



# Table of Contents

Types of Online Accounts.....	4
<b>Creating Additional Accounts</b>	
Sub Account.....	4
Cloned Account .....	5
<b>Understanding the Check Stock Feature .....</b>	<b>6</b>
<b>Understanding the Quick Reorder Feature .....</b>	<b>7</b>
<b>How to Upload an Order .....</b>	<b>7</b>
<b>Viewing Orders &amp; Invoices .....</b>	<b>8</b>
<b>Return Goods Authorization (RGA) .....</b>	<b>9</b>

# Types of Online Accounts

## Master Account Holder (Distributor Account):

In addition to access to e-Commerce features, resource downloads, and interactive resources the master account holder can also set up subaccounts and assign features for their specific location.

## Sub Account:

Sub account user access is assigned *by the master account holder*. Sub account users may be given access to check stock, place an order and/or view orders and invoices. When logged in, this user type also has access to resource downloads and interactive resources.

## Cloned Account:

Distributors responsible for more than one Dixon account AND at least one sub account may prefer to have the ability to toggle between multiple Dixon account numbers with a single login.

## Notice:

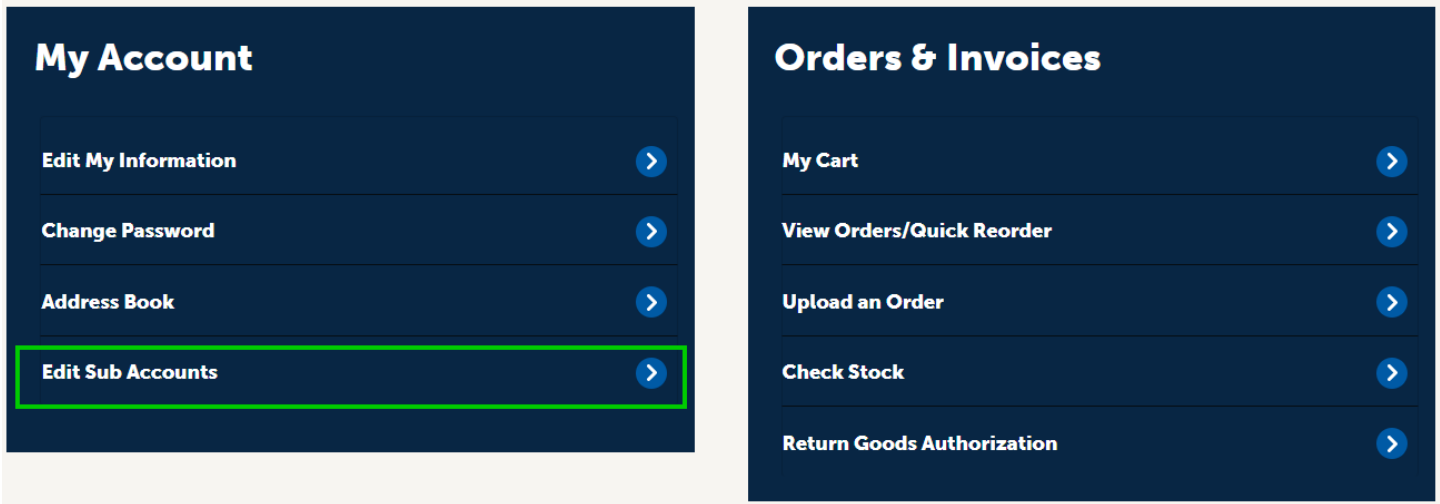
- When an online account holder leaves your company it is the distributor's responsibility to e-mail [getonline@dixonvalve.com](mailto:getonline@dixonvalve.com) to have the individuals account disabled.
- *We strongly recommend that each online account user to have their own individual account credentials for security purposes.*

# How to Create a Sub Account

The master account holder has the responsibility to set up, maintain, and assign account features for all sub accounts.

*Note: When an account holder leaves the company it is the distributor's responsibility to e-mail [getonline@dixonvalve.com](mailto:getonline@dixonvalve.com) to have their account disabled.*

1. On the My Account page click Edit Sub Accounts.



2. Click Add Member next and complete the form, clicking Save at the bottom of the page.

Note: The sub account is active only after they complete the password setup process they will receive via email. The sub account user may access only the resources as assigned by the Master Account holder.

