



Shell
MarketHub

Welcome Aboard

An Introduction To Shell MarketHub



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1

Getting Started With Shell MarketHub

Everything you need to know
to get up and running.



Shell MarketHub helps you manage day to day business with Shell from your PC, tablet or mobile device. Sign in to manage orders, account activities and reporting, and explore valuable training tools, designed to give you everything you need make to the most out of working with us.

The website has been designed as a “one-stop shop” for you to easily self-service and manage your account activities quickly and efficiently.

**From the Shell MarketHub portal,
you are able to:**

- Create Orders
- Cancel/Amend Orders
- Customise your user profile
- (Superusers only) Setup/manage other users in your organisation

As a regular user, you will be able to access most portal functionality. Superusers in each organisation will have additional functions available to enable them to create and manage other users.



For an optimal user experience, it is important that you are aware of the minimum system requirements to view and interact with Shell MarketHub.

Shell MarketHub has been optimised with the following settings in mind:

- Internet Connection: Broadband connection 5 Mbps or greater
- Internet Browsers: In general it is recommended your browser is the latest stable version
- Internet Explorer 11 and above
- Firefox 65 and above
- Chrome 72 and above
- Mac OS X 10-10 and above
- Tablet iOS 9 and above
- Tablet Android and above
- Windows 7 and above
- Microsoft Excel 2010 and above
- Adobe Acrobat Reader – ensure the latest stable version is installed
- Screen Resolution: 1024 x 768

Using an unsupported browser or device other than those recommended could impact your online experience, and Shell MarketHub may not work if viewed on an unsupported browser or device.



1.3 Getting Started

1st Time Login

You will be able to login to the Shell MarketHub portal using the credentials assigned to you by your company's Superuser. If you do not know who your company Superuser is, or if you would like to be registered as a Superuser for your company, please contact our customer service team.

After you have been registered by your Superuser, your username and temporary password will be sent to your email address. You can then login to the portal using those credentials.

If it is your first time logging in to Shell MarketHub, you will be prompted to read and accept our Privacy Policy and our Terms and Conditions. You will be granted access to the portal by agreeing to both of these.

Additionally, if you have logged in with a temporary password, you will be asked to change your password when you login.

Your permanent password should:

Have at least 1 upper case letter (A–Z)

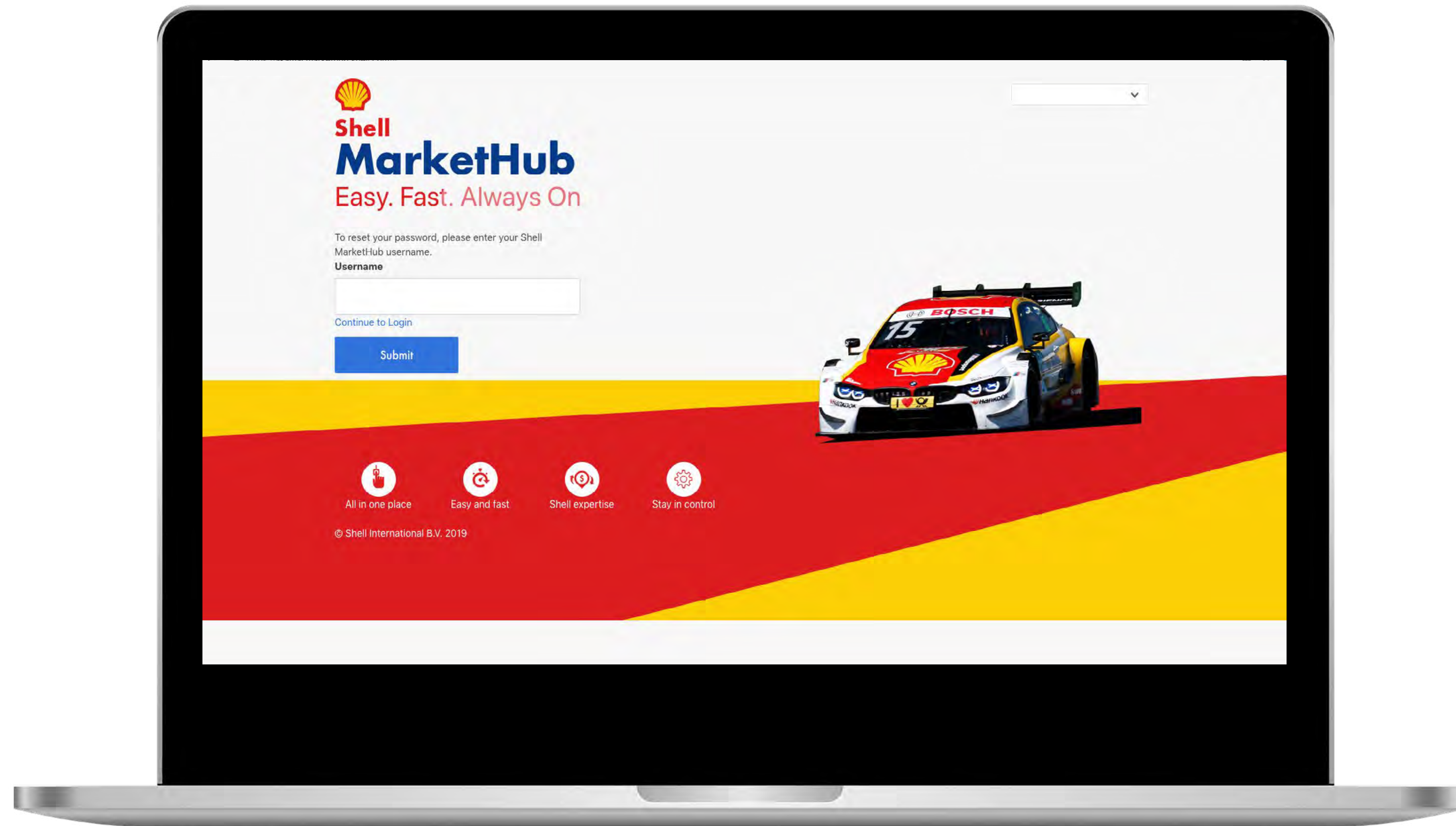
Have at least 1 lower case letter (a–z)

Have at least 1 special character (@, #, \$, &, etc...)

Have at least 1 number (0–9)

Be between 8–14 characters long





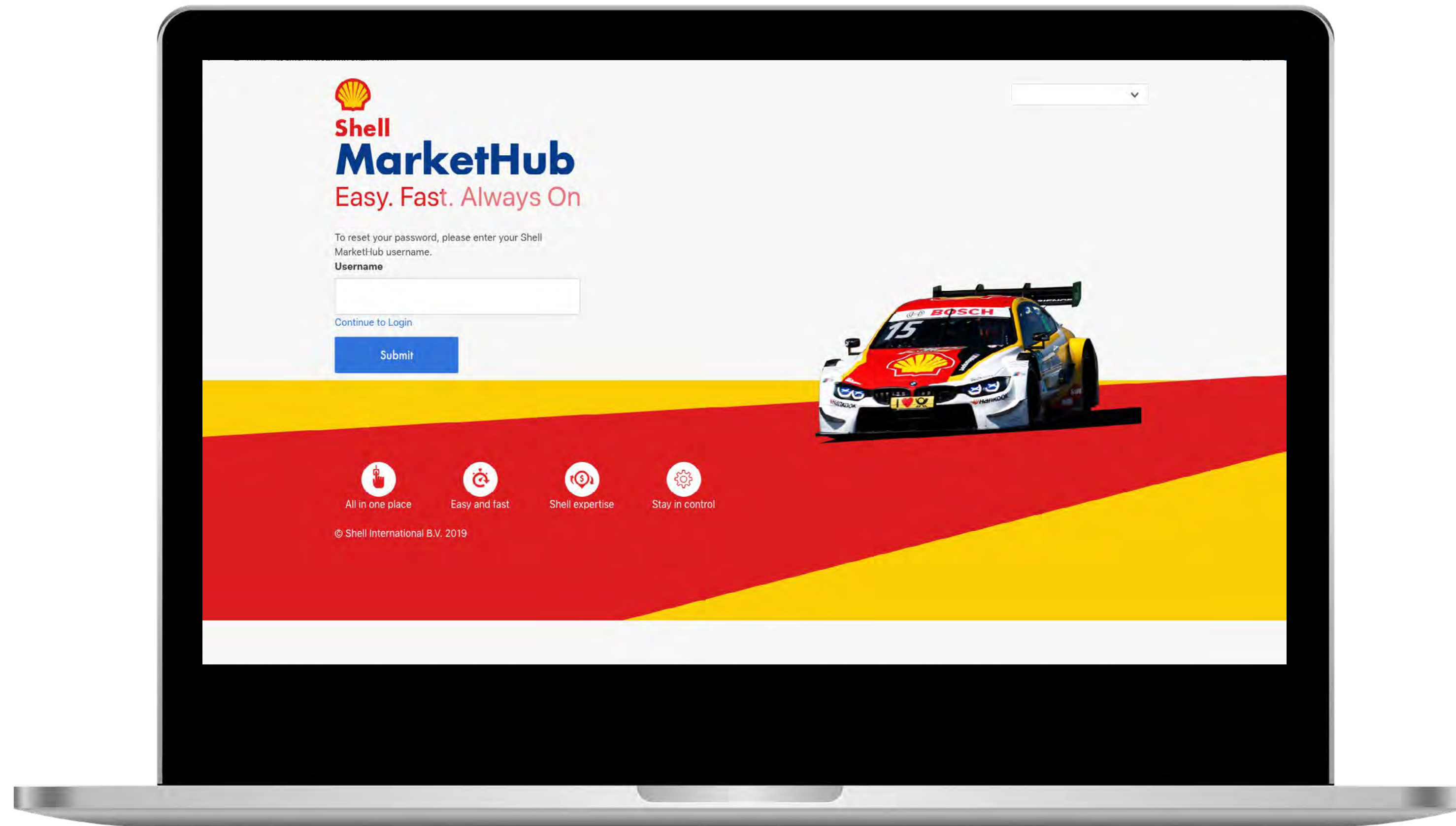
If you have forgotten your password, you can reset your password from this page.

Note you can only do so if you have been registered in the system by our support team or by your company's Superuser.

To reset your password, you will be prompted to provide your username.

Upon clicking the reset button, a new password will be sent to your email address.

You can use the new password to login.



If you have forgotten your username, you can retrieve your username from this page.

Note you can only do so if you have been registered in the system by our support team or by your company's Superuser.

To retrieve your username, you will be prompted to provide your email address.

Upon clicking the retrieve button, your username will be sent to your email address. You can then login to the portal using your username and password.

If you are a Company Superuser, you have the ability to setup other users in your company to use Shell MarketHub.

This allows you the flexibility to add new users from your organisation without needing to contact our support team.

To create new users, you must have Superuser permissions. Note that you can only create other users at your company.

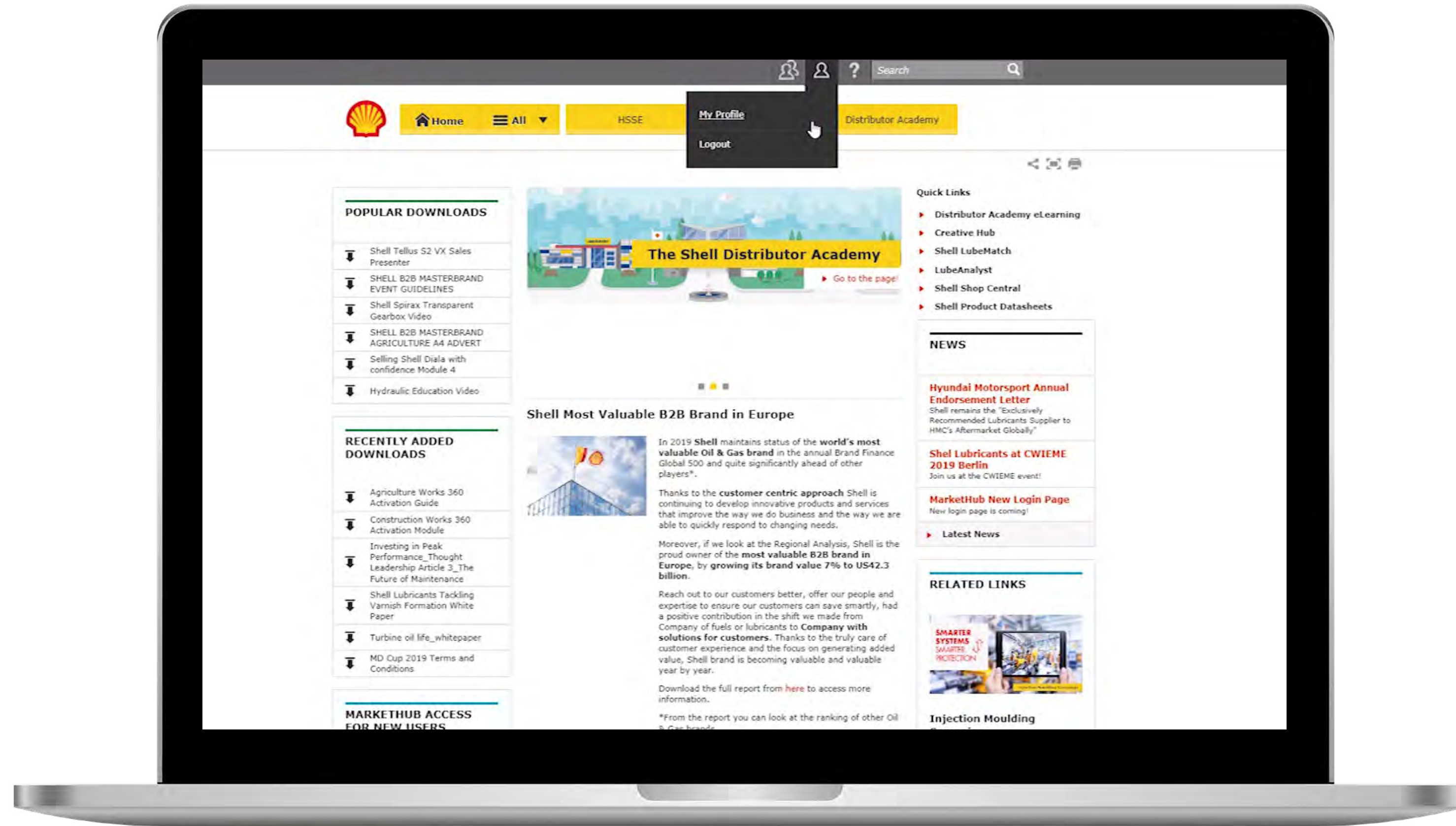
If you are a Company Superuser, a key responsibility is to manage user accounts for others in your company. This allows you the flexibility of making any updates to user profiles (such as contact information or activating/disabling users) without needing to contact our support team.

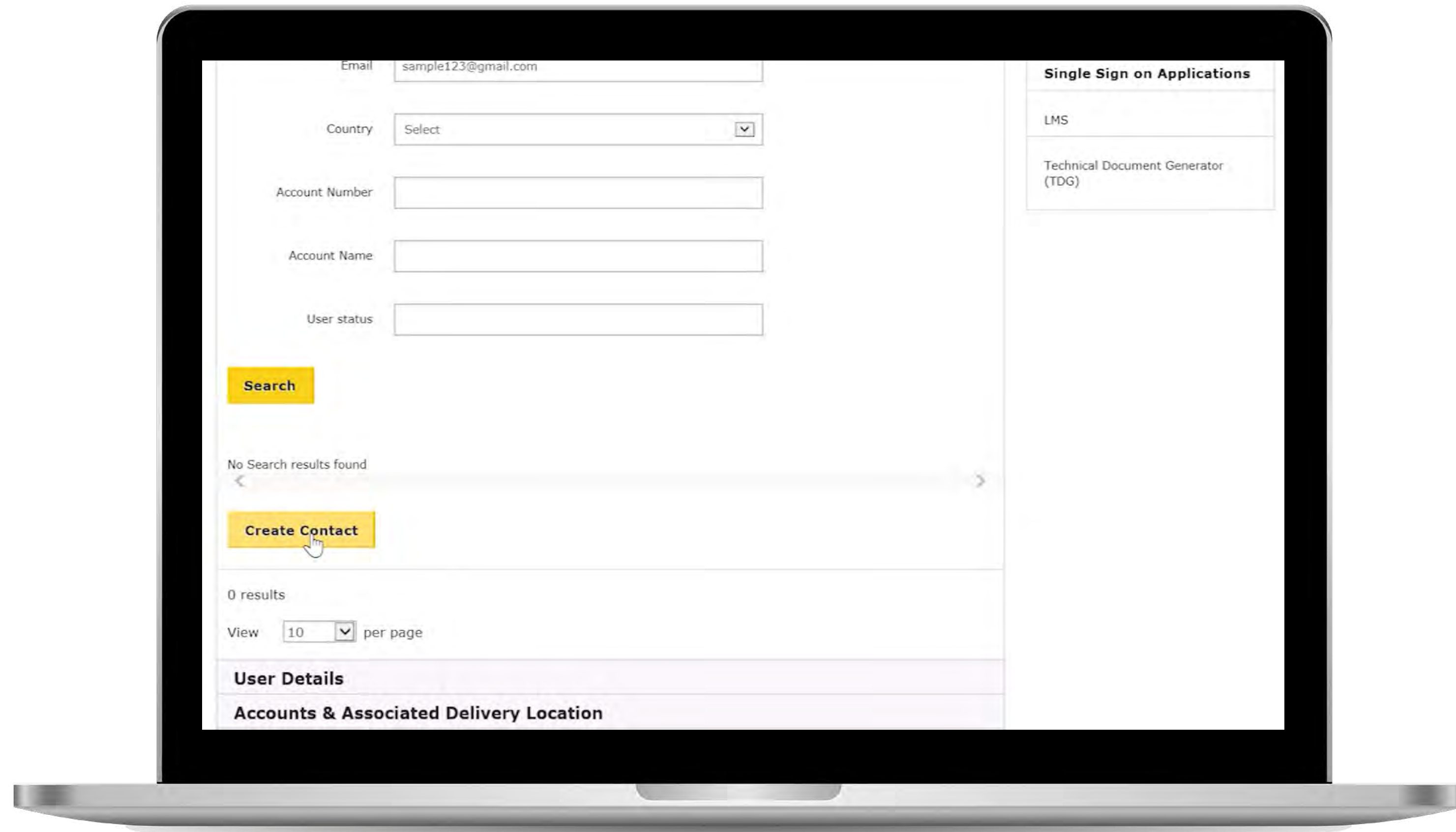
To manage other users, you must have Superuser permissions. Note that you can only manage other users at your own company.

From the UAM Home Page, click “Manage Other Users.” You will be taken to the “Manage Other Users” page, where all of the user accounts in your company will be displayed in a table format. You can filter and sort the table by column header. Screen reader support enabled.

Please refer to the User Account Management Reference Guide for additional details.

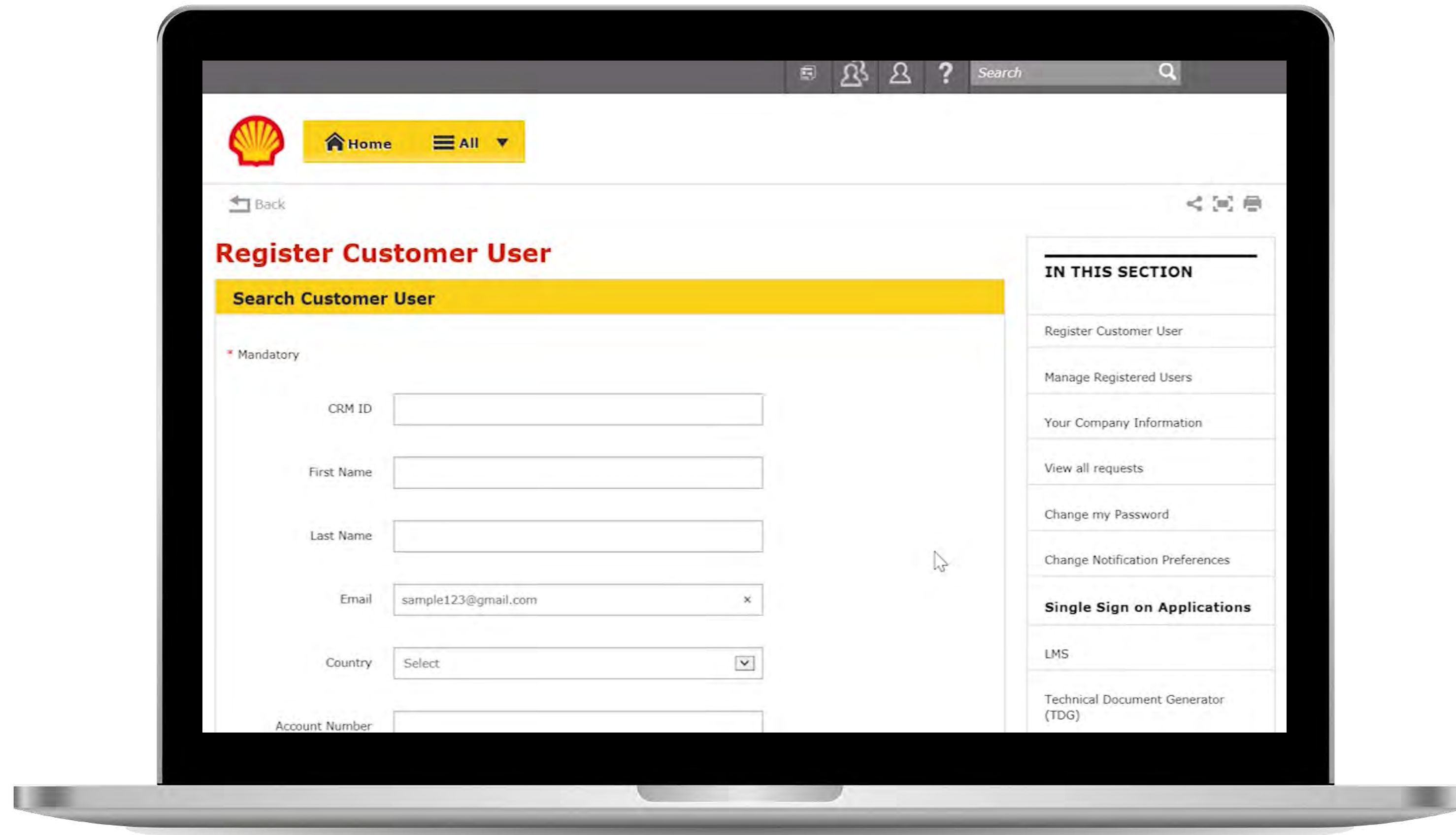


Step
1Click on **User** icon and then **My Profile**



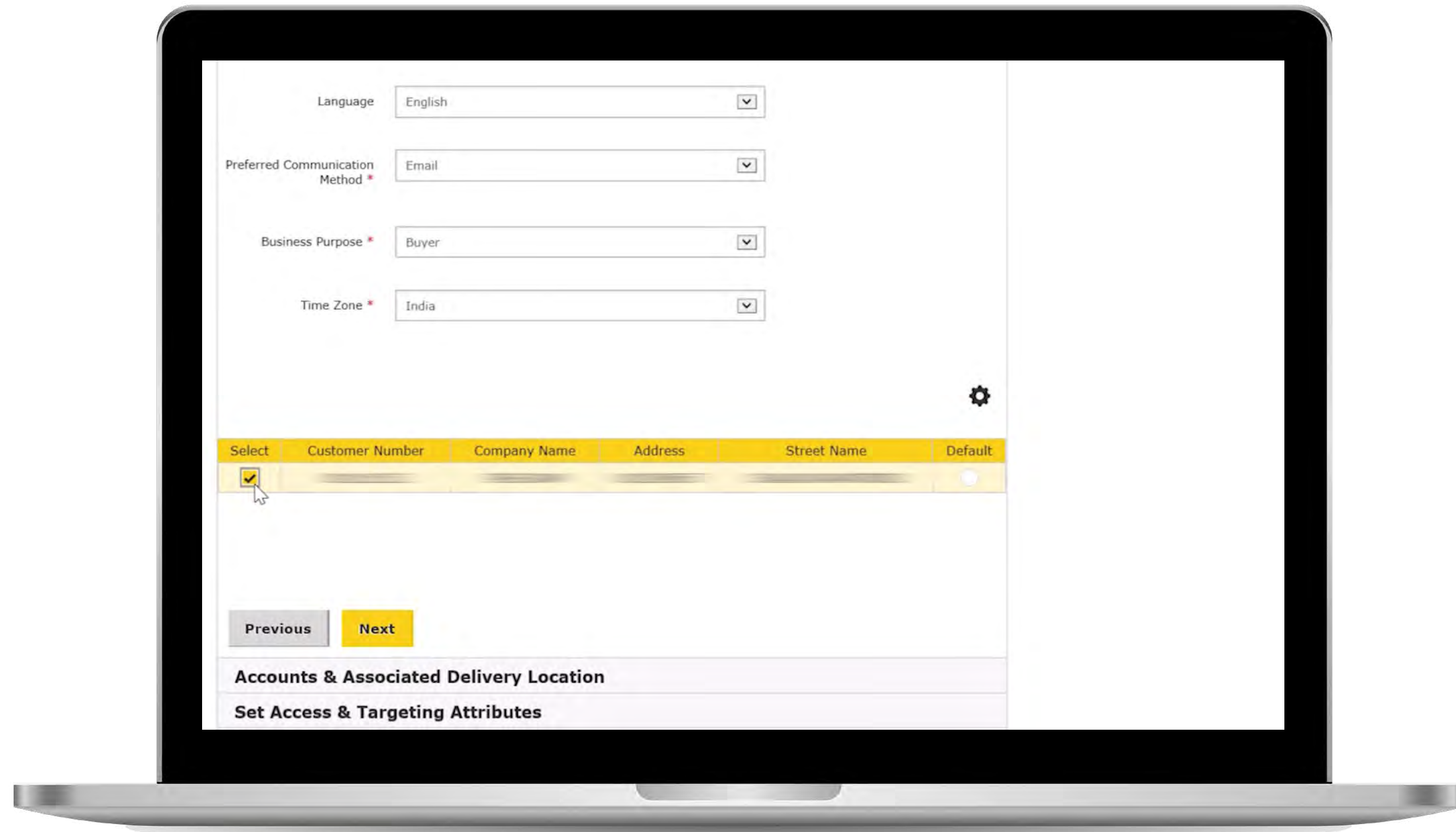
Step
2

Click on **Registered Customer User** and key in the email address of user which you creating the account for. Click **Search** to check if there are duplicate accounts. If not, then **Create Contact**



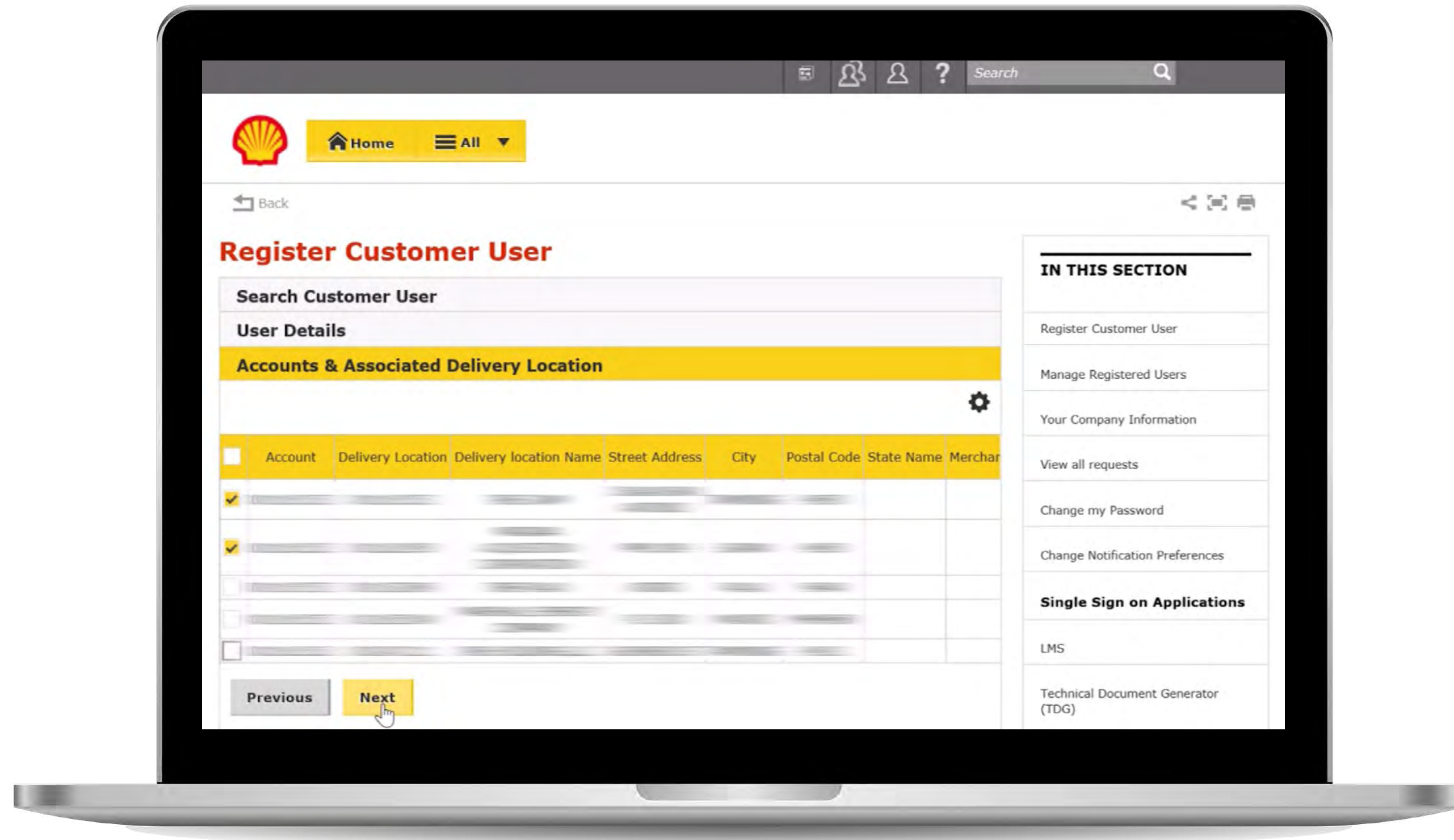
Step
3

Fill in the mandatory fields with the asterisks



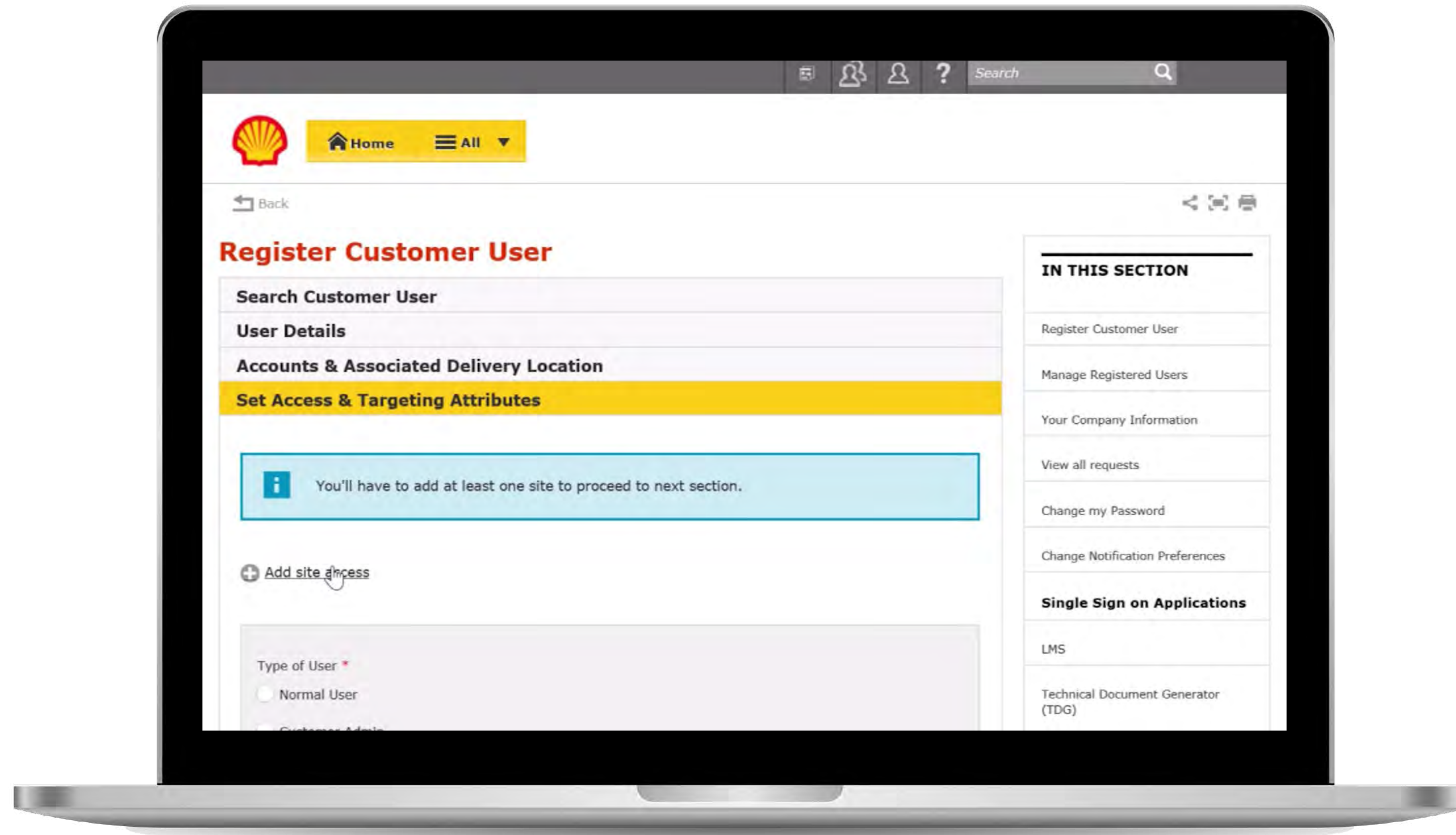
Step
4

Select the sold to account that the customer is using
and click **Default**. Click **Next**



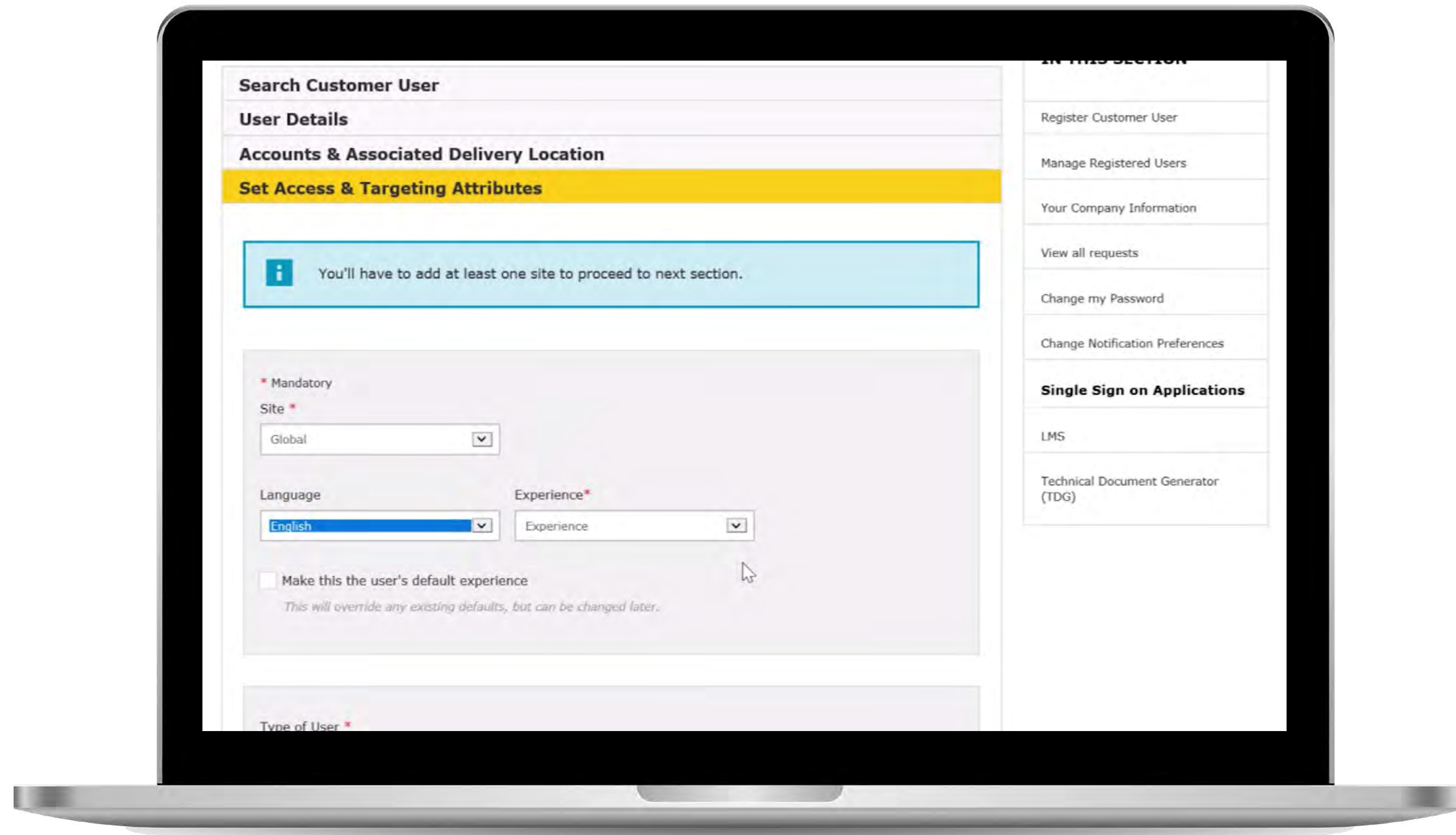
Step
5

Select the 'ship to' that you would like your customer admin to have access to. Click **Next**



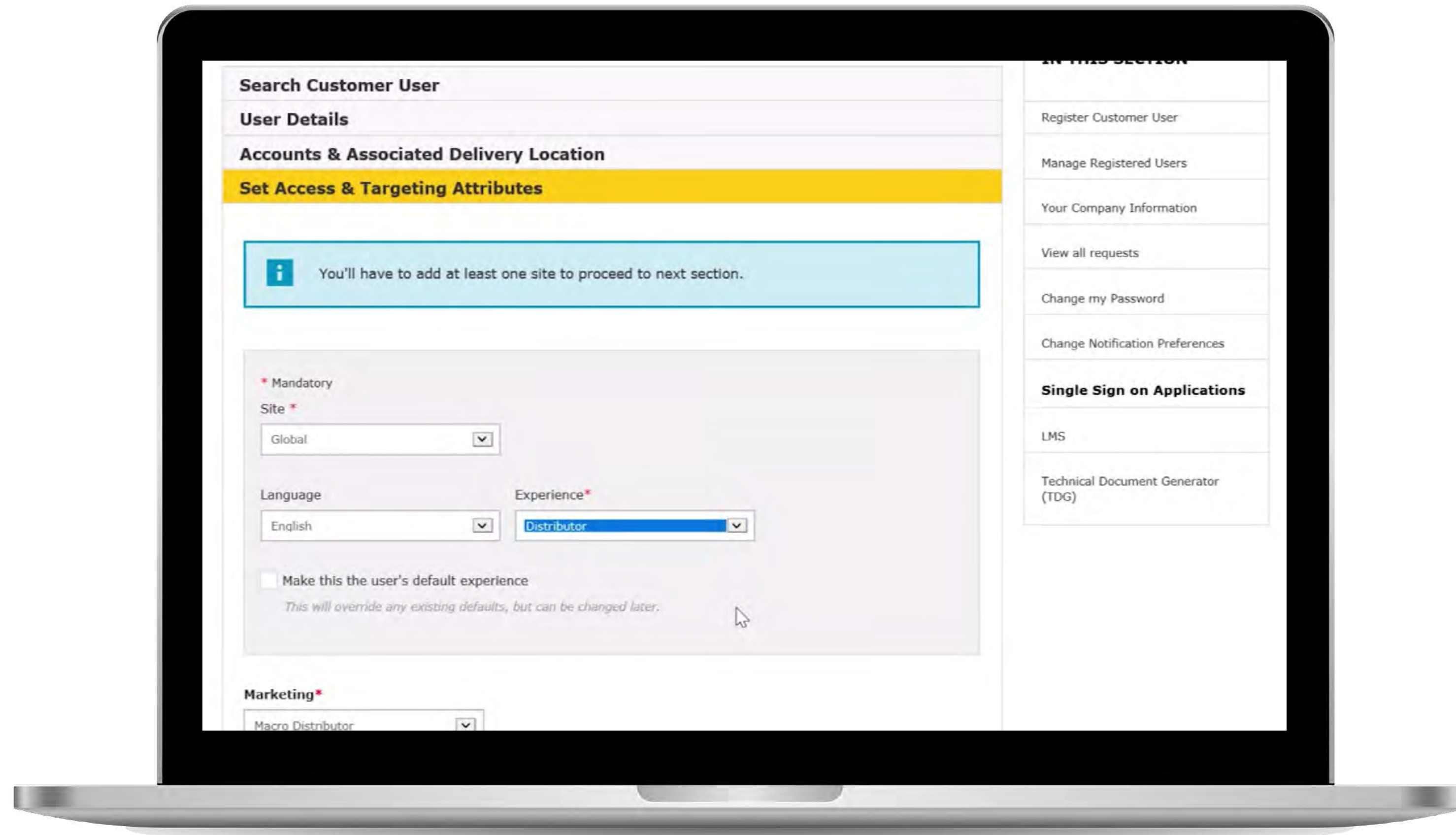
Step
6

Under the **Set Access & Targeting Attributes**,
click on **Add site access**

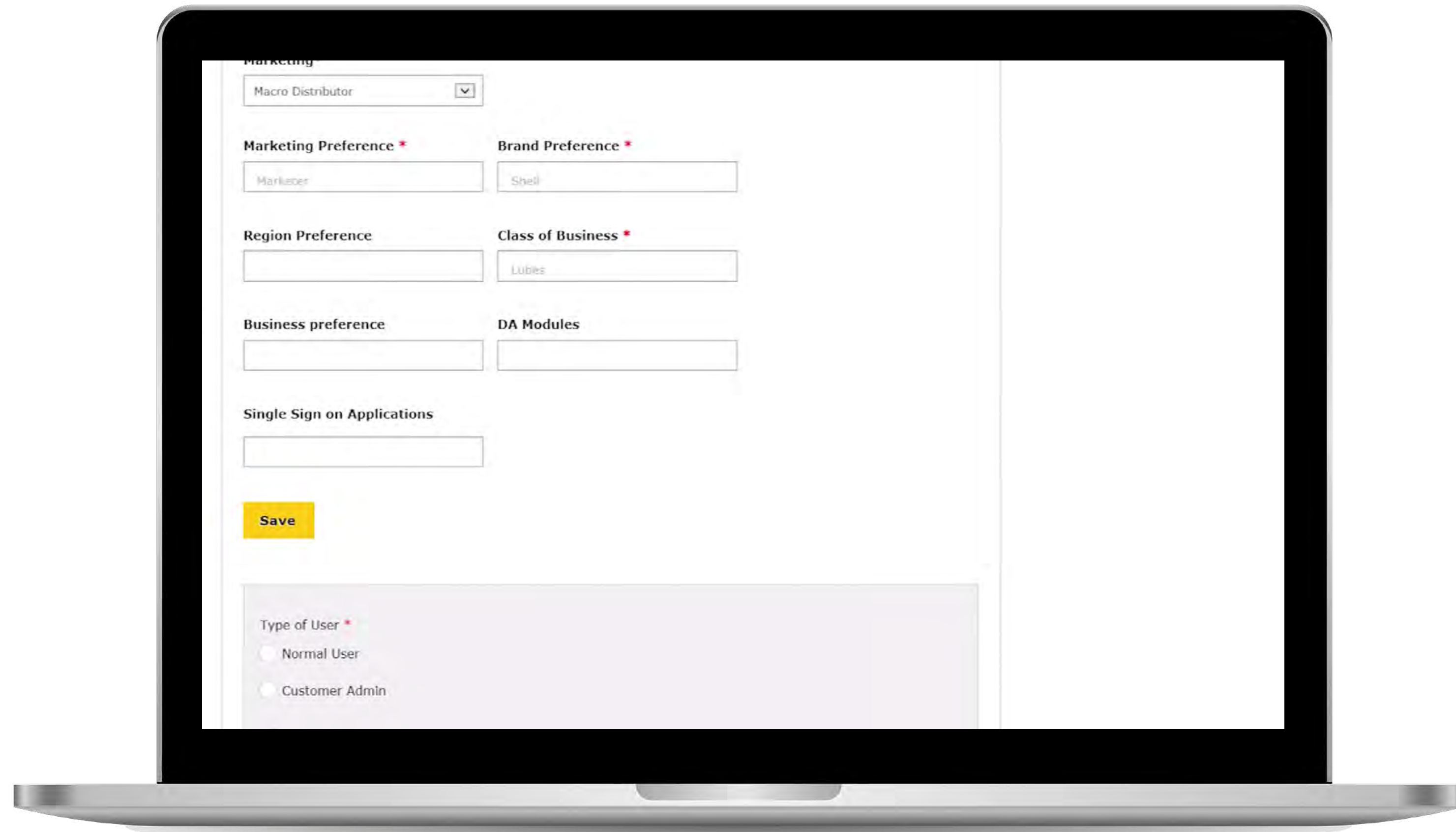


Step
7

Under the **Site** icon, select **Global** and
choose the desired language

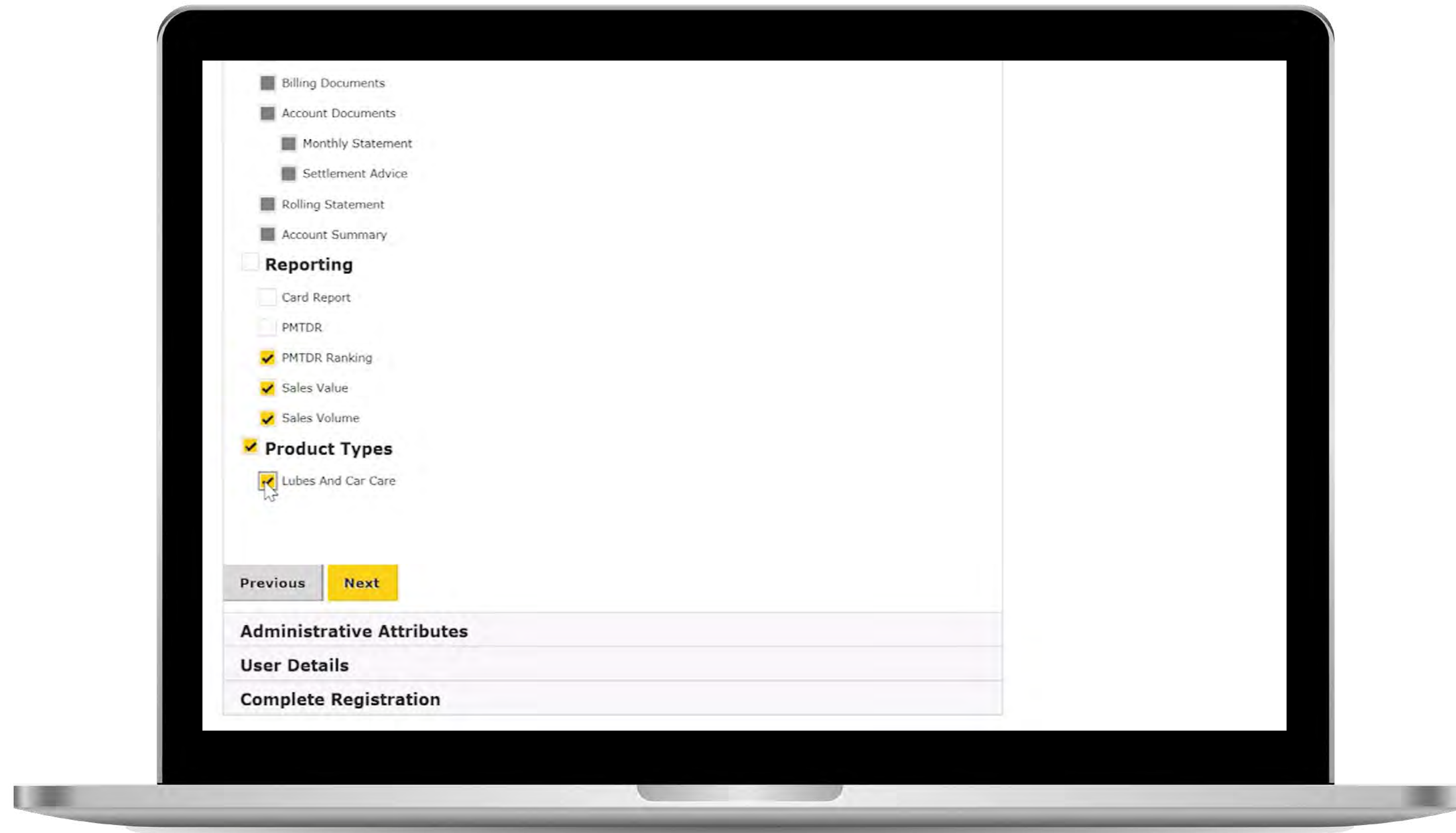
Step
8

Select the necessary experience relevant to your user from the drop-down menu and then tick the **'Make this the user's default experience'** of your customer user



