Components
Online Overview
& User Guide

METALLIC
BUILDING SYSTEMS

Contents

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What is Components Online?

Components Online

What is Components Online?

Components Online is an exclusive product for our customers to purchase component products directly – streamlining and expediting the ordering process.

Components Online is designed to allow for an exceptional and seamless customer experience throughout the ordering process.

What can Customers do with Component Online?

- Search component offerings
- Generate quotes
- Purchase components

Introduction to Components Online

Technology Requirements

Accessible via:

- Devices
  - Desktops
  - Laptops
  - Smart Phones
  - Tablets

- Browsers
  - Internet Explorer (Versions 10.0 and higher)
  - Chrome
  - Firefox
  - Safari

Any browser or device that is not listed above may not provide an optimal user experience with Components Online.

Accessing Components Online

- New User
- Existing User

Site Access | New User

Once a user account has been created, the user will receive a system generated email.

Prior to initial account access, the new user account must be verified.

If you do not have a username and password, please contact your customer service representative to request system access.

1. To verify your account, click on the **click here** link in the email received.

Sent: Monday, June 22, 2015 11:49 AM
To: Your Name
Subject: Verify your account

You must verify your Test Company account in order to activate it. Please click here to verify.

Here are your credentials:

Customer Number:######
Username:
Temp Password:

**Customer number will be a valid sequence of numbers. The hashtag (#) is only used as an illustration to represent a valid customer number.

Site Access | New User

2. Enter your username and password provided in the email.

3. Users will be prompted to change the password.

Site Access | Existing User

Existing users of Metallic Building Company's ExpressPlus™ program will be able to gain access to Components Online with the same credentials. Components Online can be found in the Components Online section of the Metallic website or you can access the site [here](#).

Welcome

Select Language	English ▼
Customer Number	demo only
Username	demo user
Password	••••••••

Login

Forgot Password?

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If you do not remember your username and password, please contact your customer service representative to request system access.

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Site Access | Project Dashboard

After logging in, users will see the Project Dashboard.

Click the **Component Projects** tab.

If a user does not have access to **Building Projects**, the system will open the **Component Projects** tab by default.
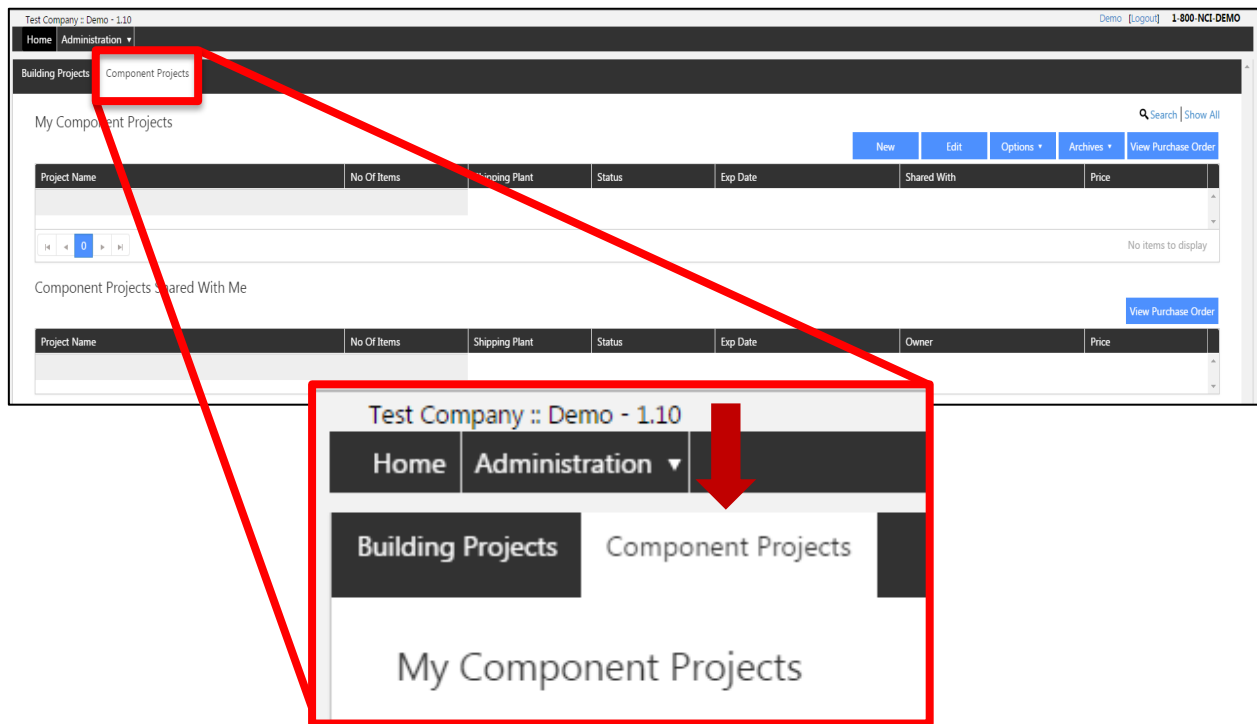
Navigating Components Online

- Update User Profile
- Project Dashboard
- Home Screen

Navigation | Update a User Profile

To update a user's profile, click on the username in the top right hand corner of the screen. The username in the image below is "Demo".
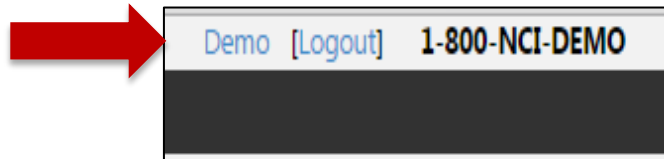
The **Update Profile Information** screen will appear. Users can update their profile information including First and Last Name, Email Address and Username.

Navigation | Update a User Profile

To change the account password, check the box next to **Change Password**. Once selected, additional fields will appear to input new password information.

Users must enter the current password, new password, and confirm the new password before any changes will be accepted by the system.

When completed, select **OK** to return to the Project Dashboard.

Navigation | Project Dashboard

The Project Dashboard contains two tabs: **Building Projects** and **Component Projects**.

The **Building Projects** tab is used to complete building projects. The **Component Projects** tab is used to purchase specific parts or items.

Both sections give users the ability to manage user information, view and manage current and past project orders, and display customer service contact information.

Desktop View

Tablet View

Navigation | Project Dashboard

1. **Company Name** – Displays name of company.

2. **Project Tabs** – The tabs separate the type of projects being ordered.
   - To view and manage building orders, click the **Building Projects** tab.
   - To view and manage component orders, click the **Component Projects** tab.