# Cloned Accounts

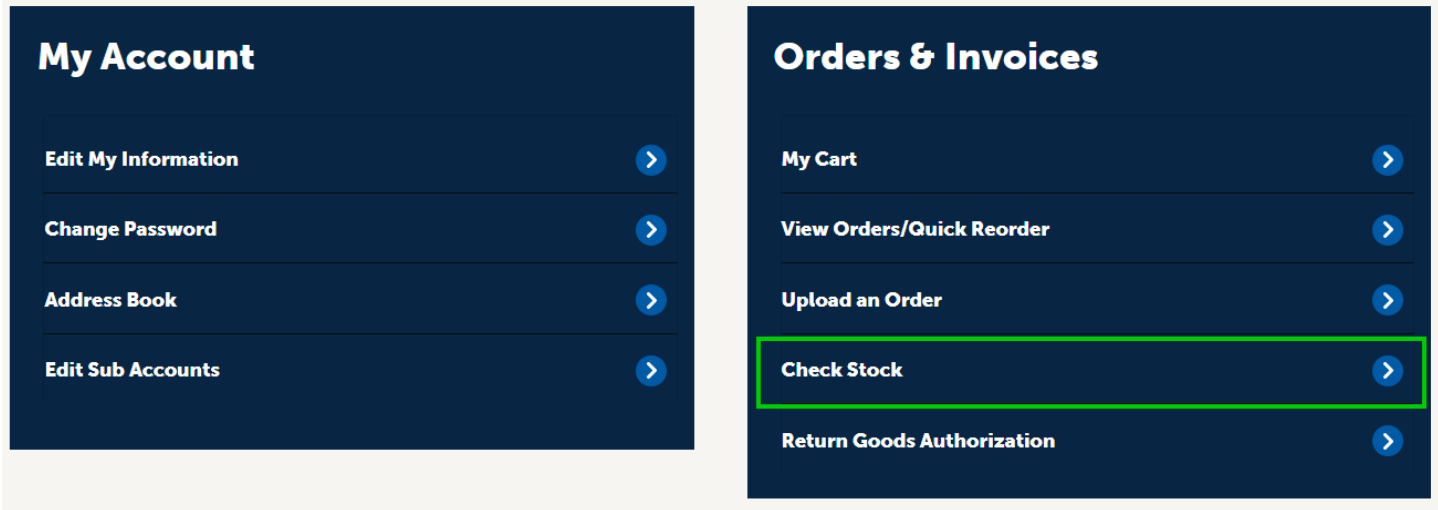
Cloned accounts can only be created by Dixon.

1. Send an e-mail to [getonline@dixonvalve.com](mailto:getonline@dixonvalve.com) requesting the creation of a cloned account. Please supply the additional locations for which you are requesting access.
2. Dixon will attach additional account numbers to the main account and notify the distributor the account has been cloned by e-mail within 1 business day. The clone accounts will be fully accessible within 24 hours of being added.
3. Cloned accounts are accessible by toggling between accounts numbers:



# Understanding the Check Stock Feature

1. On the My Account page click on Check Stock.



2. Add the part numbers for which you want to check availability then click the Check Stock button. If you want to check stock for more than 1 item click the Add Part button for additional rows.
3. Each check stock return provides the distribution centers (branches) where stock is available.
  - Full Quantity Available means that 100% of the quantity requested is available.
  - If less than 100% is available, the display shows the amount available from your primary branch location in addition to the other branch locations where the full quantity is available.

