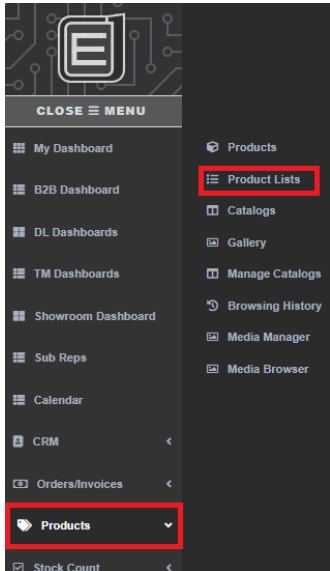
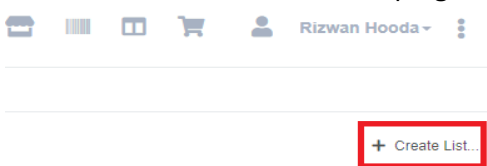


Create a Product List

1. From the left-hand menu, click on **Products > Product Lists**



2. Click on Create List from the top righthand side of the screen



3. Fill out the following fields
 - a. Name your list
 - b. Expiry date – how long you want the list to be available
 - c. Visibility: make the list available in the 'Shop View'
 - i. Order Entry: view list under 'Your Lists'
 - ii. Left Nav: view list under 'Product Lists'
 - d. Customer(s) – if you want any customer to be able to view the list on the website
 - e. Click Save once finished

Create Product List

Name *

Description

Tags
Categorize this list with tags...

Expires *
5/24/2024

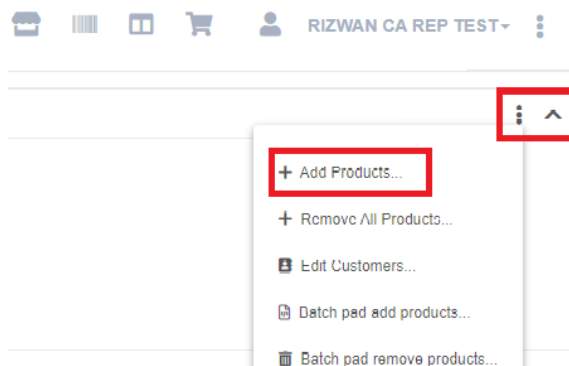
Visibility
 Order Entry
 Left Nav

Customer(s)
Find customer(s) to add...

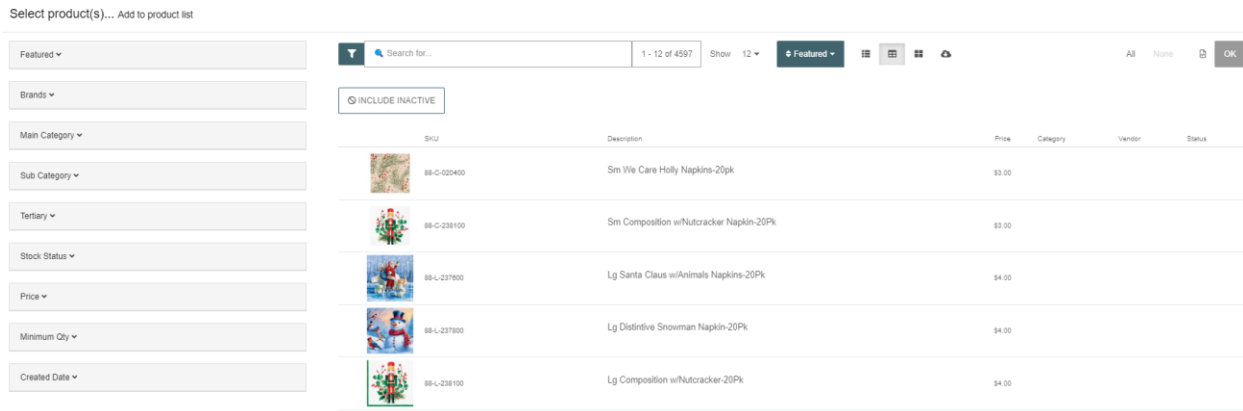
Save Cancel

Create a Product List

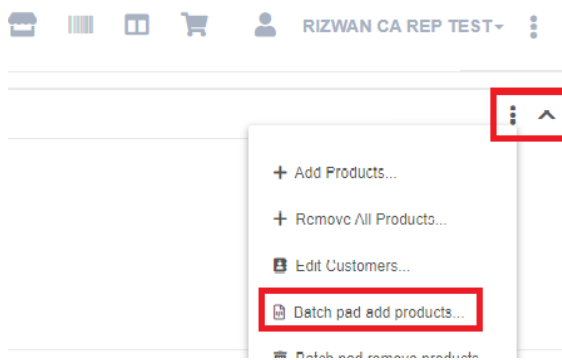
4. Click into your list to start adding products
5. Click on the 3 dots on the top right side, select 'Add Products'



