Customer Connect Portal Training Guide

2023

Building connections that last™

ASC
Engineered Solutions

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Logging In & Resetting Your Password

ASC Engineered Solutions Homepage

Registering

Register for an account –

1. Navigating to the ASC Engineered Solutions site (www.asc-es.com)

2. Clicking the "Customer Login" button in the upper right-hand corner of the page

3. Click "register" and complete the form

4. Once submitted you will receive an email to activate your account and confirm registration

Login Page

Login

Email

Password

Password Reset Option

Forget your password?

Remember Me

LOGIN

Logging In

Once your ASC login has been registered for the Connect Portal, you can login by –

1. Navigating to the ASC Engineered Solutions site (www.asc-es.com)

2. Clicking the "Customer Login" button in the upper right-hand corner of the page

3. Entering the login and password for existing ASC customer account

Resetting Your Password

If needed you can reset your password by –

1. Navigating to the ASC Engineered Solutions site

2. Clicking the "Customer Login" button in the upper right-hand corner of the page

3. Selecting "Forgot Your Password?" option above the login button

4. Opening the email sent and using the password reset link to set a new password

Adding Users or Locations

Adding Users

Additional contacts from your company can be granted pricing and availability access but must create their own login and submit their own permissions request form

To create a login, users should -

1. Navigate to the ASC Engineered Solutions site (www.asc-es.com)
2. Click the "Customer Login" button in the upper right-hand corner of the page
3. Select the "Register" button then complete and submit the registration form

Adding Locations
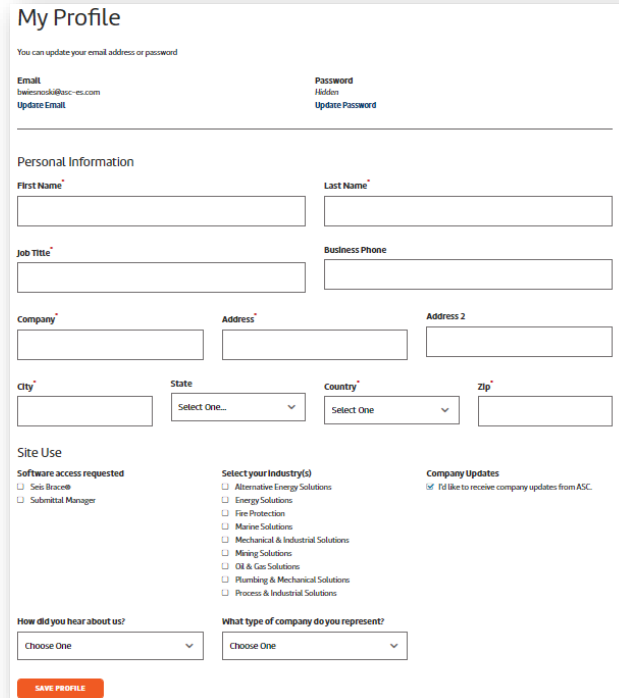
To gain new pricing and availability access, or to access pricing and availability for additional locations on the Connect Portal, users should –

1. Login to their Customer Account on the ASC site (www.asc-es.com)
2. Click the dropdown displayed next to the user name and select "Your Account"
3. Click the "Edit My Profile" link to open and submit the Connect Portal permissions request

Connect Portal Access

If you do not have a location (by ship-to location) linked to your registered account, you can request access by completing the form under your profile. Your request will be reviewed and granted permission within 24 hours by our pricing team.

Connect Portal Permissions Request

Searching For Items

Search Terms

The site-wide search bar can be used to easily find items on the ASC site and navigate to the product page. When using the site-wide search bar **search by ASC figure number for best results.** Otherwise search by series, description or item number

The "Price Sheets" page includes search functionality that allows users to search by item number or UPC.

