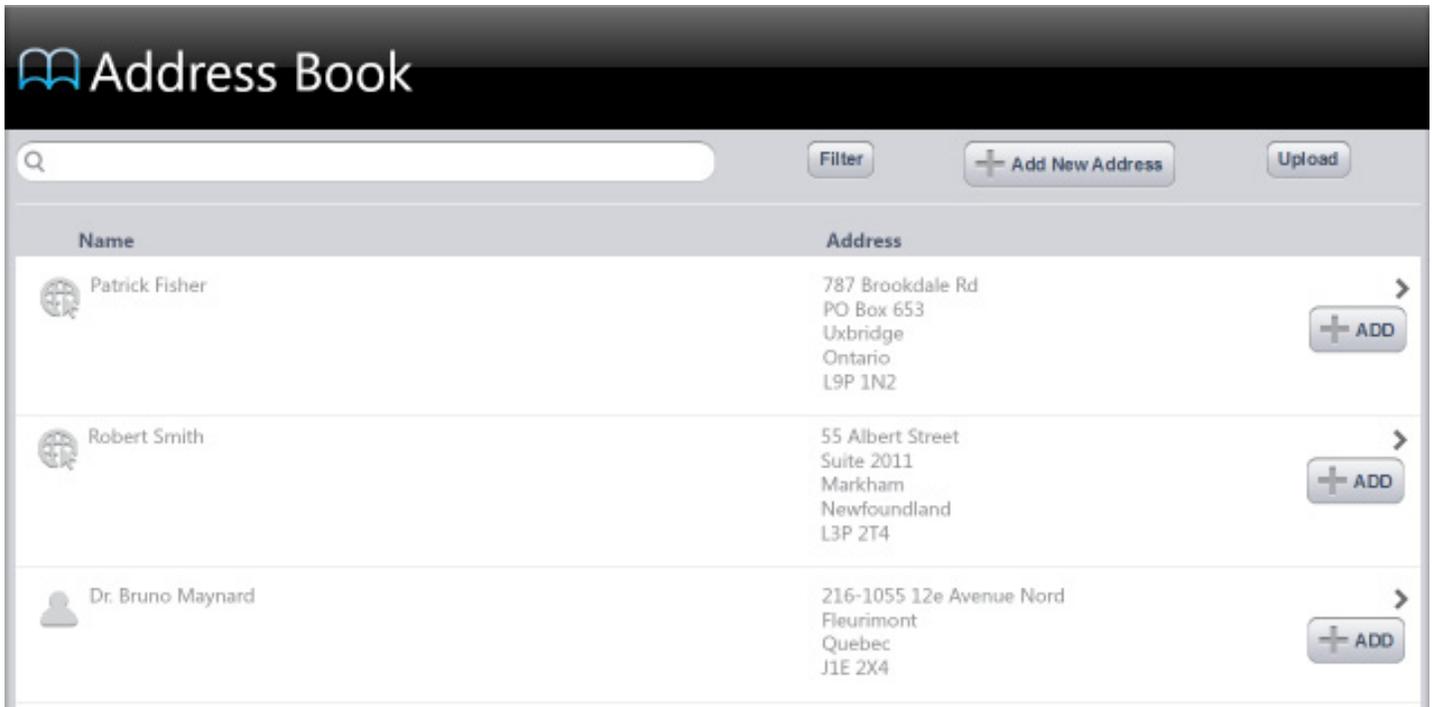


- If you want to ship the order to other recipients then select “**Add Recipient**”.



## 2. Select Recipient(s) (continued)

- From here, simply click the “Add” button next to the recipient to add them to the recipients list.



The screenshot shows the 'Address Book' interface. At the top, there is a search bar with a magnifying glass icon, a 'Filter' button, an '+ Add New Address' button, and an 'Upload' button. Below this is a table with two columns: 'Name' and 'Address'. Each row represents a recipient and includes a small globe icon, the recipient's name, their address, and a '+ ADD' button with a right-pointing arrow.

Name	Address
 Patrick Fisher	787 Brookdale Rd PO Box 653 Uxbridge Ontario L9P 1N2
 Robert Smith	55 Albert Street Suite 2011 Markham Newfoundland L3P 2T4
 Dr. Bruno Maynard	216-1055 12e Avenue Nord Fleurimont Quebec J1E 2X4

### Note:

If the recipient is not in your address book, you may add them by selecting “Add New Address”. This will be covered in the “Address Book” section.

### 3. Checkout Process

- Select the “Cart” icon on the left menu.



#### Review Products in Cart

- First review the items in your order.
- You can still add/remove items as well as edit the quantity to be shipped.