3. **Project Name** – Displays pertinent information regarding an order at a glance.
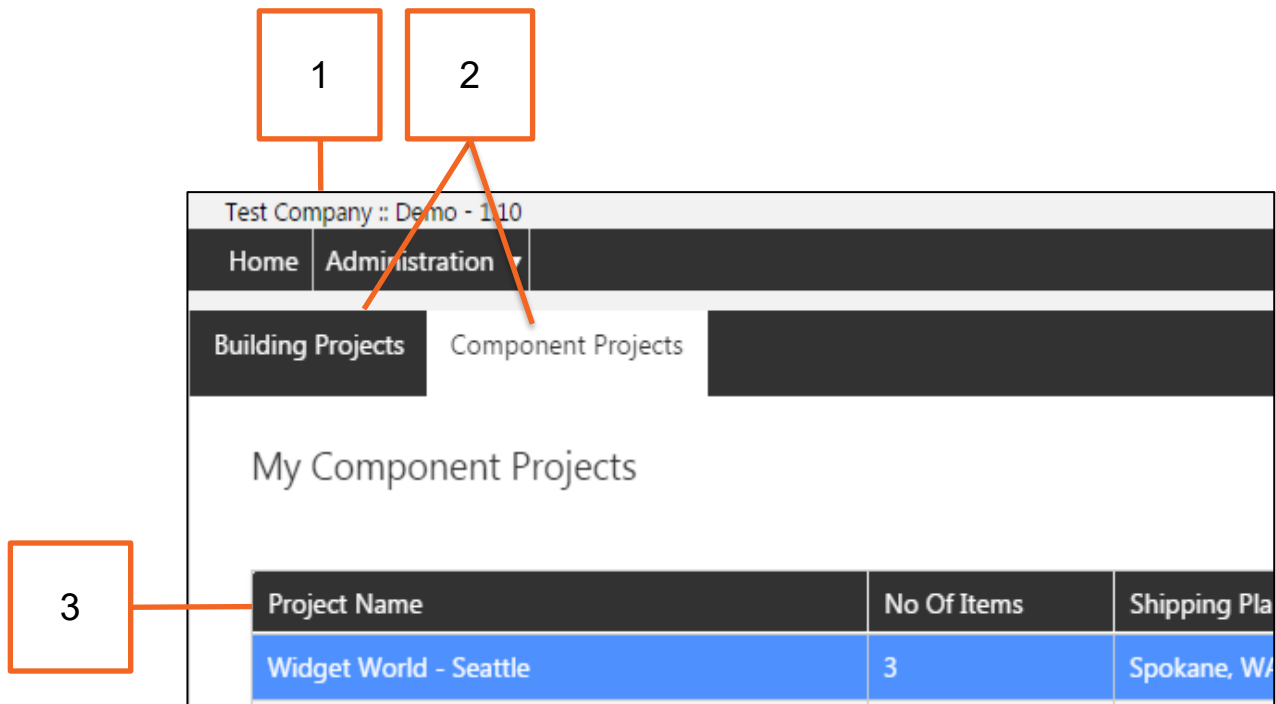
4. **Username** – Displays the name of the individual logged into the system. Clicking the username allows the user to manage basic profile information and change the account password.

5. **Customer Service Contact Information** – Phone number for users if they require assistance.

6. **Action Buttons** – Help users complete tasks and manage the project dashboard

- *New* – Creates a new project
- *Edit* – Edits Information within a selected project
- *Options* – Displays options to manage an existing project (i.e. rename, copy, delete, share)
- *Archives* – View or archive existing projects
- *View Purchase Order* – View purchase order of a specific project
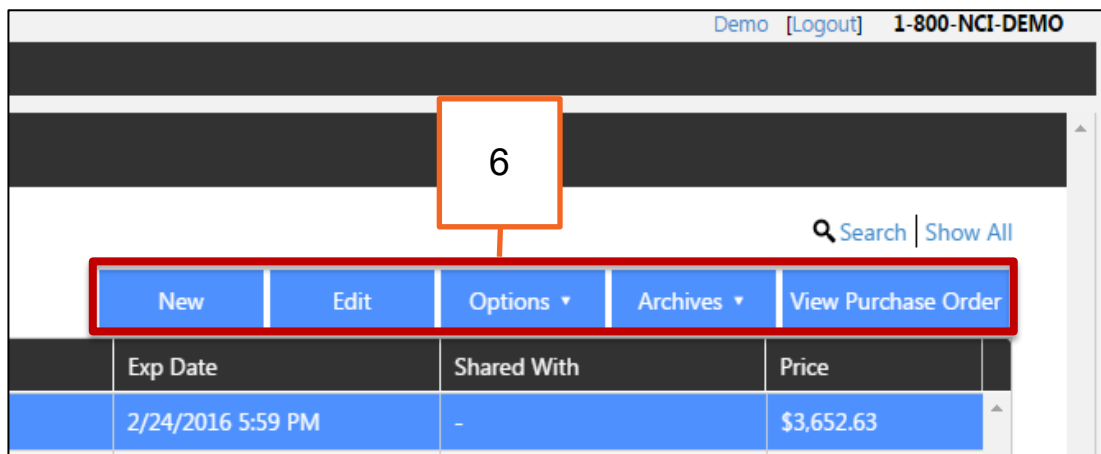
Project Dashboard | Order Page

When starting a new Components Project, users will be brought to the Components Online order page to select their items for purchase.

The ordering page has five sections: (1) Site Navigation Menu, (2) Project Name, (3) Product Menu, (4) Search Bar, and (5) Cart.

Desktop View

Tablet View
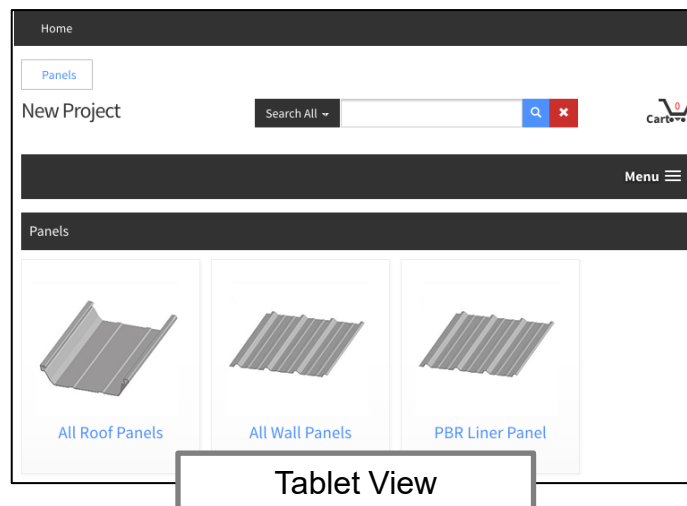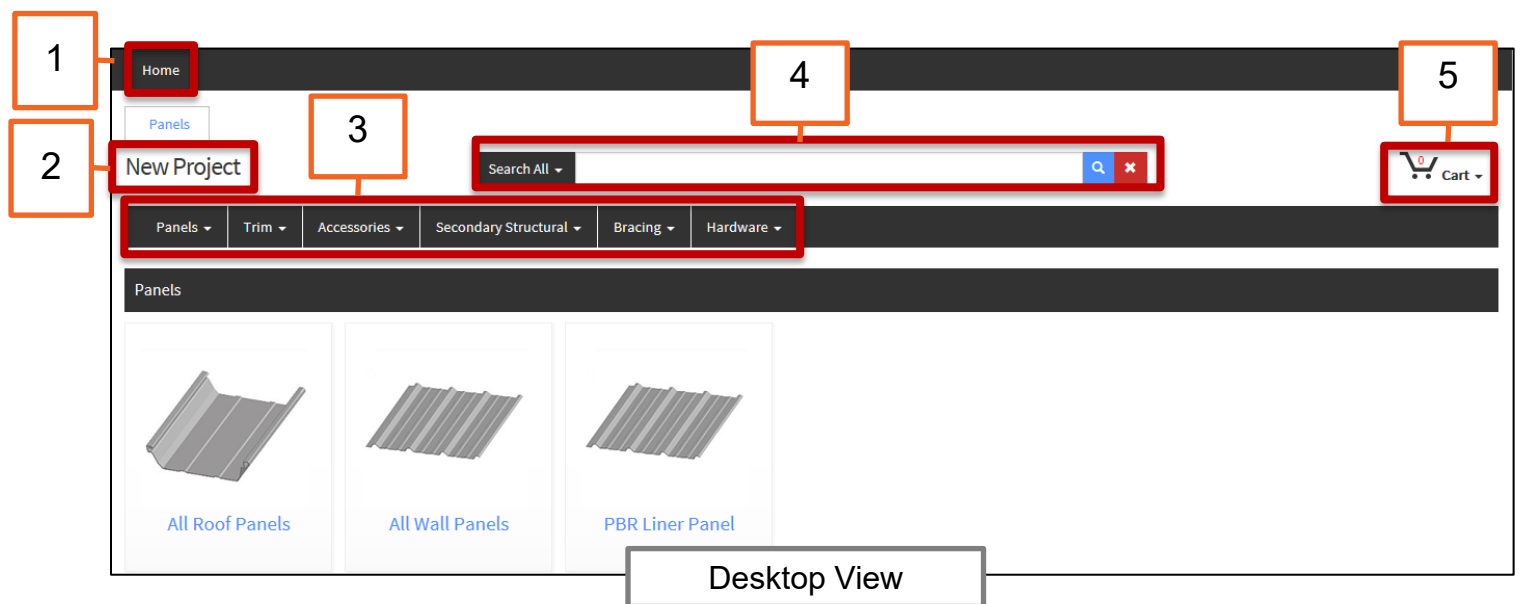
Component Projects | Order Page

1. **Site Navigation Menu**
   - **Home** – Returns user to Project Dashboard.
   - **Administration** – Drop down menu with links to manage administrative tasks within Agora and Agora Components. The links available within this section vary based on a user's permissions set by the company administrator.