6. You add products multiple ways
 - a. You can search by product code, full or partial
 - b. You can search by UPC code
 - c. You can search by keyword/description
 - d. You can search by the filters



7. You can add items to you list in a batch, by selecting 'Batch pad add products'



8. Enter your items 1 line at a time and click on OK, it will add the products to your list

Create a Product List

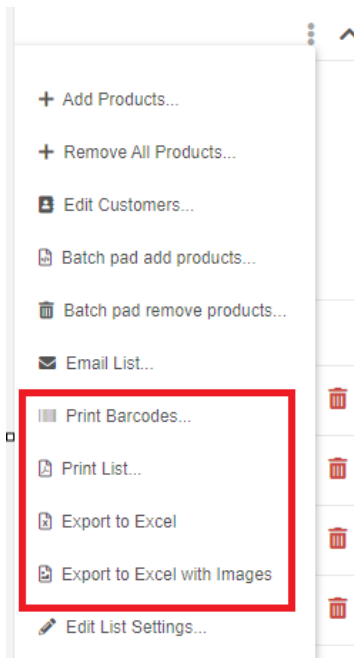
Product Bulk Pad... Enter products separated by comma or white-space

SKUs *

24-1000
27-PURE

OK Close

9. Once your items are entered you can generate
 - a. PDF of List
 - b. Barcodes
 - c. Export to Excel
 - d. The Email List won't work for when sending to customers, they don't have access to log into the CRM site



10. Print Barcodes – pick the printout type, barcode type, and click on download

Barcode Printout

Label Options *

Large Labels (Avery 5160)

Barcode Type *

Code 3 of 9

Starting Position Row *

0

Starting Position Column *

0

Cancel Download

Create a Product List

11. Print Product List – save the PDF and email to customers
 - a. Pick the Report Type
 - i. Product List – has pricing (you can chose to remove pricing), and you can pick the number of items per page
 - ii. Spec Sheet – has 1 product per page, qty available, and no pricing
 - b. Pick the sort for the product
 - c. Click on download

Print Product List... Rizwan Test

Format*

Standard Product List

Standard Product List
Product Spec Sheet

Rizwan Test

Items Per Page*

12

Order By*







Hide Price

Pricelist

Cancel Download

12. If you chose 'Left Nav' in the list settings, you will have access to the list when in the Shop View of order entry

13. If you specified the customer, you only see the list when entering an order for that customer

      RIZWAN CA REP TEST

Shop View

Home / Shop / Shop

Shop

HIDE FILTERS 1 - 36 of 4595

Product Lists

Rizwan Test

Your Lists

WINTER / HOLIDAY

Spring

favourites

SPRING / SUMMER

MOTHERS / FATHERS DAY

List

DISPLAY

XMAS ORNAMENTS

Favorites

Rizwan Test

Order History

Create a Product List

Customer Process from Abbott website

1. From the customers dashboard, click on 'My Profile' and then 'List

00 * Test Customer*** Account Number: 00TEST

| Label | Items | Created By | Customer(s) | Expires | Created |
|-------------|-------|--------------------|-------------|---------|---------|
| Rizwan Test | 5 | RIZWAN CA REP TEST | | 5/24/24 | 3/25/24 |

2. Customers have the option to view, print Barcodes, generate PDF, and Email list

| Label | Items | Created By | Customer(s) | Expires | Created |
|-------------|-------|--------------------|-------------|---------|---------|
| Rizwan Test | 5 | RIZWAN CA REP TEST | | 5/24/24 | 3/25/24 |

3. The customer can shop from the list, they should click on the shopping cart icon, and select 'Continue Shopping'

Menu Search the site

My Cart - 3/25/2024 00 * Test Customer*** (001E51)

REVIEW YOUR CART

Switch Cart + New Cart Delete Cart Continue Shopping

NO ITEMS IN YOUR CART

4. Click on 'Show Filters', the list will appear under 'Recommendations'

SHOW FILTERS 36 of 4595

HIDE FILTERS 36 of 4595

Recommendations

Rizwan Test

My Order History

Featured