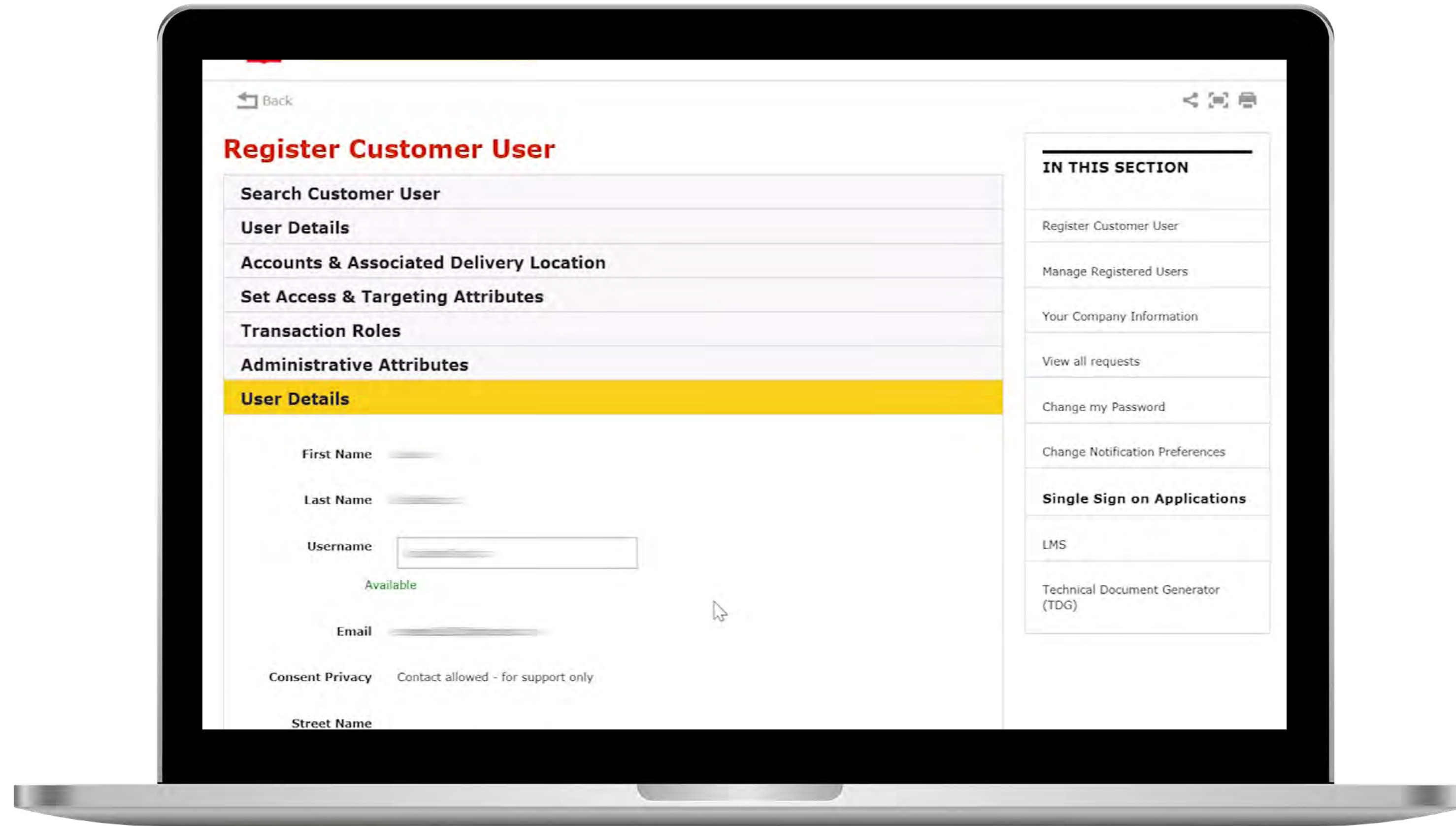
Step
9

Select the relevant marketing preference, brand preference, class of business relevant to the user. Click **Save**



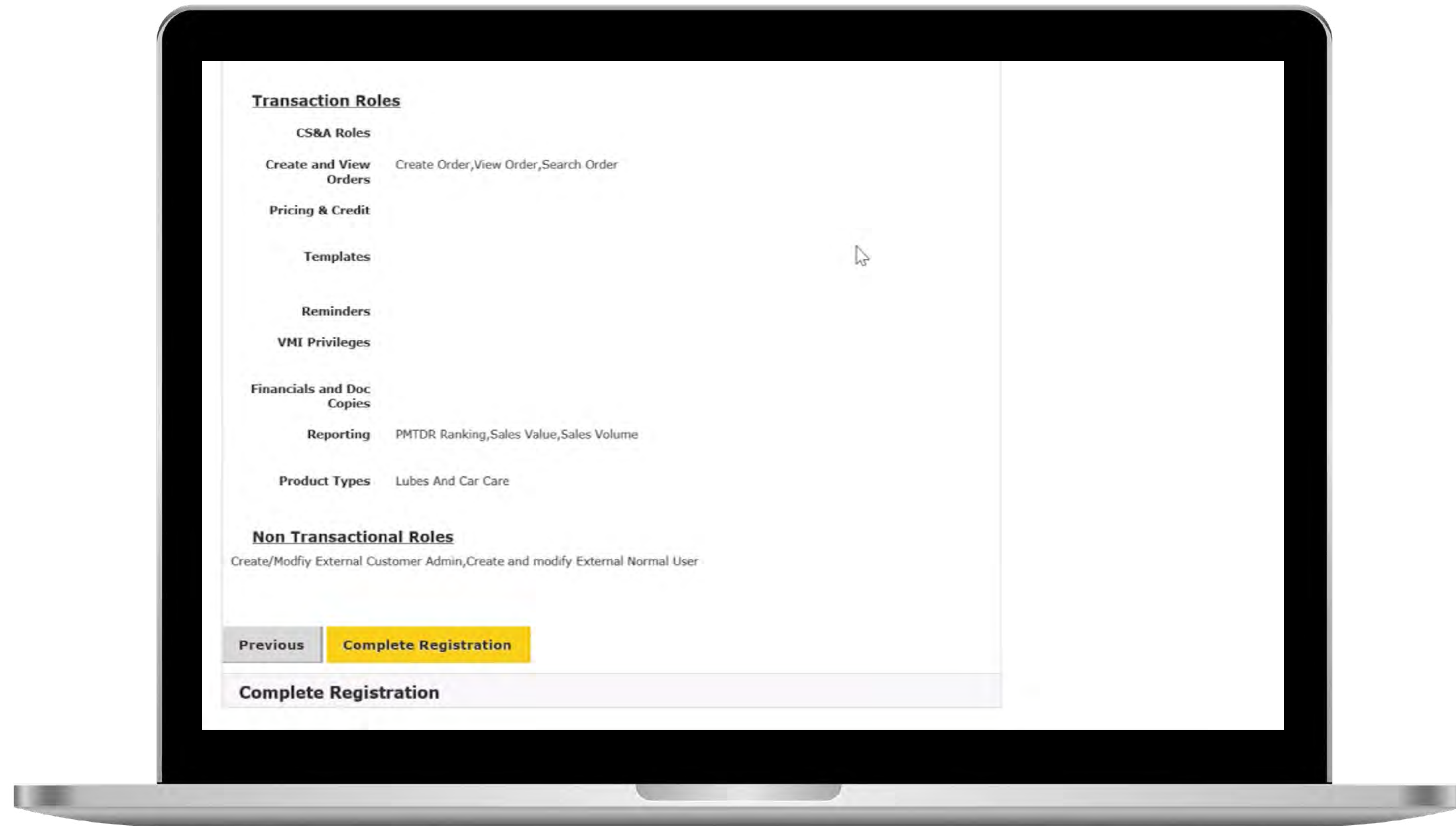
Step
10

Select the customer user under the user.
Tick enable to transact to e-commerce functionality
and click **Next**. Customise the admin of your customer
admin. Ensure that the product type is ticked as the
registration will not proceed. Click **Next**



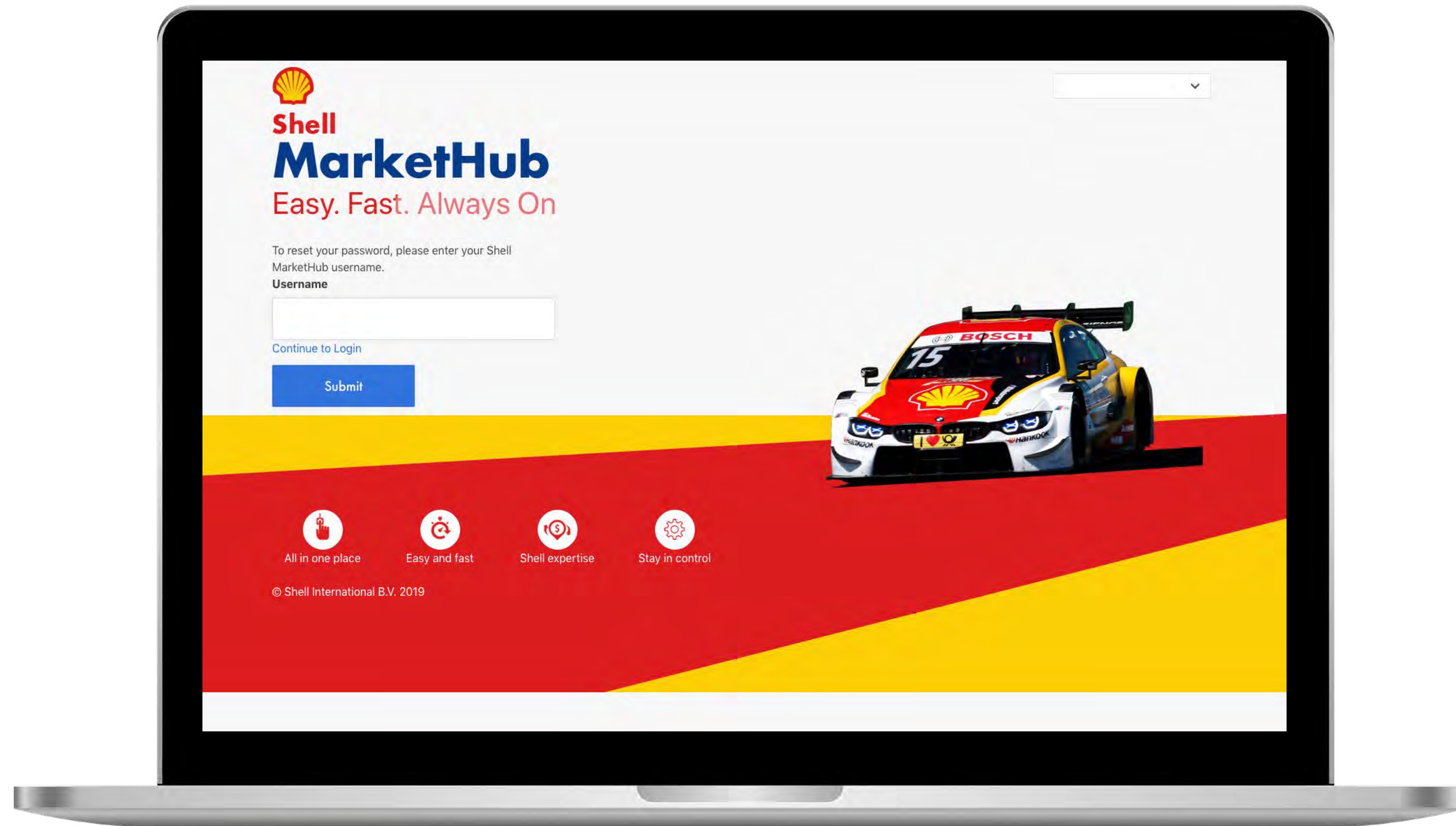
Step
11

Select the necessary administration roles and click **Next**. You will now see a user summary based on all the information which you have keyed in during the creation of the account. Note a Username will be automatically generated but you can customise it and ensure that there are no spaces in the username.



Step
12

Check the summary to ensure that all the information is correct.
Click on **Complete Registration**



If you have further questions or require additional assistance, please contact your customer service centre.

You can also contact customer support via the login page.

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2 Order Management

Making it quicker and simpler for you to place, view, amend, repeat and cancel your orders.



2.1

Order Management

Order Management Workspace At A Glance and Glossary of Terms

In this section, we will take a high-level glance at many of the core functionalities.

Account – Displays the Customer Account

Business Category – Displays the purchasing business category

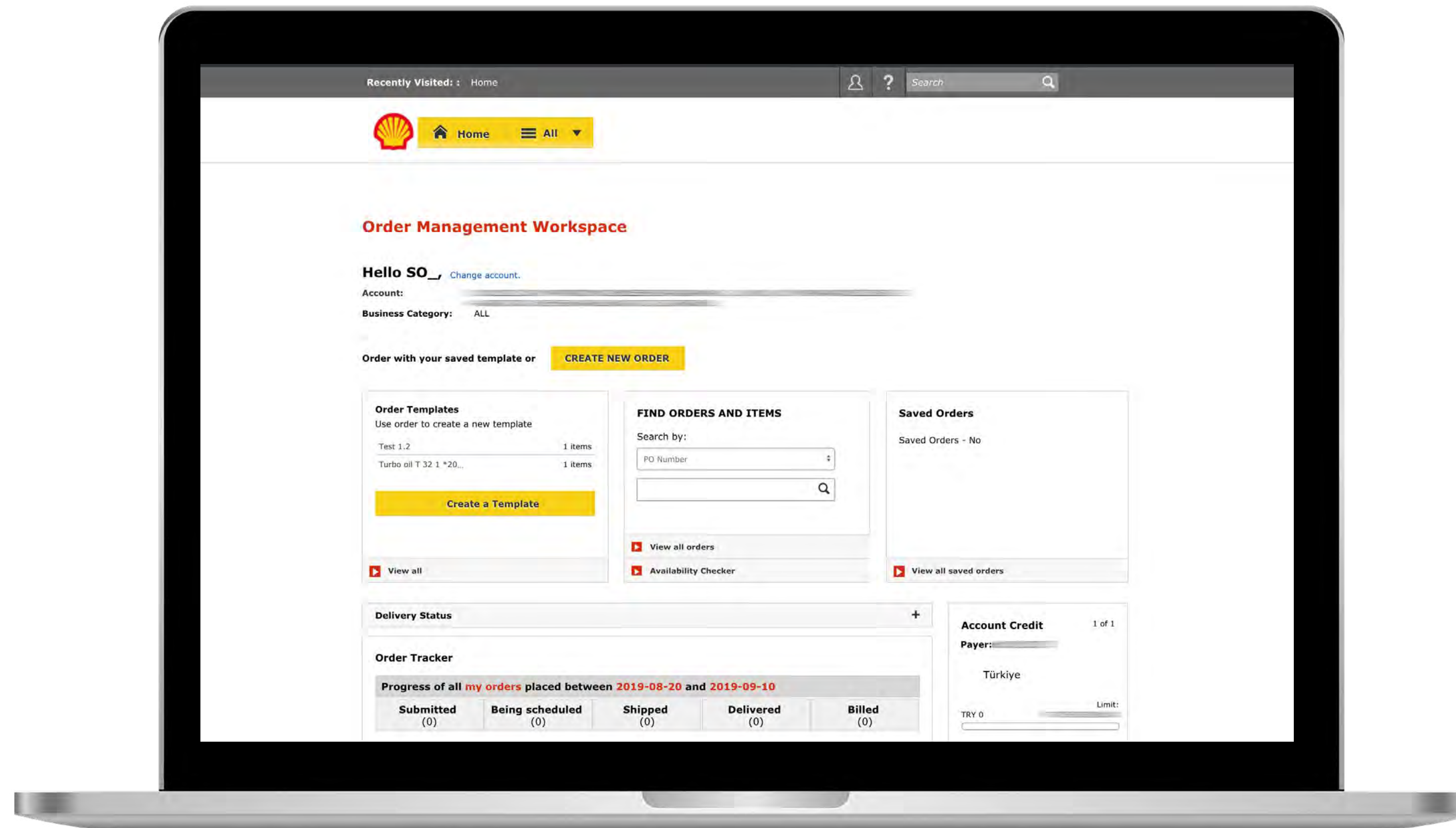
NOTE: You may choose to change the Business Category should you wish to place an order for a different category

Saved Orders – Pick-up and complete an order which has been saved in draft format – either automatically because the system timed out or because you made a deliberate decision to save the order for later

Reorder Reminders – Place an order from or view reorder reminders in detail

Product List – More flexible from your template. It's a system proposed list such as your frequently ordered products based on order history or user defined product list such as your full product portfolio

Create New Order – Displays the quick link to place an order



Order Tracker - Allows you to check order status within a three-week window and provides a graphical representation of the order progress. Each order is categorized within the following status:

Submitted – Shell has received your order

Being Scheduled – Delivery is being scheduled

Shipped – Order is in transit

Delivered – Order confirmed as delivered

Billed – Invoice has been generated

Delivery Status – Helps you track the status and date of your delivery

To see orders beyond the three week window, click on **View All Orders**.

2.1

Order Management

Order Management Workspace At A Glance and Glossary of Terms

Please Note – Important messages are highlighted with an exclamation

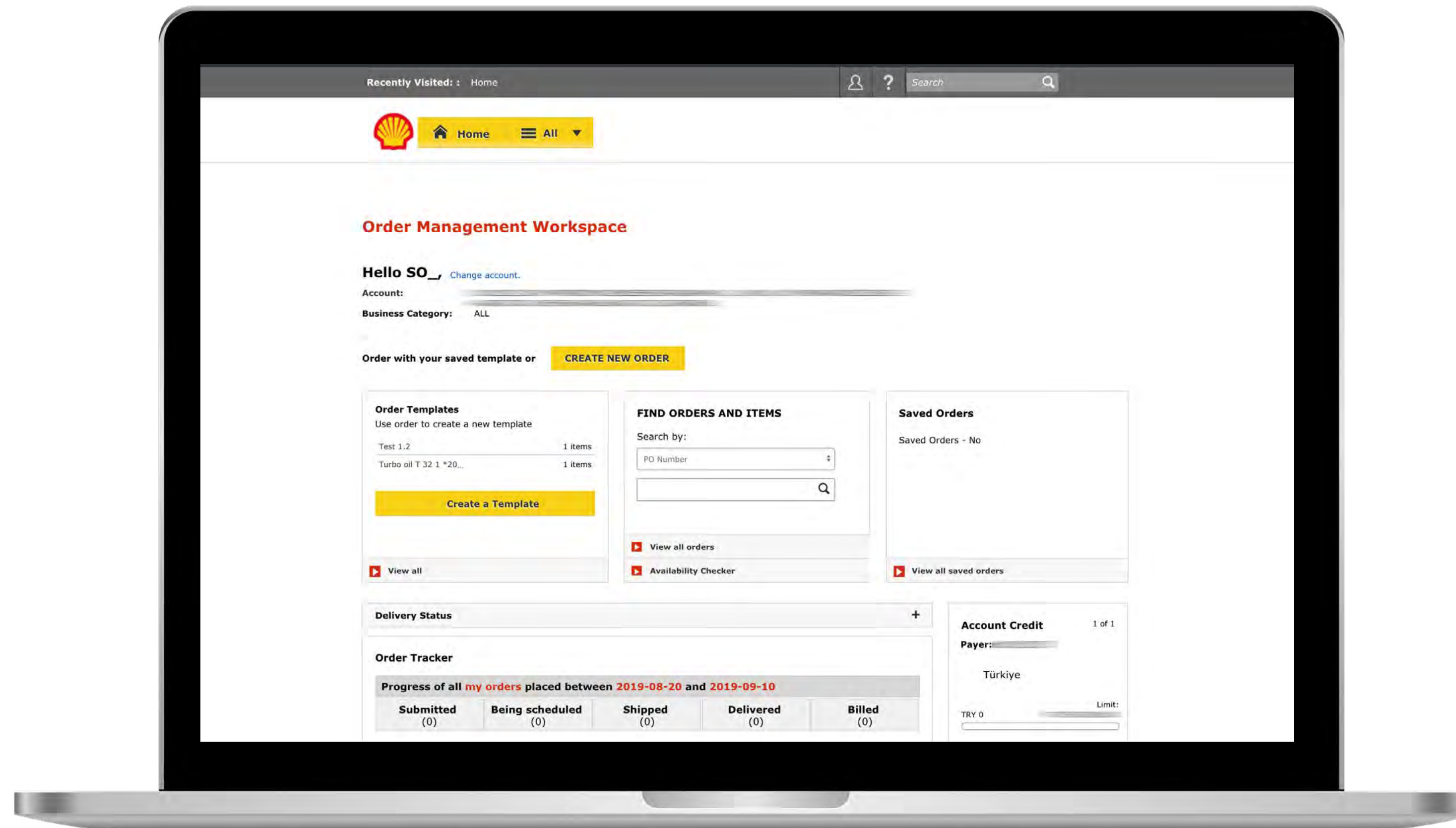
Click to see more details

New! Account Credit section provides a real time snapshot of your credit information. The remaining credit displays the amount of credit left

Please note – Access to Account Credit may vary per user privilege

New! Find Orders and Items is a quick way to find and search your orders. You may select different types of reference numbers related to the order as shown on the drop-down search such as:

PO Number
(Shell) Order Number
Contract Number
Delivery Number
Billing Number
Delivery Location
Order placed by
Product Number



Select View All Orders to view orders by date range which defaults past 120 days or locate an item within your order

Availability Checker – View product availability

Shell Lube Match – Your online lubricant recommendation tool that makes it easier for you to find what lubricants are suitable for your vehicles and equipment as well as helping Shell Lubricants distributors to find the right lubricant instantly for almost any application

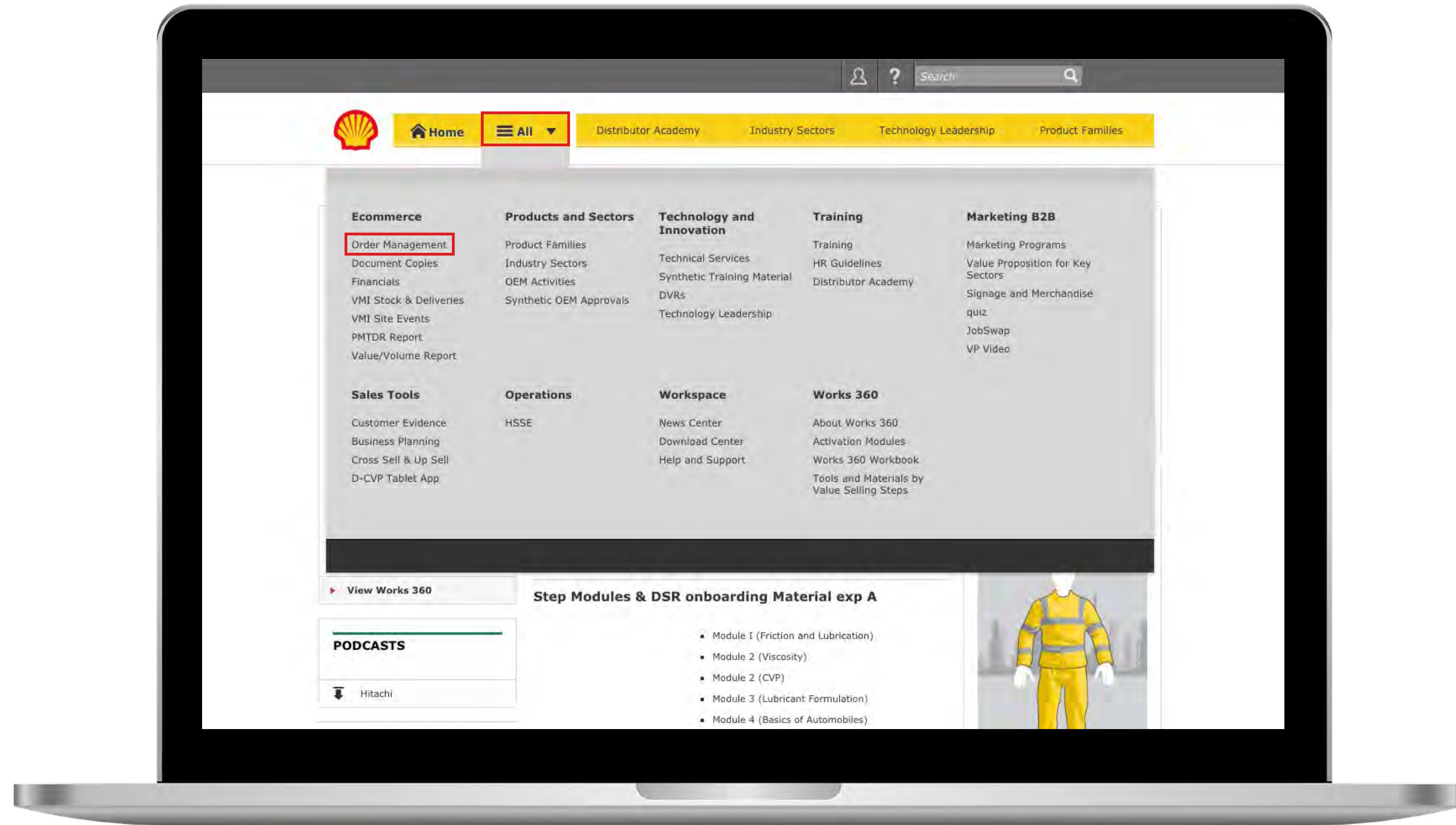
Browse Product Catalogue – Access, download and print MSDS and TDS online via the Product Catalogue website

Account summary also available from the account credit tab.

2.2

Order Management

Check The Availability Of Product Before Ordering



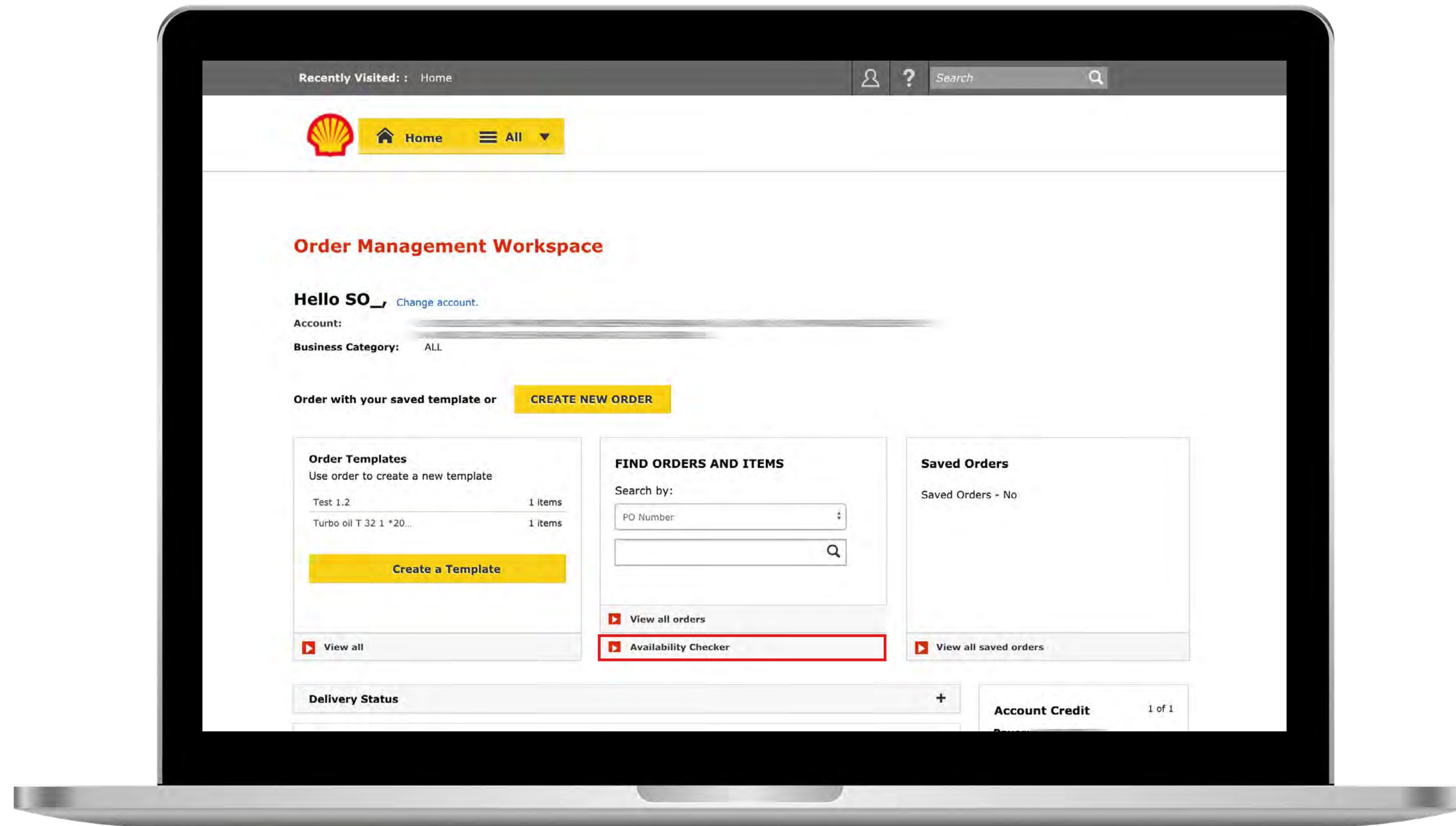
Step
1

Click **All** at the top of navigation and click on **Order Management**

2.2

Order Management

Check The Availability Of Product Before Ordering



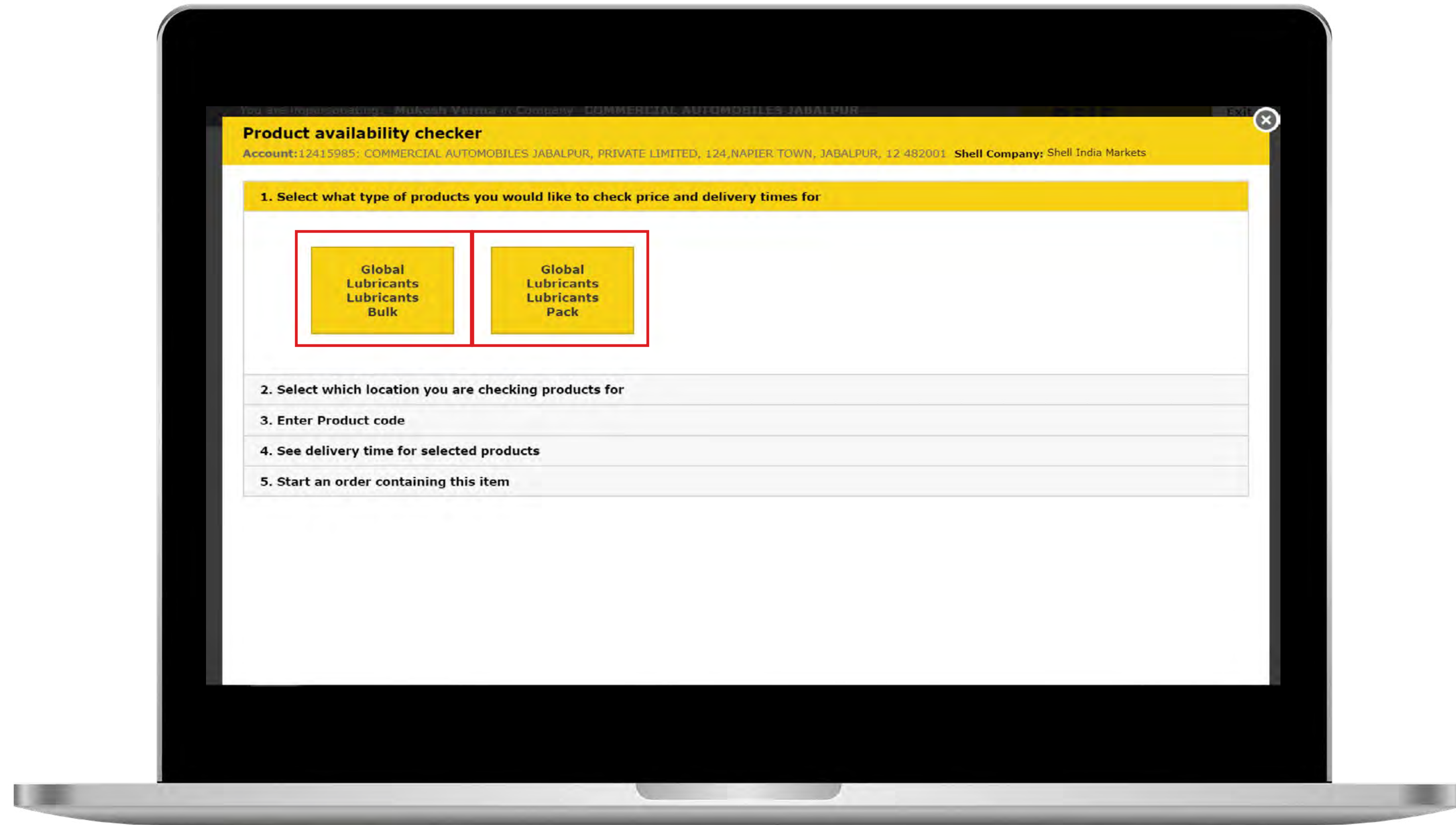
Step
2

Navigate to **Find Orders** and Items and
click on **Availability Checker**

2.2

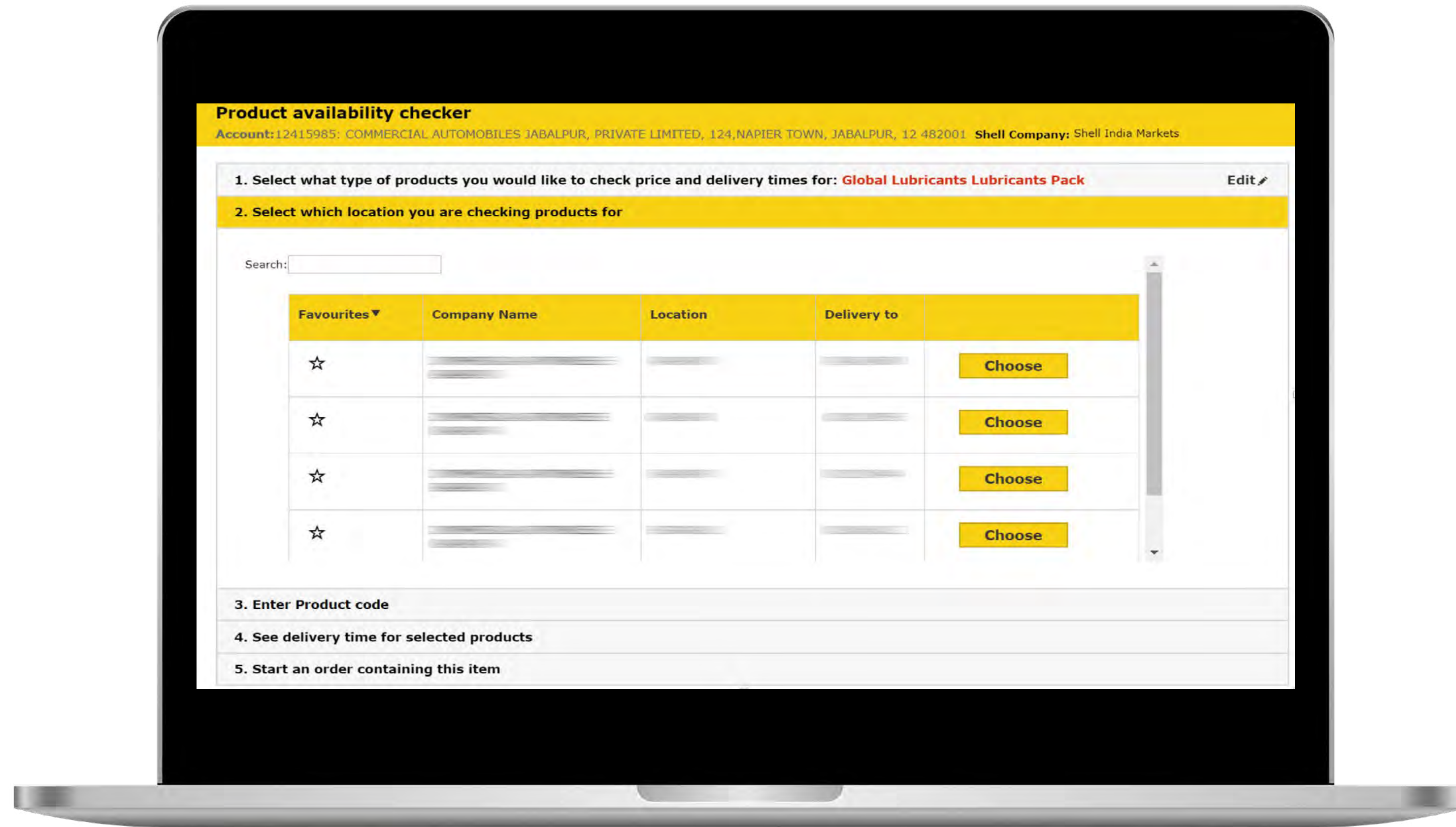
Order Management

Check The Availability Of Product Before Ordering



Step
3

On the next screen choose the type of product you would like to check.
You must choose between **Bulk** or **Pack**



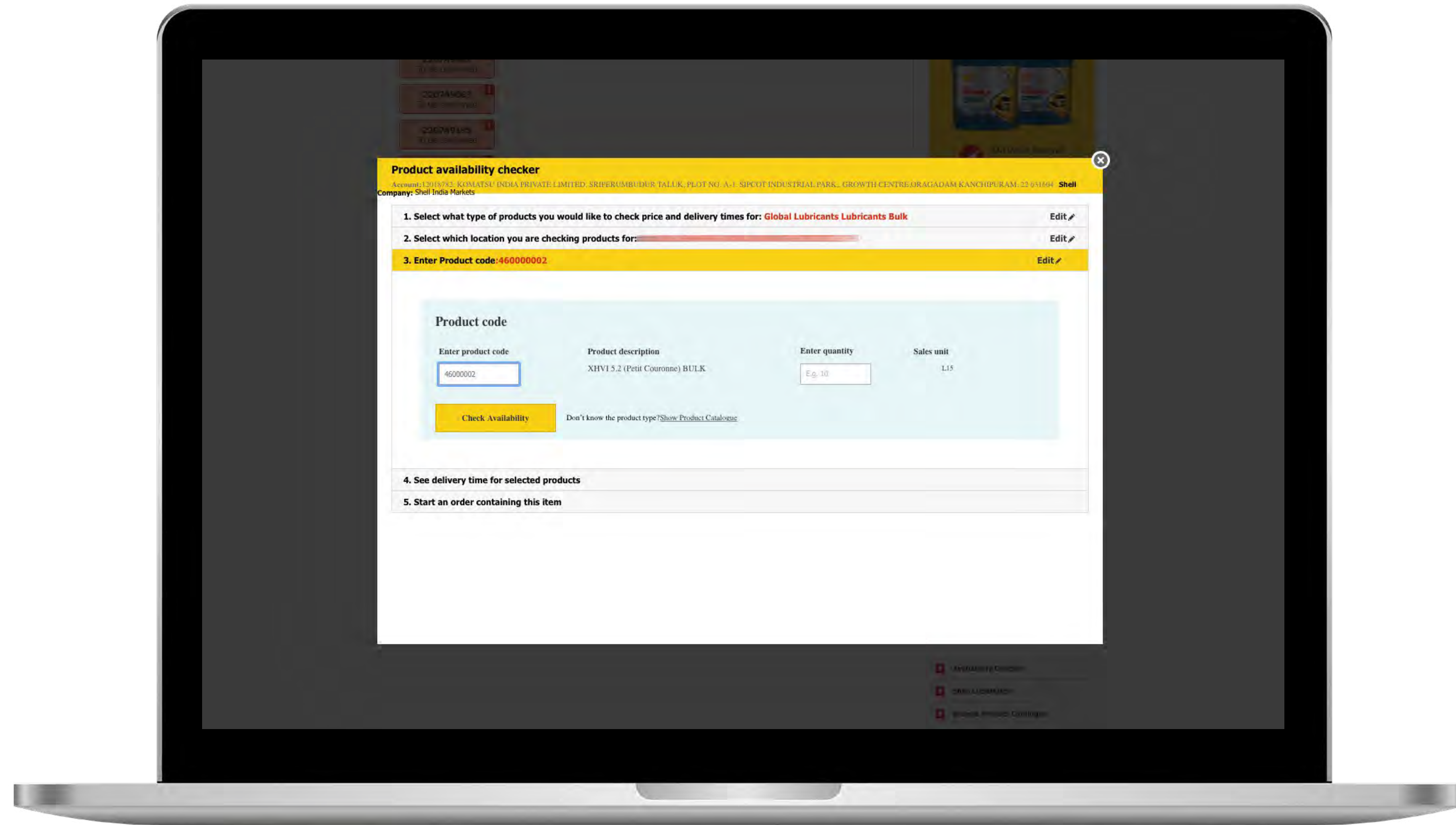
Step
4

Next, choose a delivery location from the list.
Alternatively, use the **Search** option to find the product

2.2

Order Management

Check The Availability Of Product Before Ordering



Step
5

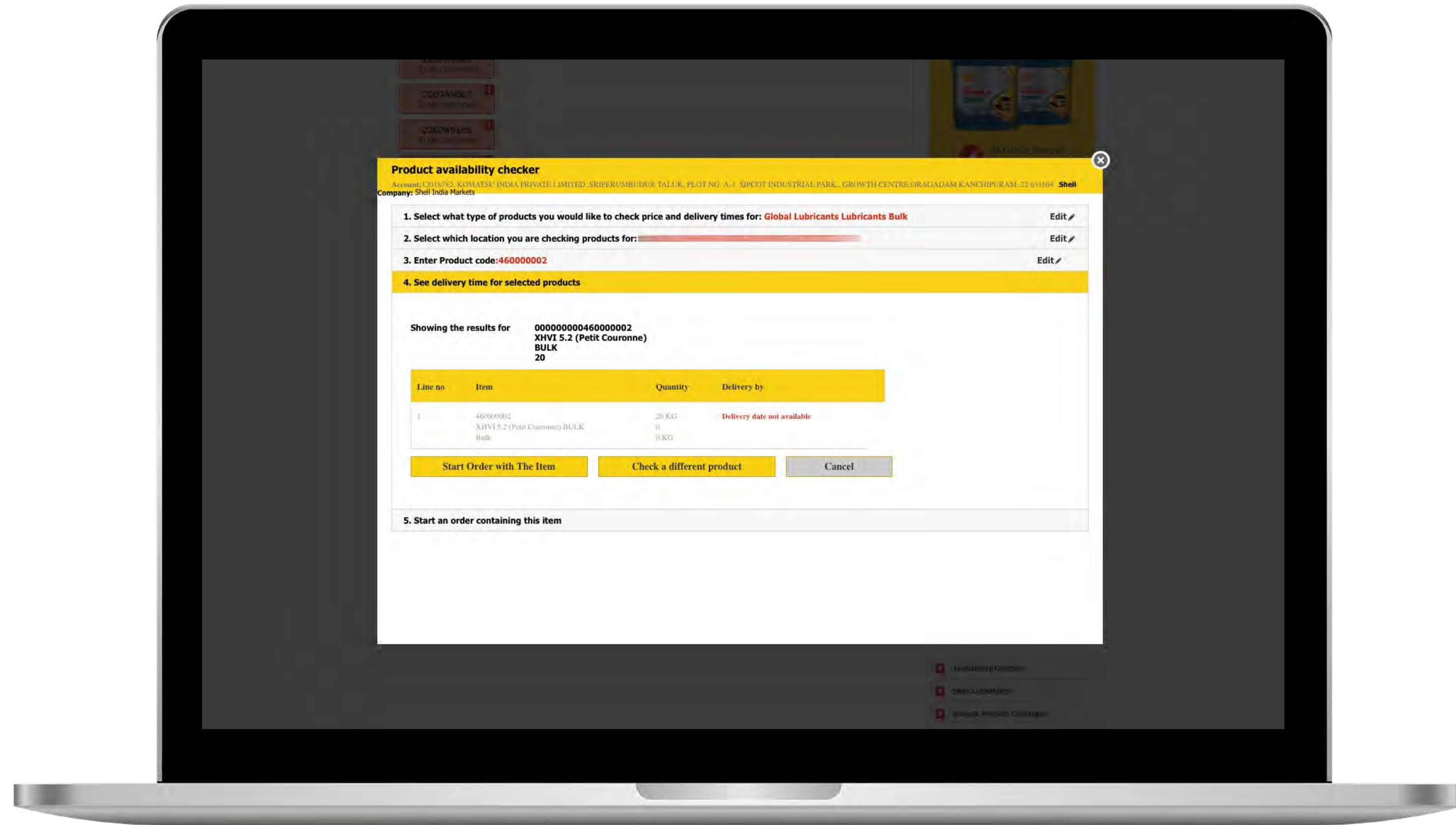
Enter the **Product Code** and required quantity.
Click on **Check Availability**

Quick tip: If you don't use the specific product code
you can also use the Product Catalogue to
check product availability.