2. **Project Name** – Name assigned to current project.

3. **Product Menu** – Category menus are available to help users navigate through the product offerings.

4. **Search Bar** – The search is where you can enter complete or partial information to search for products.

5. **Cart** – Displays the number of items currently in the cart to be purchased. Clicking the arrow next to the cart will provide a preview of the items placed in the cart.

Desktop View

Mobile View
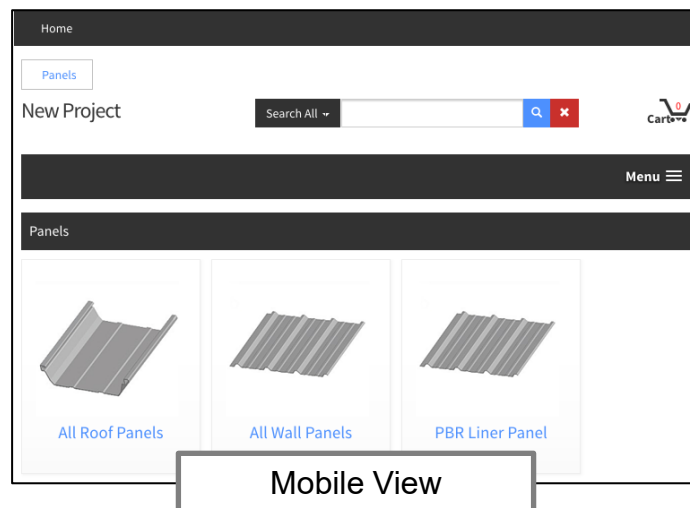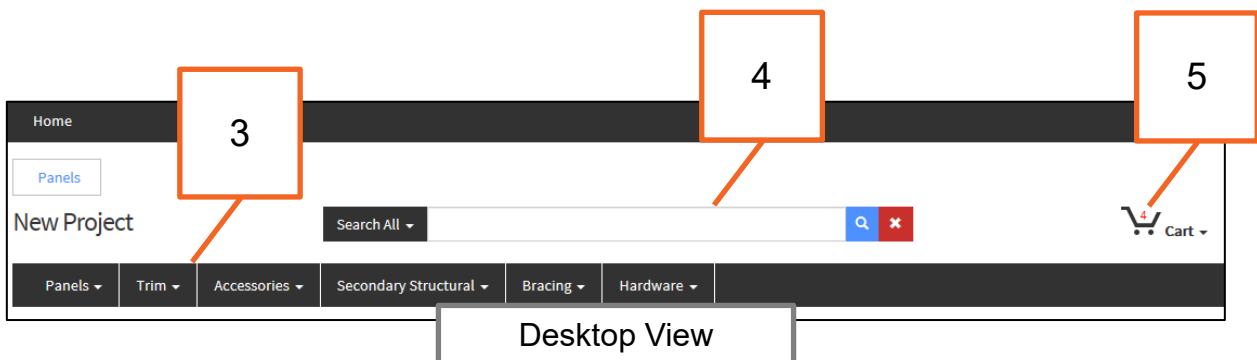
The Ordering Process

- Start an Order
- Search for Items
- Add Items to Cart
- View/Modify Items in Cart

To order items, a project must first be created.

1. Click **New** from the Component Project Dashboard.
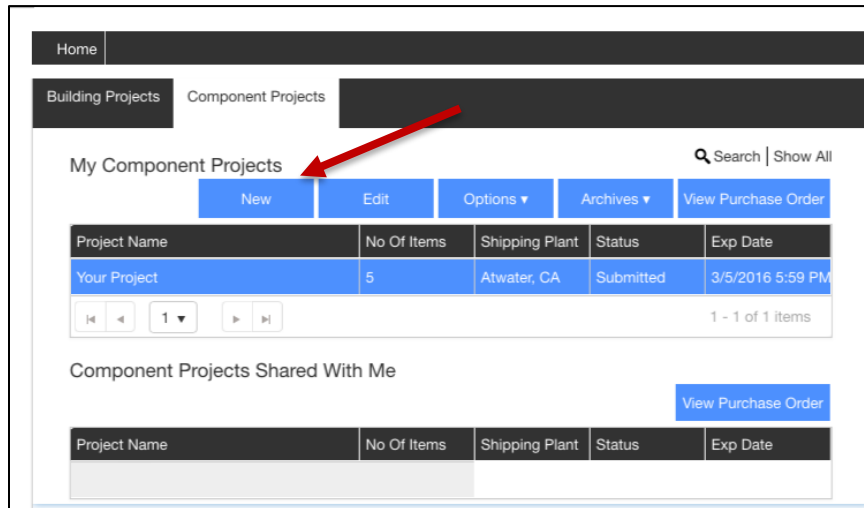
2. The Project Name and Zip Code are required fields. (Note: The Zip Code should be the location where the items will be shipped.) The Shipping From field is not required.

3. Click **Ok** to create the Project.

The Ordering Process | Search for Items

Once the project has been created, you will be able to search the system for items to purchase.

Desktop View

Tablet View
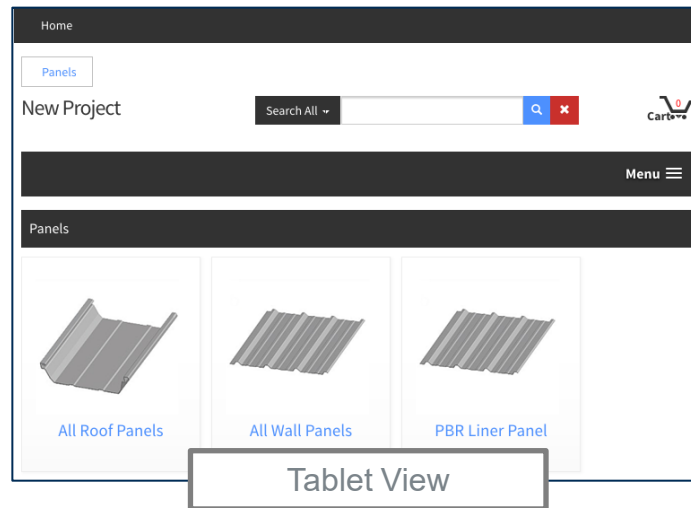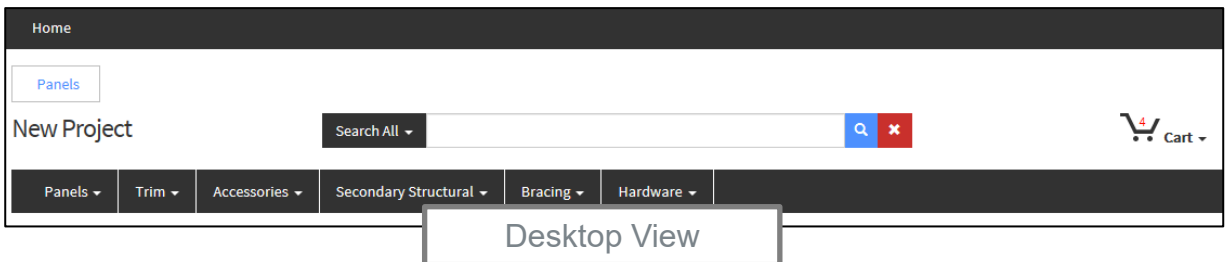
There are two methods for finding items in the system. Users may utilize either the Product Menu or the Search Bar.