Item Number/UPC Search

Finding Items

If looking for a previously purchased item, you can find ASC Figure Numbers or descriptions on – 1.) Previous Quotes, 2.) Order Confirmations & 3.) Invoices

Refining Search Results

After completing a search, filters along the left side of the page can be used to refine results and show a limited subset of items

Results can be filtered on brand, finish, material, connection type or solution
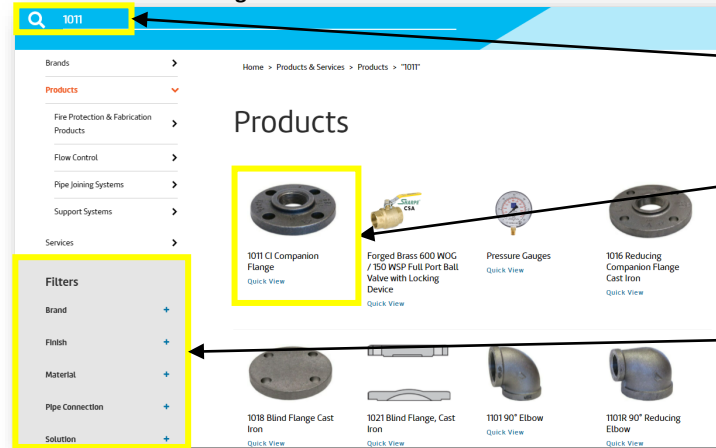
Figure Number Search Results

Figure Number Search

Item Descriptions & Images Shown In Search Results

Filters Allow Refinement Of Results

Browsing For Items

Finding Items Through Browse

The "Products & Services" tab allows users to browse for items and use refinements to narrow subset and help identify the right item
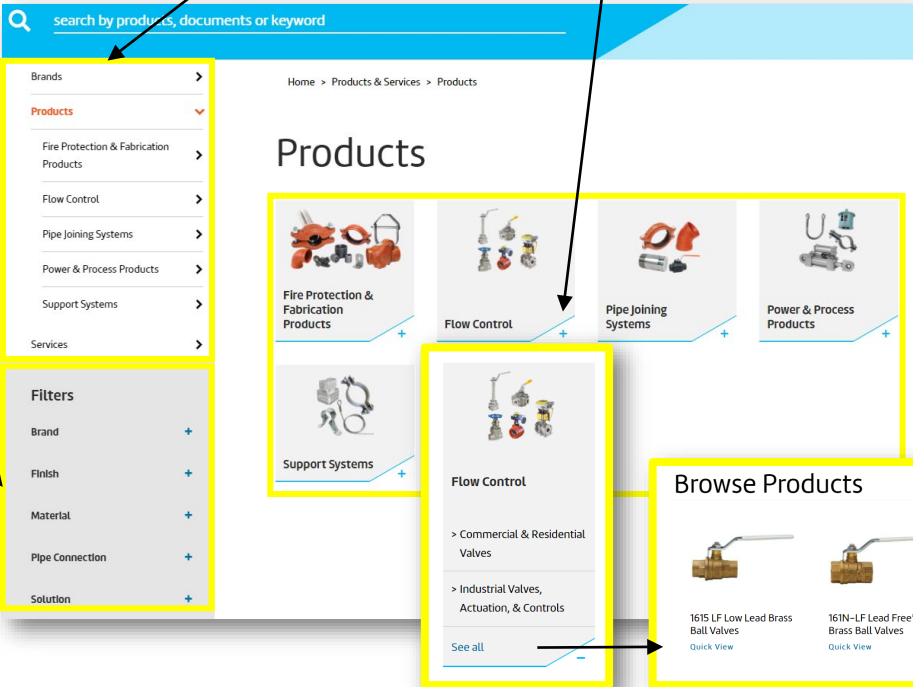
Two methods to refine narrow product listings –

Product Hierarchy

- Items are organized on site through three cascading levels of groupings; division, line & category
- Hierarchy can be navigated through index on left side of page or tiles showing above item listings

Filters

- Like search results, products can be filtered on brand, finish, material, connection type or solution
- Filters are most helpful when used after navigating the product hierarchy

Product Hierarchy Indexed On Left-Hand Side Of Page

Top Tiles Can Also Be Used To navigate Product Hierarchy

Filters Can Be Used To Narrow Listings At All Levels Of Product Hierarchy

Standard Pricing & Availability Check

Standard Pricing & Availability

Once your ASC login has been registered for the Connect Portal, you can check pricing and availability by –

1. Opening the ASC Engineered Solutions site and logging in

2. Navigating to an item through either search or browse

3. Scrolling down to the "Product Inventory And Pricing" section of the product page

4. Selecting the right account to view current list pricing, account-specific net pricing and inventory availability

5. When viewing pricing one of three scenarios will show:

   - Standard Pricing: Pricing shown for both list and net prices

   - Special Net: No list pricing shown but net prices shown

   - No Multiplier: List pricing shown but no net pricing shown

Account Sections

If you have access to multiple accounts, your customer account selection will carry over from one product to the next and you will not need to reselect the account of interest for every product