#### Review Recipients List

- Next review the recipients to whom the order will be shipped.
- You can still add/remove recipients.

**Current Order (5 item(s))**

**Items to be included in Order** 
[Back to Items](#) [Add Item](#) [Remove Item](#)

Item	Item Code	Description	Quantity
TAMIFLU-LCTF Visitor Poster	LI80152E08	Visitor Poster	5 <span style="float: right;"><a href="#">Edit QTY</a> &gt;</span>

**Order Recipients** 
[Add Myself](#) [Add Recipient](#) [Remove Recipient](#)

Name	Address
Jason Harris	2902 South Sheridan Way Oakville, Ontario L6J7L6 <span style="float: right;">&gt;</span>

[Cancel Order](#) [Submit Order](#)

### 3. Checkout Process (continued)

#### Submit Order

Once you have reviewed your order, you may submit by pressing “**Submit Order**” button or “**Cancel**” the order to start over.



#### You have now placed your order!

- A pop up box will appear giving you the Order Number.
- You may wish to make a note of the Order Number for tracking purposes.
- You will receive an email when the order has been processed advising you of the tracking number.



## Address Book

*From your address book you can:*

- *Add New Contacts*
- *Update Contacts*
- *Delete Contacts*

### My Address Book

- Select “**Address Book**” on the left menu.

### Types of Contacts

There are 2 types of contacts in the Address Book.

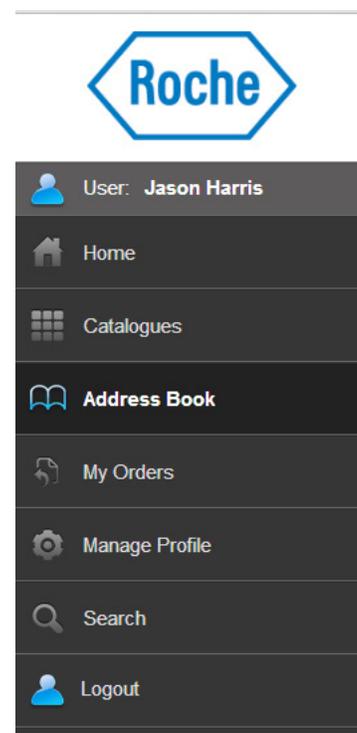


**Global Contacts** are all the users of the system. These contacts are seen by everyone and can only be edited by System Administrators.



**Personal Contacts** are recipients you have added to your Address Book. These contacts are only seen by you and can be edited at anytime.

*Example: An important physician to whom you wish to send products.*



## Address Book (continued)

### Add a New Recipient

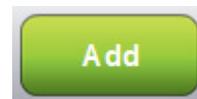
- Click “Add New Address”



- Enter all the required fields (\*) for the new recipient.
- All of this information can be updated/edited later.

A screenshot of a web application window titled "Address Detail". The window has a grey header bar with a "Back" button on the left, the title "Address Detail" in the center, and "Cancel" and "Add" buttons on the right. The main content area is a white form with several input fields. The fields are: "Name" (required, marked with a red asterisk), "Company", "Address 1" (required, marked with a red asterisk), "Address 2", "City", "Province" (dropdown menu with "Alberta" selected), "Country" (dropdown menu with "Canada" selected), "Postal Code" (required, marked with a red asterisk), "Telephone", "Fax", "Email", and "Preferred Shipping Methods" (dropdown menu with "None" selected).

- Once all the required fields have been filled in, simply click “Add”.