The Ordering Process | Search for Items

Search with the Product Menu

When utilizing the Product Menu, products are grouped together by category.
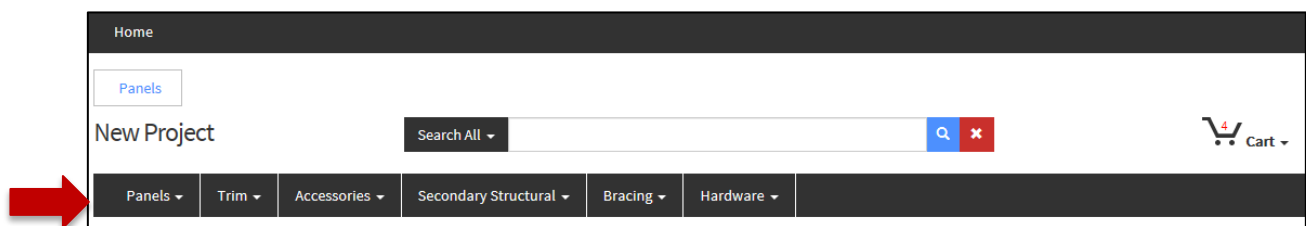
When using a mobile device, click the Menu icon to expand the category list.

Tablet View

The Ordering Process | Search for Items

Users may click on or hover over a category in the Product Menu to find a specific group of items.

If you click a category, all sub-categories will appear in window below.
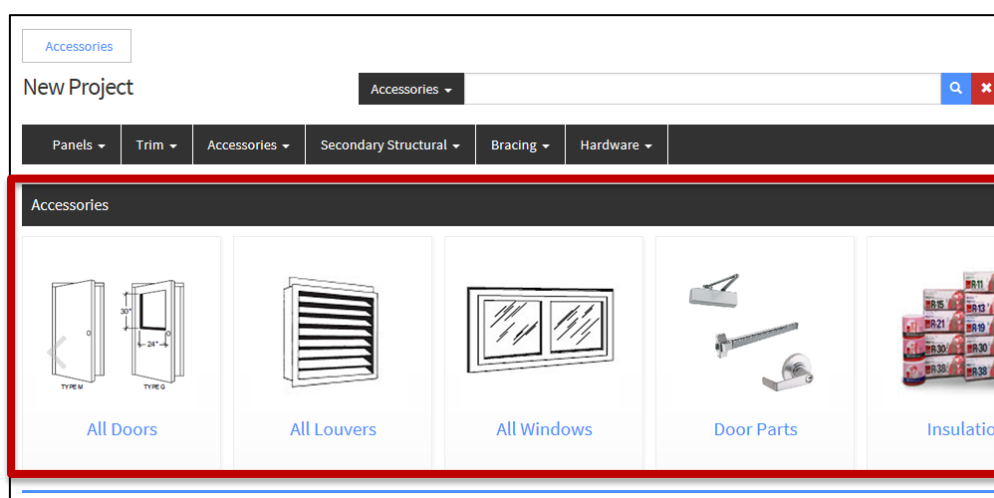
If you hover over a category, all sub-categories will appear in a dropdown menu below.

Search with the Search Bar

To utilize the search bar, enter any of the following information into the search field:

- Product Attributes (ex: 24", cap, roof panel)
- Item Description (ex: PBR 26", Door Header Angle)
- Part Number (ex: CL332, HW3745)

Users can also use the wildcard ('%') to search for items.
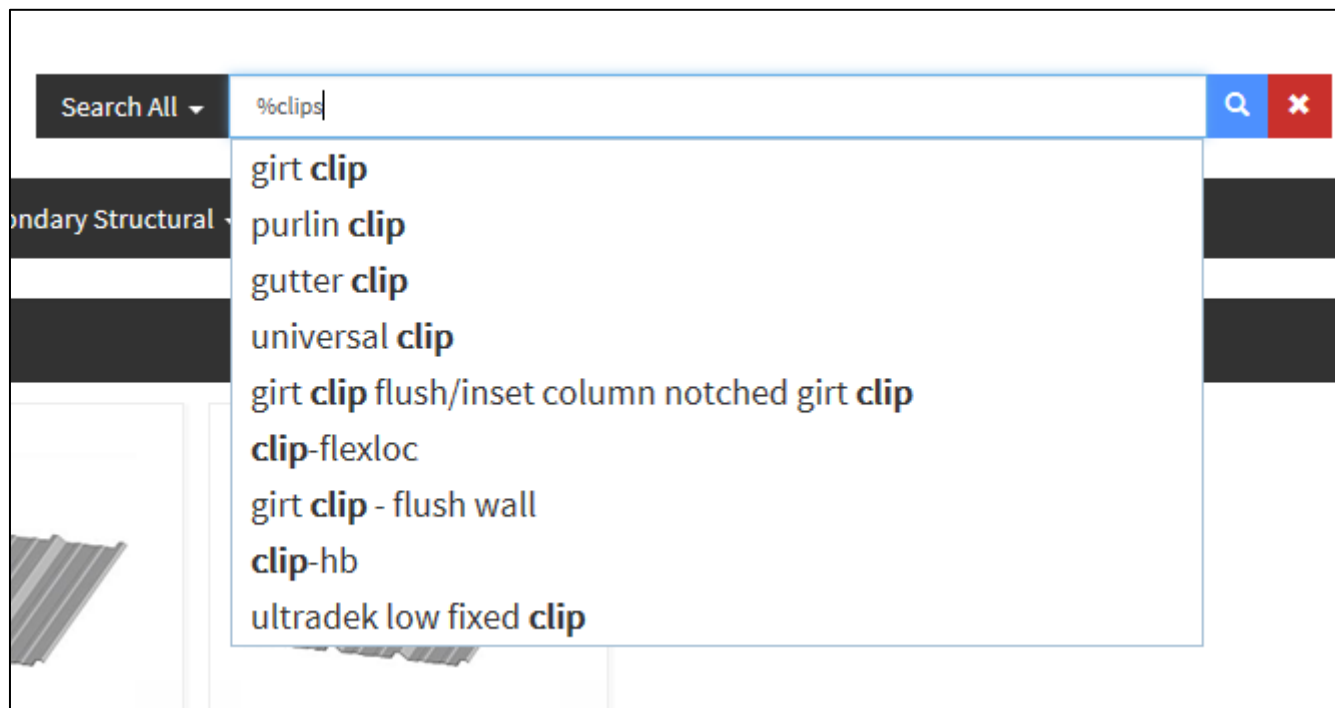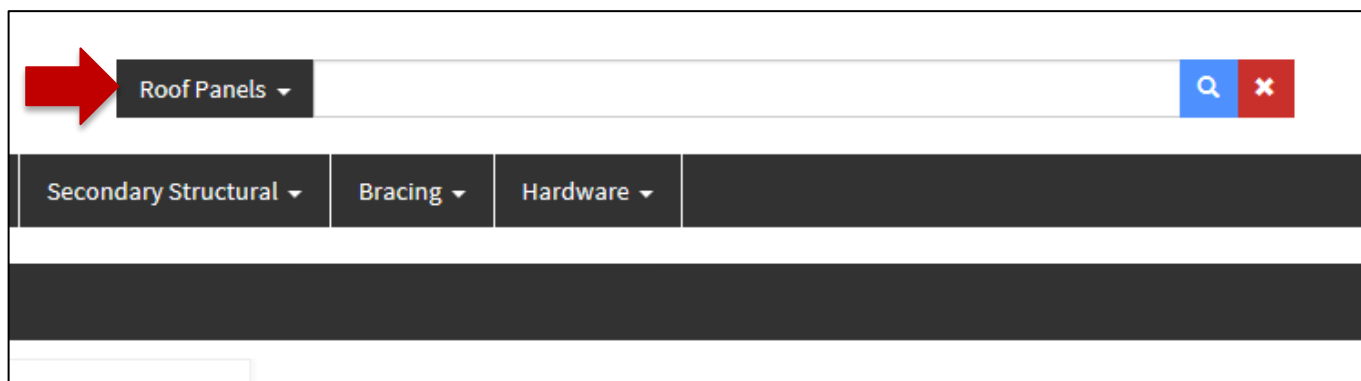
Search All is selected by default and searches are performed on the entire product offering.