2.2

Order Management

Check The Availability Of Product Before Ordering



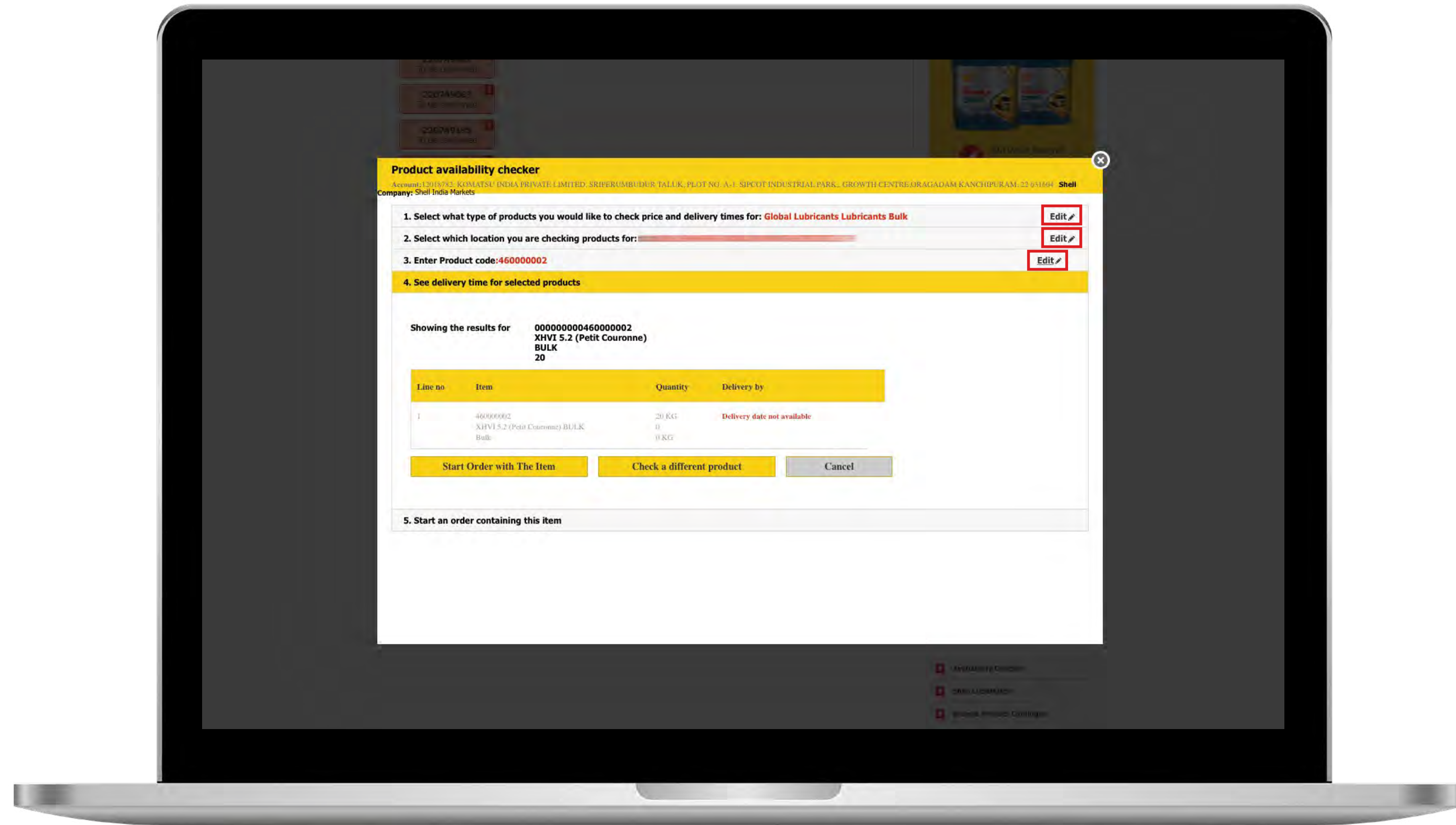
Step
6

Here you will see the available delivery dates for the **Product**.
To place an order click **Start Order** or
click on **Check a different product**

2.2

Order Management

Check The Availability Of Product Before Ordering



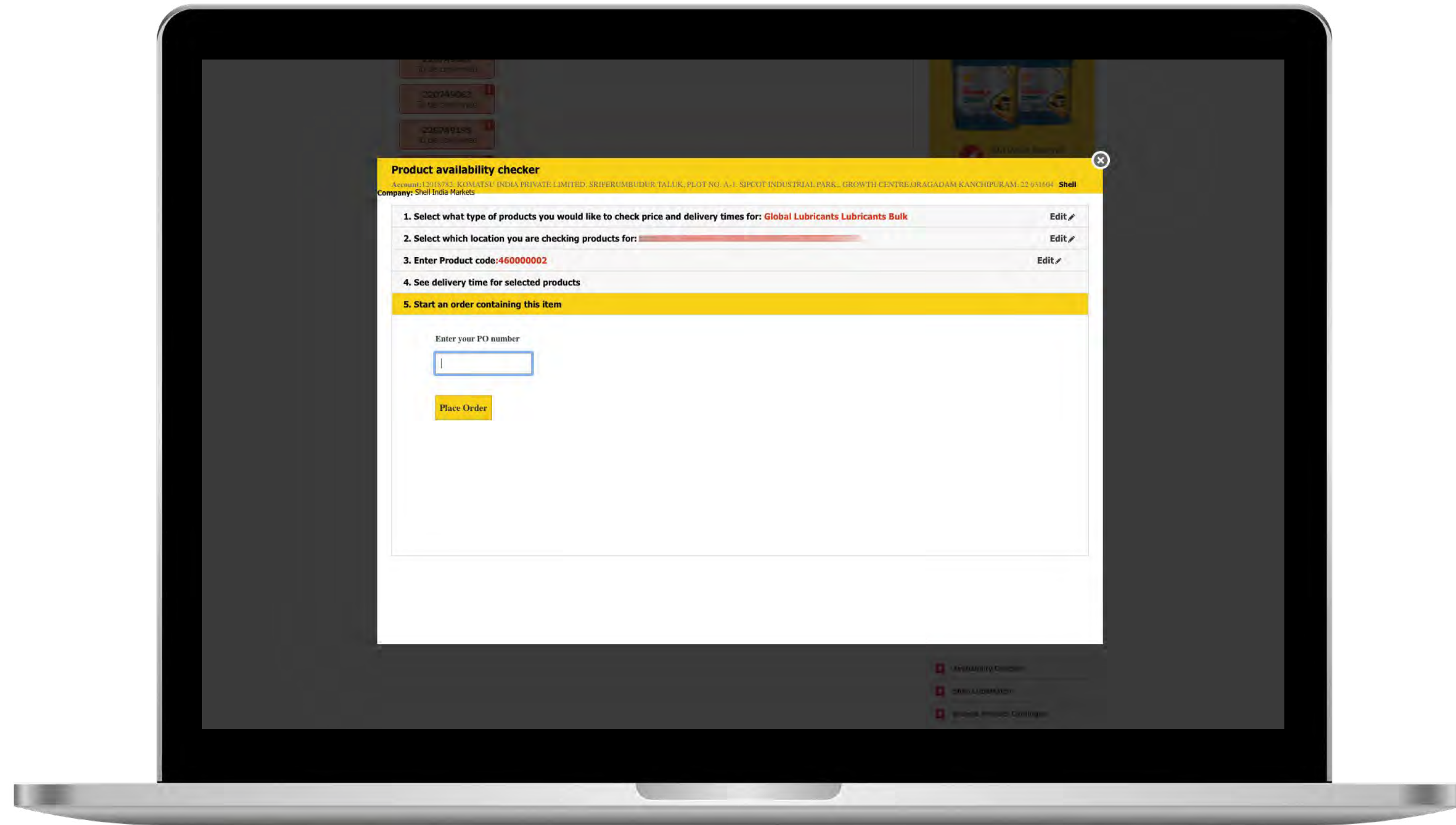
Step
7

At any time before placing an order you can change all chosen parameters by clicking **Edit** icon

2.2

Order Management

Check The Availability Of Product Before Ordering



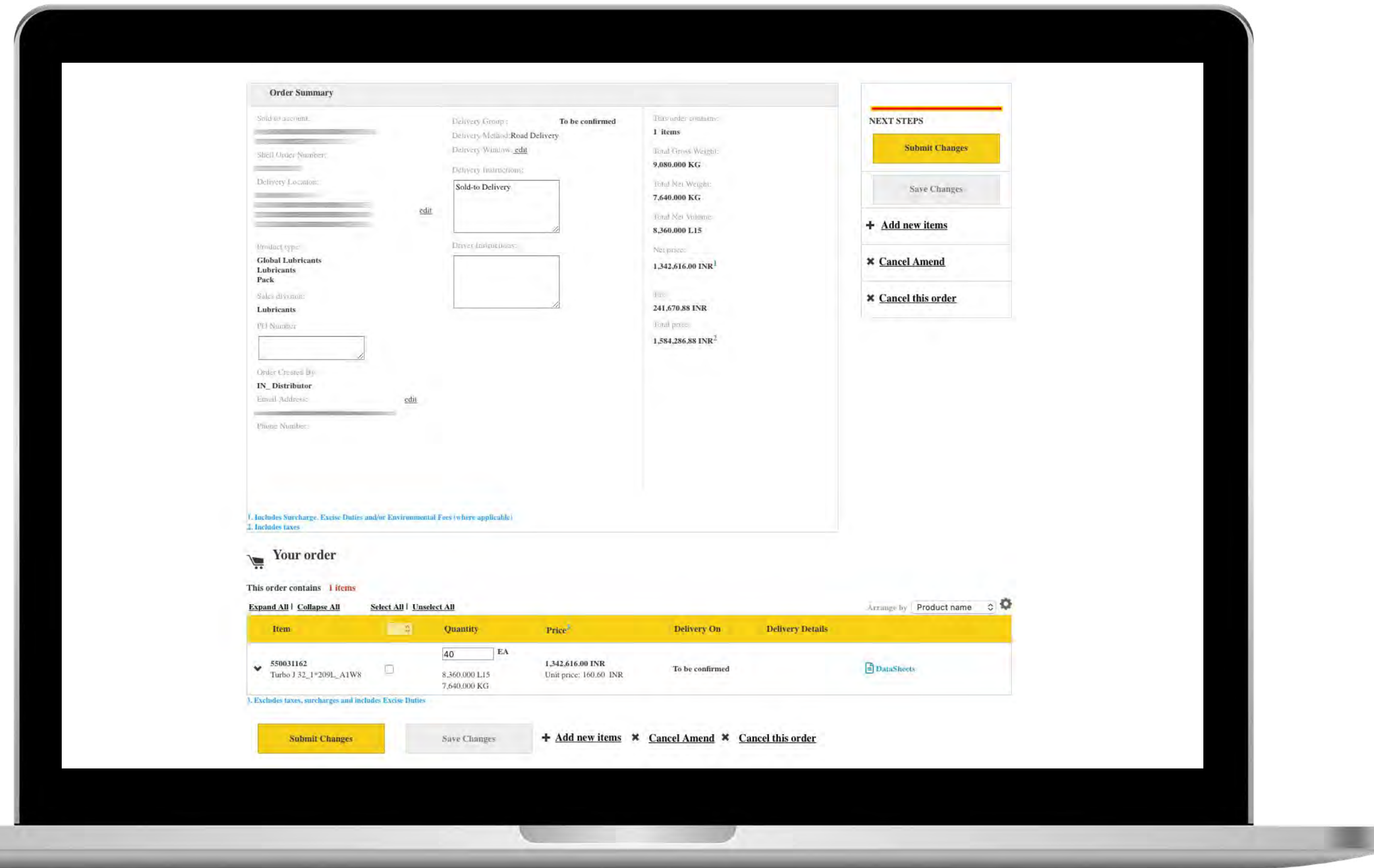
Step
8

Here you have the option to input a **PO Number**.
Then click on **Place Order**

2.2

Order Management

Check The Availability Of Product Before Ordering

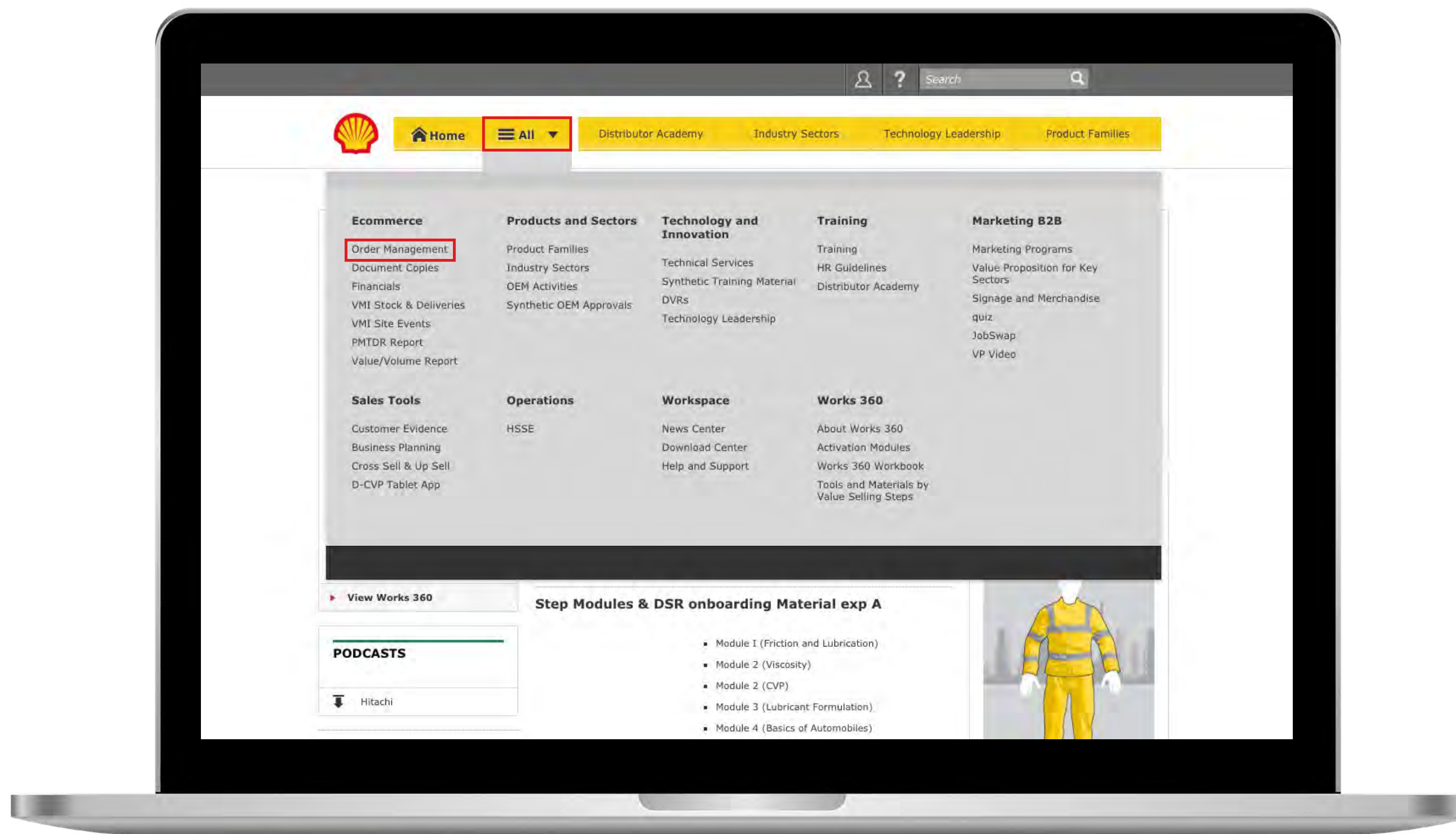


Step
9

On the **Summary** screen you can change the quantity or process to another product/step

2.3 i Order Management

How To Place An Order - For users in India, Turkey, Indonesia, Benefrux, Spain and UK

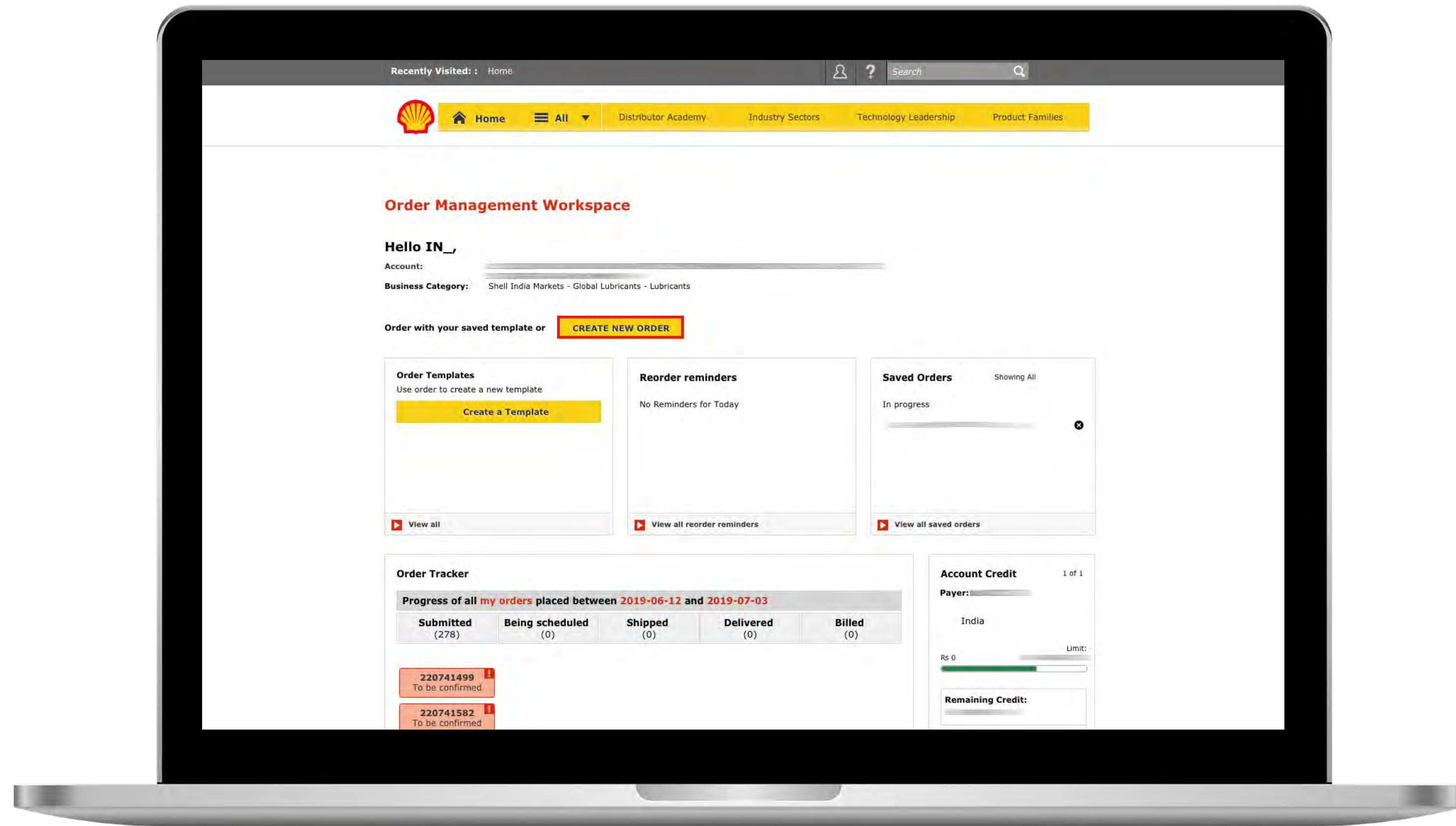


Step
1

Click **All** at the top of navigation and click on **Order Management**

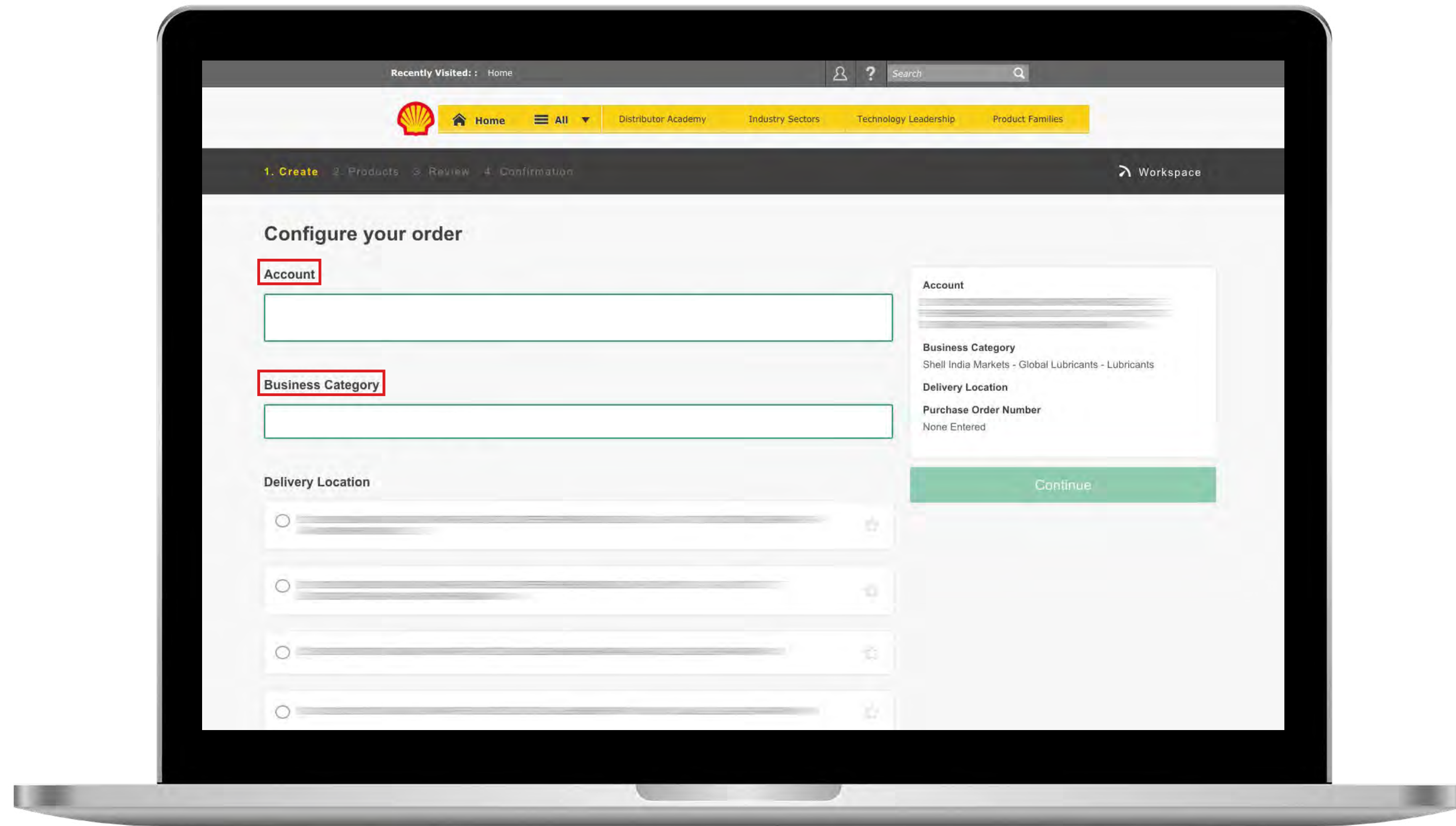
2.3 i Order Management

How To Place An Order



Step
2

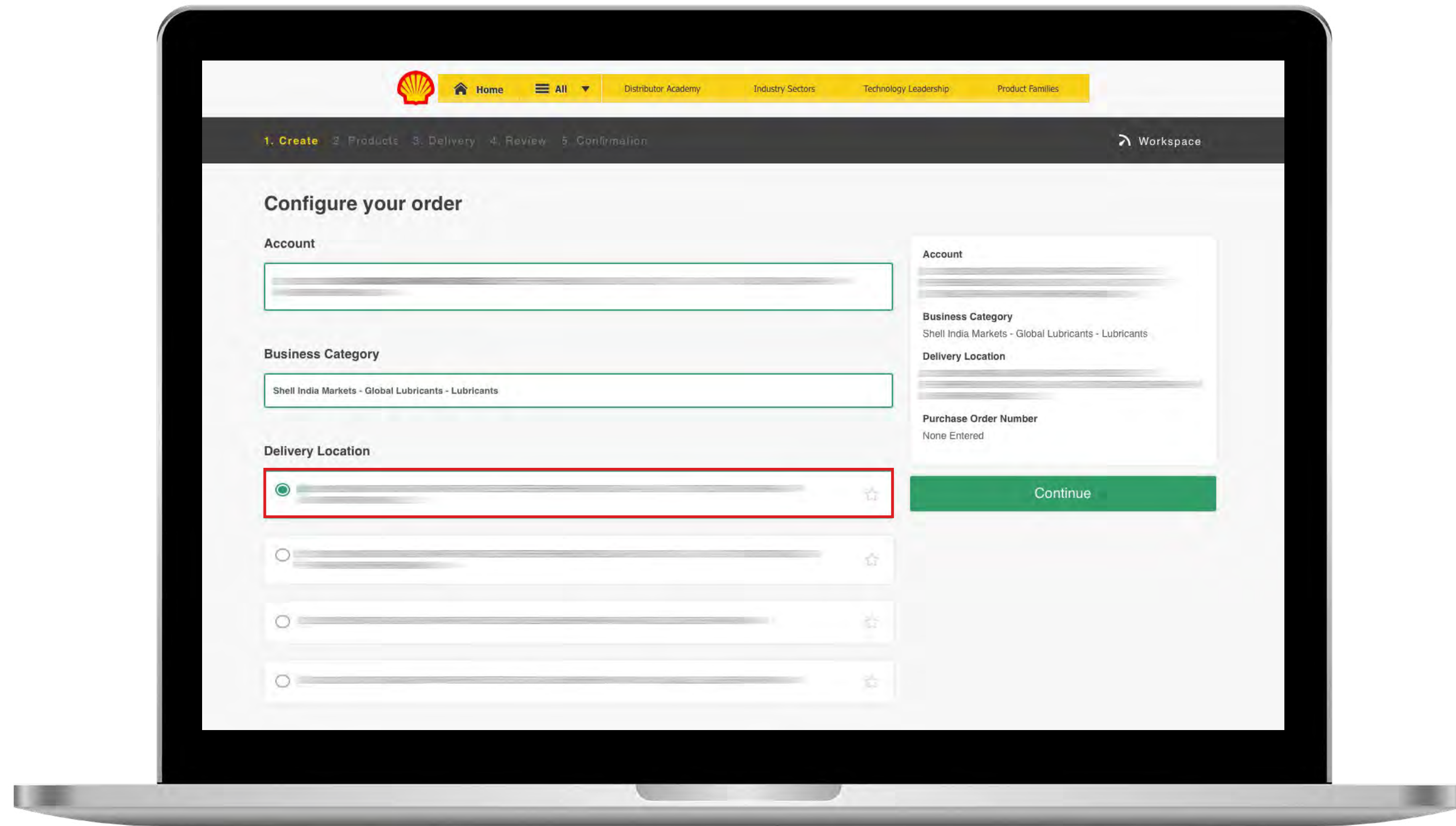
In Order Management Workspace
click **Create New Order**



Step
3

Select your **Account** number and **Business Category**

Quick tip: Customer with multiple users and that use more than one business category will have more than one account number. This can be accessed via account drop down.

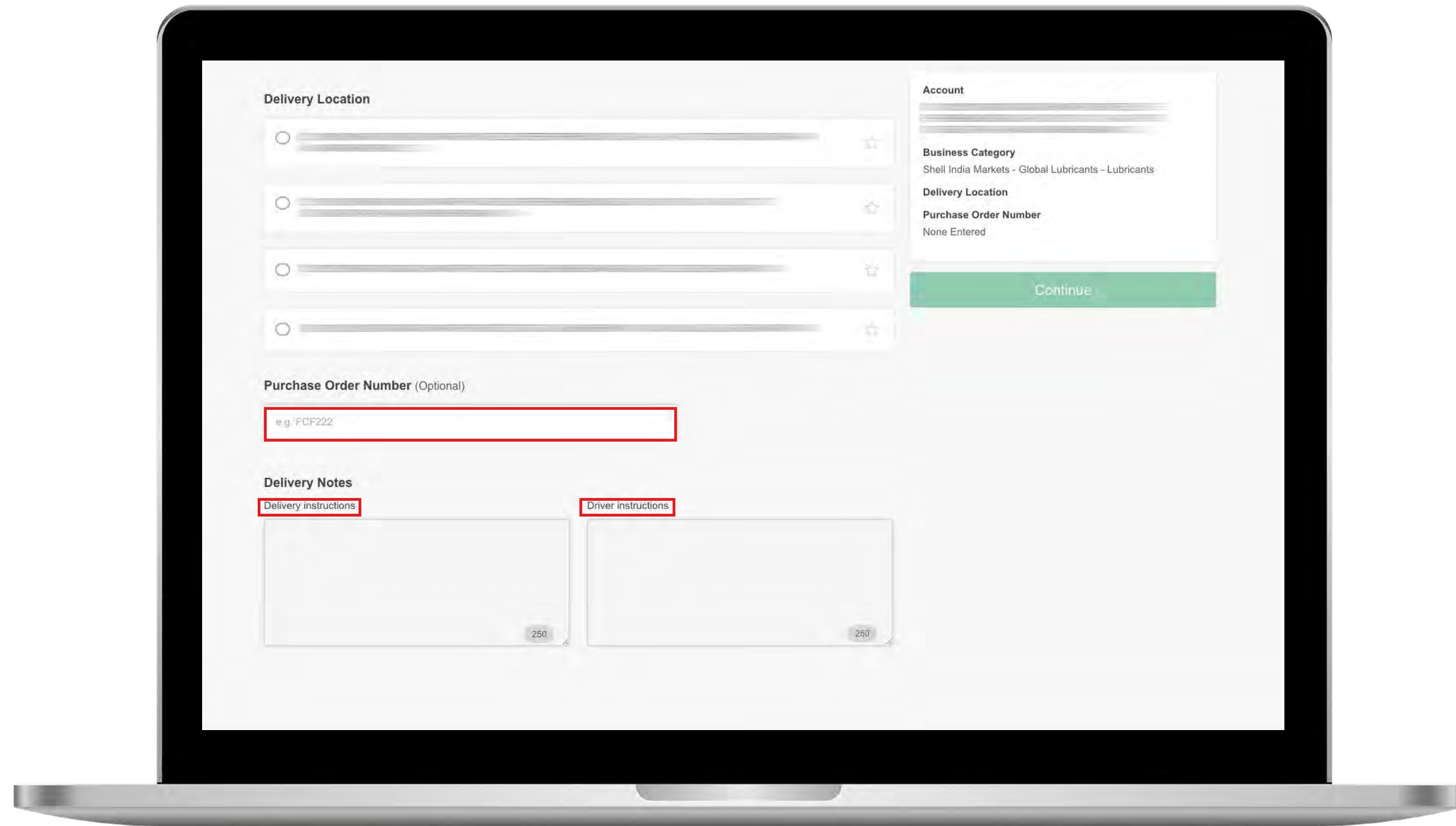


Step
4

Next, choose a **Delivery Location** from the list.
All delivery locations for your account will be listed

2.3 i Order Management

How To Place An Order

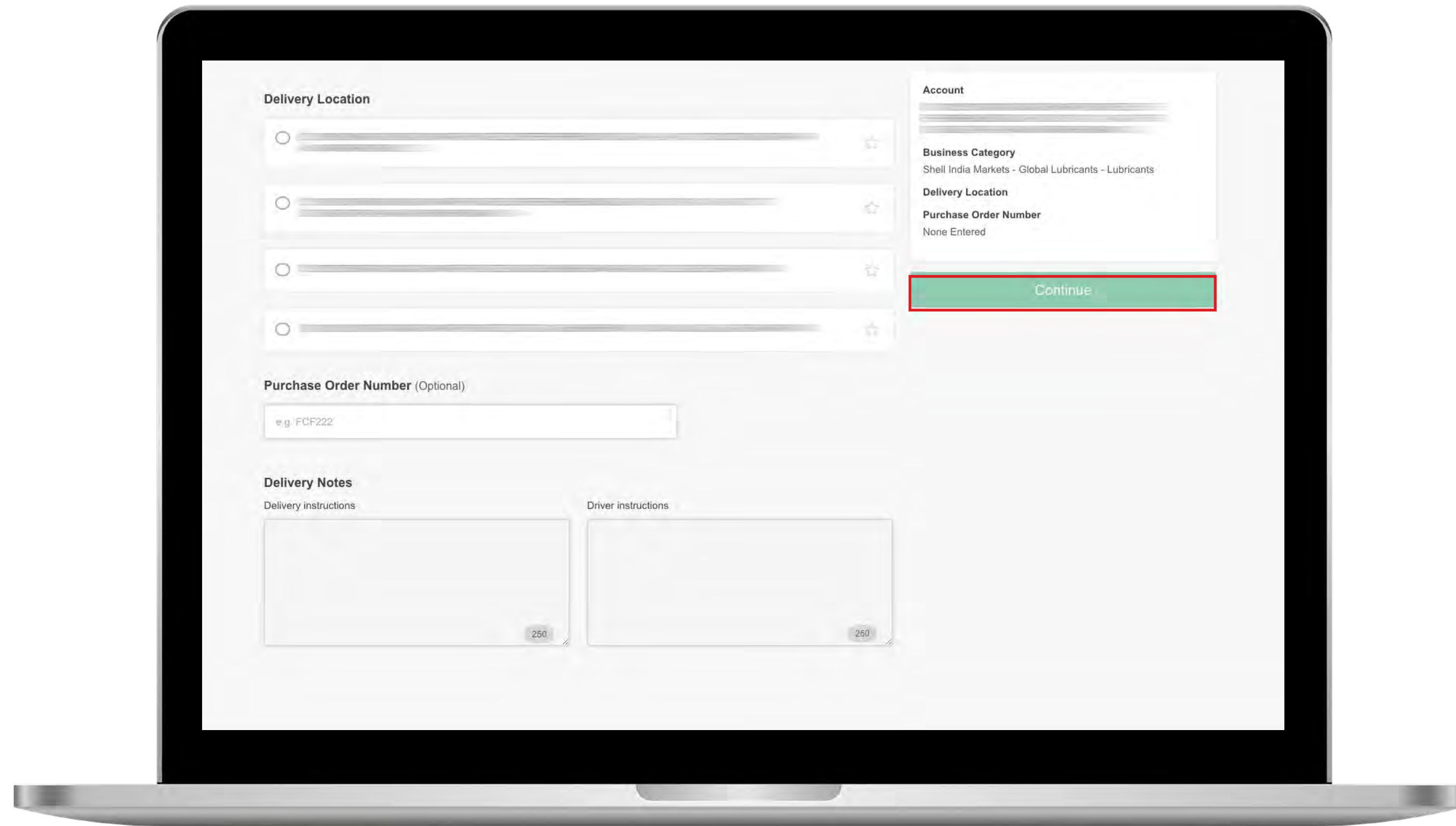


Step
5

You can add your **Purchase Order Number** or provide here any **Delivery/Driver instructions**