PRODUCT INVENTORY AND PRICING

i Questions/Feedback
Contact customerportal@asc–es.com

Choose Your Account

US Demonstration Account [account number: 81787]

Current Inventory and Pricing

Item Number	Description	Size	Inventory	List Price	Net Price	Add
0308002005	3/4X37/8 BLK CI THRD F&D FLANGE Package Quantity: 378	3/4	283 view by location	$152.230	$137.0070	⊞
0308002203	1X41/4 BLK CI THRD F&D FLANGE Package Quantity: 260	1	99 view by location	$92.400	$83.1600	⊞
0308002401	11/4X45/8 BLK CI THRD F&D FLANGE Package Quantity: 408	1 1/4	228 view by location	$110.570	$99.5130	⊞

Location-Specific Inventory Check

Location-Specific Inventory

Once your ASC login has been registered for the Connect Portal, you can check location-specific inventory availability by –

1. Opening the ASC Engineered Solutions site and logging in

2. Navigating to an item through either search or browse

3. Scrolling down to the "Product Inventory And Pricing" section of the product page

4. Selecting the right account to view current list pricing, account-specific net pricing and inventory availability

5. Identifying the item of interest and clicking the "view by location" link under the total inventory number

6. Scrolling down the page to view the "Inventory Detail" section showing inventory availability by ASC location

7. To see inventory availability by location for another item, scroll up the page and click the "view by location" link for the new item, the "Inventory Detail" section will then update for the new item
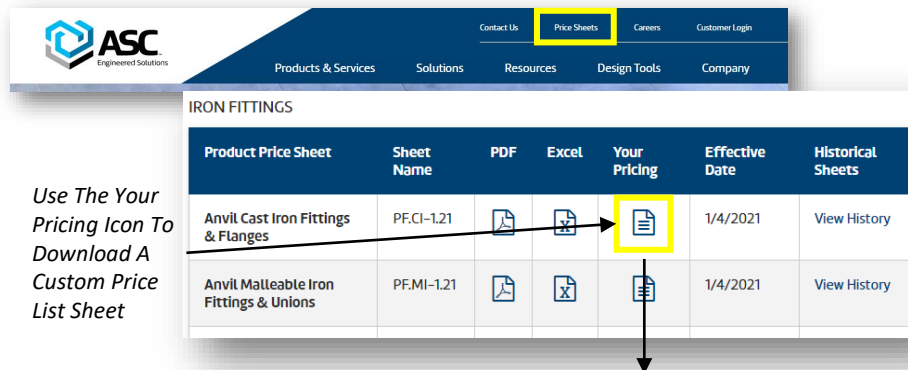
Accessing & Downloading Net Price List Sheets

Custom Price List Sheets

The ASC website includes price list sheets showing item-level list prices for all standard items and **Connect Portal users can now download net price sheets** that include item-level list prices, net prices and on factors

To access and download net price sheets -

1. Select the "Price Sheets" option in the upper right-hand corner of the site

2. Scroll down the page to find the product-specific price list sheet of interest

3. Click on the file icon in the "Excel" column to download a standard price list sheet with item-level list prices

4. Click on the file icon in the "Your Pricing" column to download a custom price list sheet with item-level list prices and your specific net prices and on factors

   • Custom price list files include account, date and product details in the page header

Use The Your Pricing Icon To Download A Custom Price List Sheet

Product Price Sheet	Sheet Name	PDF	Excel	Your Pricing	Effective Date	Historical Sheets
Anvil Cast Iron Fittings & Flanges	PF.CI-1.21	📄	📄	📄	1/4/2021	View History
Anvil Malleable Iron Fittings & Unions	PF.MI-1.21	📄	📄	📄	1/4/2021	View History

Account Name: US Demonstration Account
Account ID: 81787
Product Price Sheet: Anvil Cast Iron Fittings & Flanges
Sheet Name: PF.CI-1.21
Pricing and inventory published is valid as of June, 10 2021 2:37 pm
and is subject to change at any time.