Desktop View

Tablet View
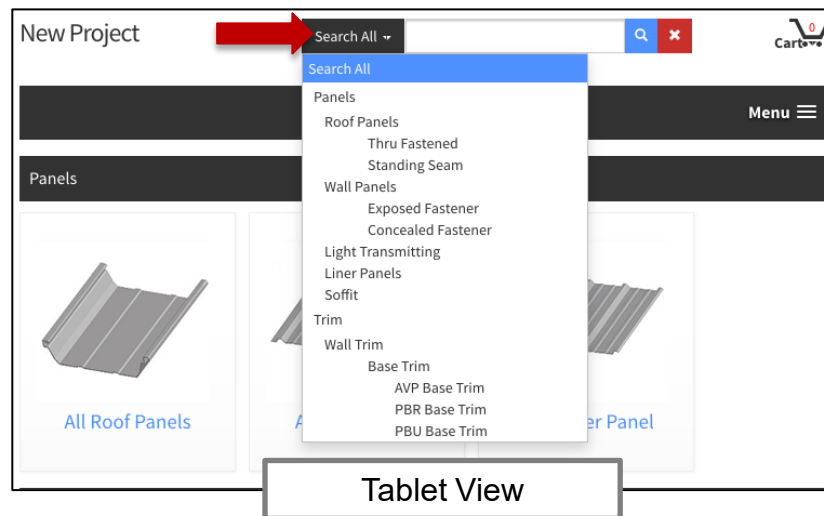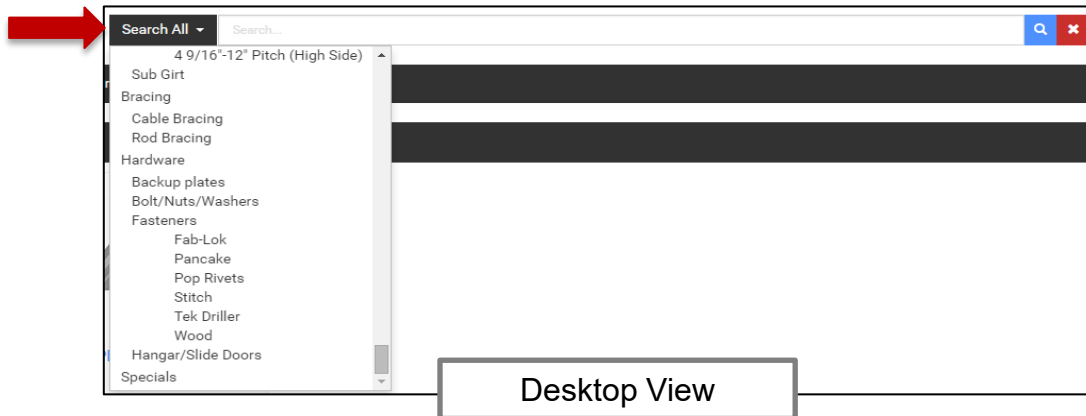
The Ordering Process | Search for Items
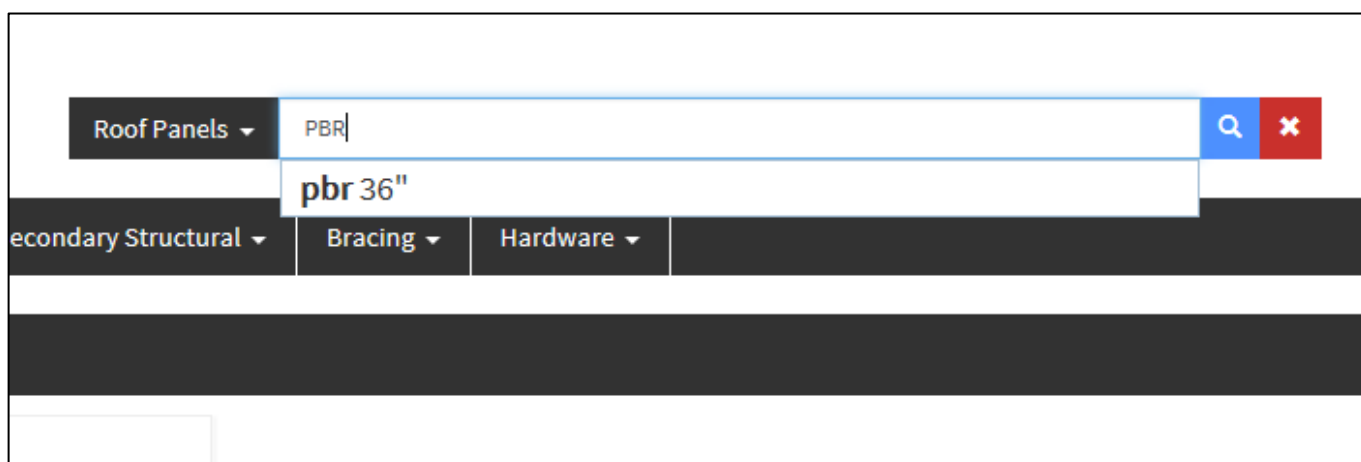
Search parameters can be further refined by searching within a specific category.

To select a different category, click the small arrow next to the search bar and select the desired category.

Based on input entered into the search field, results will auto-populate relevant items.

The Ordering Process | Add Items to Cart

Once a user has entered search criteria, the item display will show detailed information on products matching the criteria.
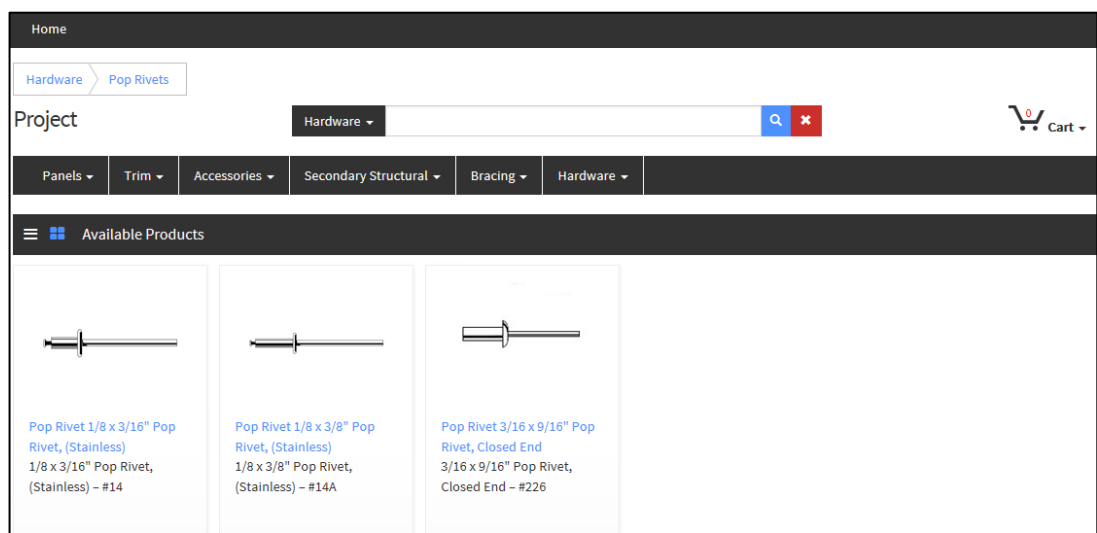
Click on the item to specify requirements and add to the cart.
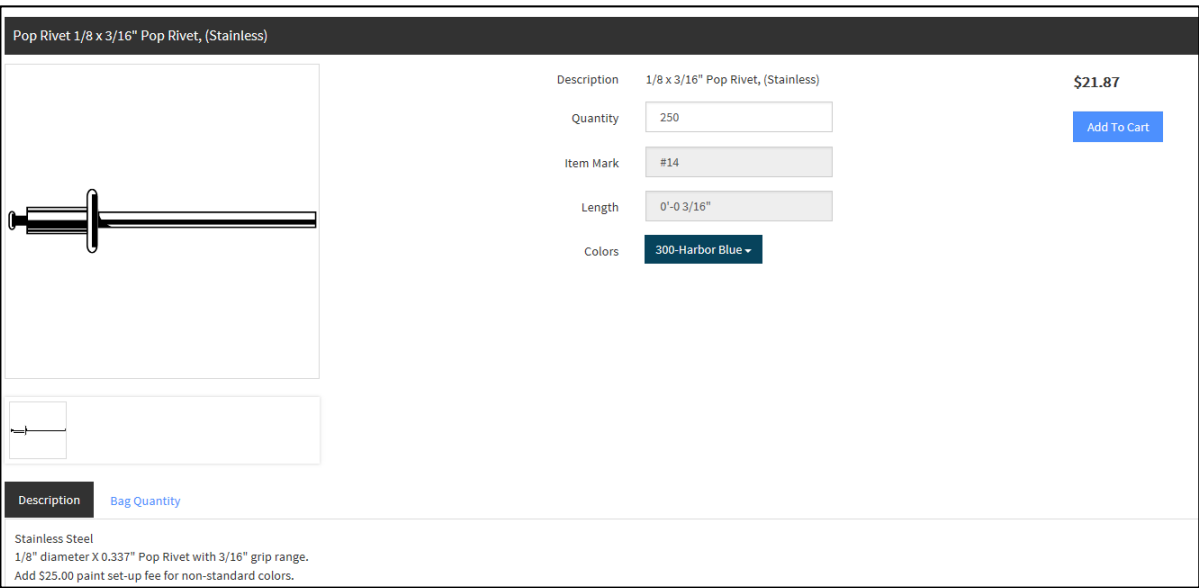
The Ordering Process | Add Items to Cart