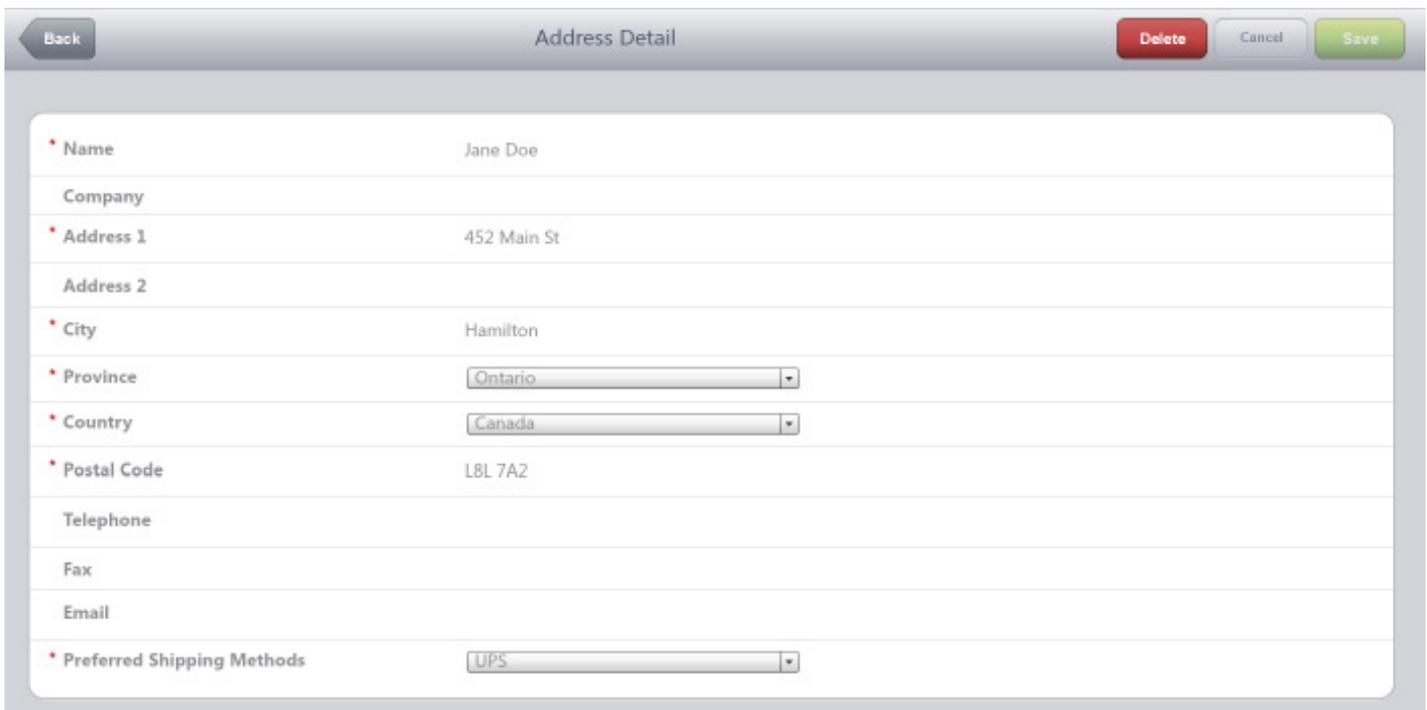
## Address Book (continued)

### Manage Existing Recipient

- To edit or delete a recipient's information simply select that recipient from your "Address Book"



- Update any of the desired fields or select "Delete" to delete the recipient.



- Once all the desired fields have been updated, simply click "Save".



## My Orders

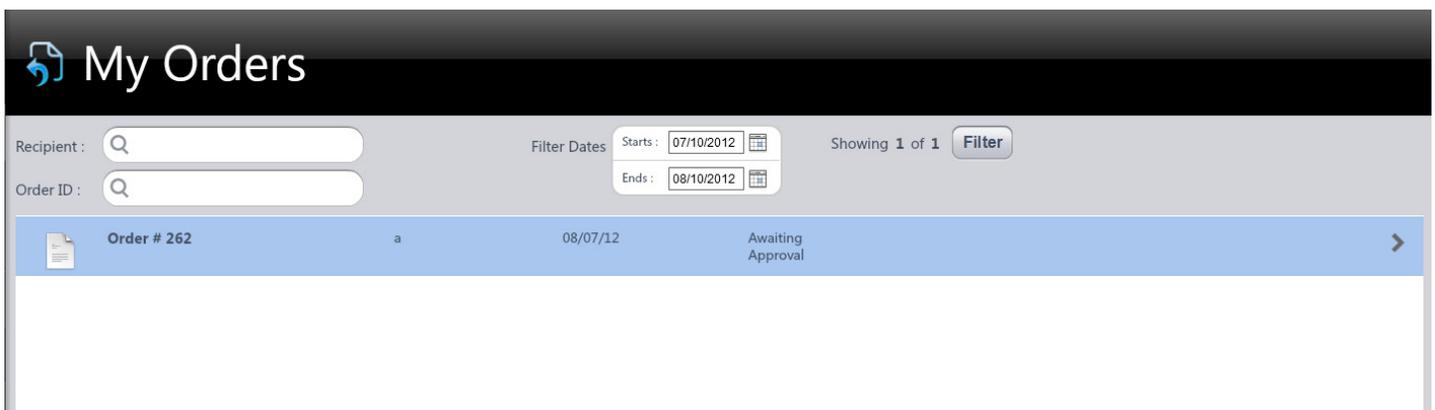
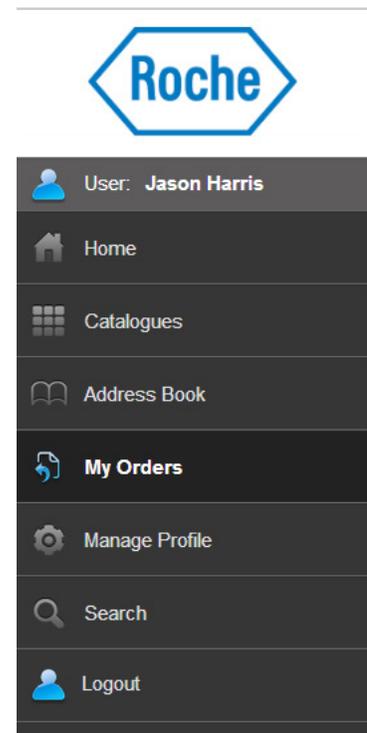
*At any time, a user can check an Order Status re: approvals, shipping, as well as, track its history*