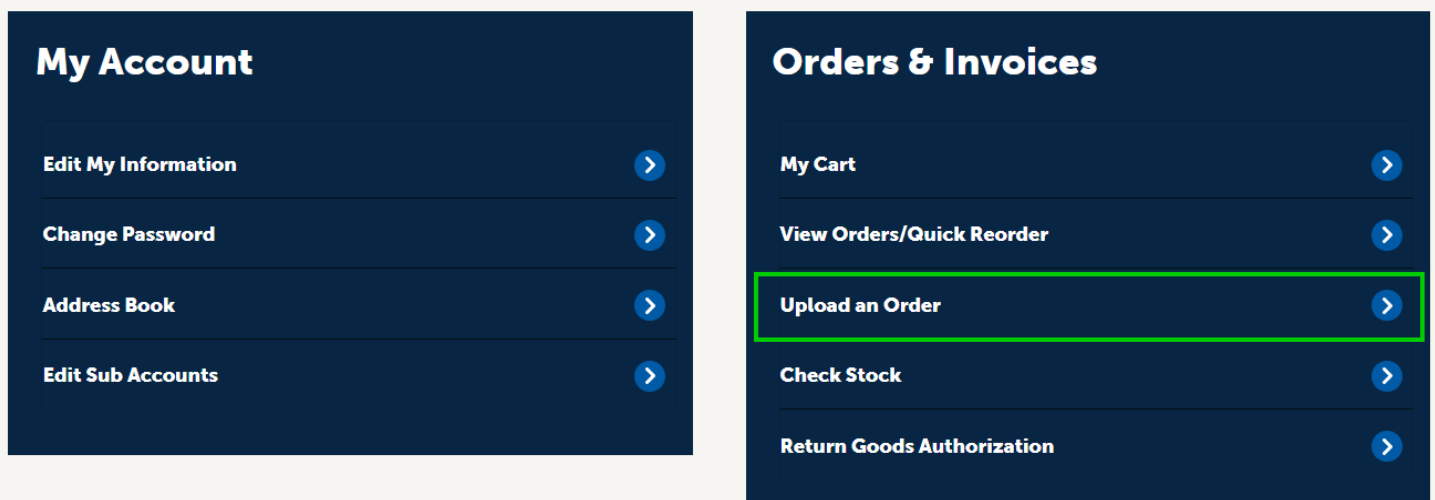
# Understanding the Quick Reorder Feature

Quick Reorders are an easy way to repeat any order already placed by clicking the Reorder button next to the orders listed on the View Orders/Quick Reorder pages.

---

## How to Upload an Order Using Our Templates

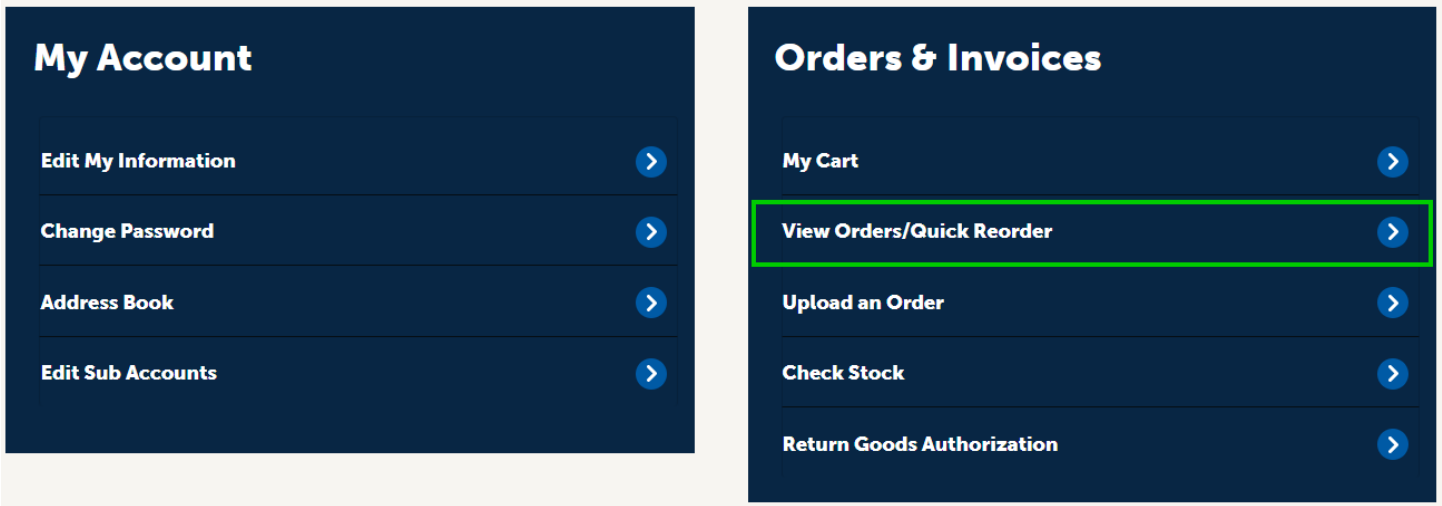
1. From the My Account page click the Upload an Order link.