Once the product has been selected, enter the desired specifications for the item based on the available fields. (ex: quantity, color, etc.)

Description	1/8 x 3/16" Pop Rivet, (Stainless)	$21.87
Quantity	250	Add To Cart
Item Mark	#14	
Length	0'-0 3/16"	
Colors	300-Harbor Blue ▾	

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The Ordering Process | Add Items to Cart

If an item has specific limitations (i.e. minimum length, minimum quantity, etc.) a notification will appear.

As specifications are entered, the price will be updated automatically to reflect any changes.

Click the **Add to Cart** button.

The Ordering Process | Add Items to Cart

Once the item is added to the cart, a confirmation message will appear.
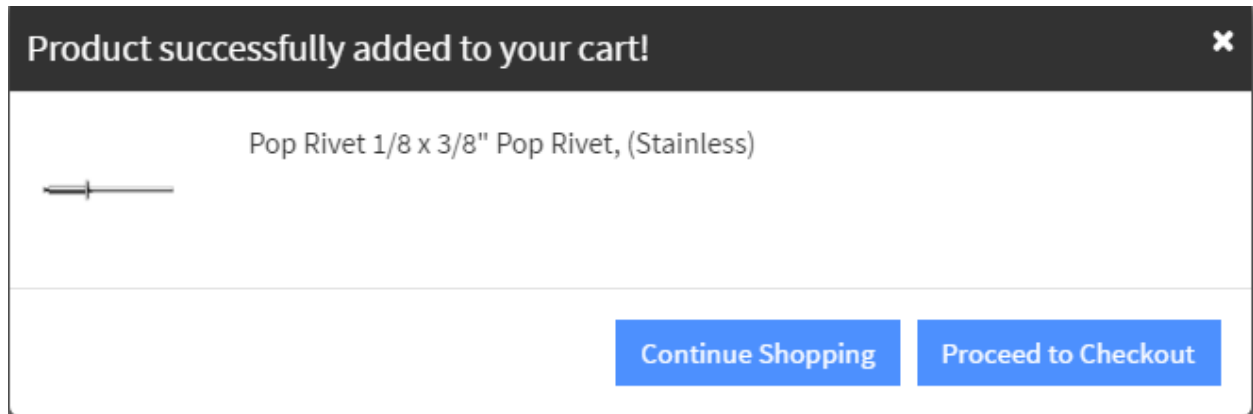
Users can either **Continue Shopping** to add more items or **Proceed to Checkout** to complete the order.

The Ordering Process | View/Modify Items in Cart

After clicking **Proceed to Checkout**, the cart is displayed.

Users may delete or modify the quantity of items in the cart.

Modify Quantities
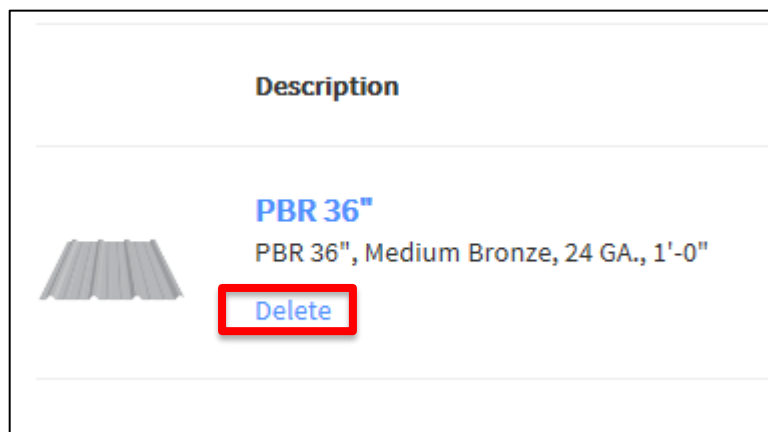
In the quantity field, update the numerical value and click **Update**.

Delete Items

To delete items, click **Delete**.

The Ordering Process | Checkout

After clicking **Proceed to Checkout**, the checkout is displayed.

During the checkout process, the **General Information** fields are auto populated with default values.

Any of these values can be changed from the drop-down menus.

All required fields are indicated by an asterisk.

The Ordering Process | Checkout

The **Shipping Information** is displayed below the General Information section.

By default, the **Same as Shipping Information** box is checked on the **Jobsite, Buyer** and **Owner Information** tabs.

The Ordering Process | Checkout

Information on each tab may modified by unchecking the **Same as Shipping Information** box and updating applicable fields.
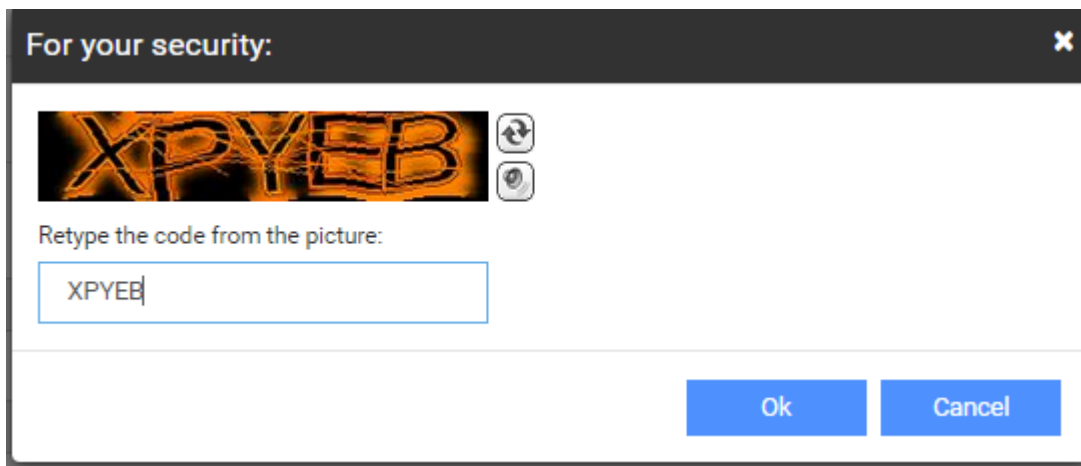
Once all of the order information has been completed, click **Proceed**.
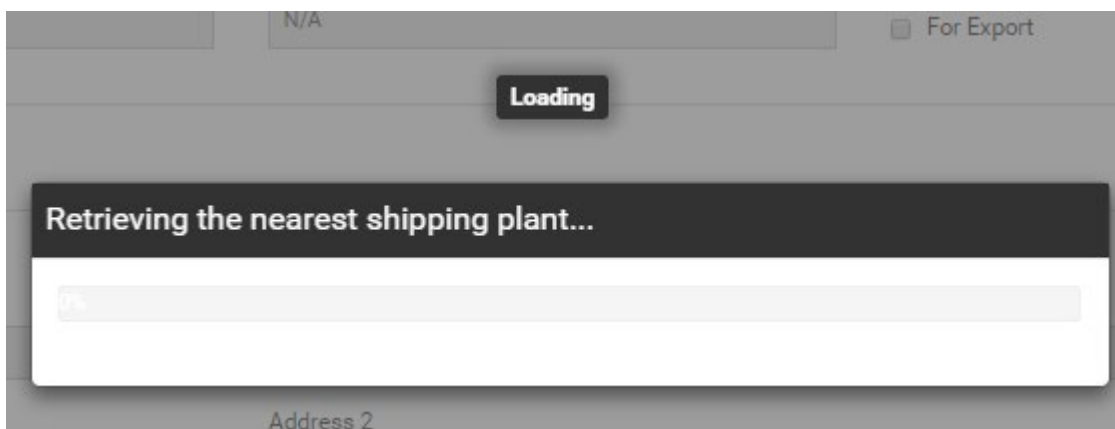
The Ordering Process | Checkout