2.3 i Order Management

How To Place An Order

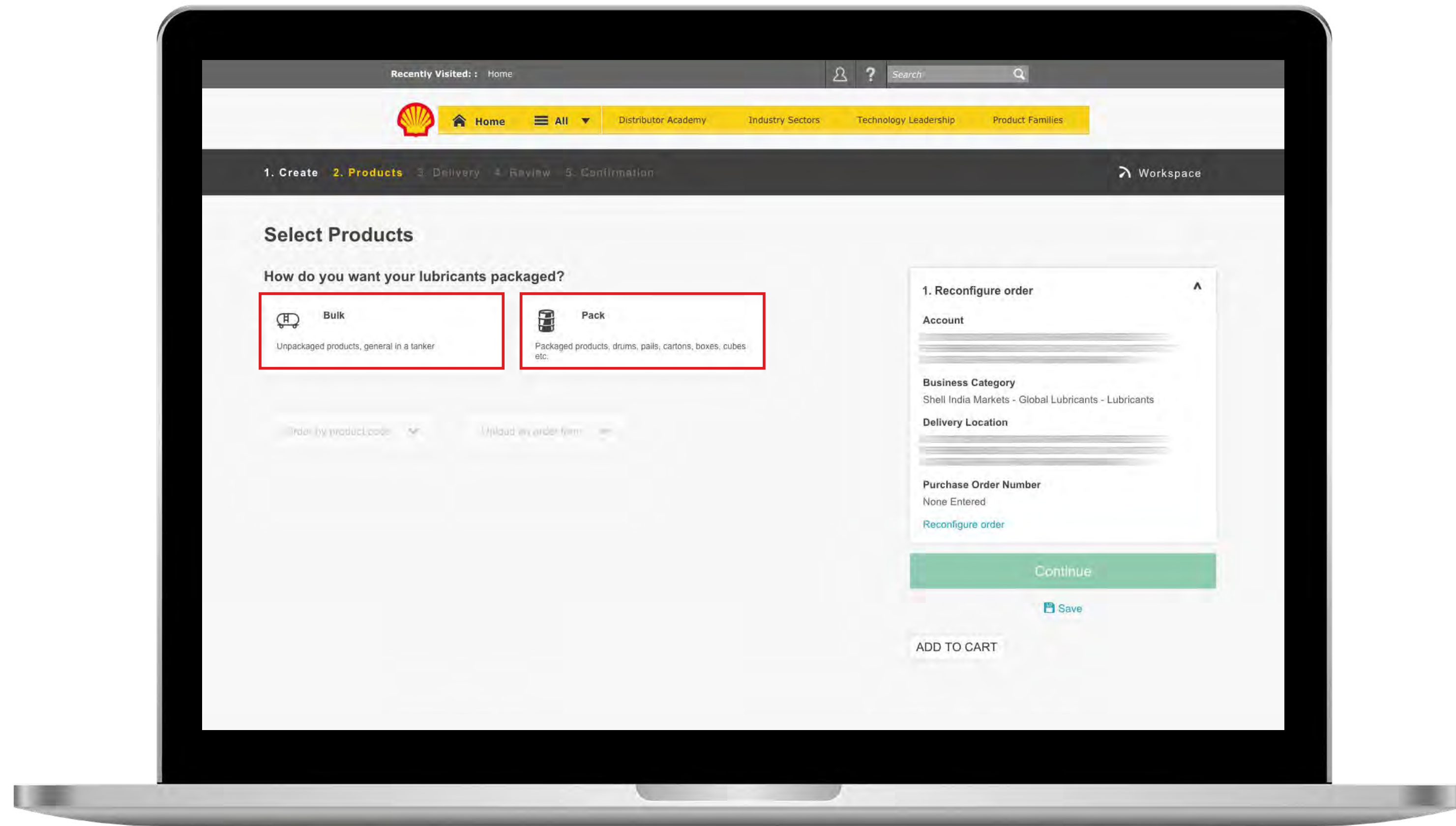


Step
6

Click **Continue** after selecting delivery details

2.3 i Order Management

How To Place An Order

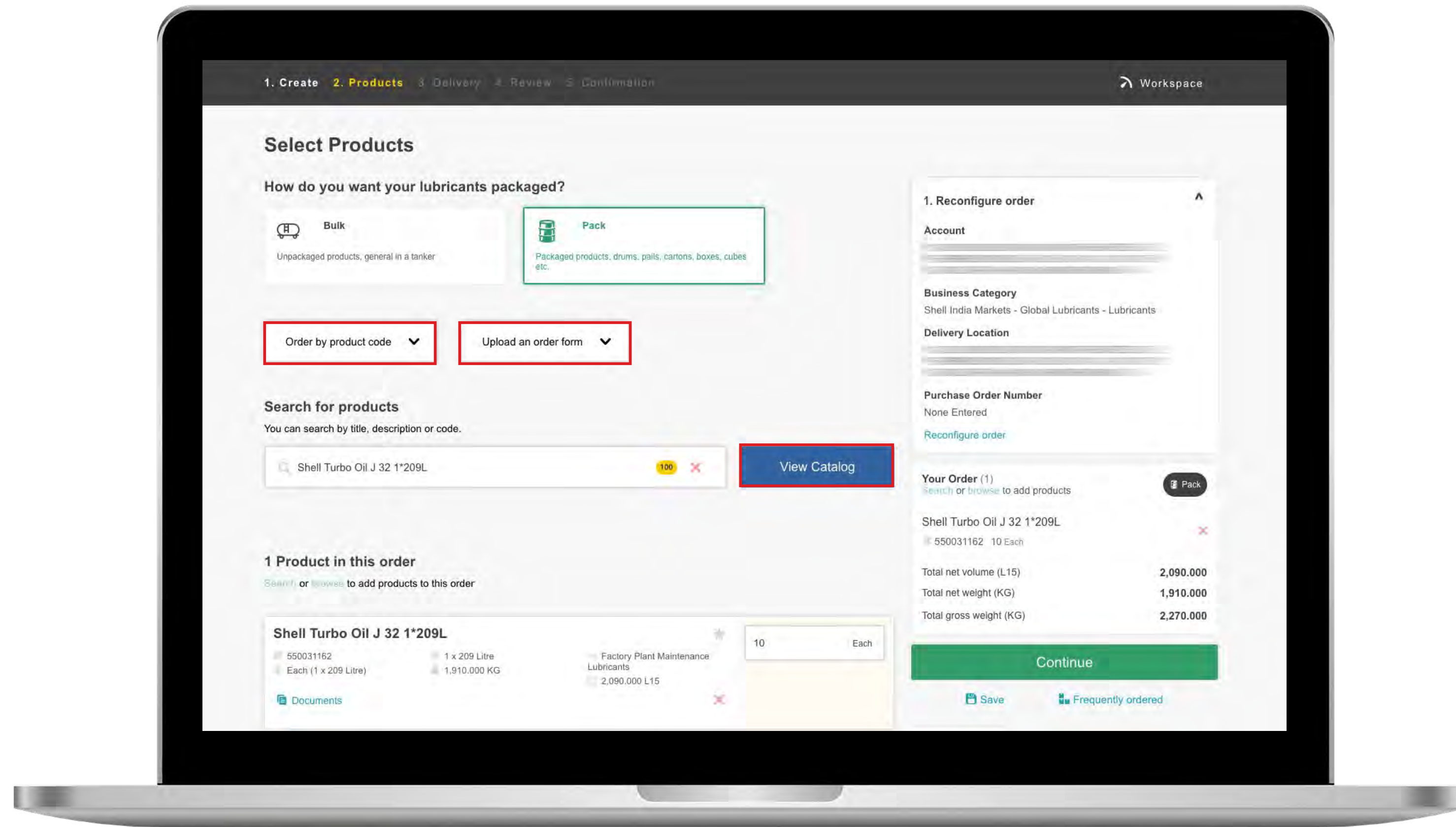


Step
8

Choose a product type using the Select Products panel.
You must choose between **Bulk** or **Pack**

2.3 i Order Management

How To Place An Order



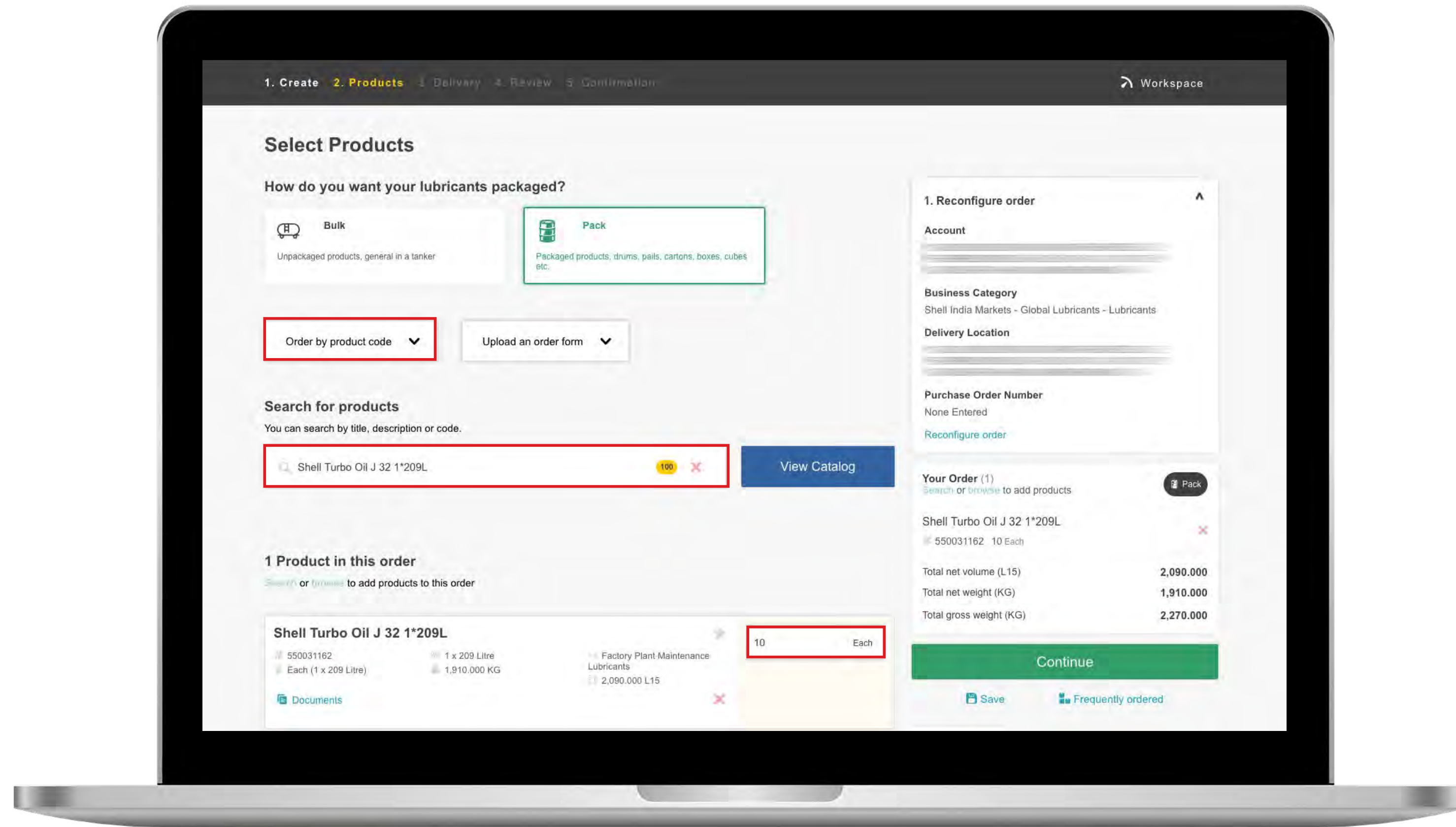
Step
9

You can set up products and search for a product here.
Click on **Order by product code** or
on **Upload an order form**.
You can use **View Catalogue** option.

Quick Tip: You can also access products from
'frequently ordered' located directly beneath
the continue button.

2.3 i Order Management

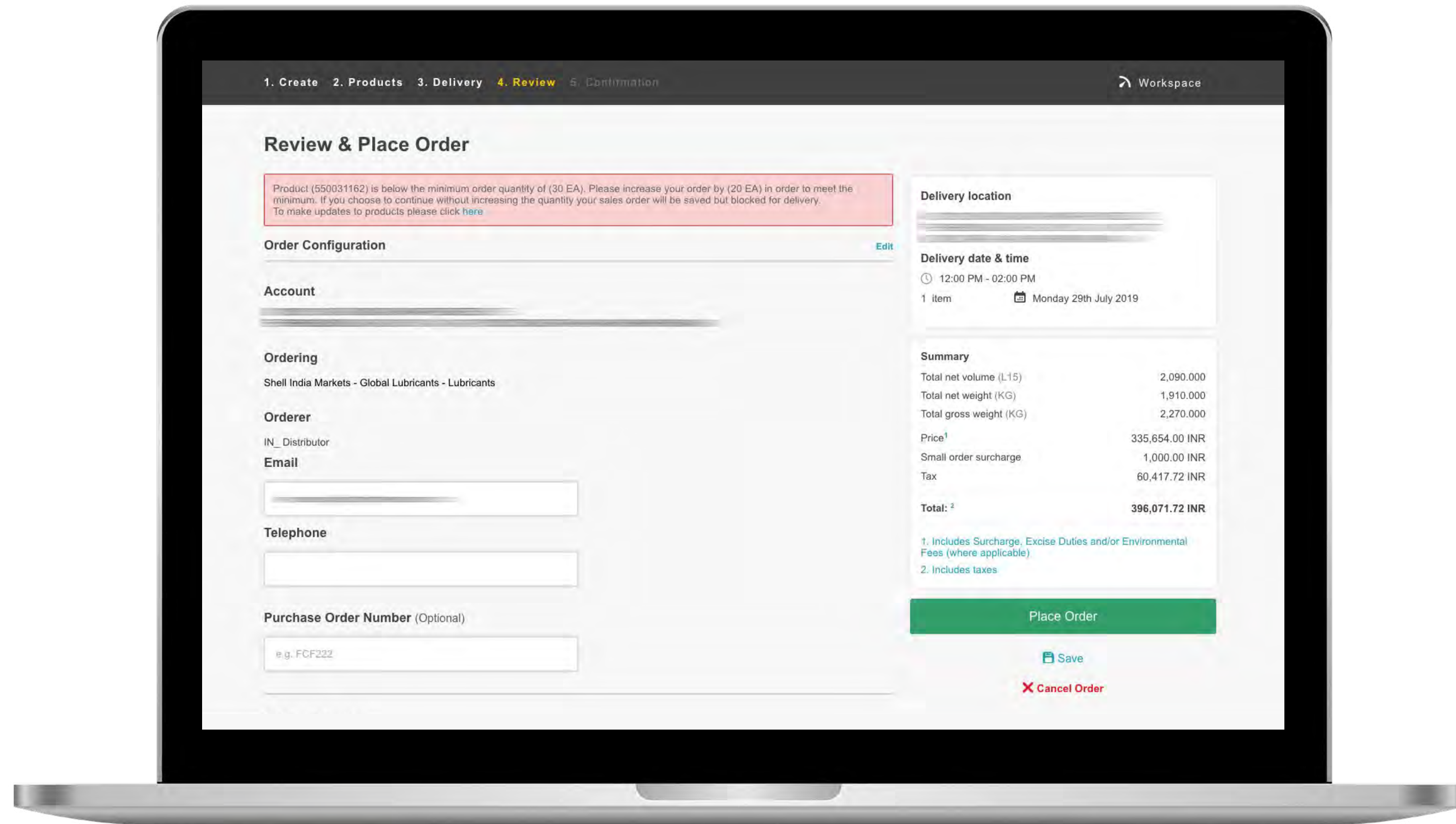
How To Place An Order



Step
10

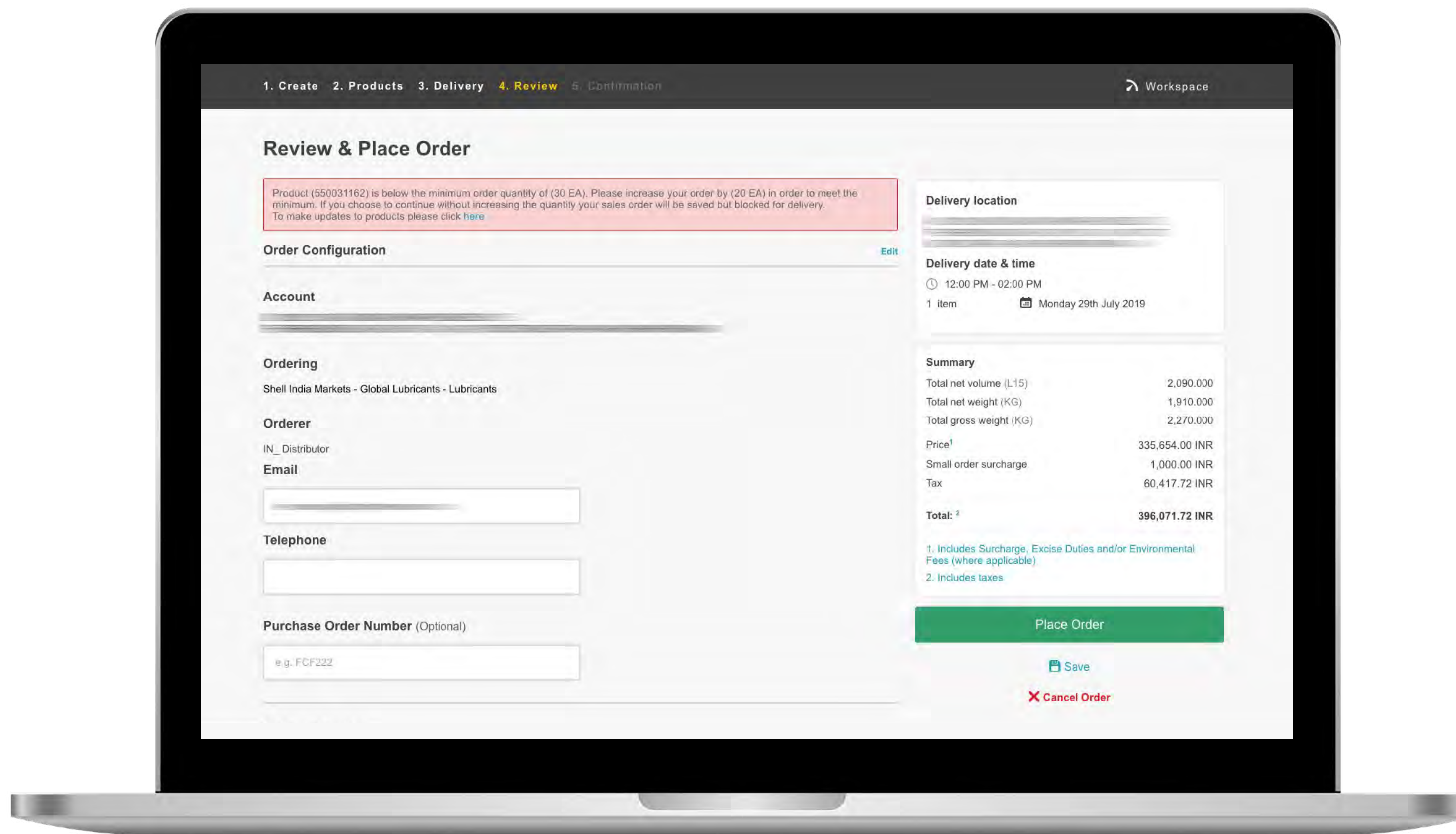
Using **Order by product code** put product code and quantity.
You can add more products if needed.
Click **Add to Order**.

You can review order by clicking on **Continue**



Step
11

At this point you can add more products or submit order by clicking on **Place Order**



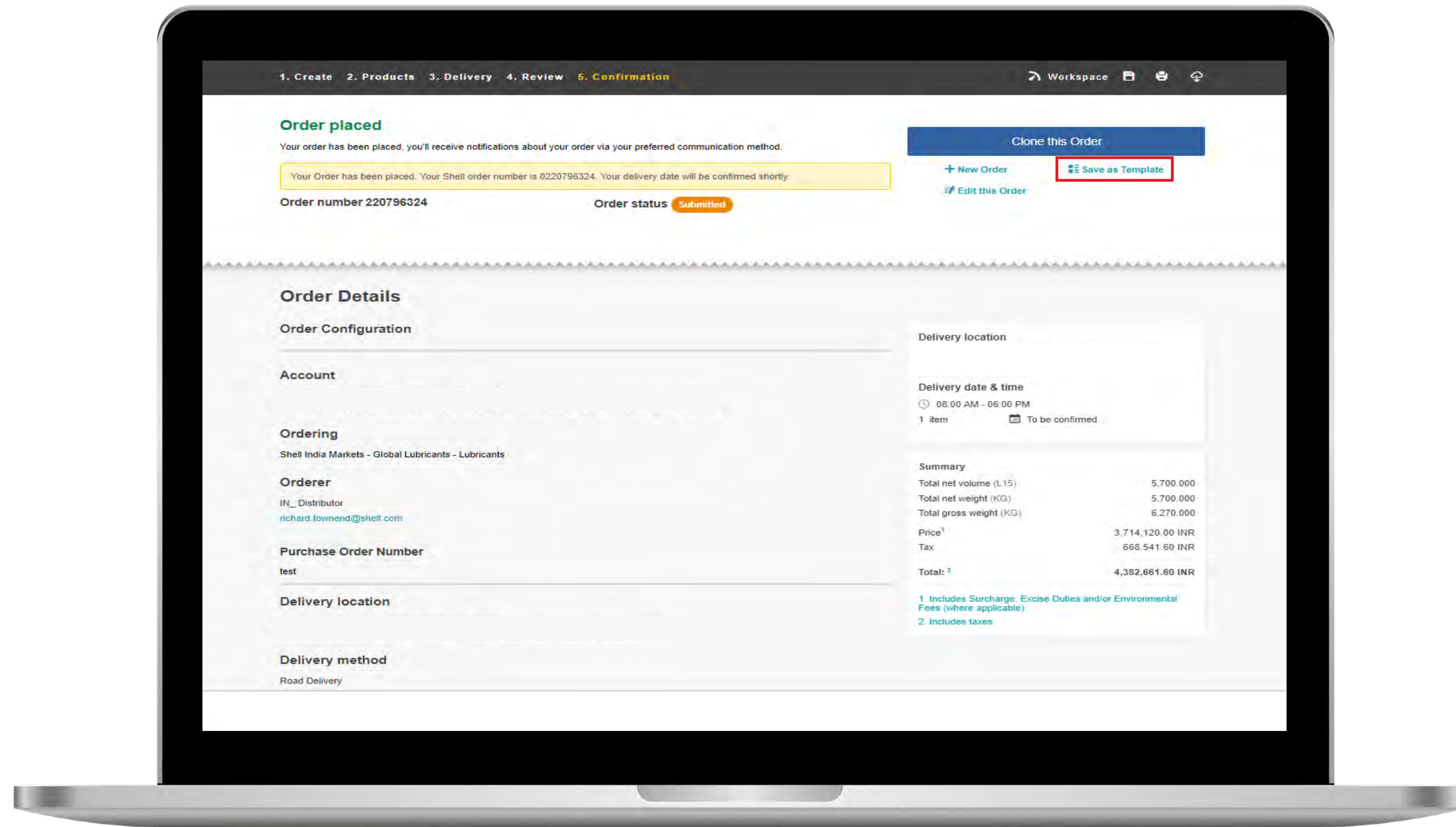
Step 12

You can click **Place Order** or **Save** and return to the order at anytime. **Cancel Order** will remove it.

Remember: if you save an unconfirmed order the delivery date will be redetermined

2.3 i Order Management

How To Place An Order - **2 Click Ordering**

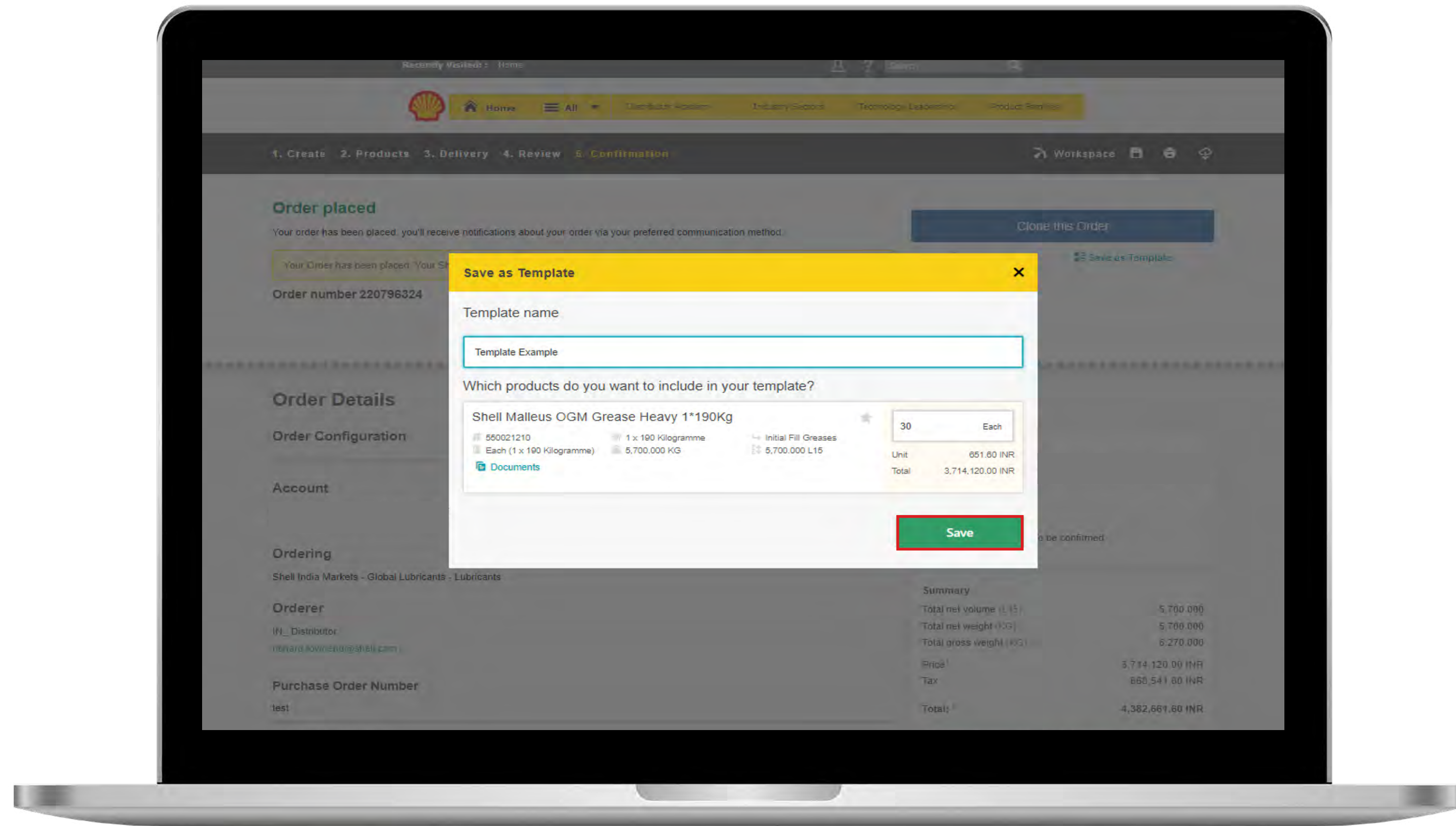


Step
1

Once an order has been placed, to enable 2 click ordering for future orders, click **Save as Template**

2.3 i Order Management

How To Place An Order - **2 Click Ordering**

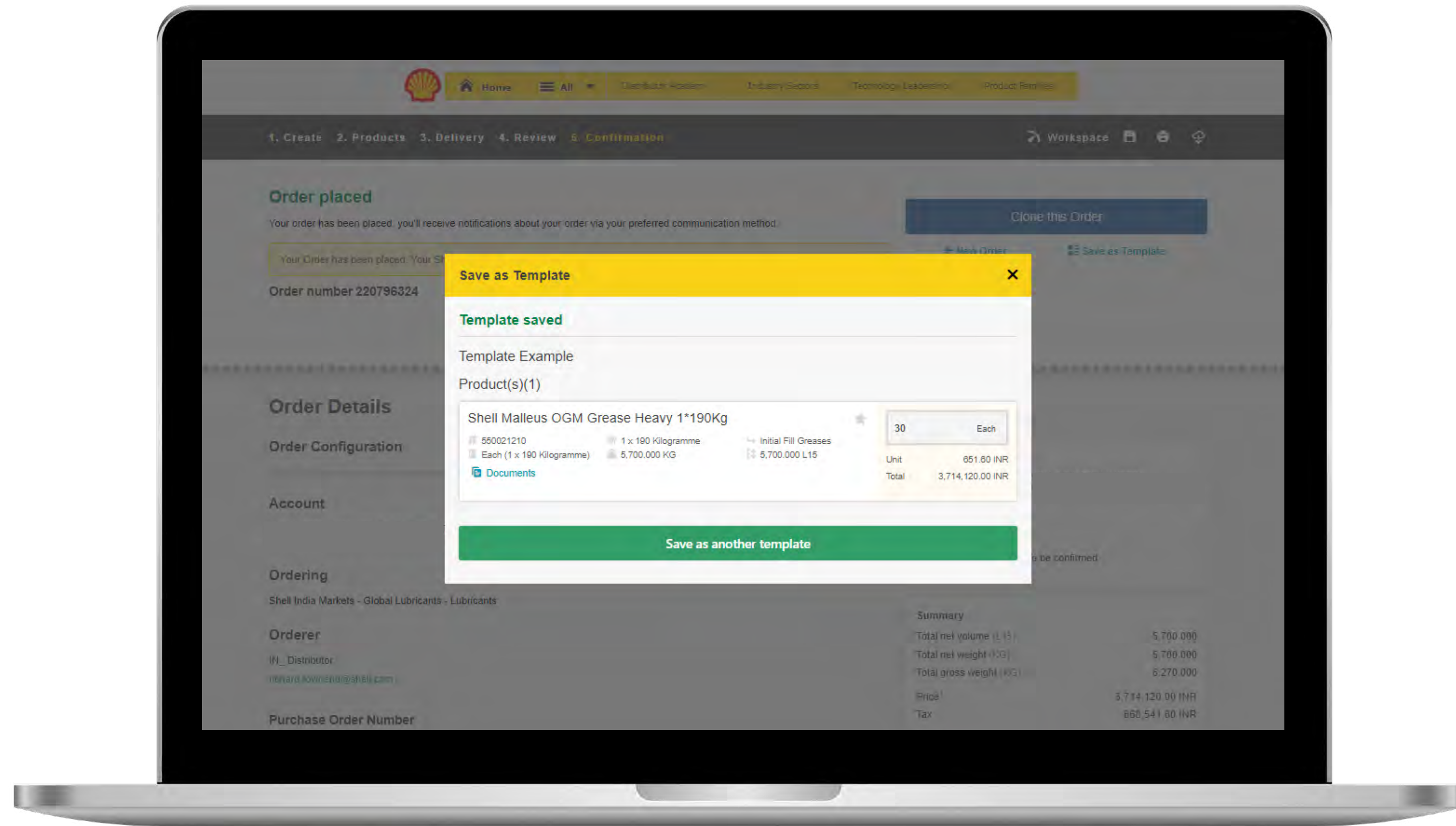


Step
2

Then enter template descriptor and details and save.

2.3 i Order Management

How To Place An Order - **2 Click Ordering**

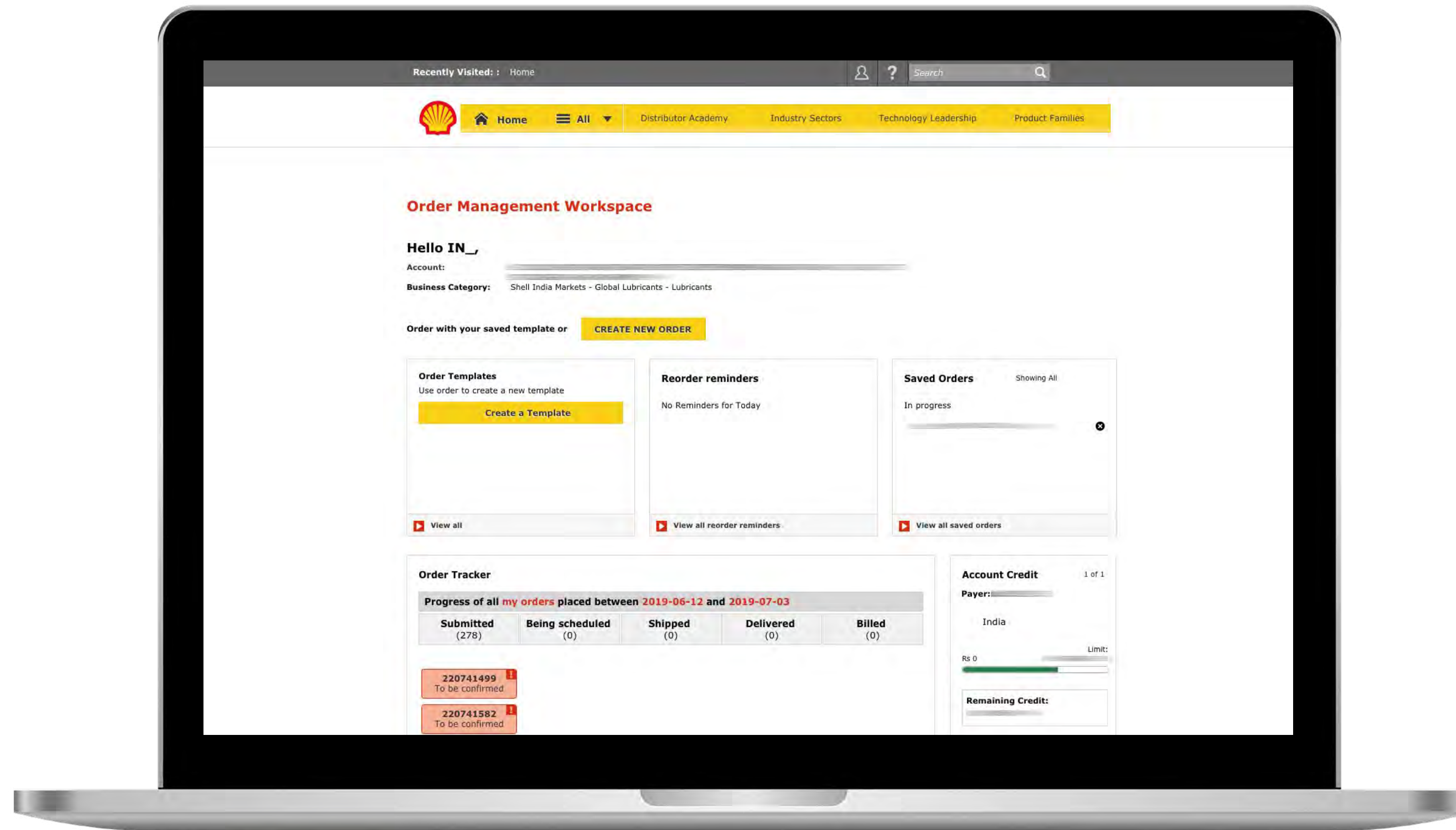


Step
3

Use the template summary, you also have the option to save as another template.

2.3 i Order Management

How To Place An Order - **2 Click Ordering**



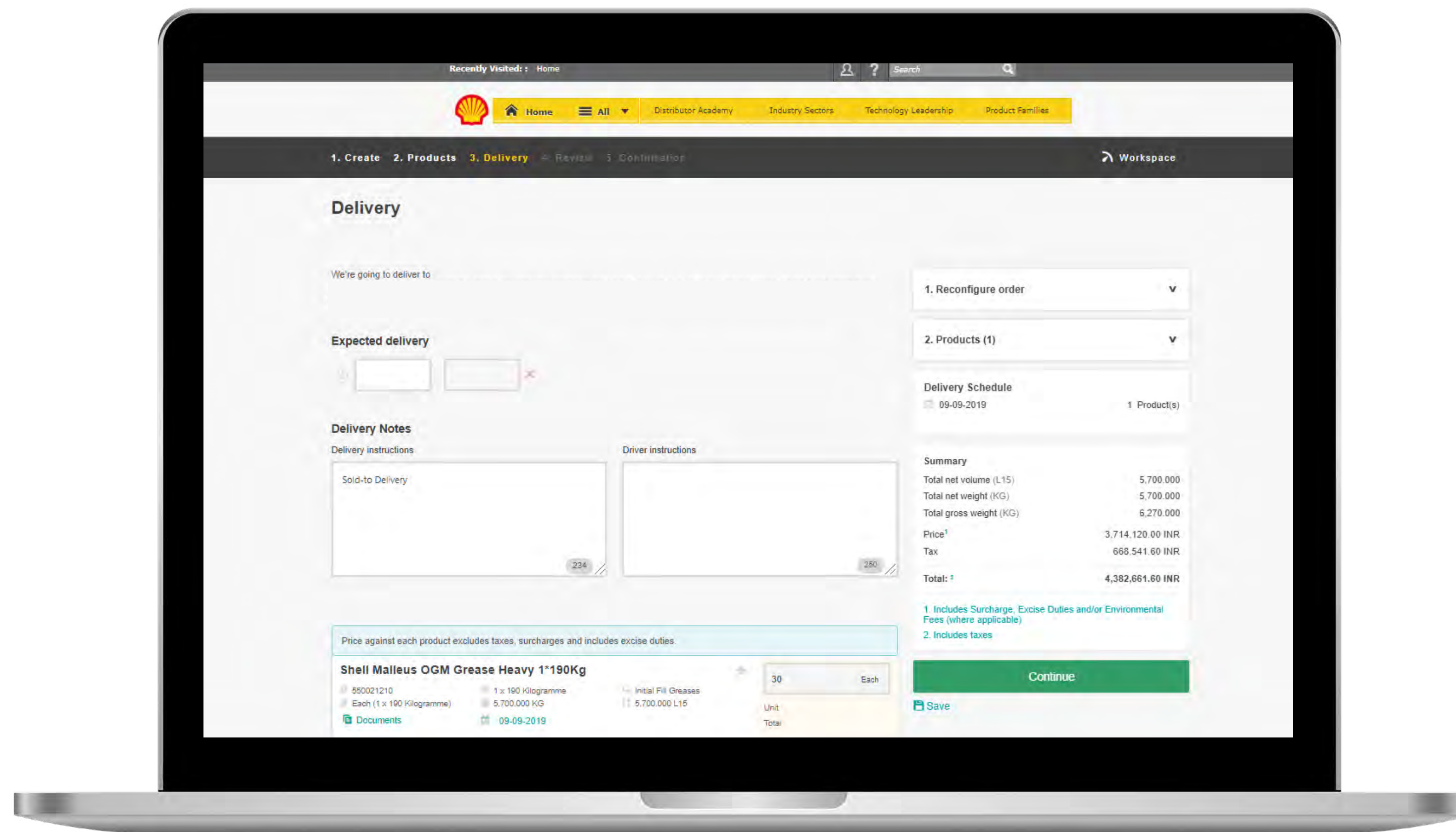
Step
4

To create an order from an existing template click on template example in order templates.

You can also create additional templates to streamline future orders.

2.3 i Order Management

How To Place An Order - **2 Click Ordering**



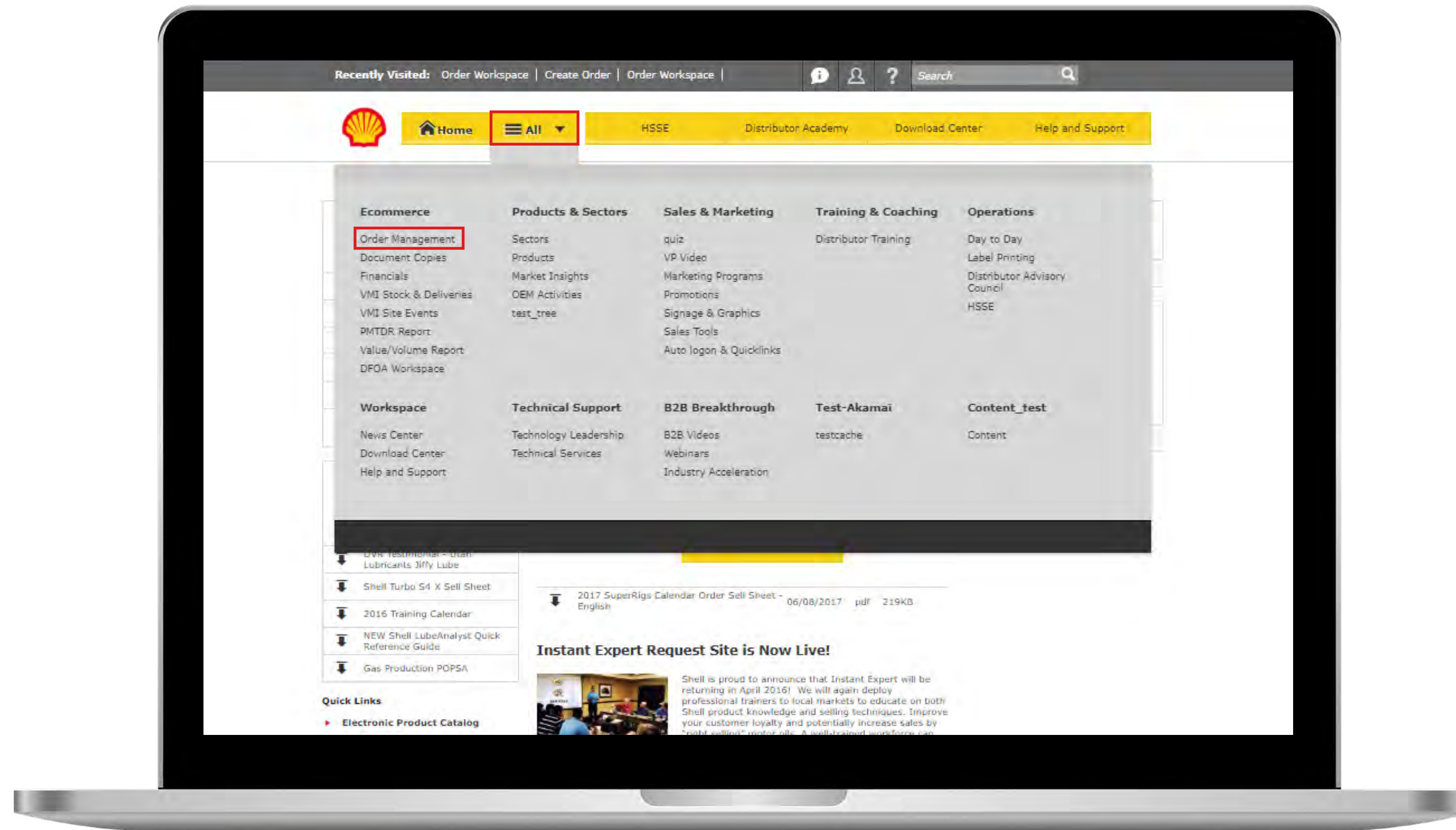
Step
5

This will then bring you to a page where sold-to and ship-to product and quantity are already populated.

Click **Continue** to place order.