Item Number	Description	Size	Figure Number	UPC	Package Quantity	Currency	List Price	On Factor	Net Price
0300000205	1/4 BLK CI 90 ELL	1/4	351	690291011863	80	USD	$18.99	0.9	$17.09
0300000403	3/8 BLK CI 90 ELL	3/8	351	690291011870	40	USD	$27.51	0.9	$24.76
0300000601	1/2 BLK CI 90 ELL	1/2	351	690291011887	150	USD	$12.04	0.9	$10.84
0300000809	3/4 BLK CI 90 ELL	3/4	351	690291011894	100	USD	$12.54	0.9	$11.29
0300001005	1 BLK CI 90 ELL	1	351	690291011900	45	USD	$14.87	0.9	$13.38
0300001203	11/4 BLK CI 90 ELL	1 1/4	351	690291011917	25	USD	$21.10	0.9	$18.99

File Header Includes Account, Date & Product Info

File Includes Item-Level List Prices, Net Prices & On Factors

My Price Worksheets – Starting A Worksheet

Price Worksheets – Creating A Worksheet

The Connect Portal includes "My Price Worksheets" where users can check pricing and availability on a list of selected items. This allows users to create quotes and check pricing on frequently purchased items
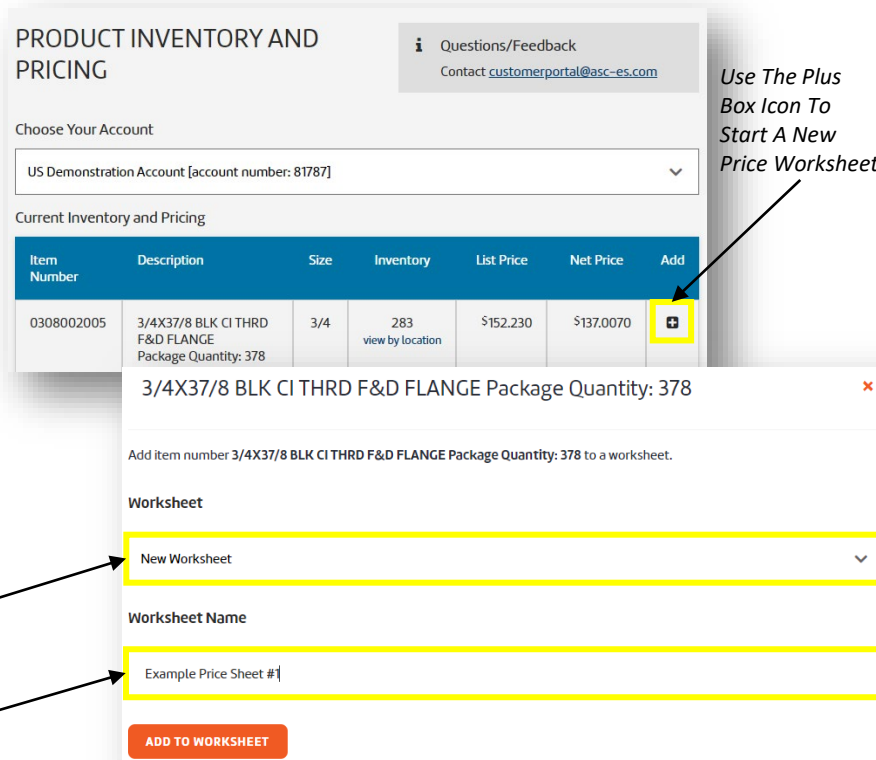
To create a price worksheet -

1. Navigate to the page for the product you'd like to start with through either search or browse

2. Find the specific item you'd like to start with in the "Product Inventory and Pricing" section

3. Click the plus box icon under the "Add" column

4. Open the worksheet dropdown and select "New worksheet"

5. Enter a name for new worksheet then click the "Add To Worksheet" button to create the sheet and add the item

Multiple Worksheets

The Connect Portal allows users to save, access and update multiple worksheets. Follow the process outlined above whenever starting a new worksheet

Select "New Worksheet" In The Dropdown To Start A New Worksheet

Name The Worksheet And Click "Add To Worksheet"

Use The Plus Box Icon To Start A New Price Worksheet

My Price Worksheets – Editing Items & Updating Pricing

Price Worksheets – Adding Items

After creating a price worksheet, you can add items, remove items and get updated pricing and availability at any time

To access previously-created price worksheets –

1. Select the "Price Sheets" option in the upper right-hand corner of the site
2. Click on "My Price Worksheets" option on the left side of page to view all price worksheets
3. Select the worksheet you'd like to edit to open it