This action will prompt a security validation code screen to appear. Enter the code. Click **OK**.

The system will use the information provided to generate a Purchase Order.

The Ordering Process | Checkout

Sample Purchase Order:

The Purchase Order will not be available to be submitted until specific information is entered. (The **Buy** option will not be selectable.)
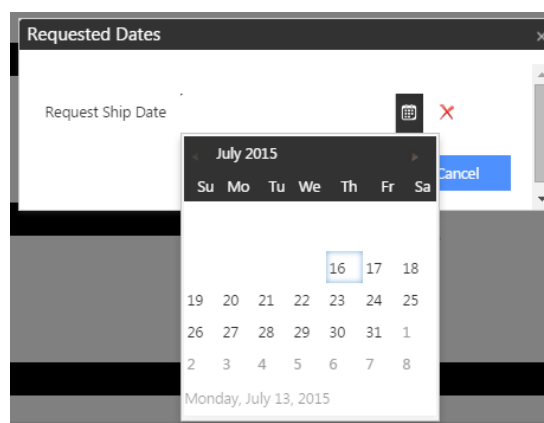
To submit the Purchase order, click **Requested Dates**.

A calendar will appear.

Click on the calendar to select an available date for shipping the order. (*Please note: the ship date selected is not guaranteed*.)

Click **OK**.

Accept the Terms and Conditions. (The Terms and Conditions are included at the bottom of each Purchase Order.)

Click **Buy**.

This will take you back to the Component Project Dashboard. The status next to the project order will change to **Submitted**.

Your order is complete.

Managing Projects

- View Purchase Order
- Copy Project
- Rename Project
- Share Project
- Un-share Project
- Export Project
- Import Project
- Archive Project
- Un-Archive Project

Managing a Project | View Purchase Order

1. From the Project Dashboard, highlight the project to be viewed.
2. Click the **View Purchase Order**.

The Purchase Order will display.

Managing a Project | Copy Project

1. Highlight the desired project on the Project Dashboard.
2. Click **Options**. Select **Copy** from the dropdown menu.

3. The Copy Project window will appear.
4. Rename the project and click **OK**.

Managing a Project | Copy Project

You will be returned to the Project Dashboard and the copy of the project created will display on the Project Dashboard.
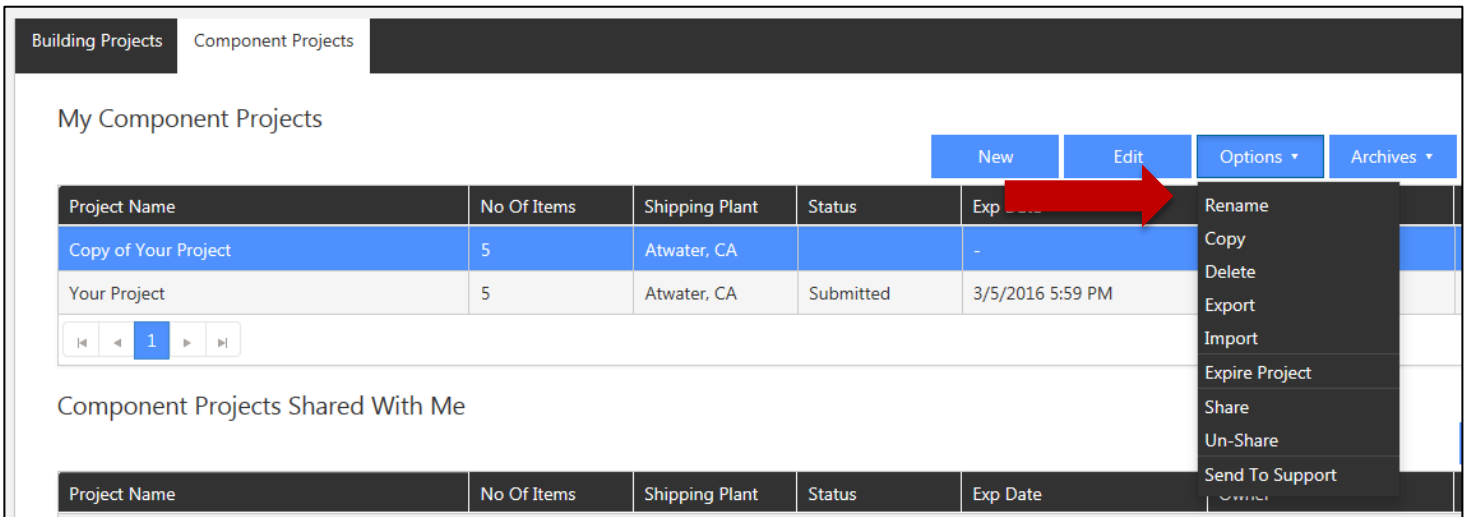
Managing a Project | Rename Project

1. From the Project Dashboard, highlight the project to be renamed.
2. Click **Options**.
3. Select **Rename** from the dropdown menu.

4. Type the new Project Name and click **OK**.

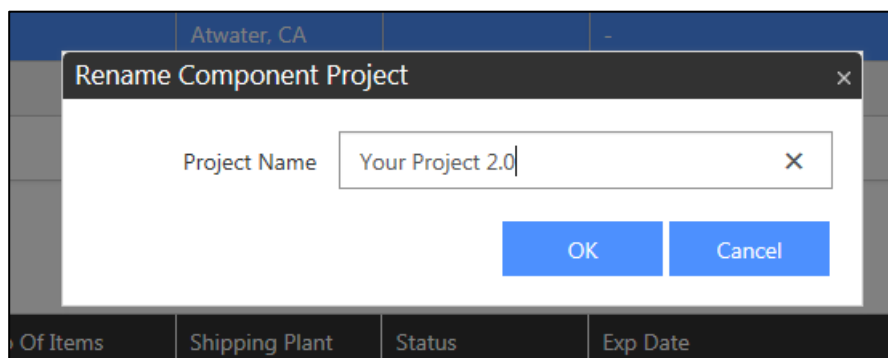The new project name will be displayed on the Project Dashboard.

Managing a Project | Share Project

1. Highlight the desired project on the Project Dashboard.
2. Click **Options**. Select **Share** from the dropdown menu.
3. From the Share Project menu, select the individual to share the project with. Click **OK**.
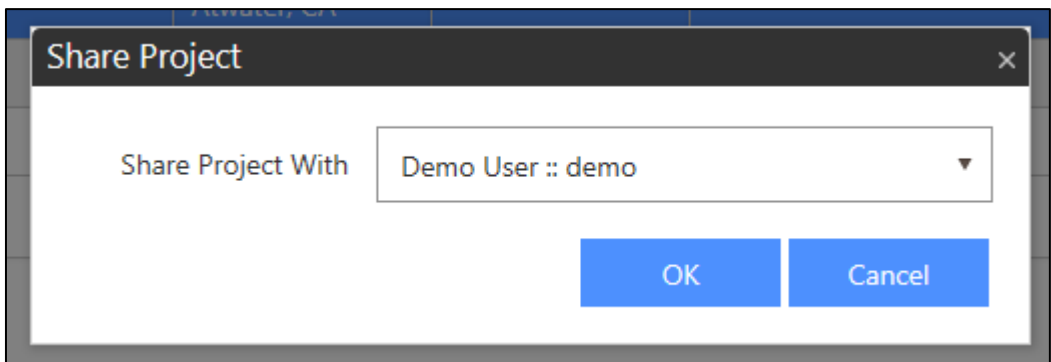
You will be able to see who the project was shared with in the **Shared With** column of the Project Dashboard.

