Quick Reference Guide

Welcome to the GBEX Marketplace

HOMEPAGE

To begin shopping, select the “Click Here To Begin Shopping” Button.

- This will direct you into Office Depot’s online catalog specific to your location.
- Once you are in the Office Depot punchout site, you will search for your desired items, add the items to your cart and then checkout. This will automatically transfer your items back to the GBEX Marketplace.

For order questions or product info please contact GBEX Customer Service at 855-372-GBEX (4239) or customerservice1@gbexllc.com
WAYS TO SHOP

1. Search by Keyword or Item#
2. Order by Item #
3. Category
4. My Shopping Lists
5. Ink & Toner

Search by Keyword or Item#
The search field allows you to shop for items by simply entering in a keyword or Part ID in the SEARCH field and selecting the search icon.

Order by Item Number
Located at the top of the screen is the “Order by Item #” feature which allows you to simply list the part ID and quantity of the item(s) you wish to add to your cart.

Category
By moving your mouse over the category headings, you can narrow your search by selecting your desired item category.

Shopping List
You may create a shopping list to locate items you purchase frequently in one easy to find place. Selecting My Shopping Lists on the home page will allow you to create a new list or view previously created shopping lists.

Ink & Toner
This is where you can easily filter through various printing supplies to find the appropriate ink or toner for your machine.

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MY SHOPPING LISTS

To create a shopping list . . .

- Locate the item that you would like to add to the shopping list
- Select “Add to Shopping List”
- A window will pop up. This window gives you the ability to create a new list or add the selected item to an existing shopping list.

To add an item to an existing shopping list

- Select the Shopping list name of where you want to add the item
- You will receive a pop up window that indicates your item was added successfully

Create a new shopping list

- Select “Create List”
- Enter the name of your new shopping list and select SAVE

You can access your shopping lists from the Office Depot homepage under My Tools. Click on the appropriate Shopping Lists. Select the item(s) to add to your cart and adjust the quantity. Select “Add to Cart” to add the items into your shopping cart.

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CHECKING OUT

To complete your order select, CHECK OUT. All items added into the shopping cart will be displayed. Select Continue. Your items will be automatically transferred from the Office Depot punchout to the GBEX Marketplace shopping cart.

Transferring your items from the Office Depot shopping cart to the GBEX Marketplace (homepage) will save your items in your shopping cart. The items will be saved in the cart until they are removed or the order is placed. Click the cart icon on the homepage to access your items.

You will be able to view all items entered into your shopping cart from your Cart Details screen.
- To update the quantity per line item, change the quantity in the open quantity field and select SAVE.
- To remove an item from your cart select the box next to the line item and select REMOVE.

Cost Center and Account Codes
- If your location is using cost centers or account codes, the cost center or account code will default to what is set in your profile.
- If you have access to multiple cost centers and/ or account codes click on the dropdown to select the appropriate cost center or account code.

To proceed to checkout select CHECKOUT.

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CHECKING OUT (cont’d)

Shipping and Billing
- The shipping and billing will default to what is set in your profile.
- If you have access to multiple shipping and/ or billing addresses click on the shipping and billing address drop down to select the appropriate address ID.

Payment Type
- Creditline (Account Bill)
- Preload Credit Card
  - If you have a preloaded credit card it will automatically default as payment type ID
- Enter credit card at the time of checkout
  - Populate the required credit card fields with your credit card information
  - Your credit card number will be encrypted as soon as it is entered into the system.

Once all required fields are populated, select Checkout and then select Submit

Depending on your department, one of the following two will occur
- If your department has an approval hierarchy and you place an order above your approval limit, a Requisition ID will be generated. An email notification will be sent to your approver for approval. Once the Requisition ID has been approved, you will receive an email notification with your Purchase Order and the order will be sent directly to Office Depot.
- If your department has no approval hierarchy, a Purchase Order ID will be generated and the order sent directly to Office Depot.

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APPROVING REQUISITIONS

Requisitions are escalated when a user creates an order above the user’s approval limit. When a Requisition is escalated to the approver, an email notification is sent to the approver.

To approve a Requisition an approver will need to log into the GBEX Ordering site, go to the Approvals tab and select “Requisitions”. This displays all Requisitions waiting for approval.

To Approve/Reject a Requisition
Select the box next to the appropriate Requisition ID and select APPROVE or REJECT.
When A Requisition is approved a Purchase Order number is assigned to the order and sent Office Depot to be filled. An email notification will be sent to the user indicating their Requisition has been approved or rejected.
APPROVING REQUISITIONS (cont’d)

To Modify a Requisition
Click on the Requisition ID (This will take you to the Requisition ID Details screen)

Fields that may be modified per line include: quantity, cost center, and account code.
Some departments may require the approver to modify the Requisition by entering the Customer PO#.
Make any desired change, and then click SAVE.