2. Files are *only* accepted in two file formats: CSV and .XLSX. File size cannot be over 1 MB.
3. To ensure the order is submitted properly, please use the templates provided. The order template column headings must not be altered or added to, otherwise the order will fail to upload. Click CSV Template or XLSX Template to download the template, then add your order items, save the file and upload it. Click Add Order to Cart if you plan to continue to build your order or Buy Now if you wish to proceed with immediate purchase of the items.

# Viewing Orders & Invoices

1. On the My Account page click the View Orders/Quick Reorder link.

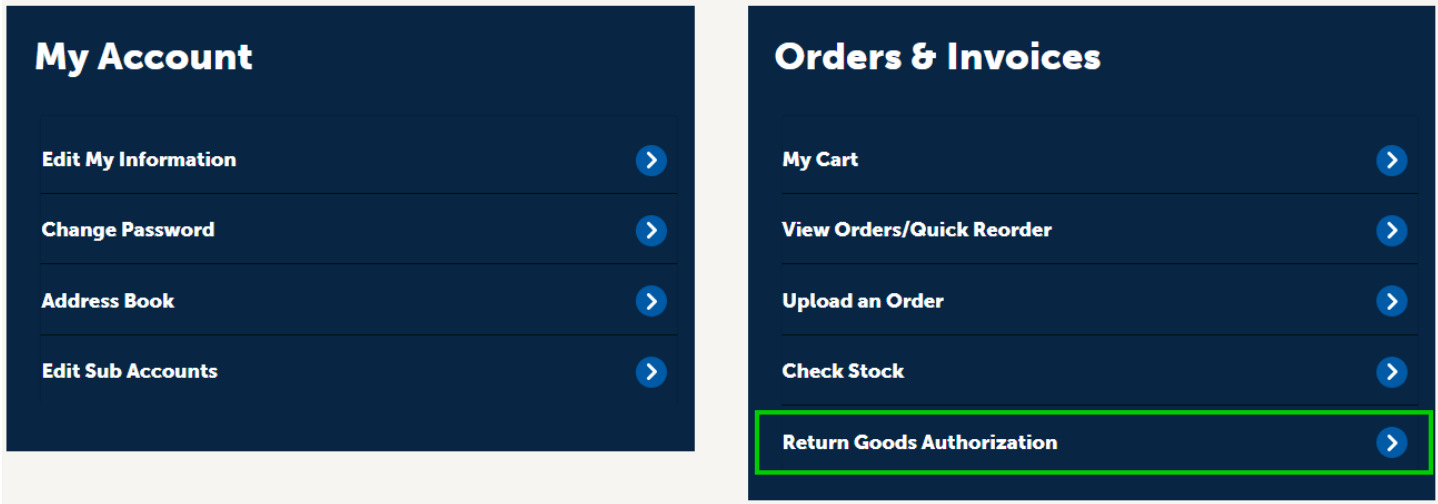


2. The page opens with Open Orders displayed.
  - You can search for an order by entering your PO number.
  - The order number provides a link to the order.
3. Click Closed Orders to view closed orders and their associated invoices.
  - You can search for an order by purchase order or invoice number.
  - The order number provides a link to the order.
  - The invoice number provides a link to the invoice.



# Initiating a Return Goods Authorization

1. On the My Account page click the Return Goods Authorization link.



2. Your e-mail program will open a new e-mail pre-addressed to *dixonrga@dixonvalve.com*. In the body of the e-mail type the following information:
  - Purchase order number
  - Invoice number (if available)
  - Part number(s) and quantity
  - Reason for RGA
  - Requestor contact information

Note: if your email program does not automatically launch, check the settings specific to the email service that you are using. Dixon cannot adjust these settings for you.

3. Once the request has been emailed the customer should receive a response within one business day. *Submittal of information does not guarantee an RGA.*