2.3 ii Order Management

How To Place An Order - All Other Markets

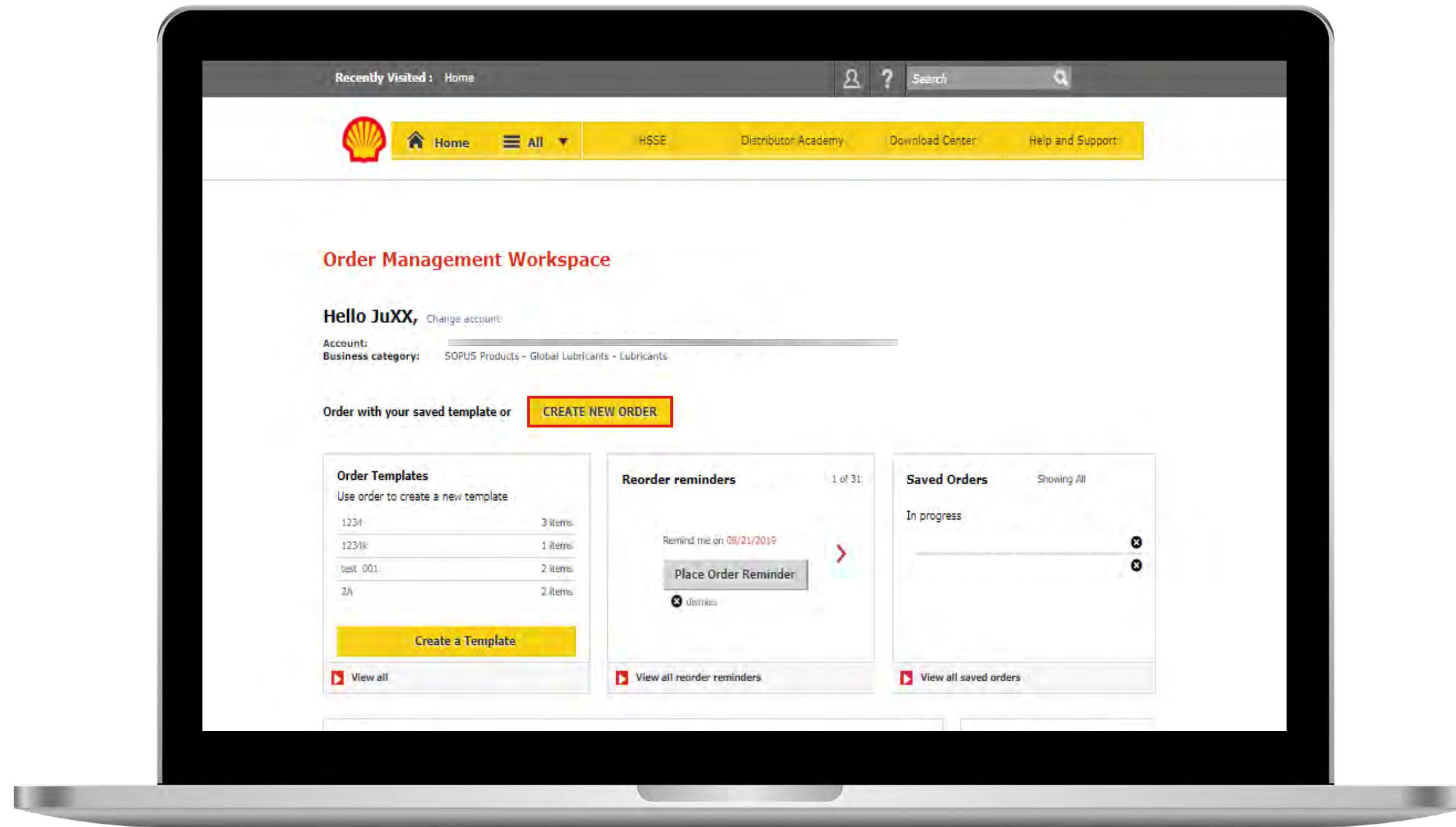


Step
1

Click **All** at the top of navigation and click on **Order Management**

2.3 ii Order Management

How To Place An Order - All Other Markets

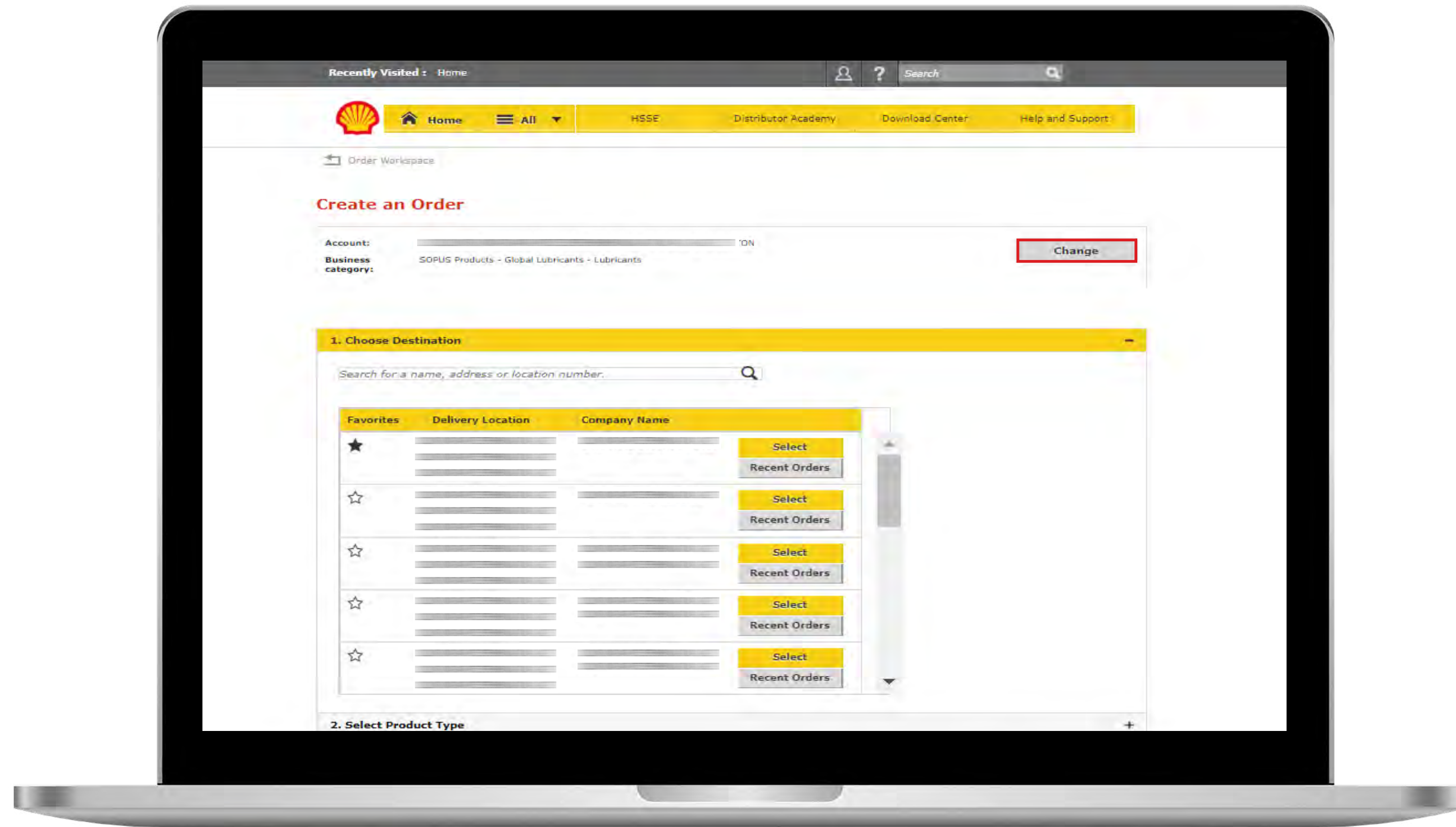


Step
2

In Order Management Workspace
click **Create New Order**

2.3 ii Order Management

How To Place An Order - All Other Markets



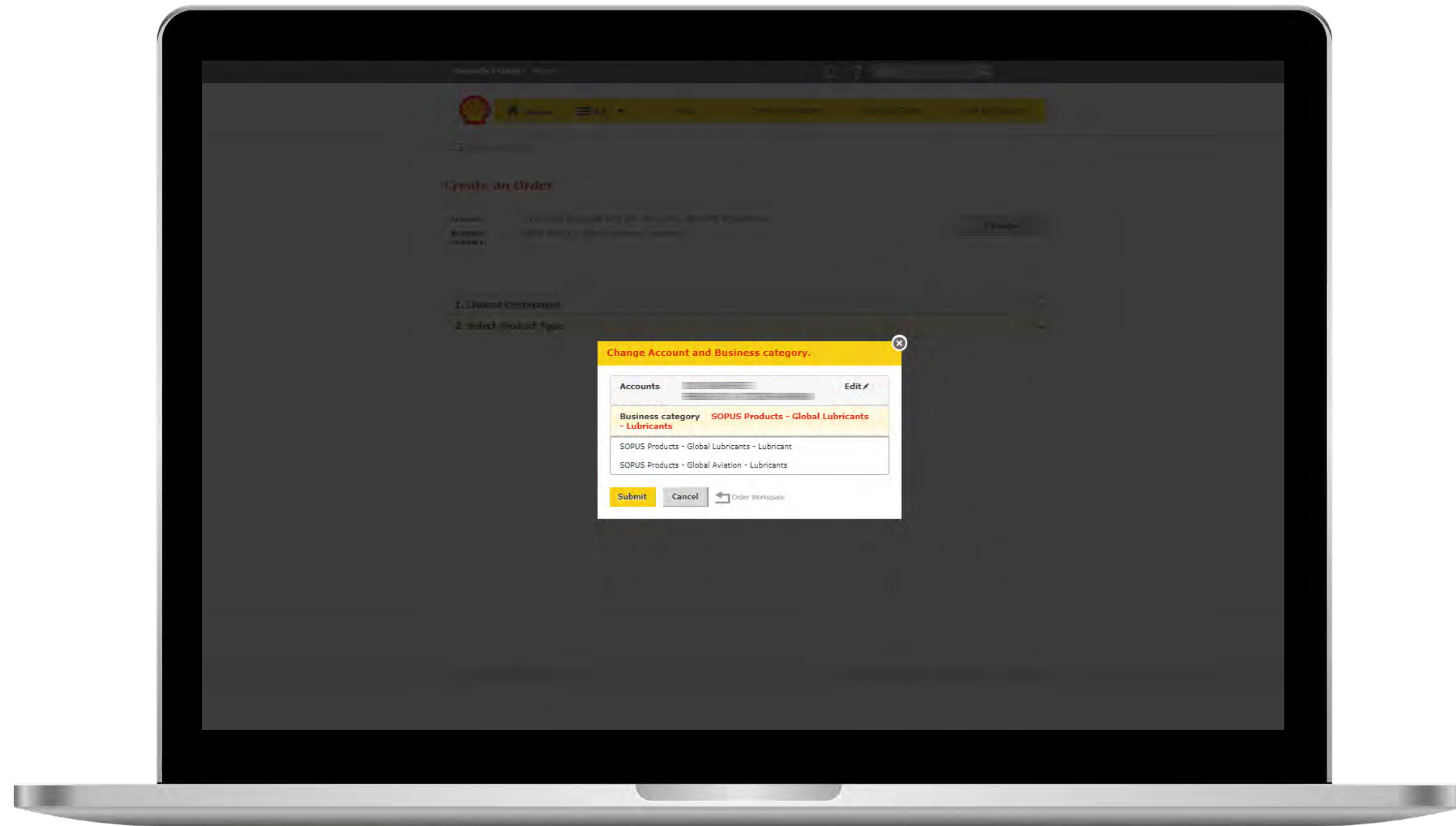
Step
3

You will then be presented with this screen where you can then create an order.

You can also change account details if you wish by clicking **Change**.

2.3 ii **Order Management**

How To Place An Order - All Other Markets

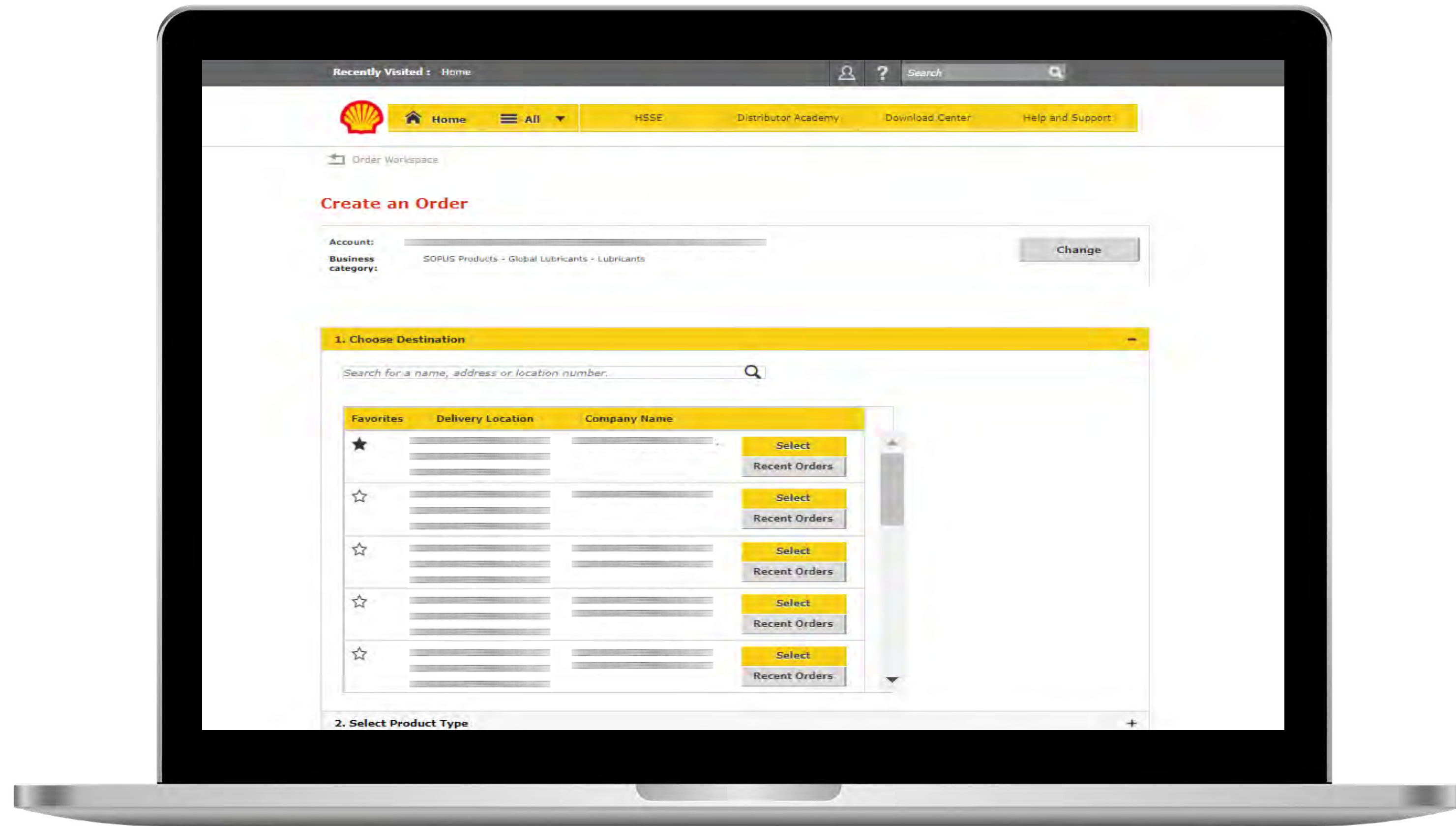


Step
4

If you do wish to change account details you can do so from this pop-up window.

2.3 ii Order Management

How To Place An Order - All Other Markets

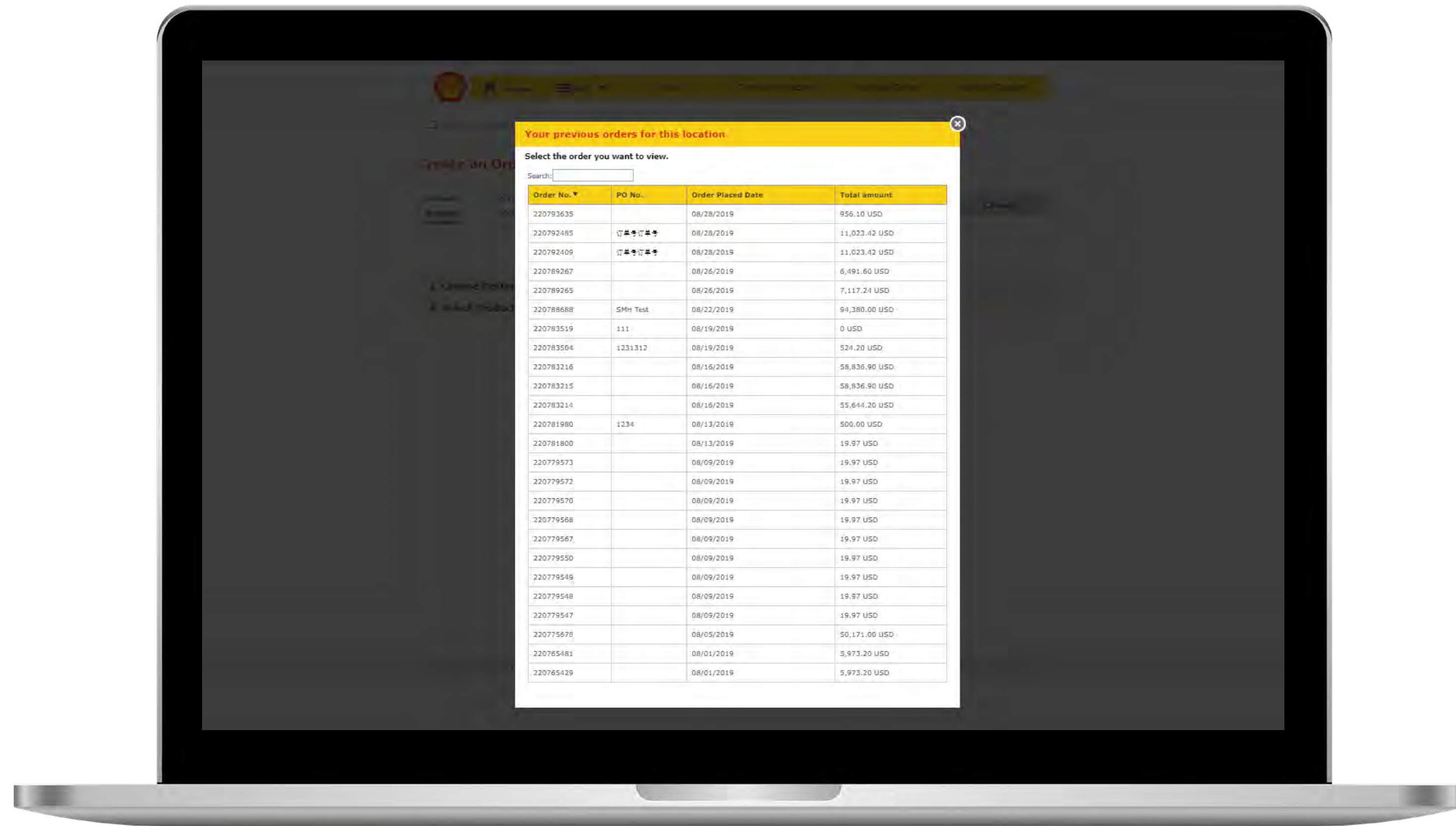


Step
5

You can also view recent orders by clicking **Recent Orders**

2.3 ii Order Management

How To Place An Order - All Other Markets

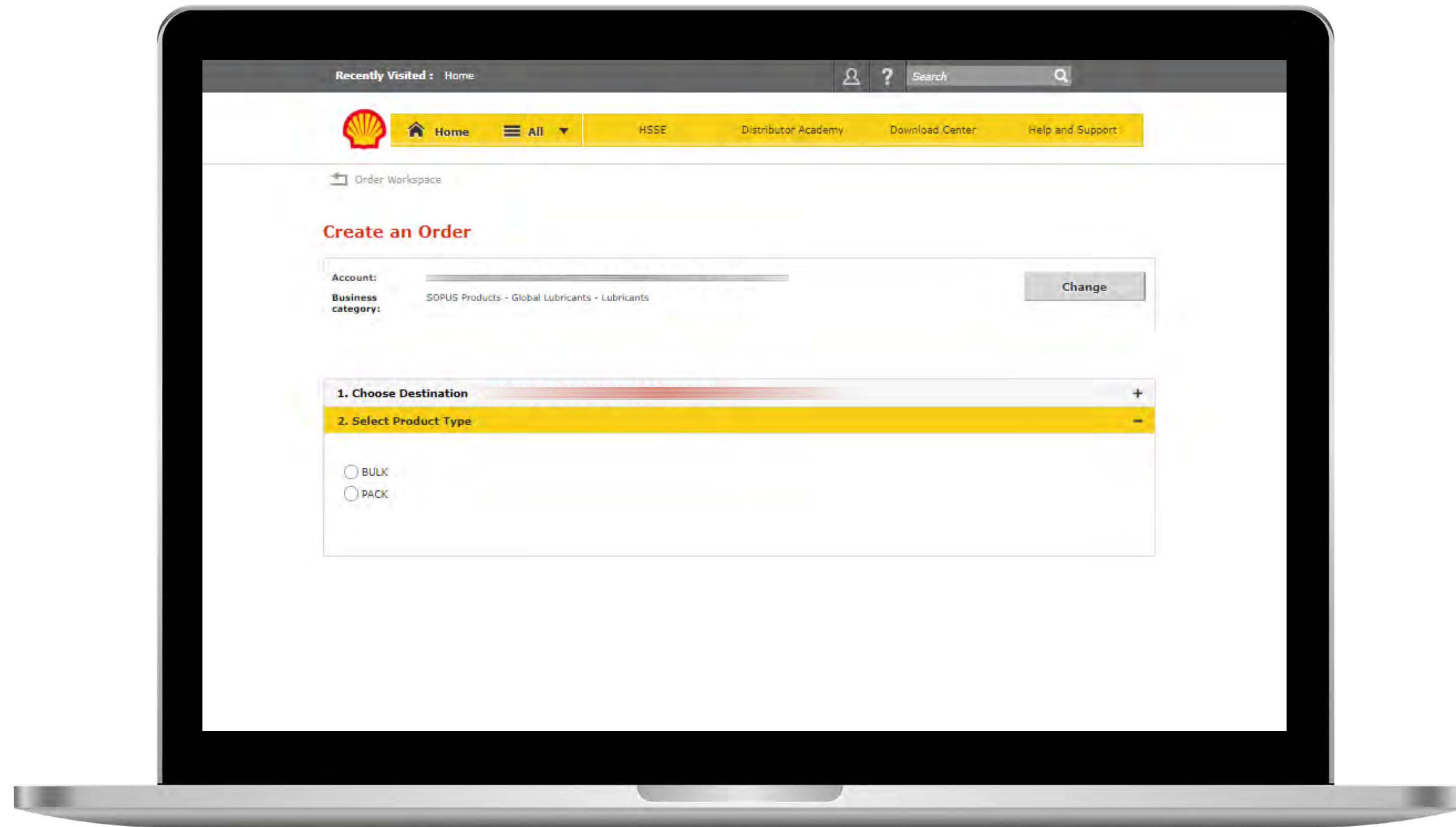


Step
6

You will then be able to select from one of your previous orders in this pop-up window.

2.3 ii Order Management

How To Place An Order - All Other Markets

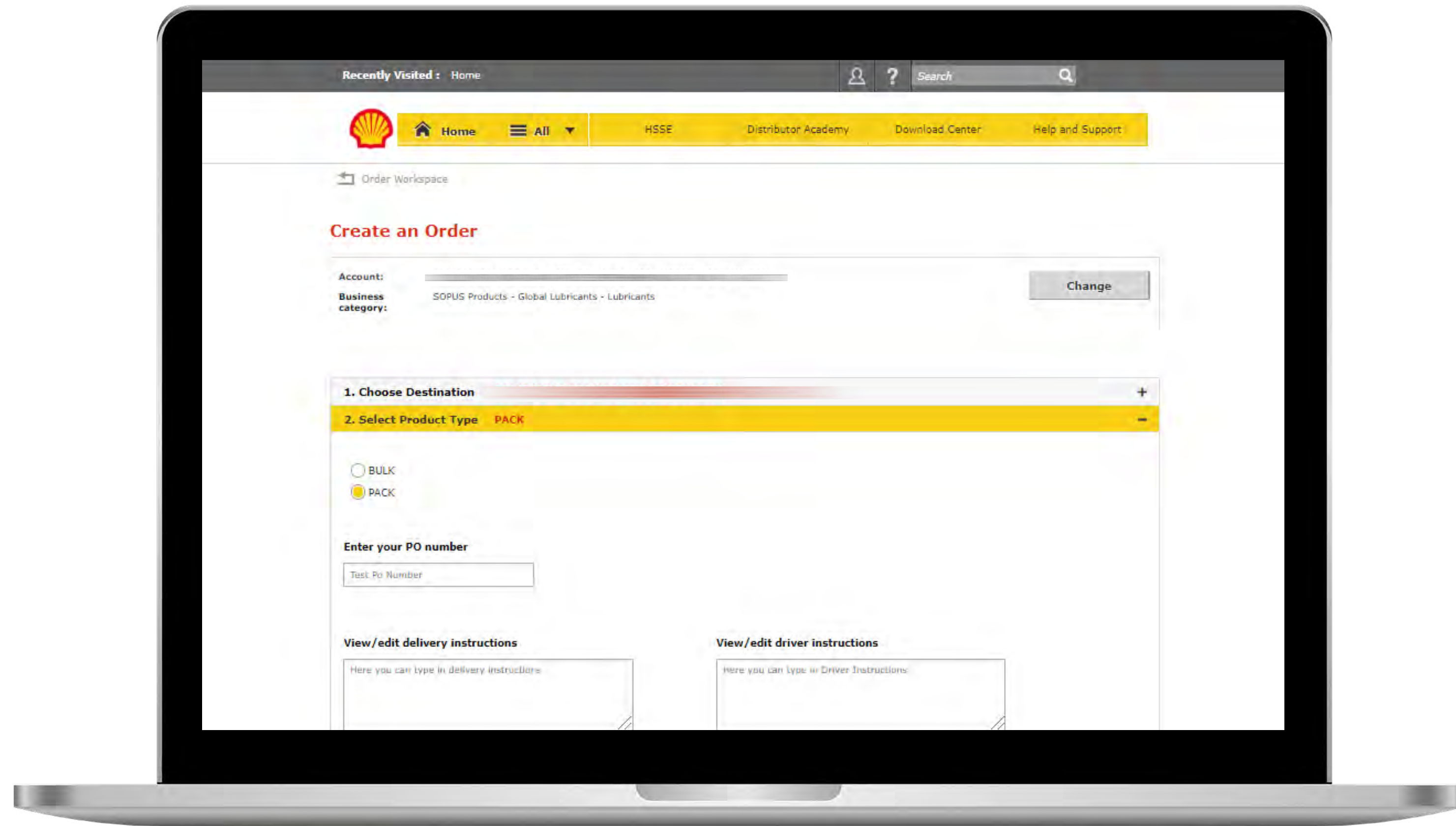


Step
7

After you have selected a recent order you can select a product type by selecting **Bulk** or **Pack**

2.3 ii Order Management

How To Place An Order - All Other Markets

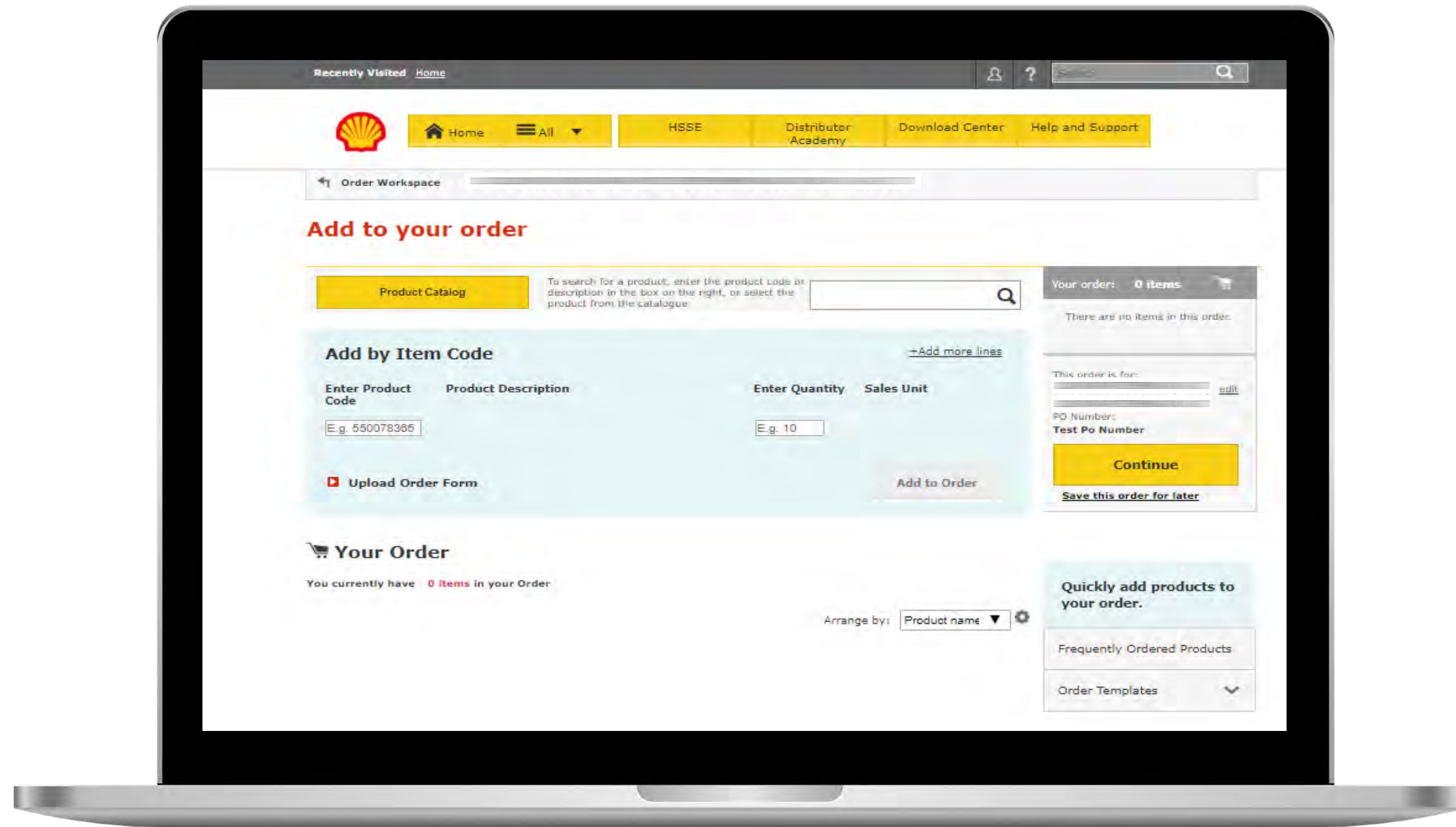


Step
8

You can then Add PO number, delivery and driver instructions
PO number may be mandatory depending on customer type

2.3 ii Order Management

How To Place An Order - All Other Markets

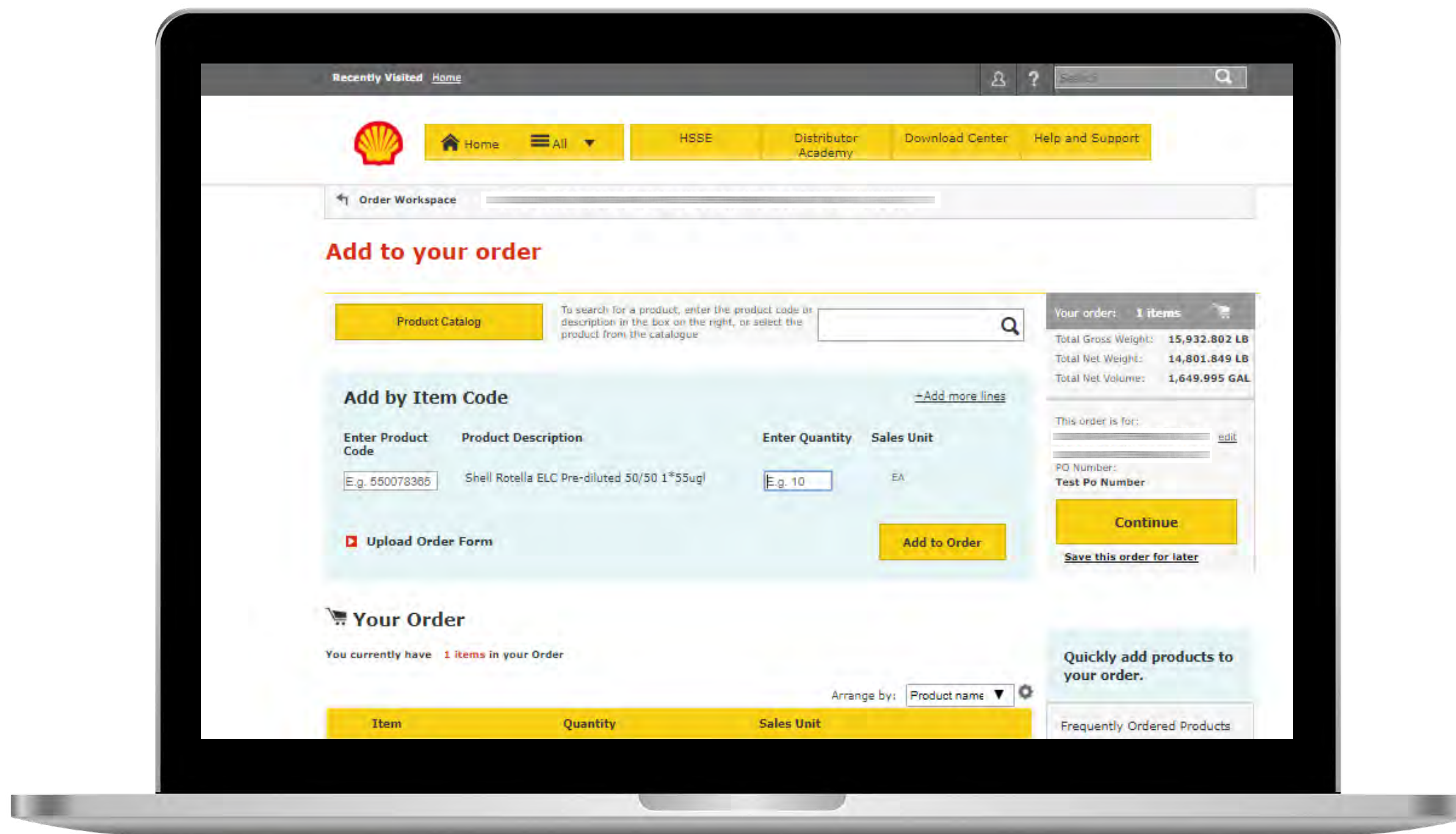


Step
9

On this page you can now add products to your order from Catalogue, directly via product number or Frequently Ordered Products.

2.3 ii Order Management

How To Place An Order - All Other Markets

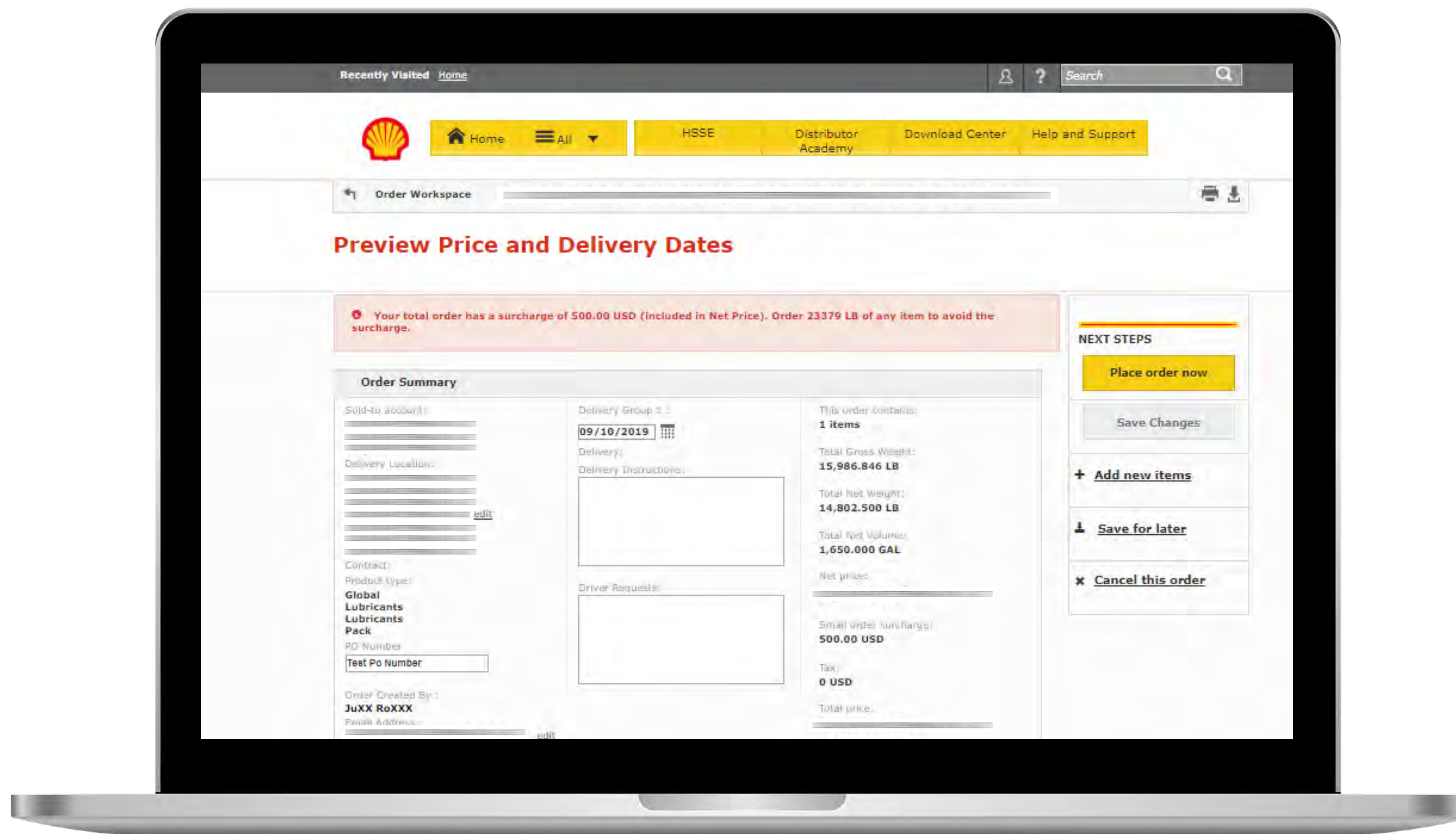


Step
10

Your product has now been added to your order.
Click **Continue** to preview your order.

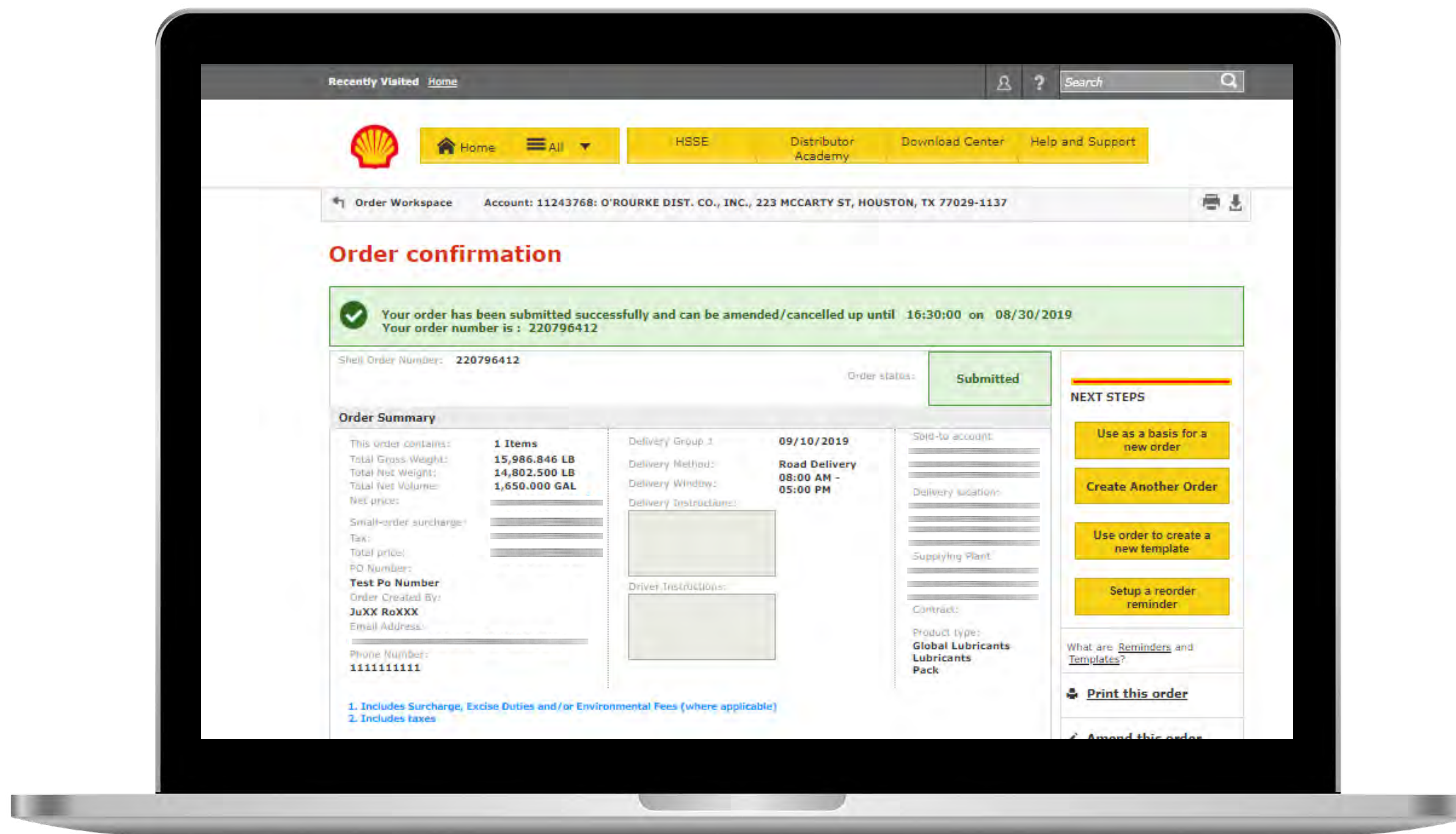
2.3 ii Order Management

How To Place An Order - All Other Markets



Step
11

Here you can preview your order. If all details are correct, click **place order now**.

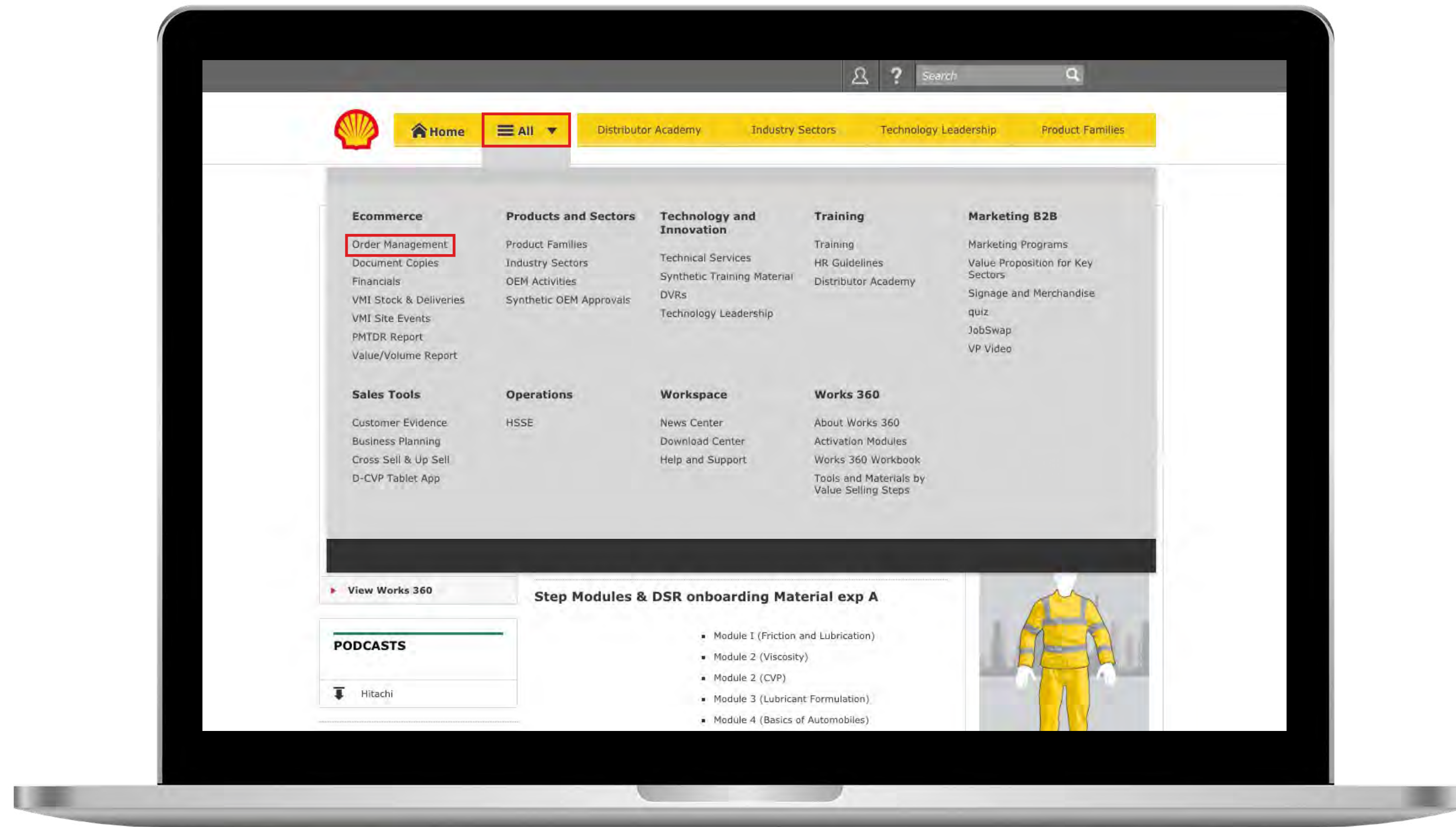


Step
12

You will then see the order confirmation screen confirming that your order has been successfully submitted. You can also print a copy of your order for your records or amend if required.