The system is designed to view details of:

- Current and past orders
- Status of orders (pending, awaiting approval or shipped)
- Shipping Dates and Tracking Numbers

### View Orders

- Select **“My Orders”** on the left menu.
- This will open up the **“My Orders”** screen which will show you all of the orders submitted from your account.
- You can Search and Filter by date, order ID and order recipient.



## My Orders (continued)

### View Order Details

- Select an order from the list to view more information about the order including the tracking number.

View Order Detail Back

**ORDER DETAILS**

ORDER #:	539		STATUS: Waiting Transmission
DATE:	Oct 25 2012 12:45PM	<a href="#">View Transmission History</a>	
ORDERED BY:	Jason Harris	<a href="#">Cancel Order</a>	

**SENT TO**

Jason Harris  
 2902 South Sheridan Way  
 Oakville, Ontario  
 L6L 6K6  
 Canada

**ITEMS IN ORDER**

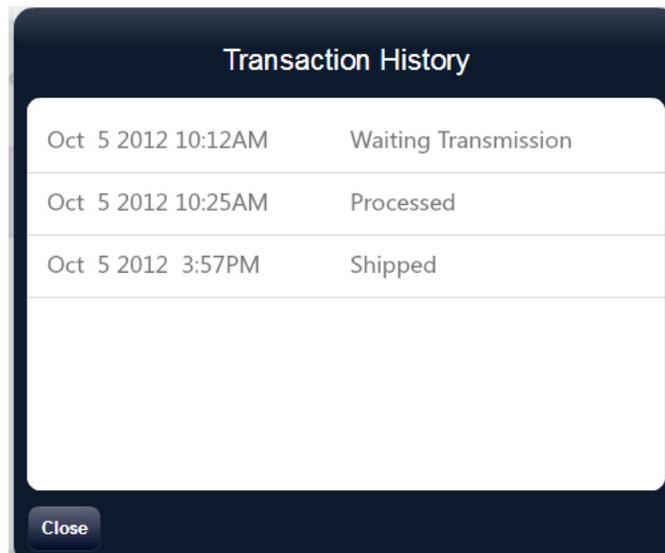
Item#	Name	Unit	Qty	Status
10010001	TIMEFLU-ITOP Visitor Poster	Shrink Wrap	5	Approved

**TRACKING NUMBERS**

## My Orders (continued)

### View Transaction History

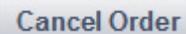
- Select “**View Transaction History**” to view the Order Progress details. (ie. date shipped, date ordered, date sent to warehouse, etc.).

A dark blue dialog box titled "Transaction History" with a white background for the table. The table has two columns: a date and time column and a status column. The status column contains the text "Waiting Transmission", "Processed", and "Shipped". At the bottom left of the dialog box is a "Close" button.

Transaction History	
Oct 5 2012 10:12AM	Waiting Transmission
Oct 5 2012 10:25AM	Processed
Oct 5 2012 3:57PM	Shipped

### Cancel an Order

- If it becomes necessary to cancel an order, select “**Cancel Order**” from the Order Details page.
- An email is automatically sent to the warehouse and System administrators requesting the order be cancelled.
- If the warehouse has not yet processed and shipped the order, the order will be cancelled.

A light blue button with rounded corners and a subtle gradient, containing the text "Cancel Order" in a dark blue font.

Cancel Order

# Search

*Not only can you search while browsing a catalogue to find products within that specific catalogue, but you can also use the “Search” screen to search all the available catalogues at once.*

## Search Screen

- Select “**Search**” from the left menu.
- This will open the “**Search**” screen. From here you can use any combination of Search, Filter and Sort criteria to find products across all available catalogues.

### Note:

When searching in this manner, a product may appear multiple times in your results list as it may be found in multiple catalogues.