An approver may also remove items from a Requisition by checking the delete box and selecting DELETE ITEM.
(A comment must be entered in the comments field when deleting an item)

Select APPROVE to approve the Requisition or REJECT to reject a Requisition.
An email notification of the Requisition status will be sent to the user.

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ORDER TRACKING

To locate your order, use the Office Depot Order Tracking located in the Office Depot punchout. Enter the search criteria to locate your order.

- **Status**
  - All orders will be listed based on the criteria selecting showing the appropriate status.

- **Reorder**
  - Allows you to take a previous order and add all items to your cart. From this point you can modify the items if necessary.

- **Cancellation**
  - There is a very small window for canceling orders. The window is less than 5 minutes from the time the order was created.
  - To cancel an order the field that states “Changeable” must be YES for that order. Click on the order number and select cancel order.

- **Return**
  - Returns can be placed directly through the Office Depot punchout site.

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REORDER

- Locate your order in Office Depot Order Tracking.
- Click on your order number.
- Scroll to the bottom of your order and select **REORDER** (All items will be added to your shopping cart)
- You can add additional items, remove items or change quantities.
- Follow the steps to checkout.

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RETURNS

- Locate your order in Office Depot Order Tracking.
- Click on your order to view in the “Order Details” screen.
- Scroll to the bottom of your order and select “Begin Return”.
- Follow steps 1 through 3 to submit your return.

- Select Continue to begin the return process
  (The returnable items will be displayed)
- Enter the quantity to return
- Select the return action: Exchange or Return for Credit
- Enter the number of boxes to be returned and select Continue
  (You will receive a return authorization number)
- Print the page by selecting the “Print This Page” link and attach the return authorization document to your order to be returned.

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REPORTING

To create a Purchase order report, select the “Reports” tab and “Purchase Order”.

Purchase Order Report

- This reporting feature allows you to create a custom report.
  - The report criteria acts as your funnel for filtering data to only show what you want to see.
  - The report columns allow you to select the data you want to populate in your report.
  - Selecting your location is required; all other fields are optional. (It should automatically default for you).
- Enter criteria of report, and then select Submit.
- You can export your report into excel by selecting the Excel button.
- You can save your report by entering the name of the report and selecting who you want the report available for.

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LOCATING YOUR INVOICE

*Transaction Log Report*

The Transaction Log is an e-Library of all your invoices. From the Reports tab, select Transaction Log. Enter the order creation date range of the orders you want to yield invoice results. The results will display with a header bar in bold and the line item detail listed below.

The report will generate within the Tier One site.

- If you click on an **Invoice #** the supplier invoice will display in a new window. If you click on the **Purchase Order #** a copy of the PO will display with any cancellations, ship notices, invoices and/or returns. This invoice or PO can be printed.
- Export the report to Excel by scrolling to the bottom of the report and clicking on the Excel button.

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Payment Report

Found under Reports Tab, the Payment Report provides a detailed report of all paid invoices within a date range. The results of this report can be used to reconcile general ledger accounts as it provides full purchase order line item details. Report results will include all invoices with a paid date within the specified range regardless of payment type.

The report generates in Excel with header information listed first for all paid invoices, followed with the line item detail is listed below.

<table>
<thead>
<tr>
<th>Record ID</th>
<th>Type</th>
<th>Supplier Name</th>
<th>Paid Date</th>
<th>Payment Terms</th>
<th>Invoice Status</th>
<th>PO Number</th>
<th>Invoice Date</th>
<th>Supplier Invoice #</th>
<th>EPS fn</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>Header</td>
<td>St Louis Safety Inc 16096</td>
<td>11/8/2010</td>
<td>CREDITLINE</td>
<td>Paid</td>
<td>HGNI-1405</td>
<td>9/21/2010</td>
<td>received on receipt file</td>
<td></td>
</tr>
</tbody>
</table>

- Additional header fields include Subtotal, Freight, Additional Charges, Tax Rate %, Taxes, Invoice Amount, Currency
- Additional line item detail fields include full shipping address, Description, item #, Received QTY, UOM, Unit Price, Extended Price, Taxes, Freight, Additional Charges, Total, PO Number, Payment Reference, Cost Center, Account Code and Item Type.

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Invoice Report

Found under Reports Tab, the Invoice Report provides a detailed report of all invoices within a date range. The results of this report can be used to reconcile general ledger accounts as it provides full purchase order line item details and pending invoices. Report results will include all invoices generated within the specified date range regardless of payment type.

The report generates in Excel with header information listed first for all invoices, followed with the line item detail is listed below.

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