2.4 Order Management

How to find existing order

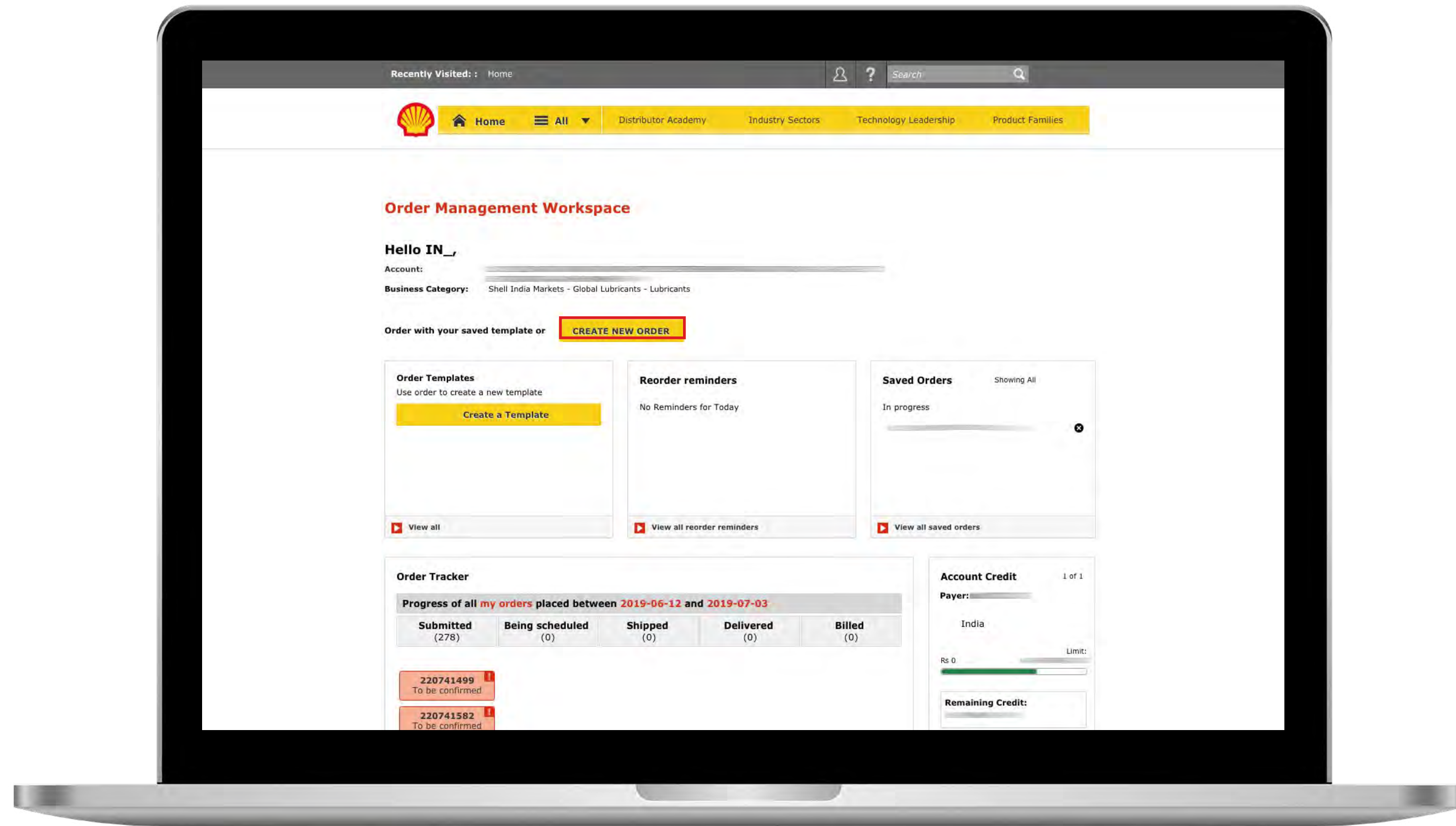


Step
1

Click **All** at the top of navigation and click on **Order Management**

2.4 Order Management

How to find existing order

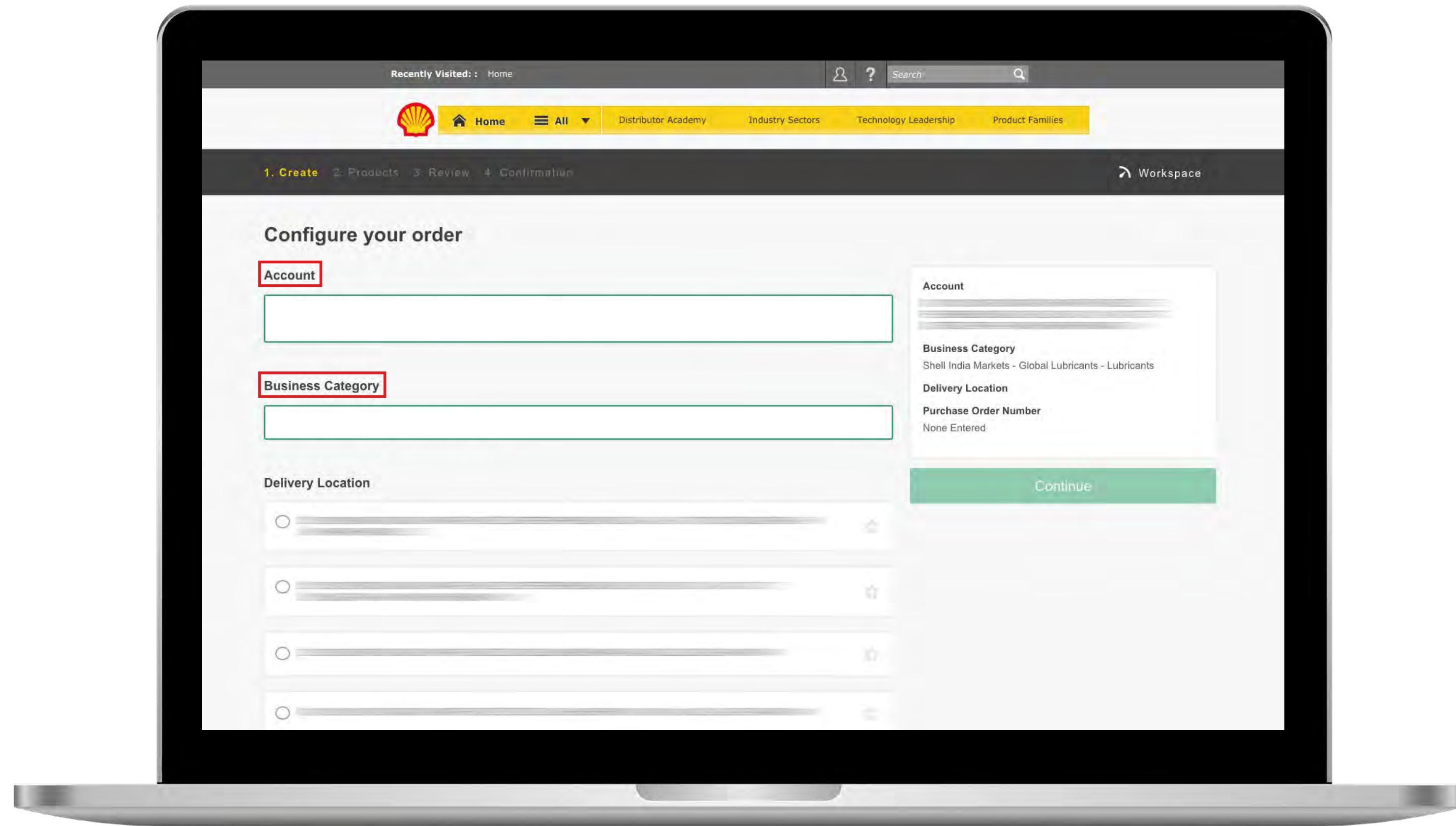


Step
2

In Order Management Workspace
click **CREATE NEW ORDER**

2.4 Order Management

How to find existing order

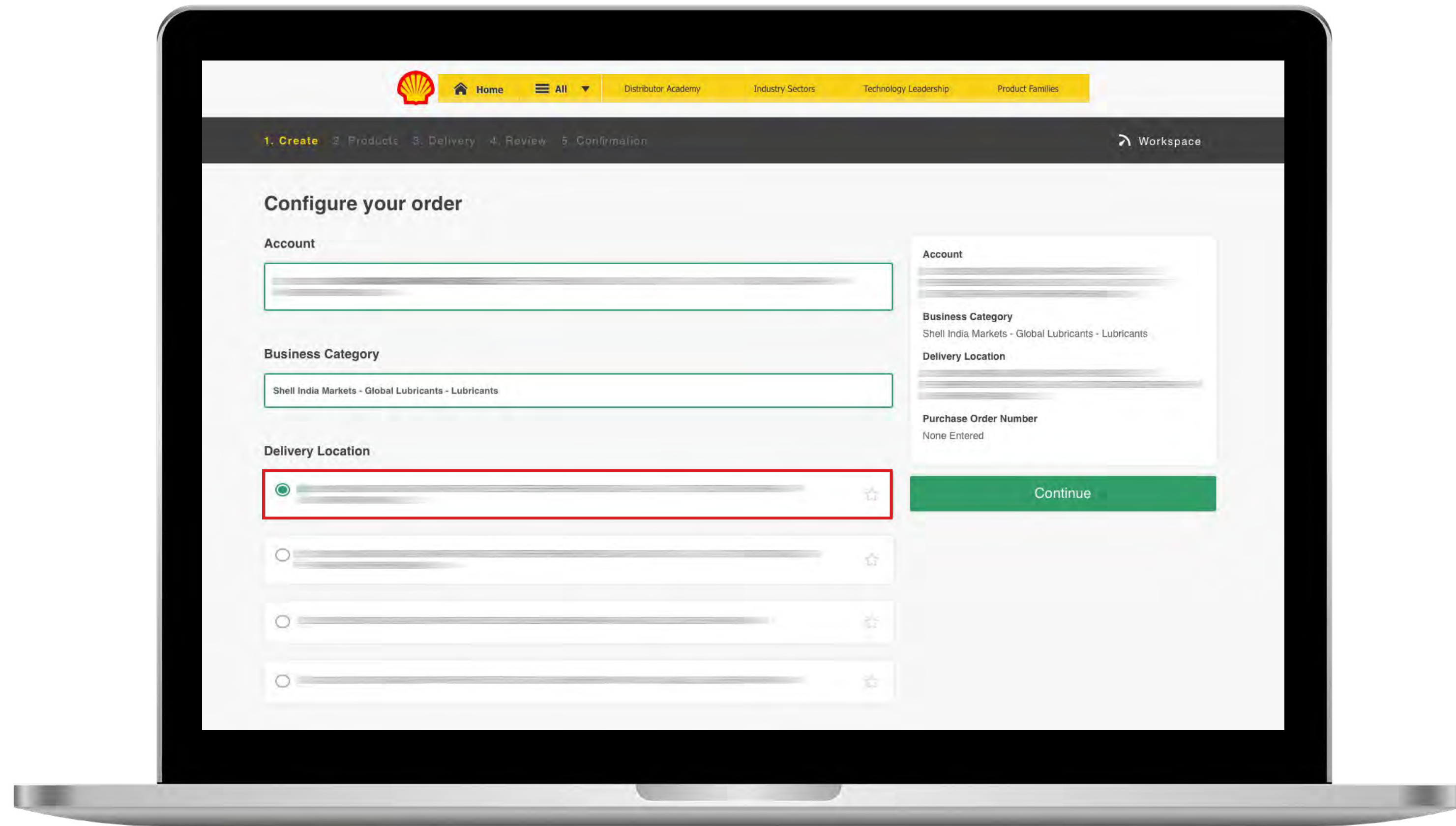


Step
3

Select your **Account** number and **Business Category**

2.4 Order Management

How to find existing order



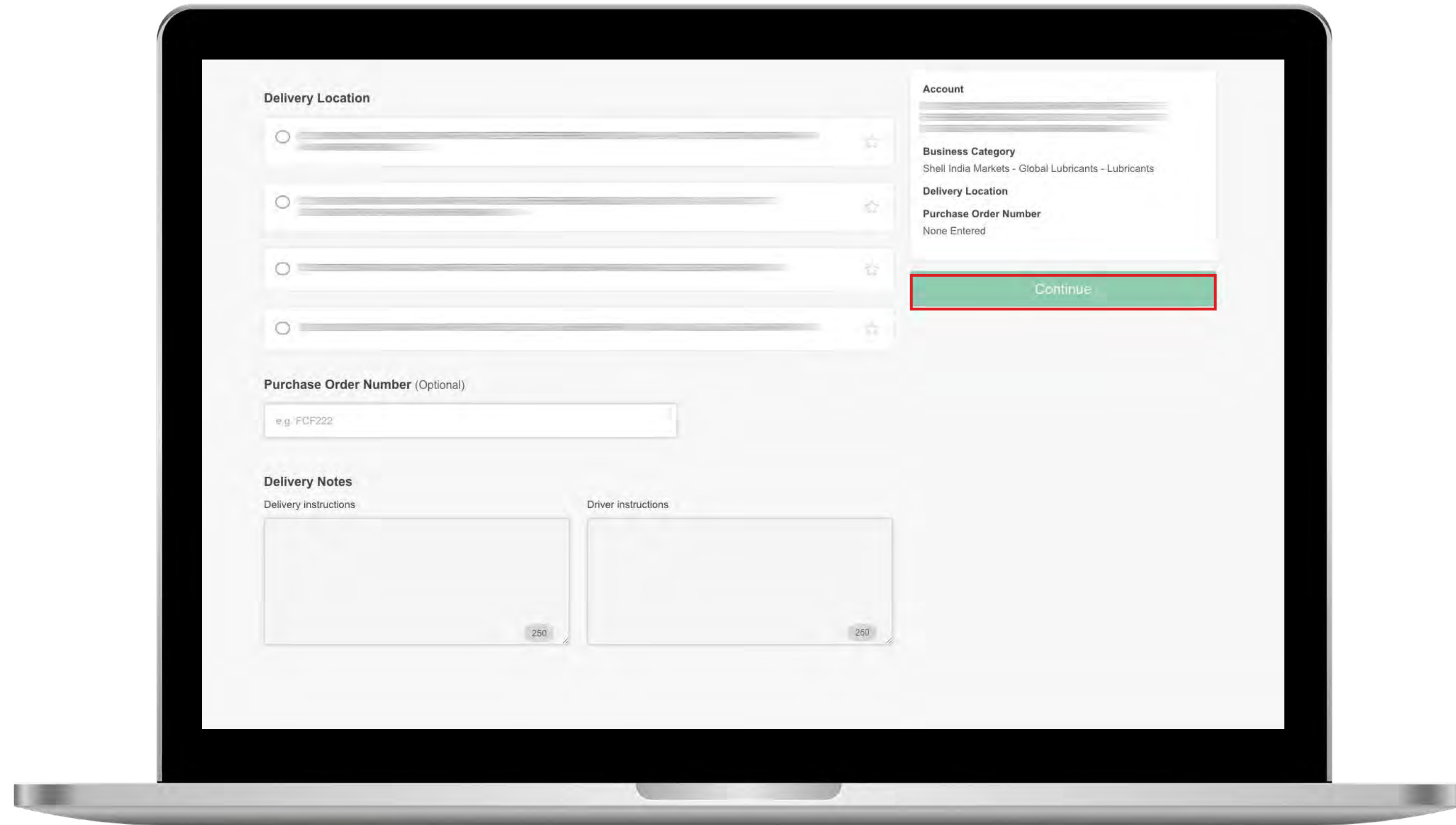
Step
4

Next, choose a **Delivery Location** from the list.
All delivery locations for your account will be listed

2.4

Order Management

How to find existing order

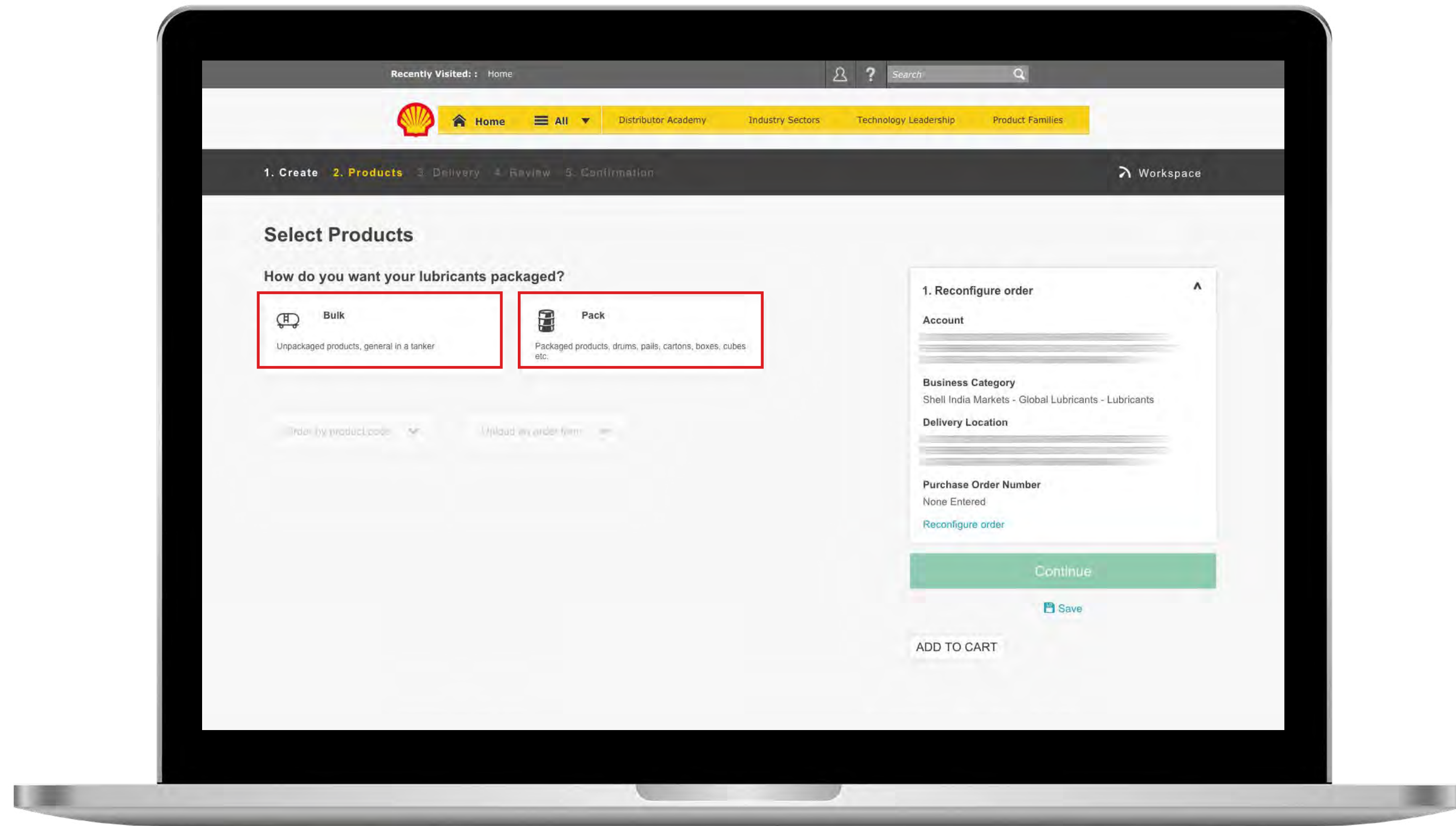


Step
5

Click **Continue** after selecting delivery details

2.4 Order Management

How to find existing order

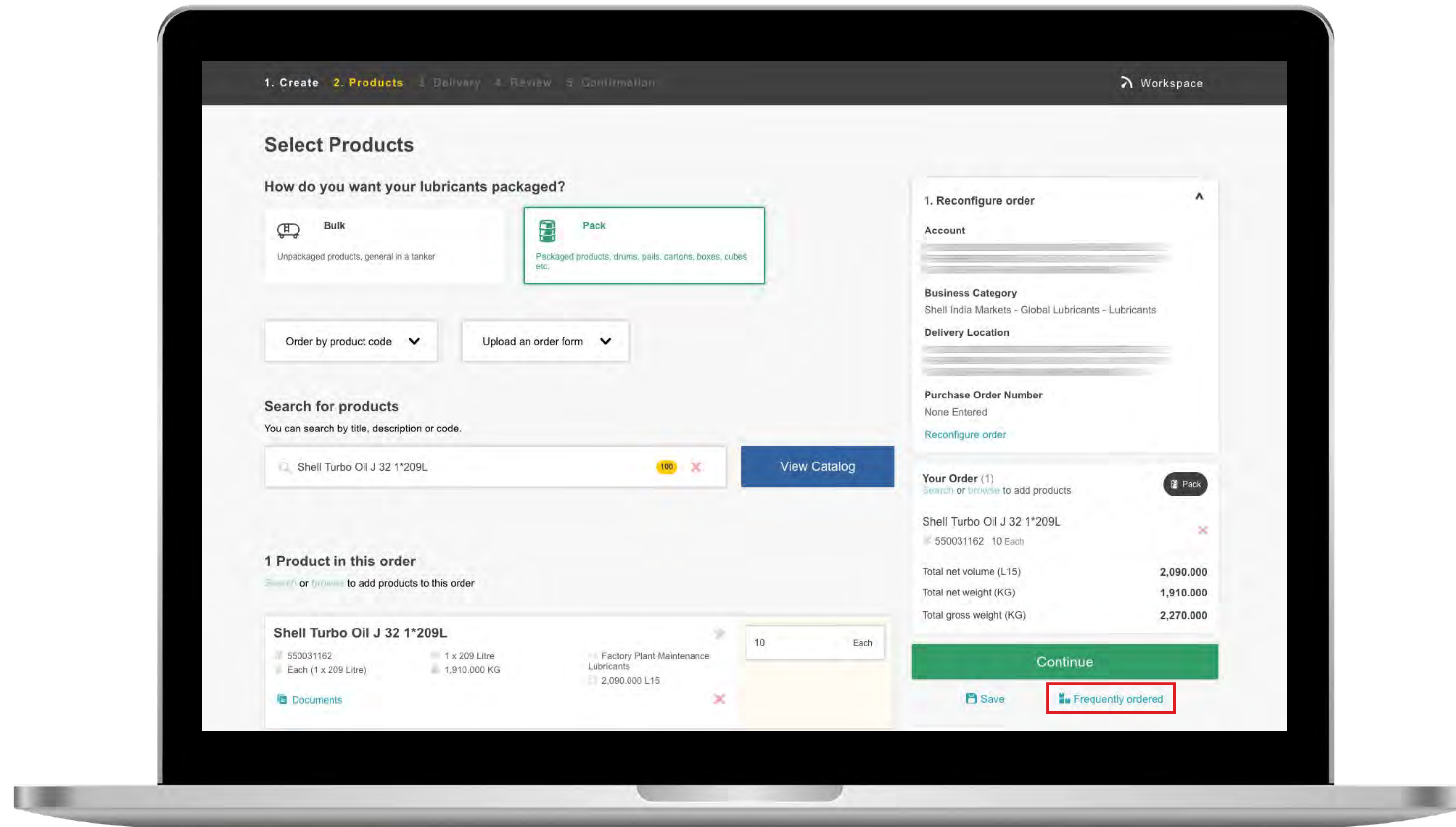


Step
6

Choose a product type using the Select Products panel.
You must choose between **Bulk** or **Pack**

2.4 Order Management

How to find existing order

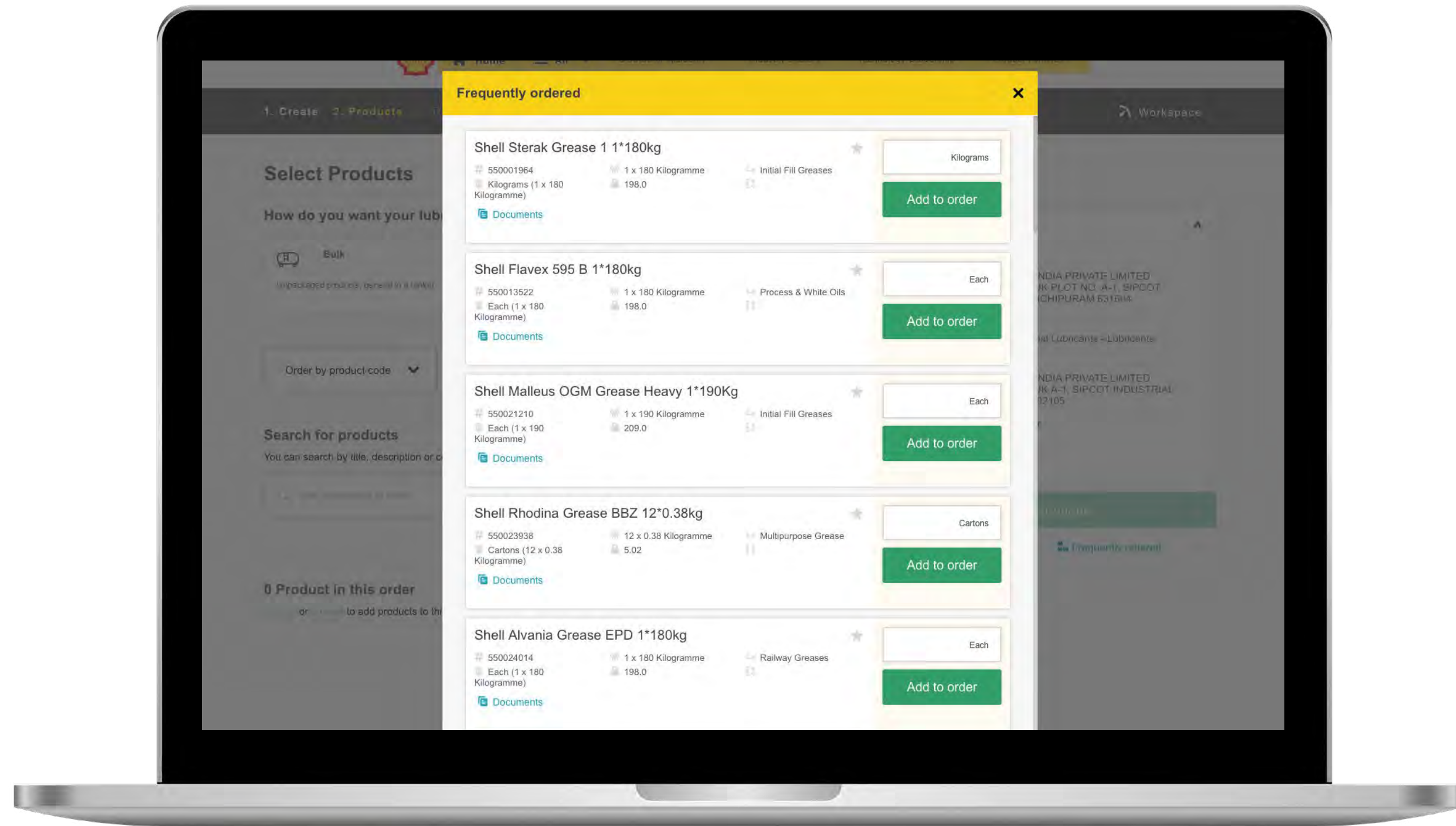


Step
7

Use the **Frequently ordered** option
on the right side of the screen

2.4 Order Management

How to find existing order

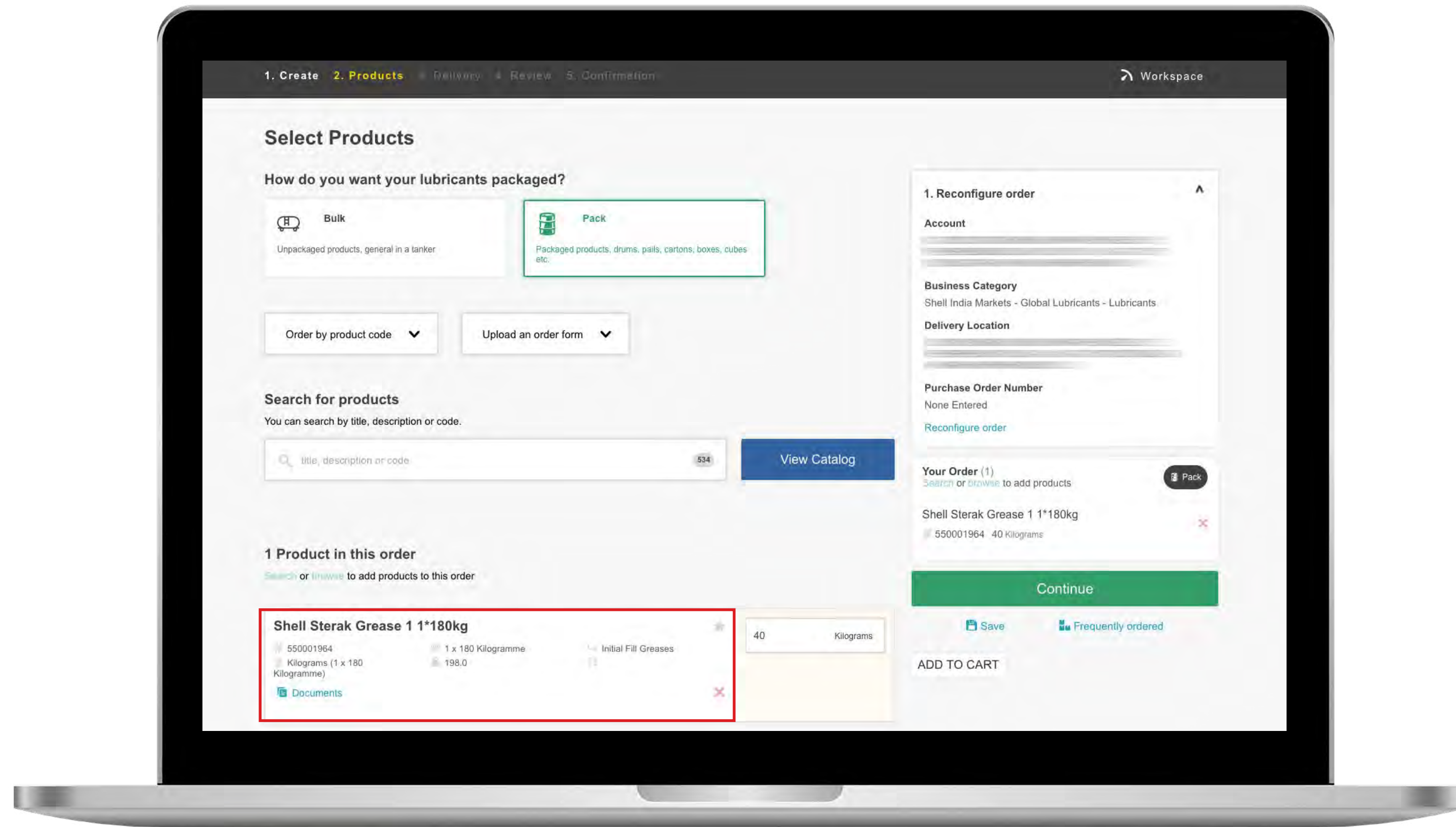


Step
8

A pop-up window will appear, showing frequently ordered products. Choose products from the list and add quantity

2.4 Order Management

How to find existing order

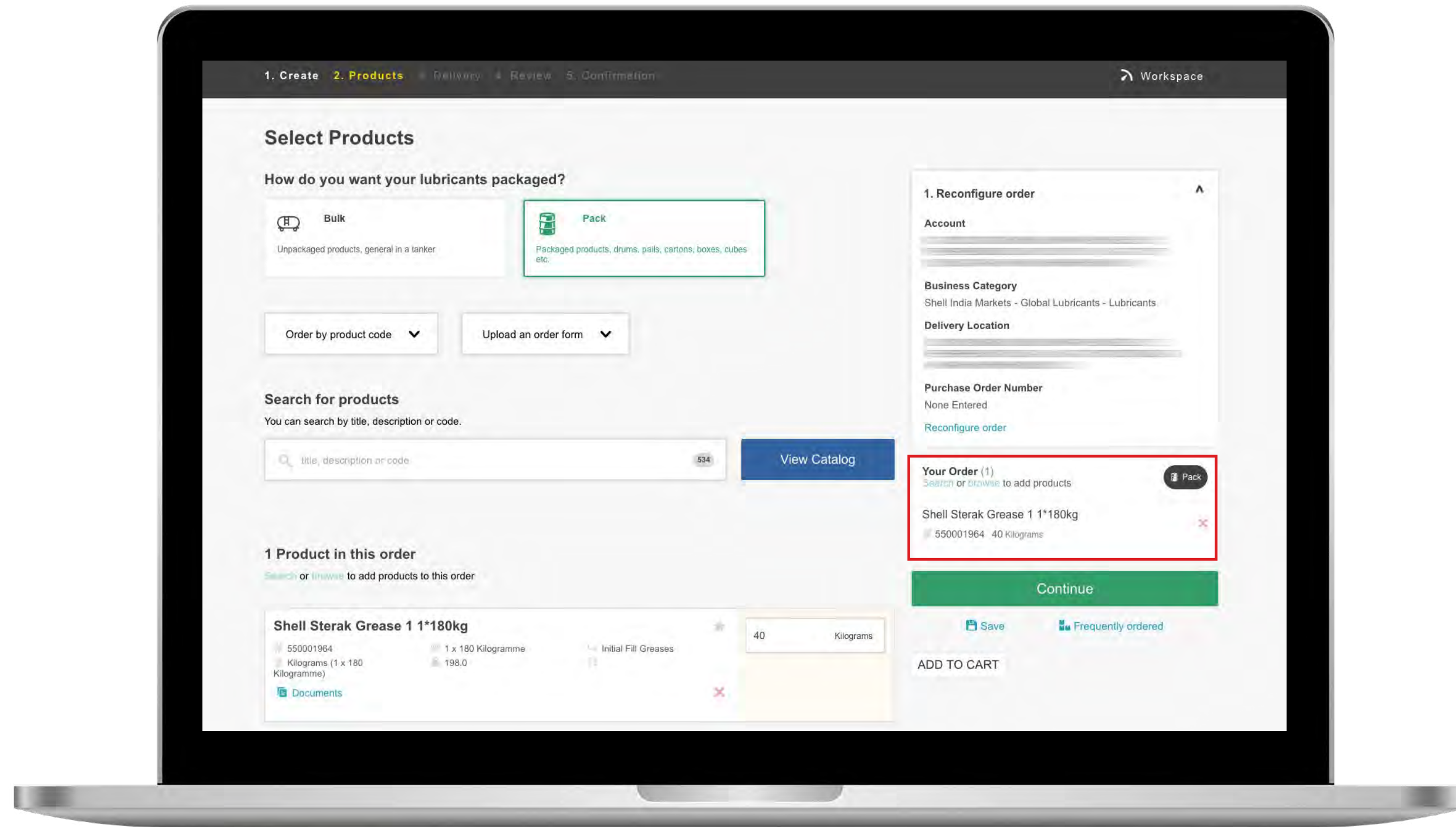


Step
9

Click **Add** to order.
A pop-up message will appear – Product in this order

2.4 Order Management

How to find existing order

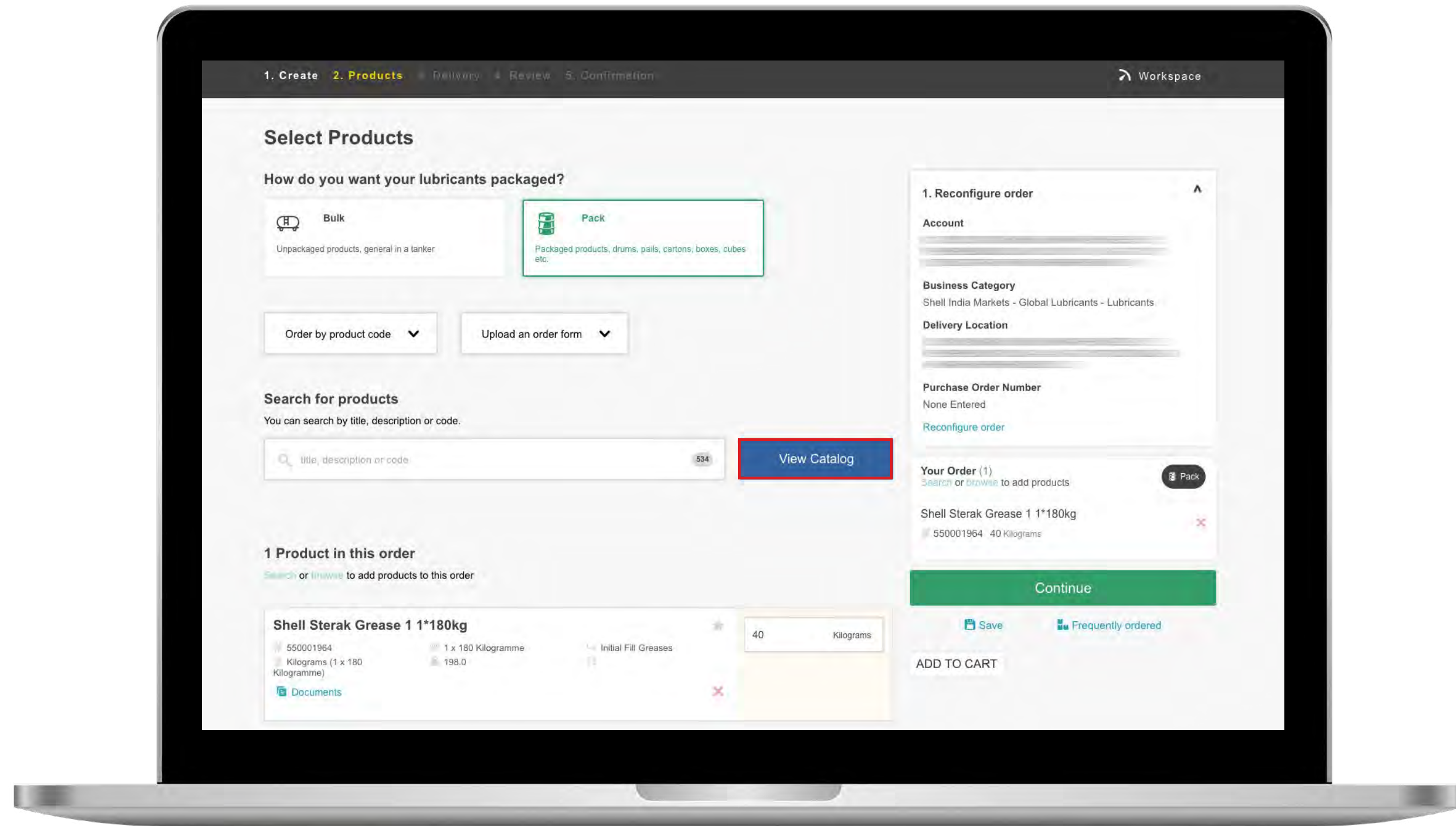


Step
10

When you close the window you can see that product was added to the new order with chosen quantity. You can change it or remove it by clicking to the red X button

2.4 Order Management

How to find existing order

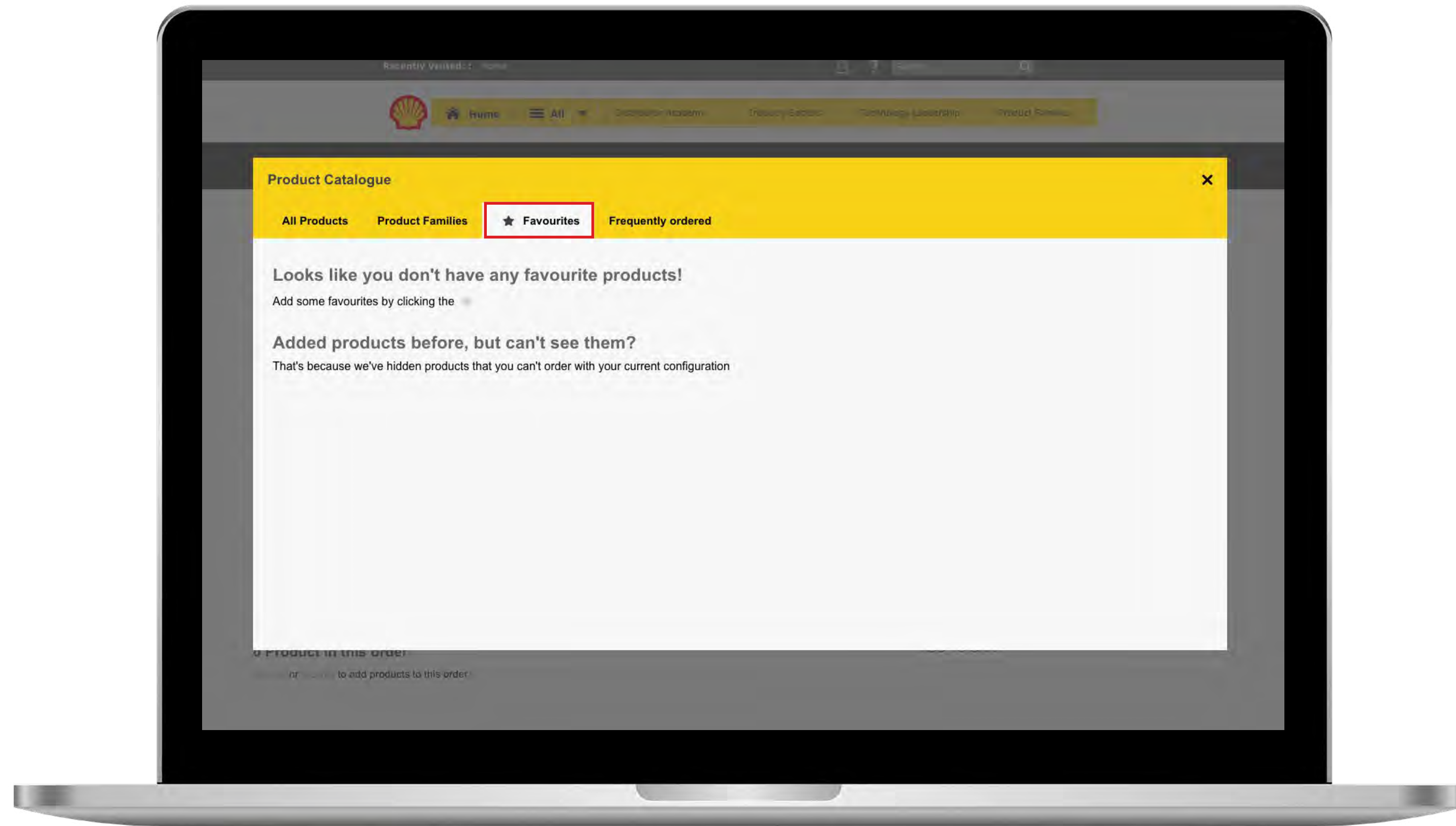


Step
11

Now you can proceed with other products

2.4 Order Management

How to find existing order

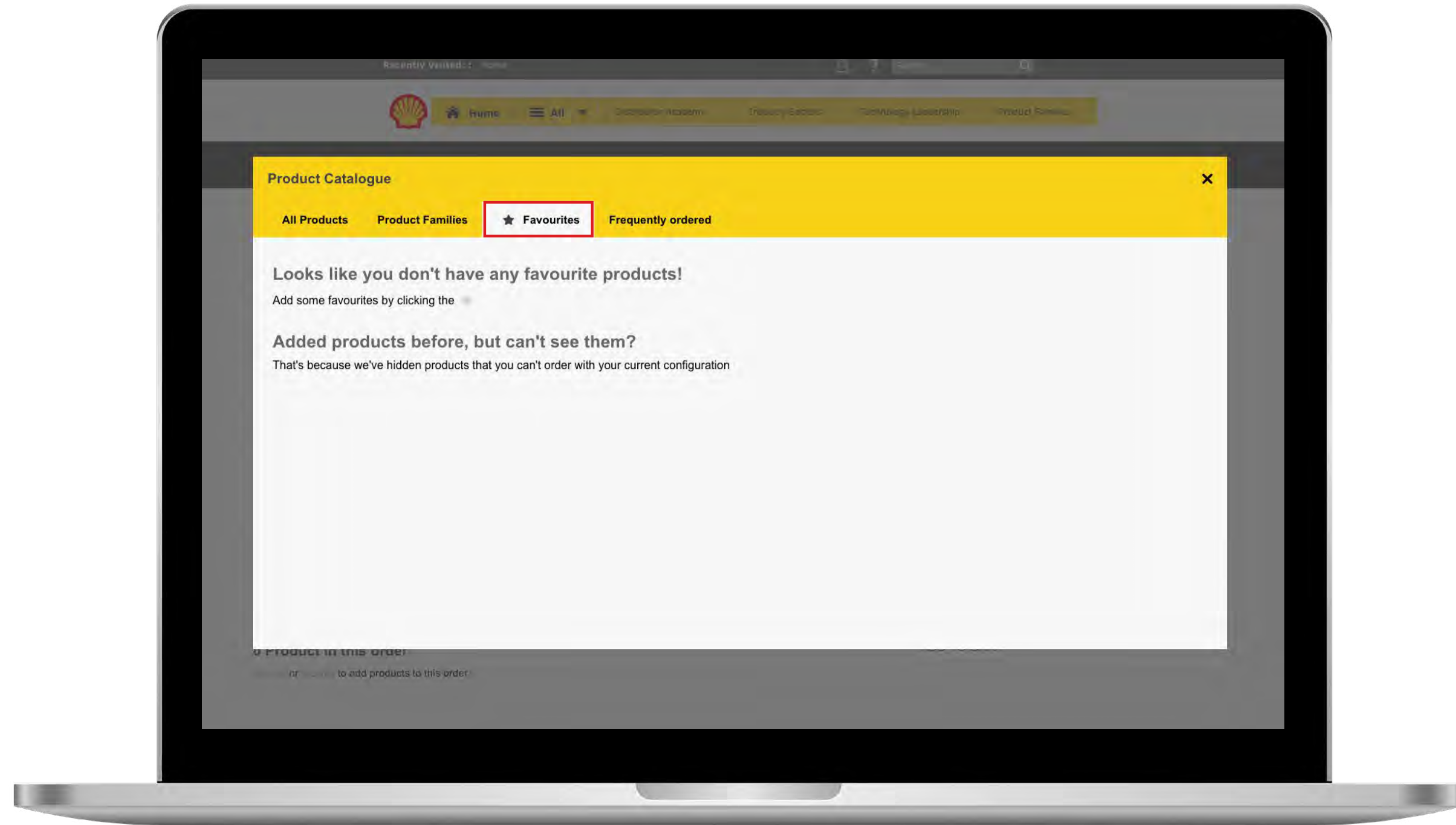


Step
12

Other ways to see frequently ordered products is to click on the **View Catalogue** button.
Click the **Star** to add products to your **Favourites**