Select "My Price Worksheets" To Access Your Sheets
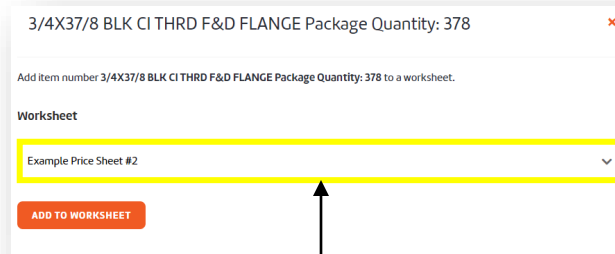
Click On A Price Worksheet Name To Open The Sheet

My Price Worksheets – Adding Items

To add items to an existing price worksheet –

1. Navigate to the page for the product you'd like to start with through either search or browse
2. Find the specific item you'd like to start with in the "Product Inventory and Pricing" section and click the plus box icon under the "Add" column
3. Open the worksheet dropdown and select the name of the worksheet you'd like to add the item to and click the "Add To Worksheet" button to add the item to the selected sheet

Select The Relevant Worksheet Name In The Worksheet Dropdown To Add An Item To An Existing Price Worksheet

My Price Worksheets – Editing Items & Updating Pricing
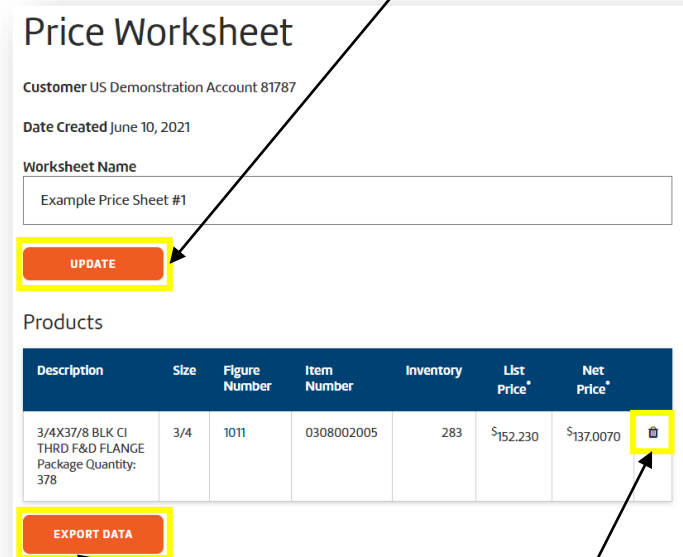
Price Worksheets – Changes, Downloads & Updates

After creating a price worksheet, you can add items, remove items, rename worksheets and get updated pricing and availability at any time

To remove items, update pricing and availability, rename a worksheet or export data –

1. Select the "Price Sheets" option in the upper right-hand corner of the site
2. Click on "My Price Worksheets" option on the left side of page then select the worksheet you'd like to edit
   - Use the "Update" button to rename your sheet
   - Use the trash can icon next to the pricing information to remove an item from the worksheet
   - Click the "Export Data" button to download your price worksheet as a CSV

Use The "Update" Button To Update The Name Of Your Worksheet

Price Worksheet

Customer US Demonstration Account 81787

Date Created June 10, 2021

Worksheet Name

Example Price Sheet #1

UPDATE

Products

Description	Size	Figure Number	Item Number	Inventory	List Price*	Net Price*	
3/4X37/8 BLK CI THRD F&D FLANGE Package Quantity: 378	3/4	1011	0308002005	283	$152.230	$137.0070	🗑