Managing a Project | Un-share Project

1. Highlight the desired project on Project Dashboard.
2. Click **Options**. Select **Un-share** from the dropdown menu.

Users will be able to tell that the project is no longer shared in the **Shared With** column of the Project Dashboard.

Managing a Project | Export Project

This feature is available to internal users only.

1. Highlight the desired project on the Project Dashboard.
2. Click **Options**. Select **Export** from the dropdown menu.
3. A .json file will be created. A pop-up will appear asking if you'd like to open or save the file.

4. Click the arrow on the right side of **Save** button.
5. Select **Save As** from the menu.
6. Select the location to save the file. Rename the file.
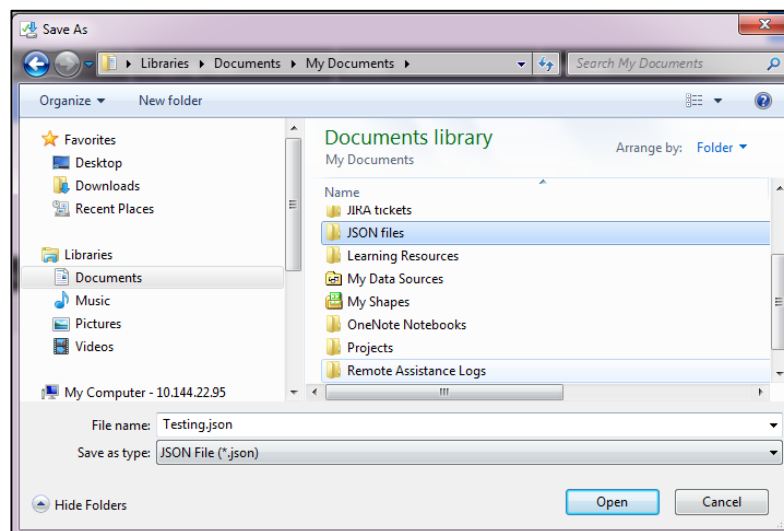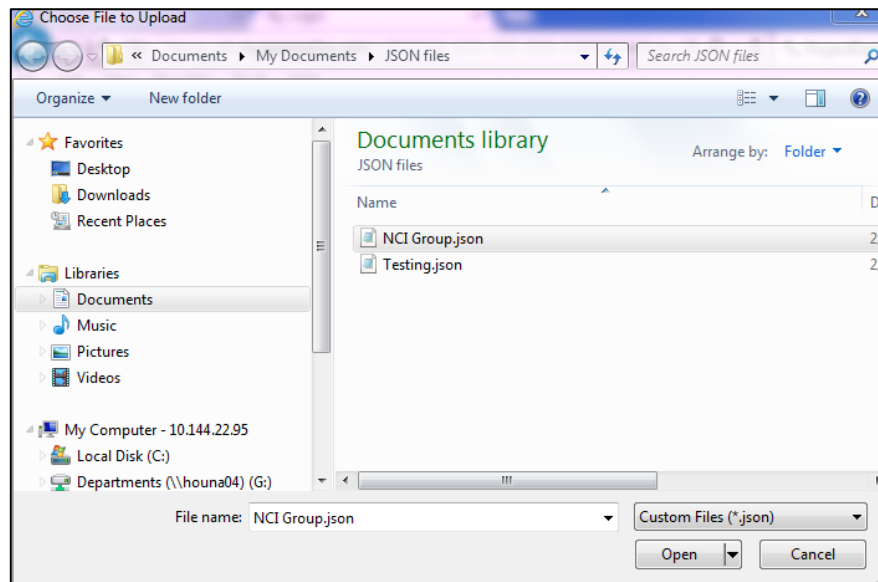7. Click **Save**.

Managing a Project | Import Project

This feature is available for internal users only.

1. Highlight the desired project on the Project Dashboard.
2. Click **Options**. Select **Import** from the dropdown menu.
3. Use the menu to navigate to the location of the .json file to import. Click **Open**.

The imported project will now be displayed on the project dashboard.

Managing a Project | Archive Project

If the project list is long, users may want to archive the project so it does not appear in the active project list.

1. Highlight the desired project on the Project Dashboard.
2. Click **Archives**. Select **Archive Project** from the dropdown menu.
3. The Project will be removed from the Project Dashboard and moved to the Project Archives. The projects are not deleted from the system.
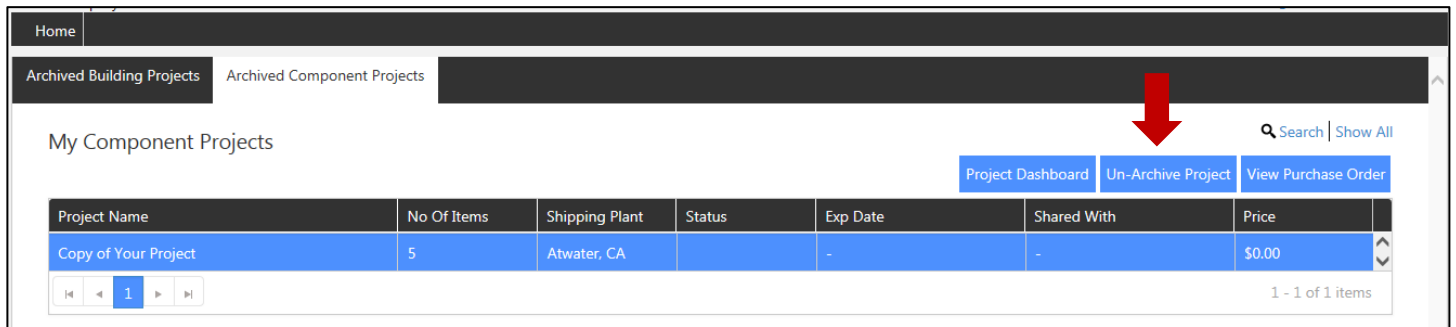

To see a list of your archived projects, select **View Archives.**
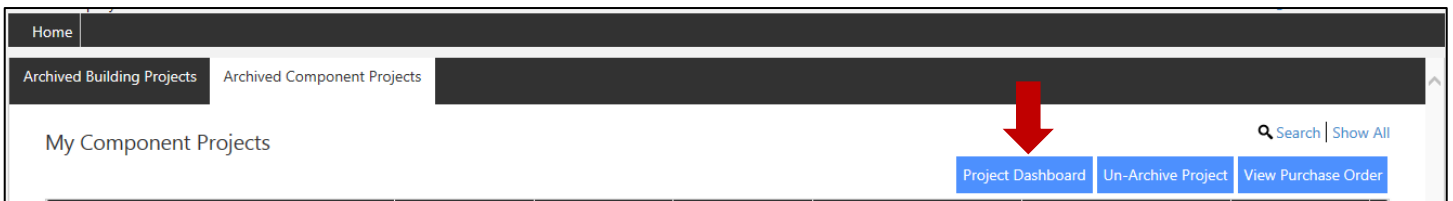
Managing a Project | Unarchive Project

1. Click **Archives**. Select **View Archives.** The Project Archives will display.

2. Highlight the desired project on the Archived Project list. Click **Un-Archive Project**.

3. Click **Project Dashboard**

4. The un-archived project will reappear on the Project Dashboard.

Contact Information

Contact Information

Metallic Building Company is committed to ensuring your success with Components Online. Our commitment to excellence begins with our commitment to our customers.

For questions, concerns or feedback, please call **1-866-800-6353** for further assistance.