2.4 Order Management

How to find existing order



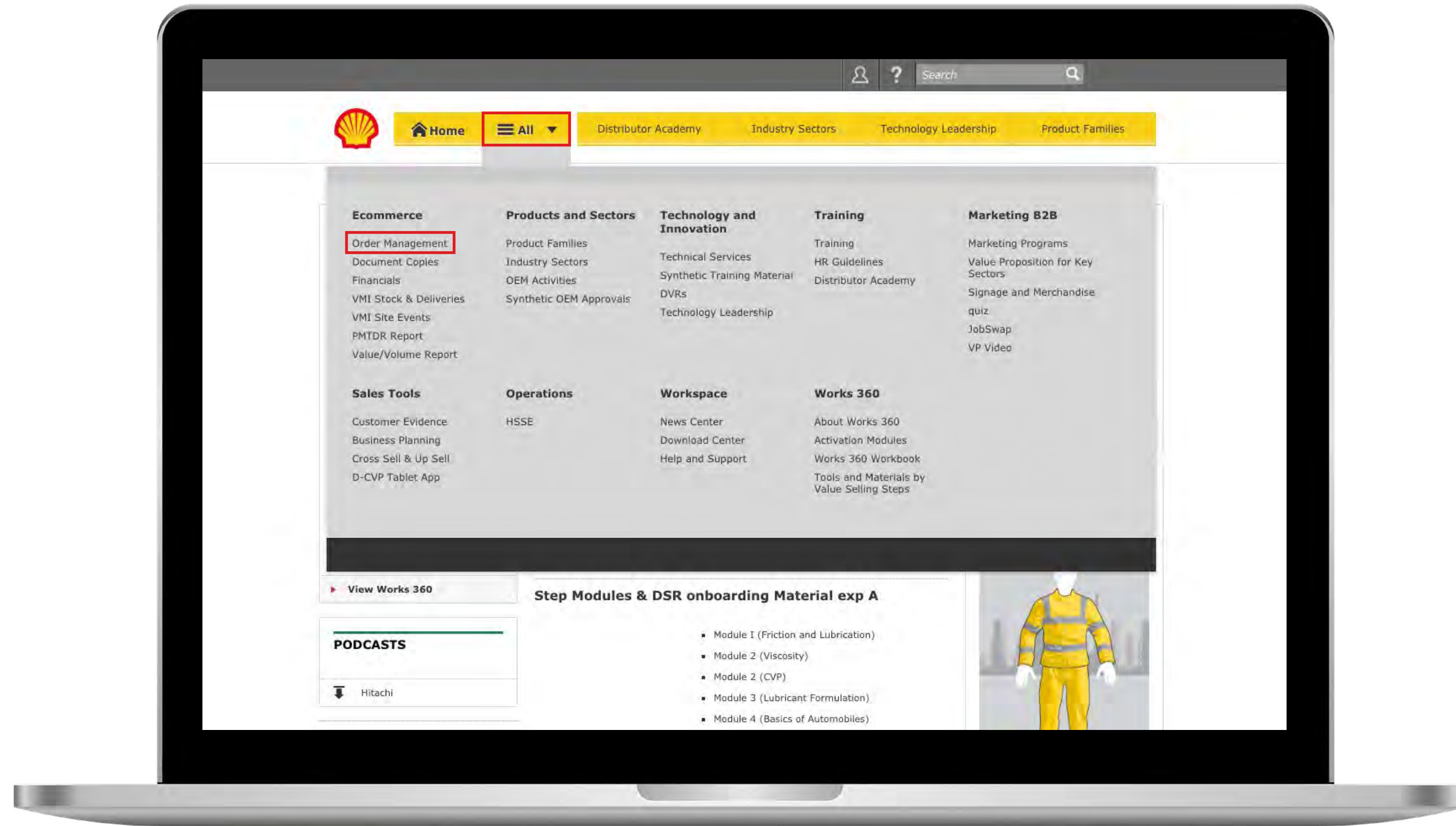
Step
13

Matched products should be visible in **Favourites**

2.5

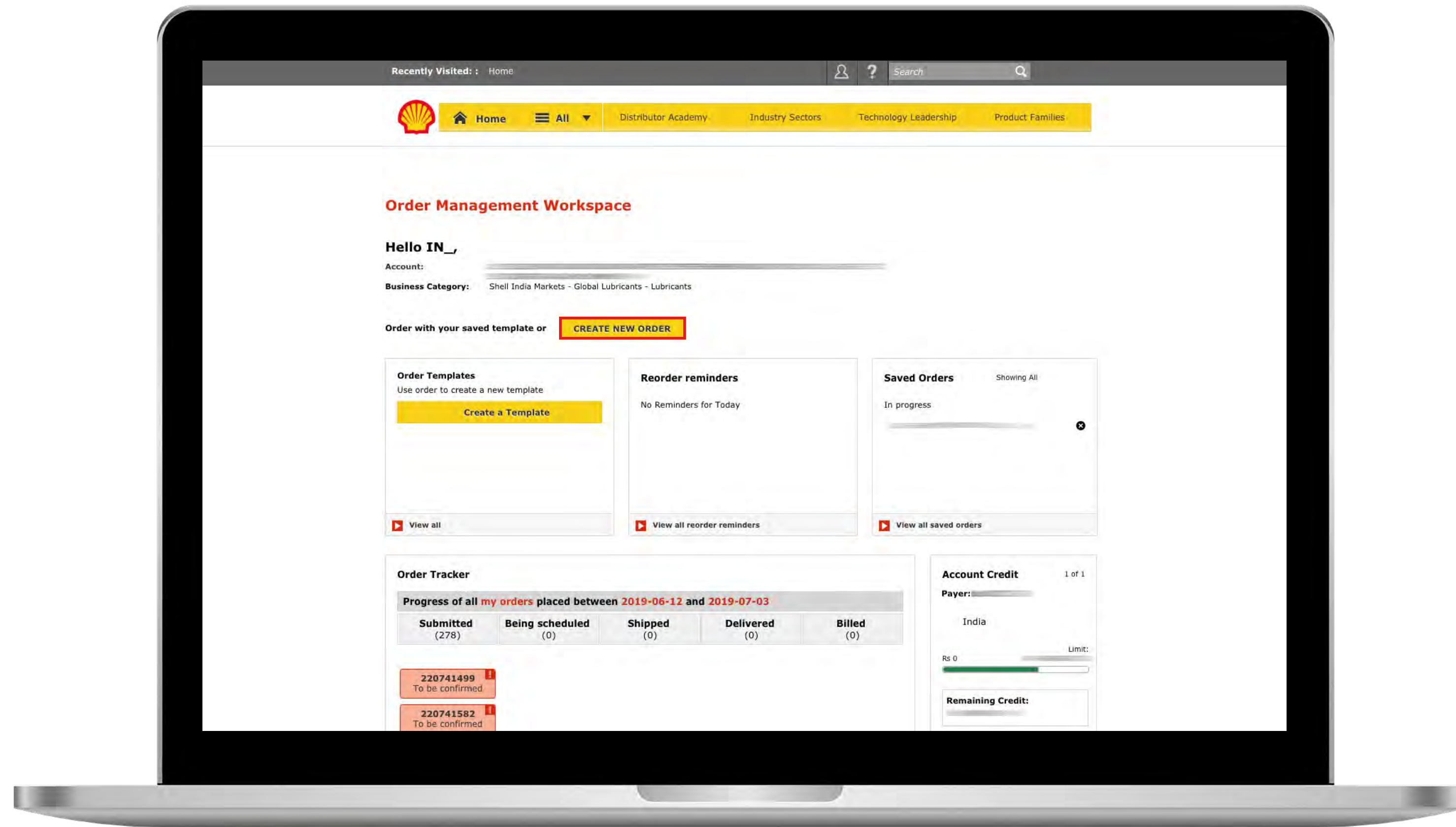
Order Management

How To Amend/Cancel An Order



Step
1

Click **All** at the top of navigation and click on **Order Management**



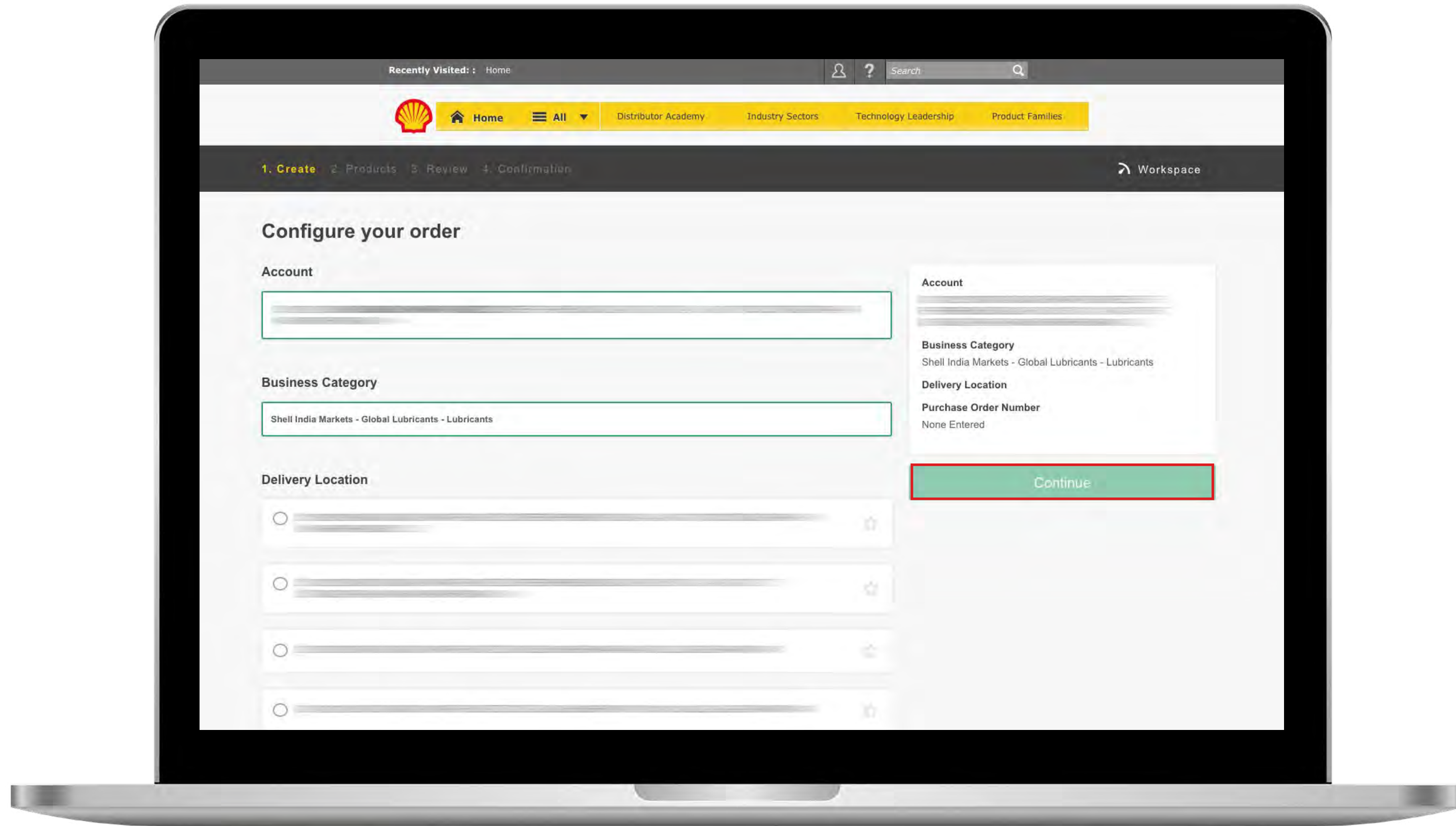
Step
2

In Order Management Workspace click **CREATE NEW ORDER**.
Then follow steps of QRG How do I place an order
(to choose all needed parameters)

2.5

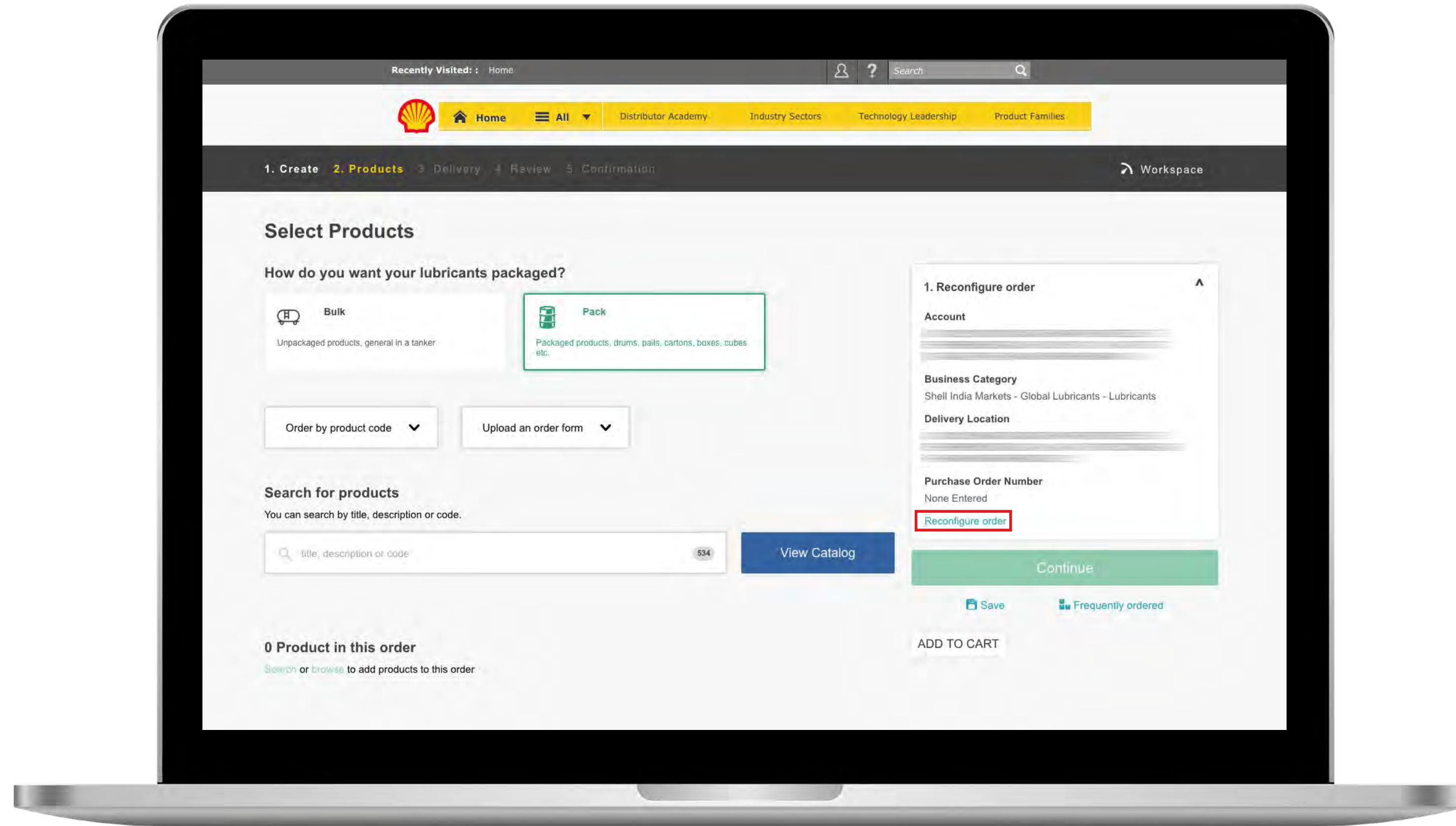
Order Management

How To Amend/Cancel An Order



Step
3

After choosing all those parameters click **Continue**



Step
4

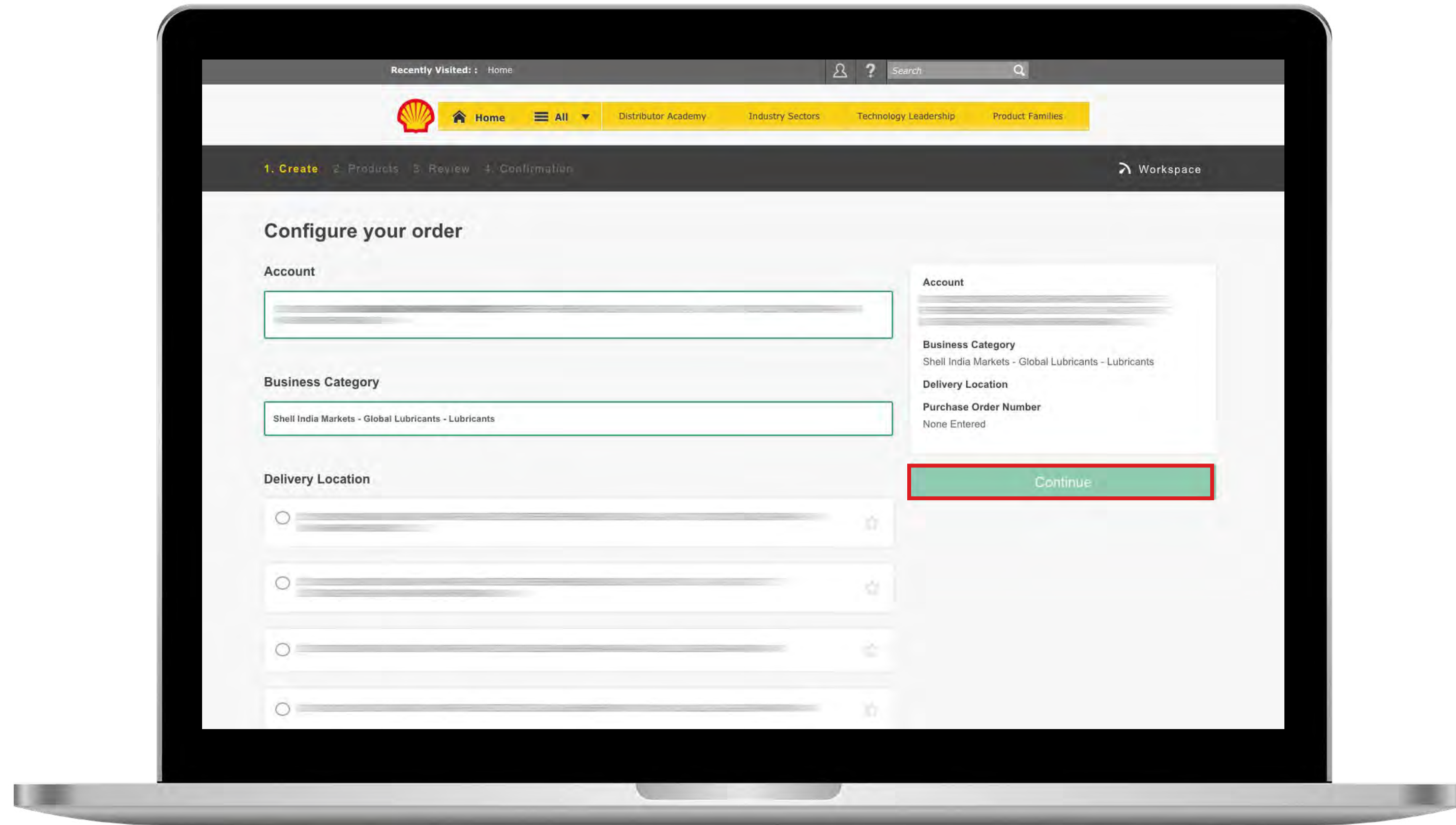
Within 24 hours of placing your order, you are able to amend/cancel your order via Shell MarketHub. After this time you will need to call customer support.

You can change delivery details at any time by clicking on **Reconfigure order**

2.5

Order Management

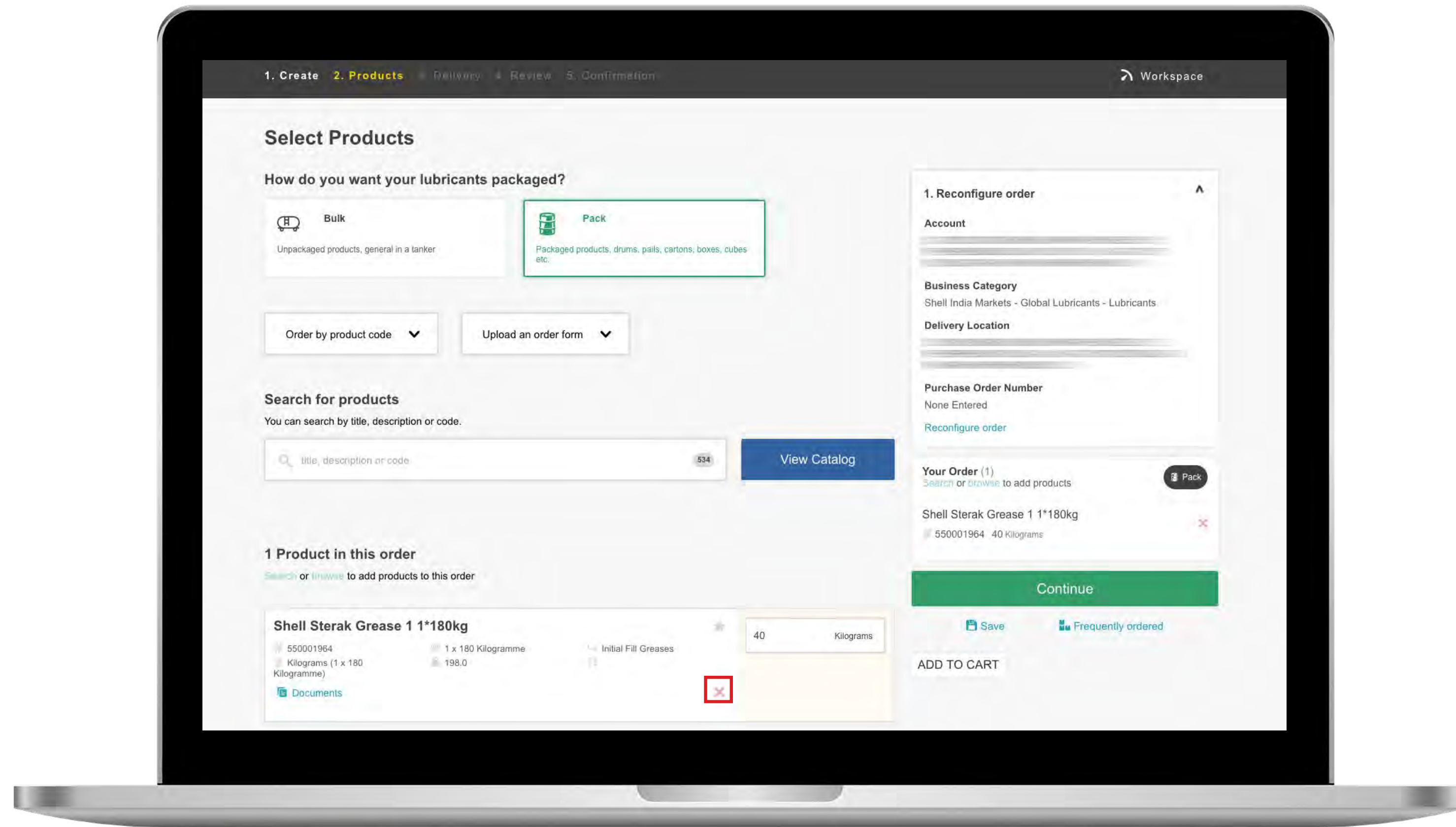
How To Amend/Cancel An Order



Step
5

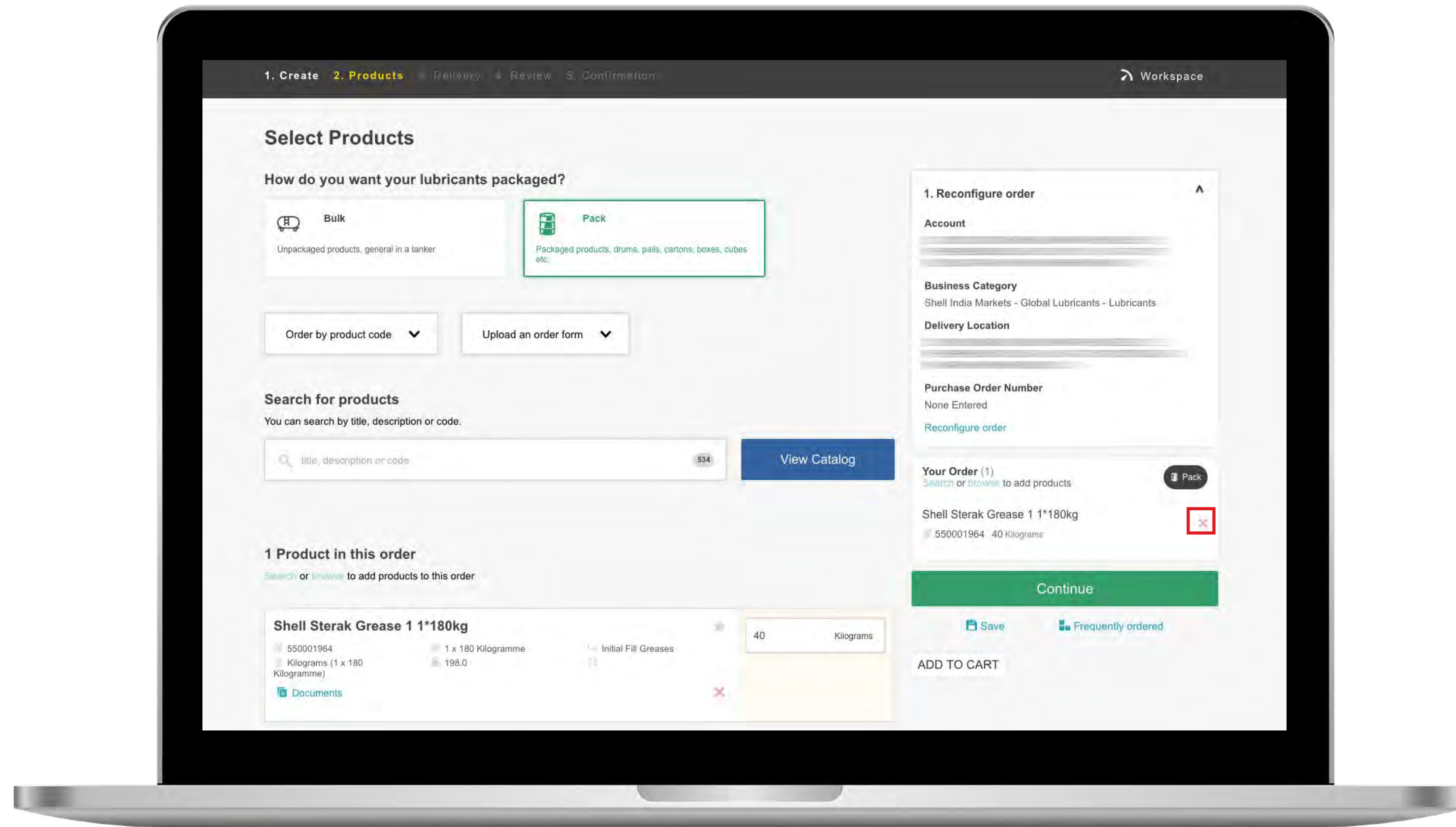
You will be automatically moved to the previous step
Here you can change the **Account** number,
Business Category and **Delivery Location**

After setting parameters (by clicking **Continue**)
you can choose products



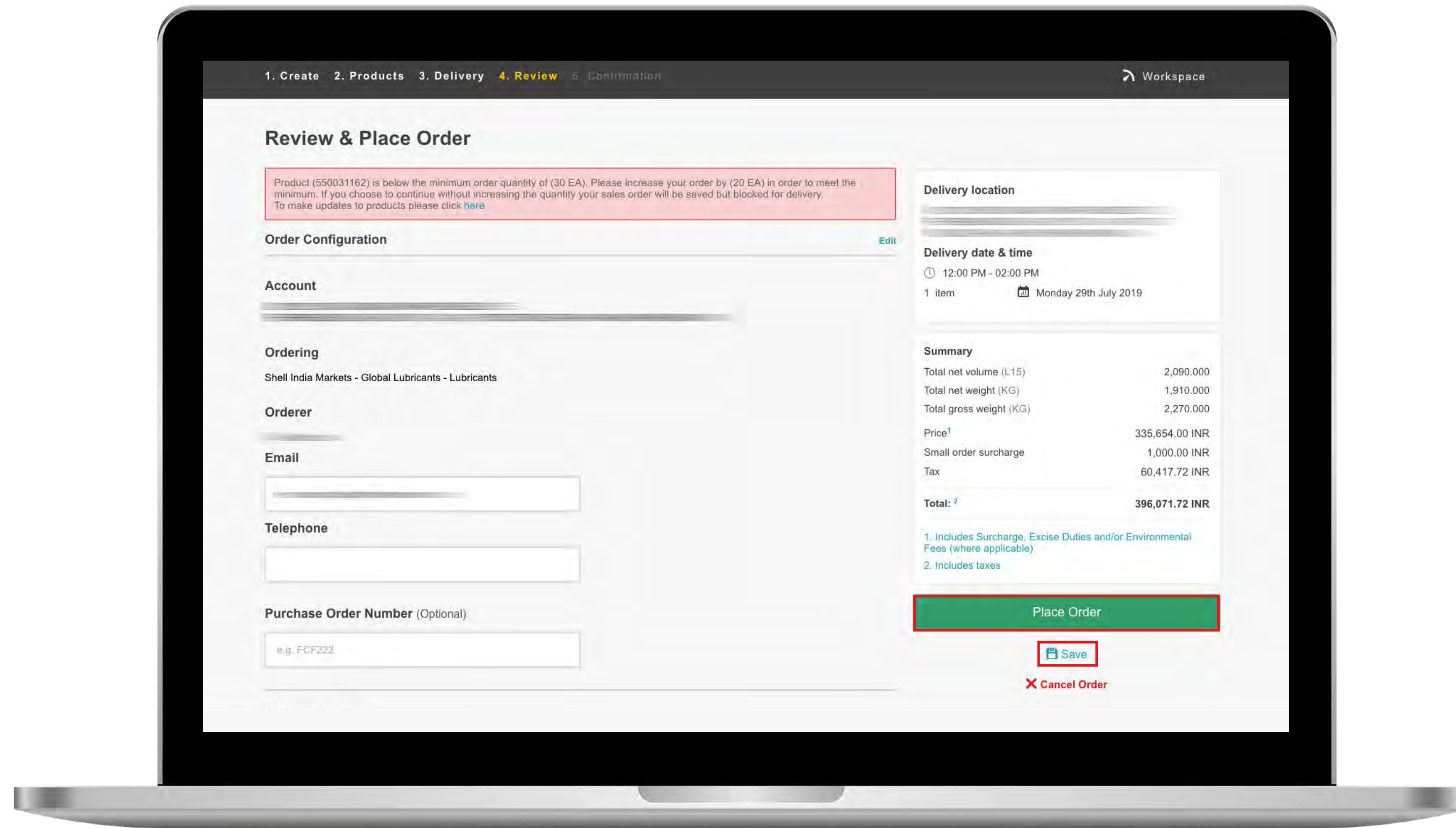
Step
6

You can change products, quantity,
or fully remove products using **X** button



Step
7

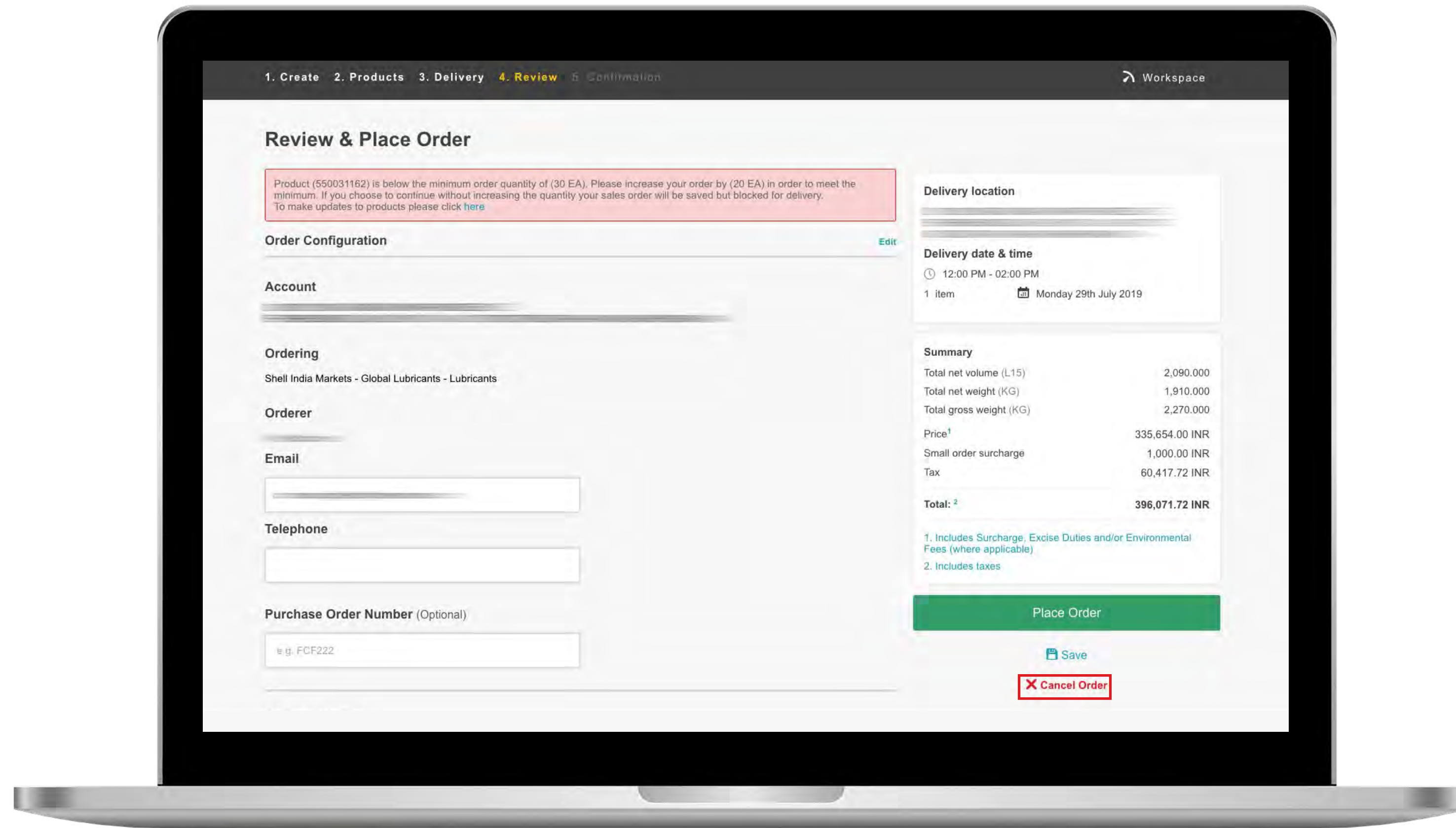
You can also fully remove products from order
using **X** on the right side of screen



Step
8

Note: after clicking **Continue** or **Place Order** at this stage,
you can't change details of your order

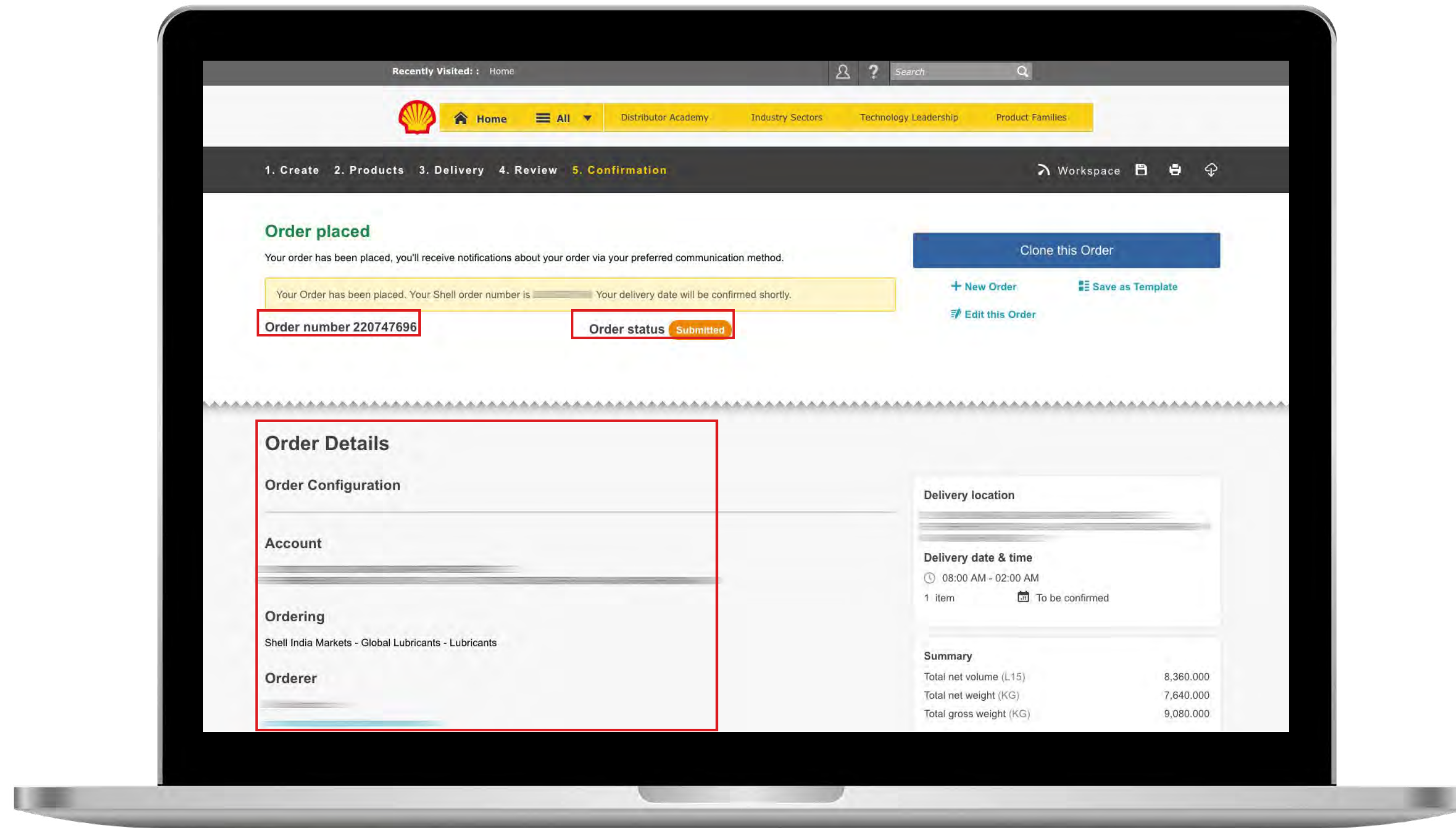
Using **Save** you can stop at this stage without placing an order.
You can go back to this order later



Step
9

You will be moved to last screen where
you must confirm placing of your order

At this stage you can still cancel your order
by clicking the **Cancel Order** button

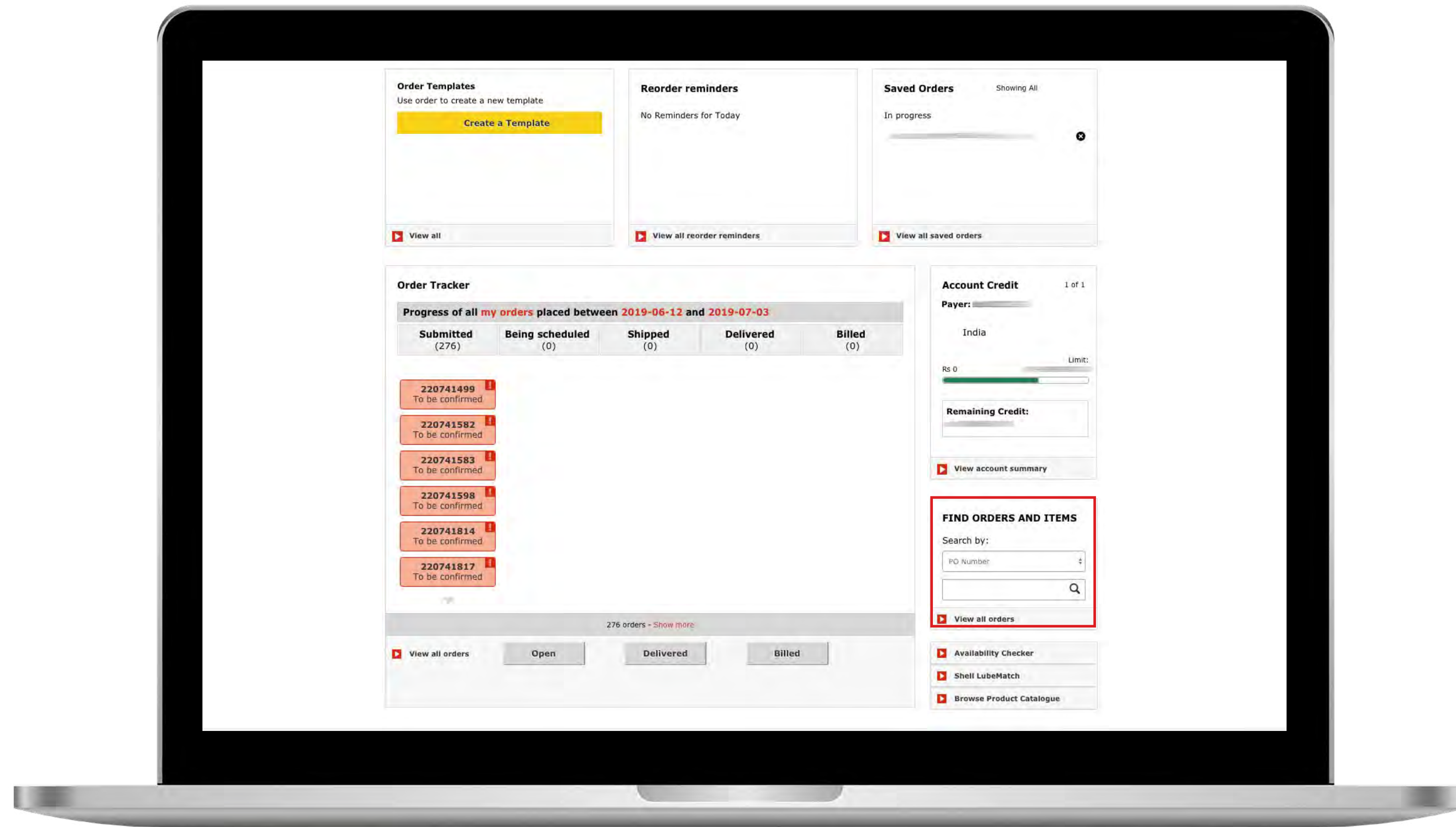


Step
10

If you placed an order system will show order number, status and summary

Note: if you placed an order before Cut-off time you can still cancel it before Cut-off time the same day

If you placed order after Cut-off time you can cancel it till next day Cut-off time



Step
11

If you are meeting those terms, please go to
Order Management Workspace

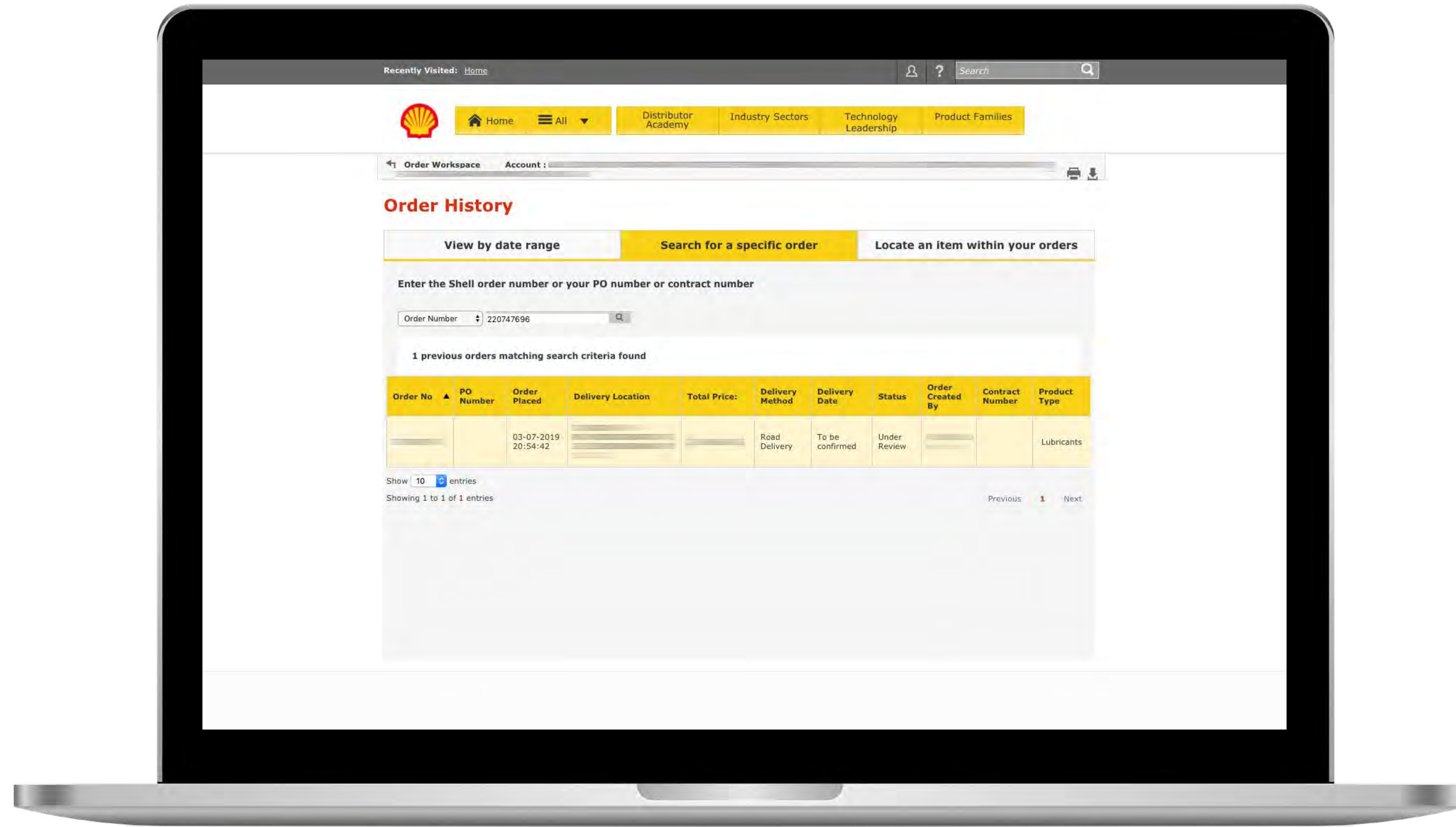
In **FIND ORDERS AND ITEMS** area
put your order number to find it