EXPORT DATA

Use The "Export" Button To Download The Worksheet As A CSV

Remove Items From A Worksheet With The Trash Can Icon
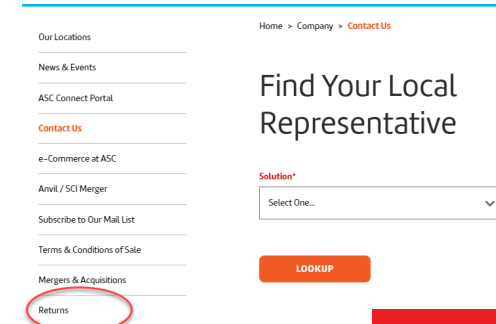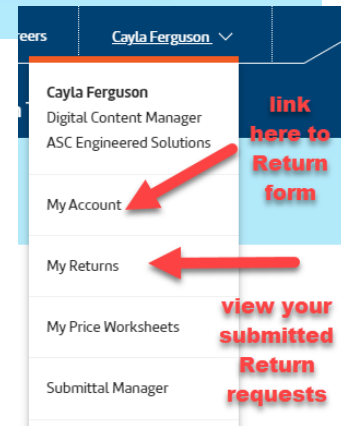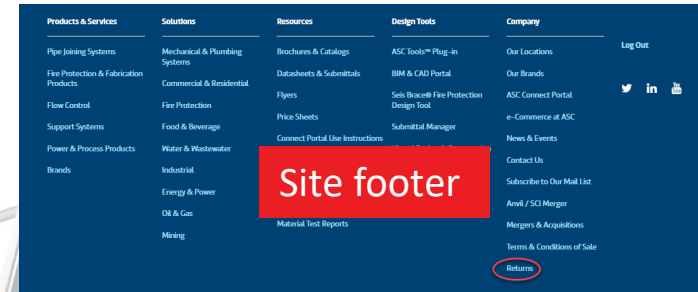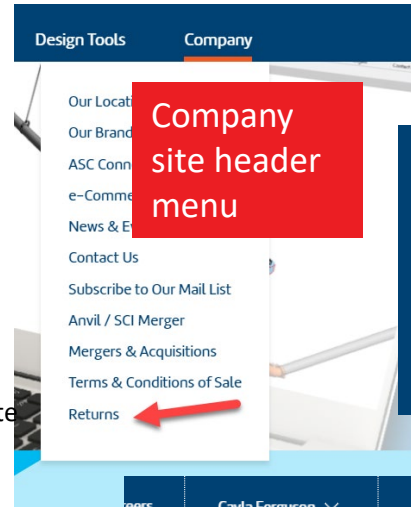
Request a Return

Return / refund request form is located at **asc-es.com/returns**

You can navigate to the form via a few places on our site – in the Company header menu, in the footer, on the Contact Us page, or on the **"My Account"** page under your name when logged in.

You must be logged in to an existing Connect Portal account or create a new one to complete the return request form.

Complete the form manually by selecting the return claim type from the drop down menu and completing all required fields. You can also upload any supporting documentation as images or a PDF via the "File Upload" field.

You can view your submitted return requests in your account under the **"My Returns"** page. Our team will update your request as it moves from submission, to review, to approval or denial.

Company site header menu

Site footer

link here to Return form

view your submitted Return requests

Contact us page

User menu

Return Request Form

Returns

Submit Your Claim

Claim Type *

Choose One ⌄

Account Number *

Claim Dollar Amount *

Invoice Number *

Order Number *

Purchase Order Number *

Delivery Number

Reason *

Comments

File Upload

[Upload Files]

Upload an image or PDF file (.jpg, .jpeg, .png, .pdf)

[SUBMIT]

Contact Info

First Name *

Last Name *

Email *

Phone *

Claim Type *

Choose One ⌄

| Choose One |
| Material Return |
| Shortage |
| Overage |
| Pricing |
| Freight |
| Carrier Error |
| Wrong Item Shipped |
| Other |

Choose your return reason/claim type. The form has different fields based on the selected type.

Your contact info will populate here with whatever is currently in your account profile. You can change this if you wish.

Upload any supporting documentation/images here as JPEG, PNG, or PDF files.

My Orders – view account order history & status

How to access My Orders

To use My Orders, customers must have access to a current ASC customer pricing account on the portal. You can request this access via the account registration form (this can be edited for existing accounts). The request will be reviewed by our team and, if approved, granted within 48 business hours.

If you don't have an account, you can create one.

1. Navigate to the ASC Engineered Solutions site (www.asc-es.com)
2. Click the "Customer Login" button in the upper right-hand corner of the page
3. Select the "Register" button then complete and submit the registration form

Once your account has been activated and you are logged in, you'll be brought to your account home page. You'll see the option for My Orders on the right side of the page. You can also navigate to my orders from anywhere on the site by clicking on your name in the top right corner and using the dropdown menu.
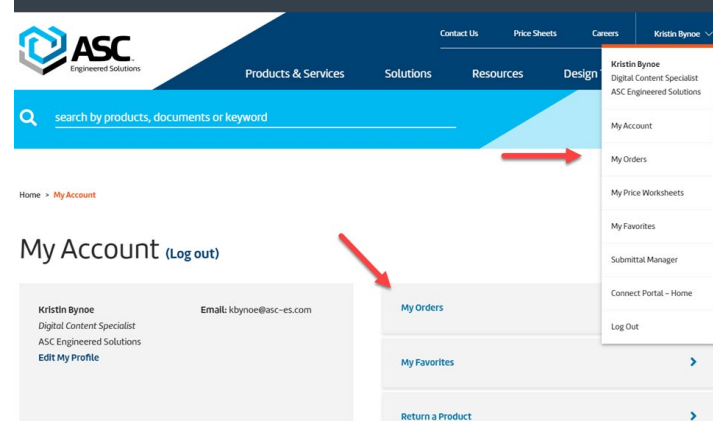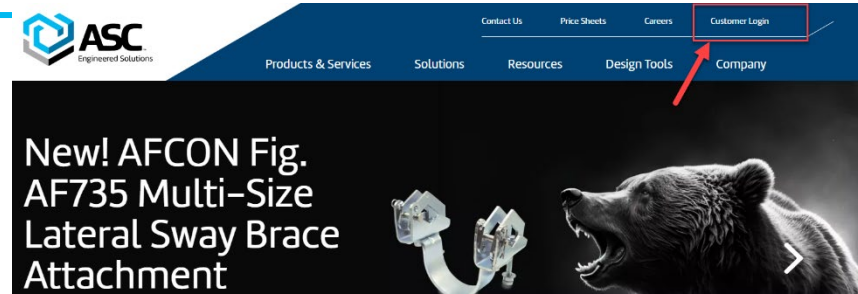
Order History

Search Terms

When you click into My Orders, you'll be taken to the order history page. You can choose the account you wish to view orders for via the dropdown menu if you have access to more than one. You can search the orders by date, purchase order#, ASC order #, Item # and status. You can also use the orange arrows on each column to sort by ascending or descending order.

Refining Search Results

Simply type in the information you wish to search by and press enter.

You can also export the information in the order history table by clicking "Export list as CSV". The list will be downloaded as CSV file.

Order Details

Accessing order details

To view order details simply click on the order number you'd like to view.

You'll be brought to the order detail page. Here you'll see an overview of your order details including the percentage of your order that has shipped and the current status.

Refining Search Results

If you continue to scroll down, you'll see the order by line item. You can search by item number here if you wish or you can also use the orange arrows on each column to sort by ascending or descending order.

Order Details (Continued)

Invoices, Tracking and Packing slips

Available tracking, packing slips and invoices will show up as a link. In order to track a shipment simply click the tracking # and you'll be brought to the carrier's website for tracking information. Please note that tracking links are only available for UPS, USPS and FedEx. To download an invoice, simply click the invoice link and it will appear in a new tab, from here you can download it and save it if you wish.

Exporting and RMA forms

From this page you can download a CSV file by clicking the Export CSV link. You can also conveniently get to the return request page by clicking the link here

To return to the order history page, simply click the "back to order history" button.

Order Details - FAQs

- What shipment tracking info is available?
    - Tracking is only available for Fedex, USPS or UPS orders.
- Who can access My Orders?
    - Customers must have an active Connect Portal account with access to at least one ASC customer pricing account to access My Orders. To request pricing account access in the Portal, users need to edit their profile and re-submit the form. The request will be reviewed manually by our team and granted within 48 hours if approved.
- Who is this available to?
    - This is only available to our distributor partners.

Materials & Key Contacts

Additional Resources

Additional materials and contacts are available through the ASC website to ensure you have the support needed in using the Connect Portal

- Updated Training Materials: The most recent training materials can be found on the Connect Portal homepage www.asc-es.com/connect-portal
- All questions, feedback or additional support needs can be submitted directly to the Connect Portal team by emailing customerportal@asc-es.com

Moving forward communication will be sent by the Connect Portal team following updates, feature enhancements or changes to the Connect Portal

Welcome to the ASC Connect Portal

We want to make it *easier* for you to do business with ASC Engineered Solutions. The Connect Portal allows you 24/7 access to Inventory, Pricing, Material Testing Reports (MTR), the Submittal System and Marketing resources.

Current Pricing and Availability

To get the current price and availability of products, **use the main site search above to search for a product using keywords such as Fig or Series number or product description.** If the product is a standard stocked item you will be able to view the item number, list & net prices, inventory available by warehouse location, and package quantity. If you do not have an account (by ship–to location) linked to your registered account, you can request access by completing the form **under your profile.** Your request will be reviewed and granted permission within 24 hours by our pricing team.

EDIT YOUR PROFILE

Questions/Feedback:

Contact customerportal@asc–es.com