Or click **View all orders** to see full list of your orders

2.5

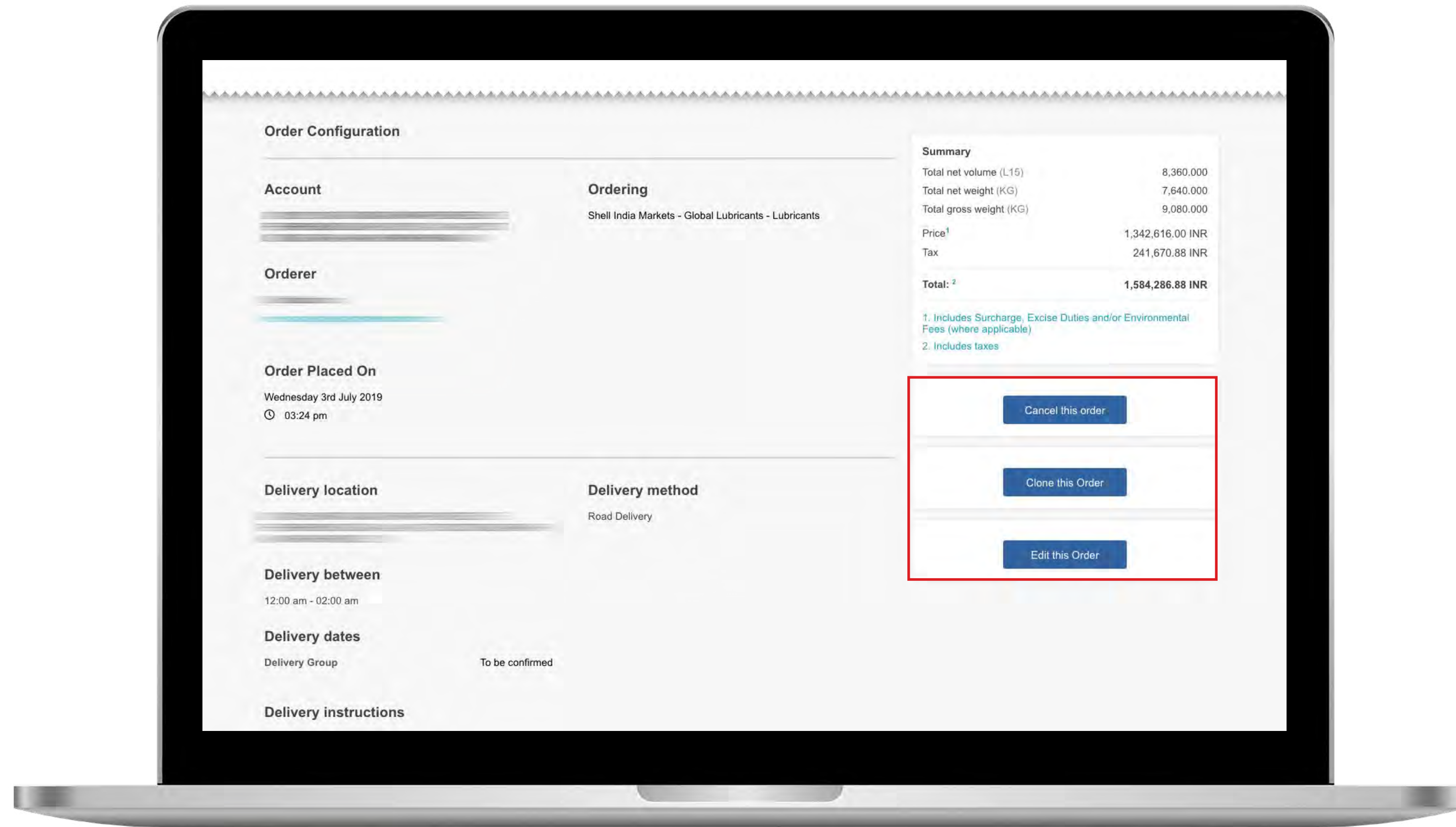
Order Management

How To Amend/Cancel An Order



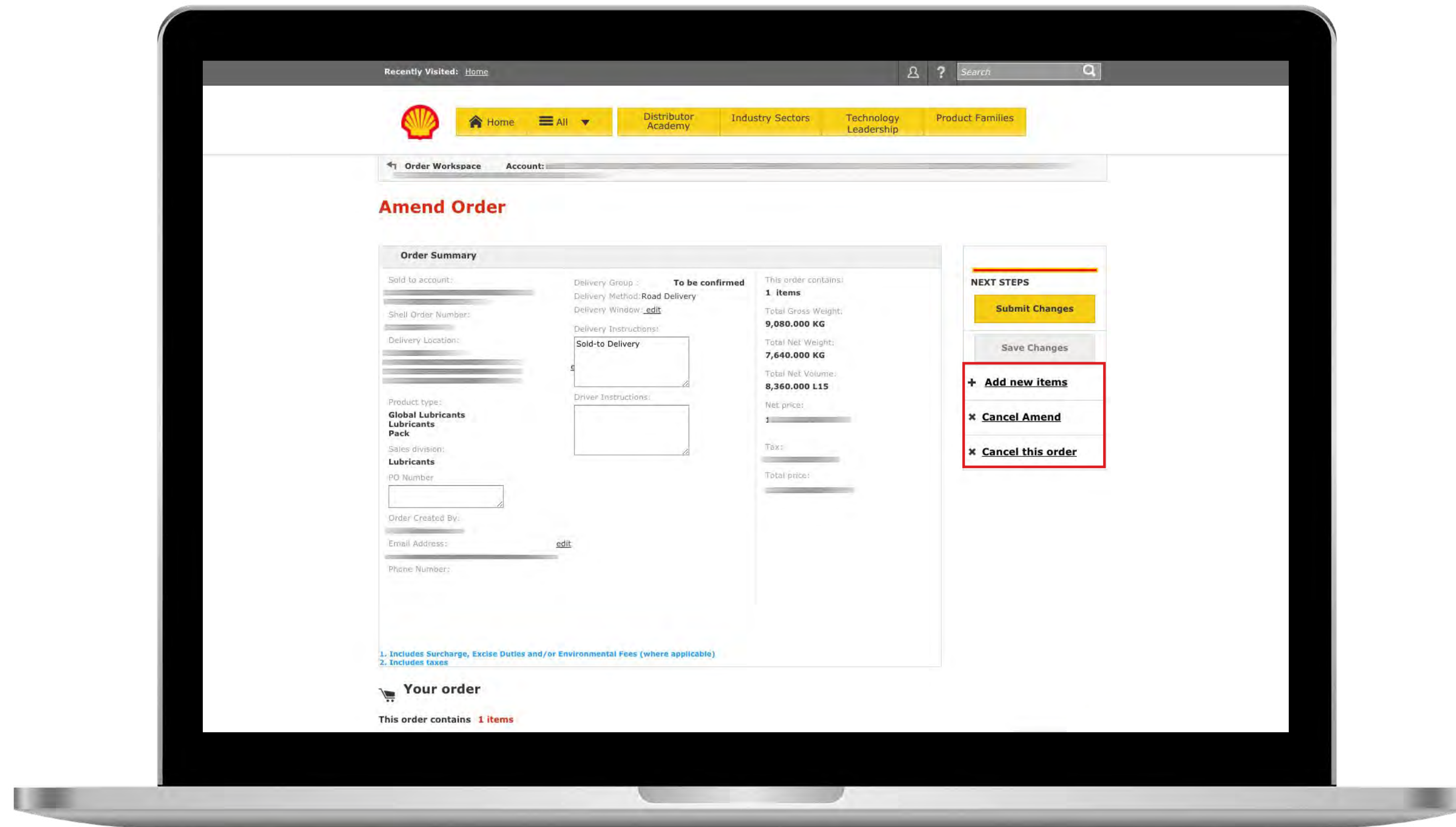
Step
12

In the list simply click on **Order**



Step
13

You will be moved to order summary and screen is called order configuration. You can choose cancelling or amending order.



Step
14

If you click **Edit order**, system will move you to a screen with additional options

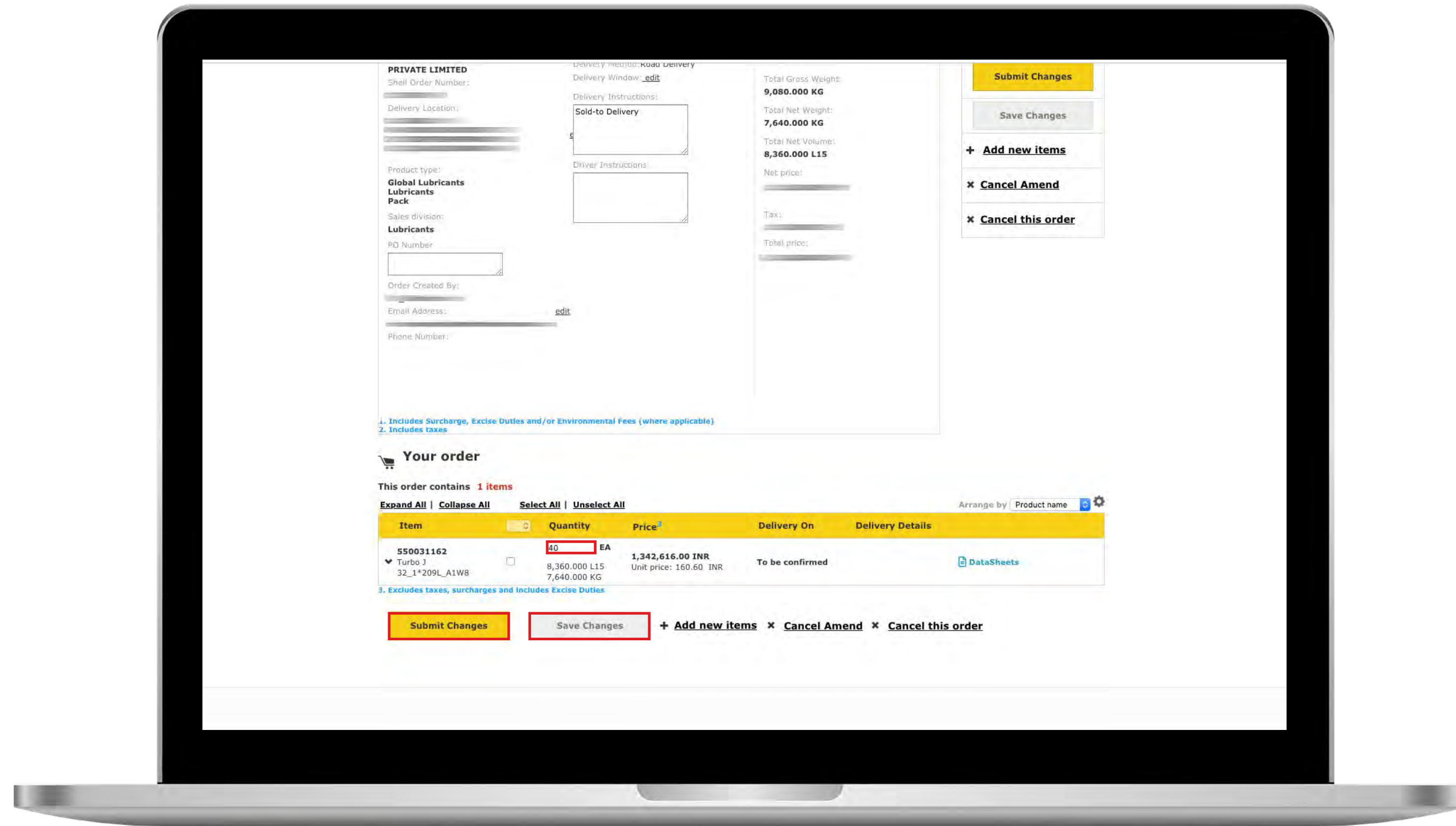
You can **Add new items**, **Cancel Amending** or **fully Cancel this order**

Note: changing Delivery Location, Account or Product Type is impossible at this stage

2.5

Order Management

How To Amend/Cancel An Order

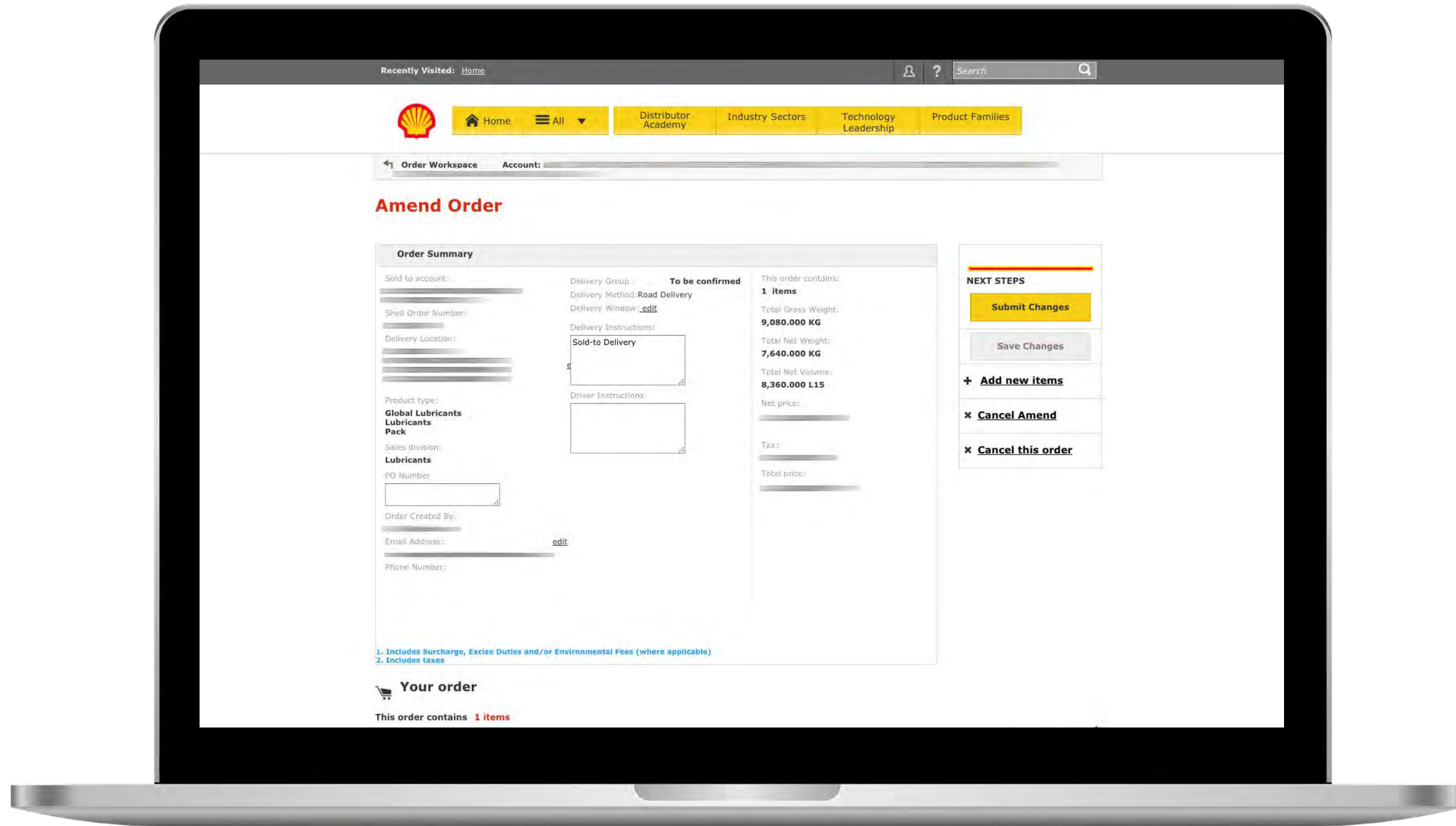


Step
15

At the bottom of the screen you can change quantity of products

Note: it may change delivery date

If you are happy with your changes simply click **Submit Changes** and then **Save Changes**



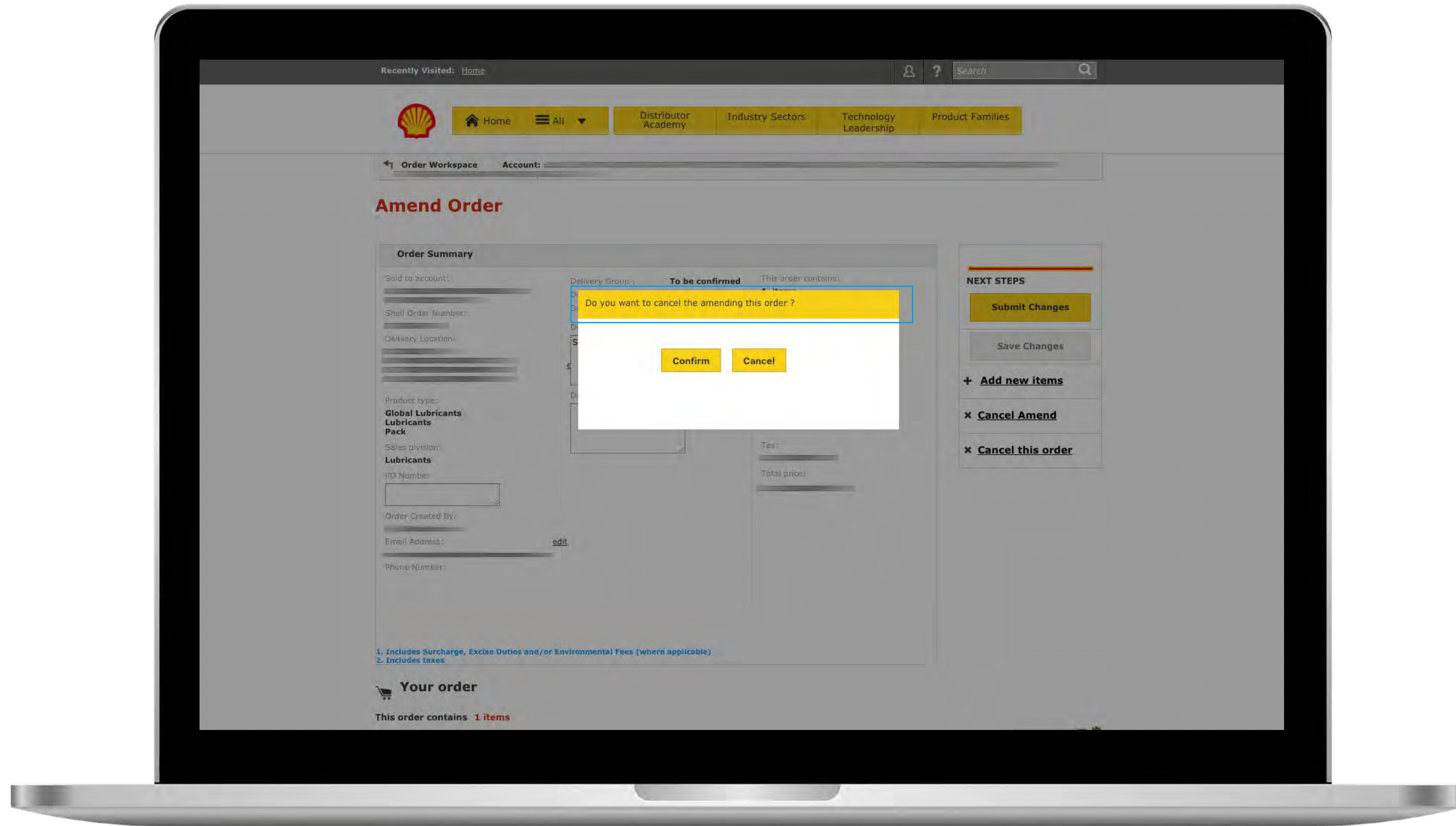
Step
16

Then you will be moved to order details and summary

2.5

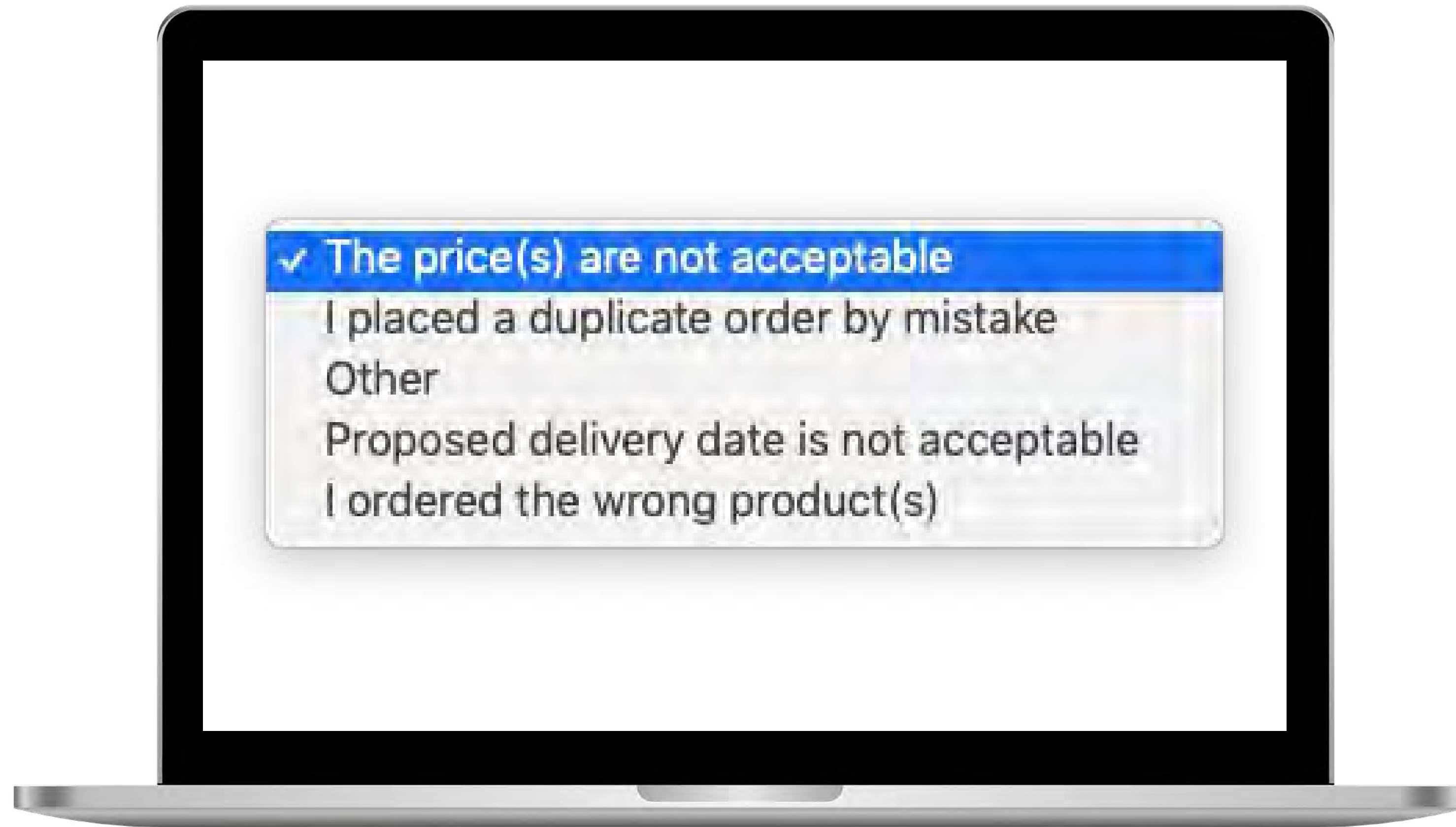
Order Management

How To Amend/Cancel An Order



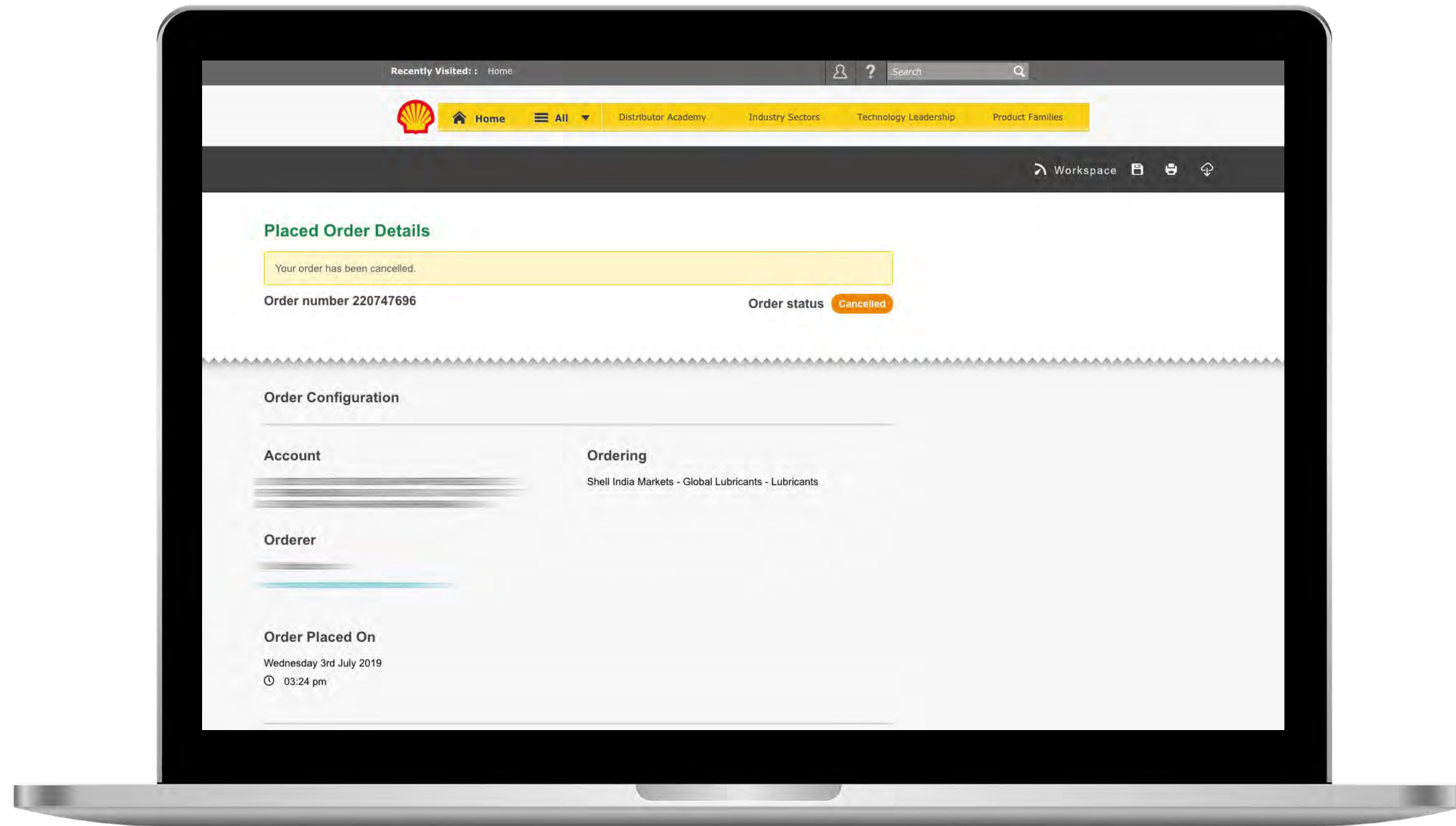
Step
17

If you decide to cancel the amendment, the pop-up window will appear giving you the option to confirm.



Step
18

You need to choose reason of cancellation.
You must use reason form the drop down list.
After choosing reason click **Confirm** button



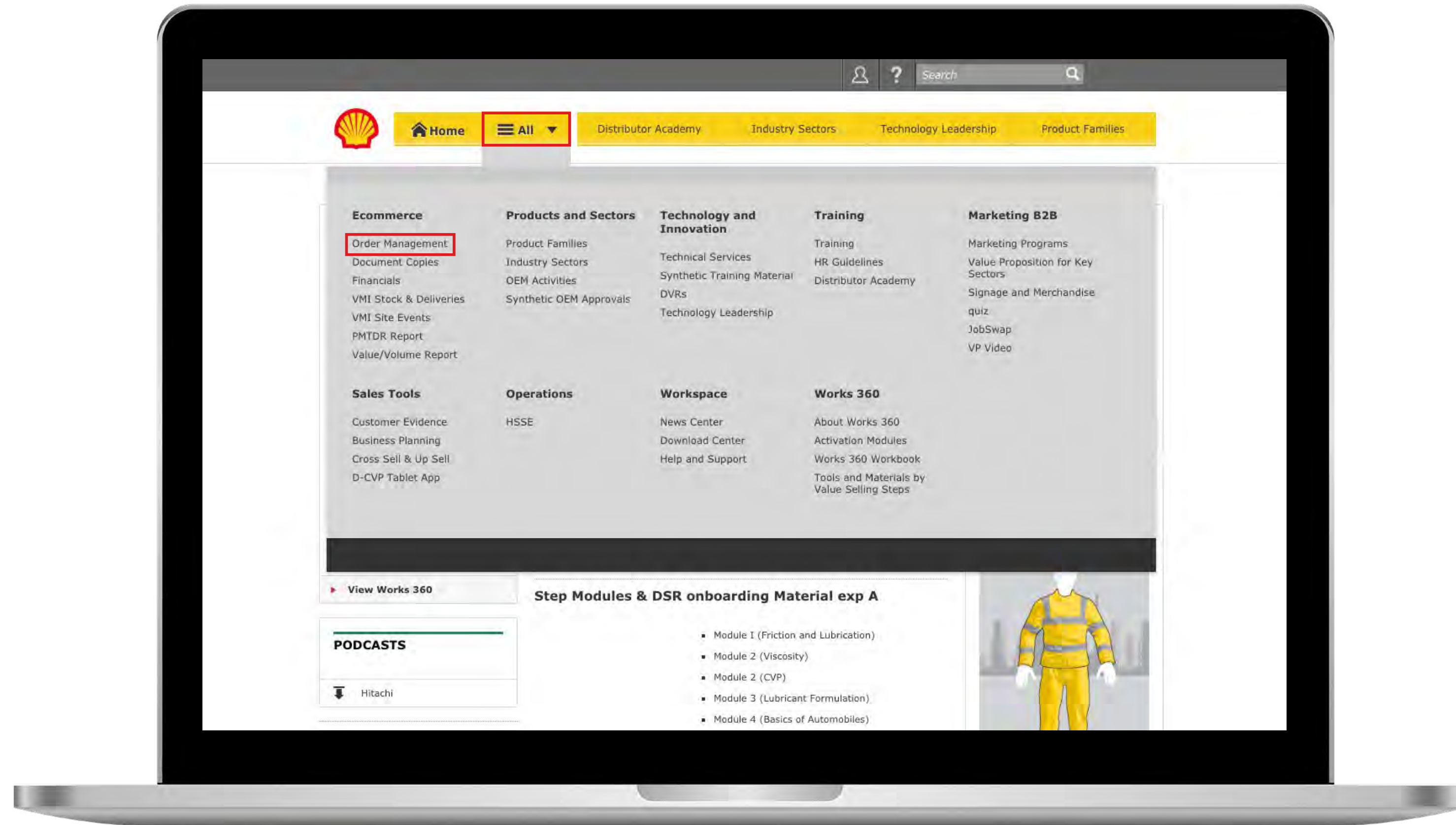
Step
19

After confirming, status of your order
will be changed to **Cancelled**

2.6

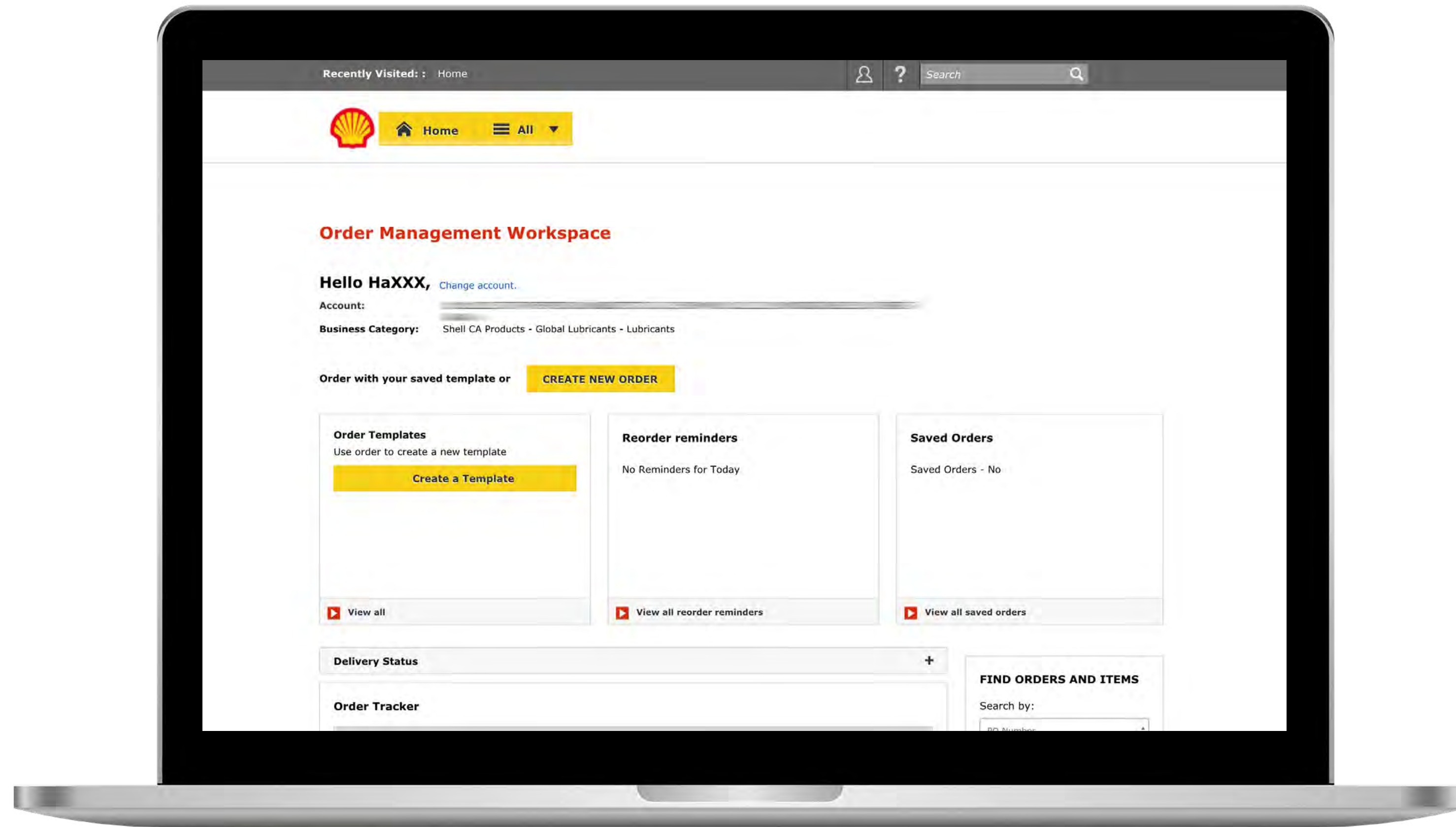
Order Management

Choosing Business Category



Step
1

Click **All** at the top of navigation and click on **Order Management**



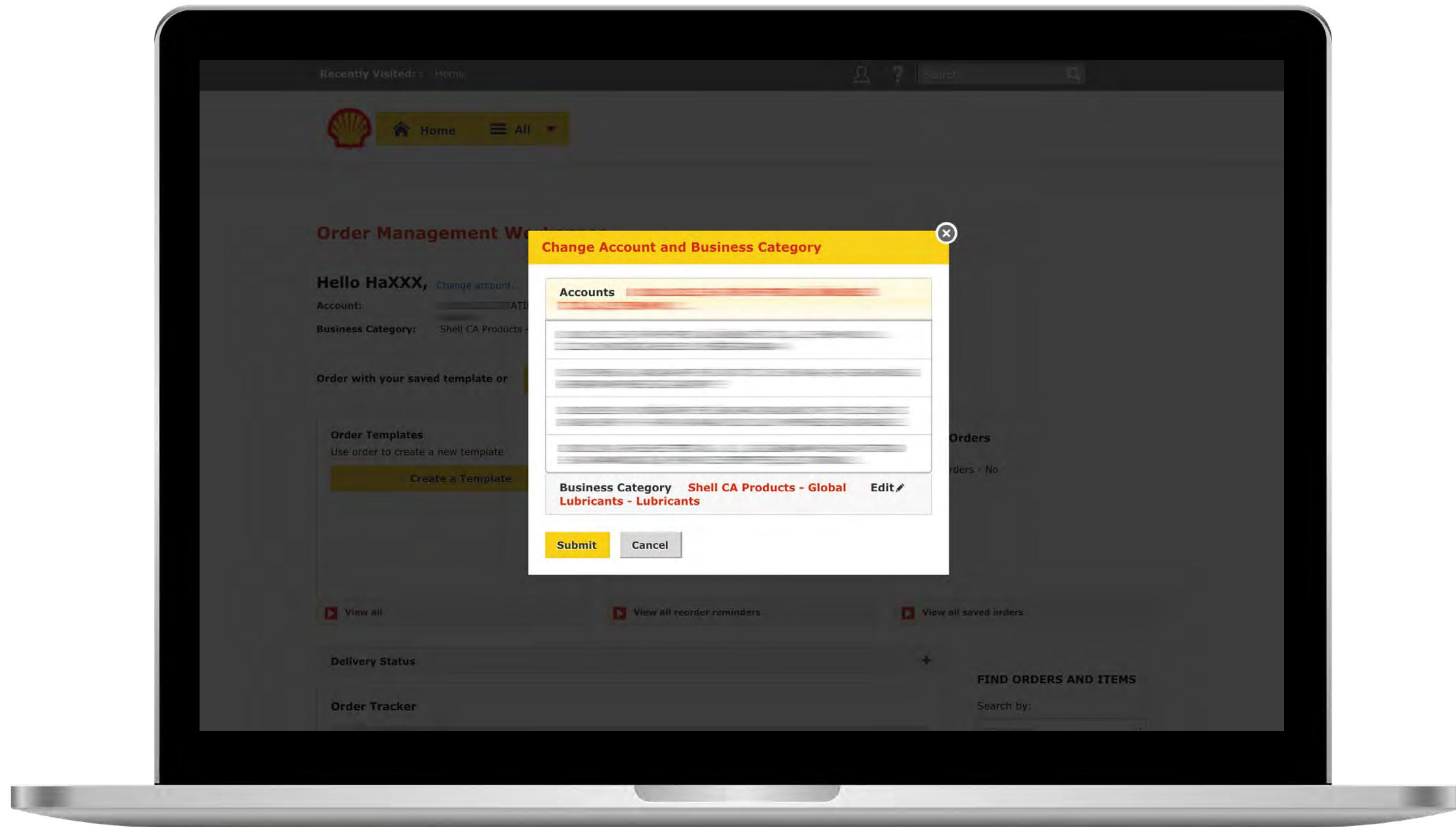
Step
2

If you have more than one business area,
in **Order Management** there will be an additional
Change Account option visible

2.6

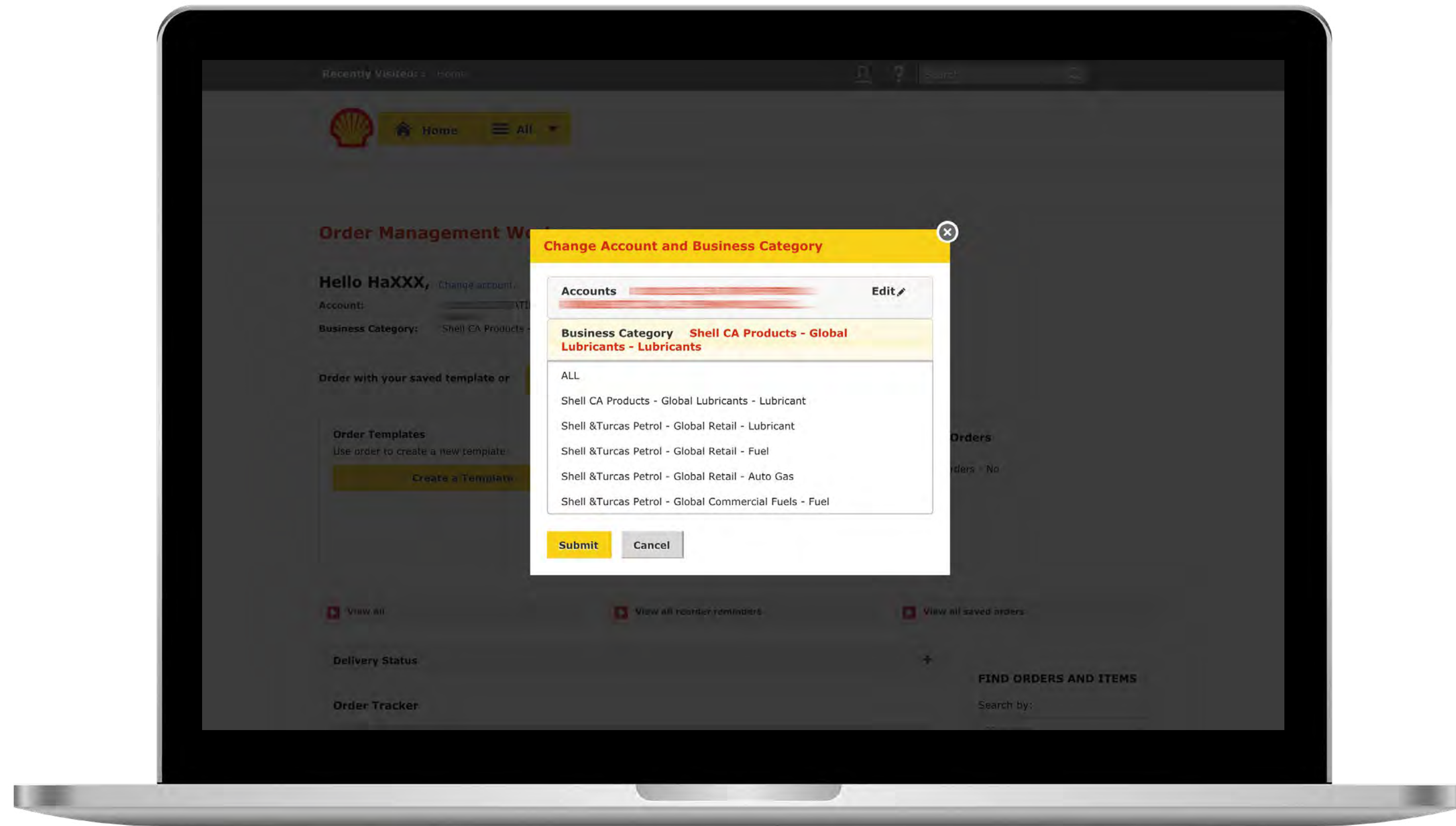
Order Management

Choosing Business Category



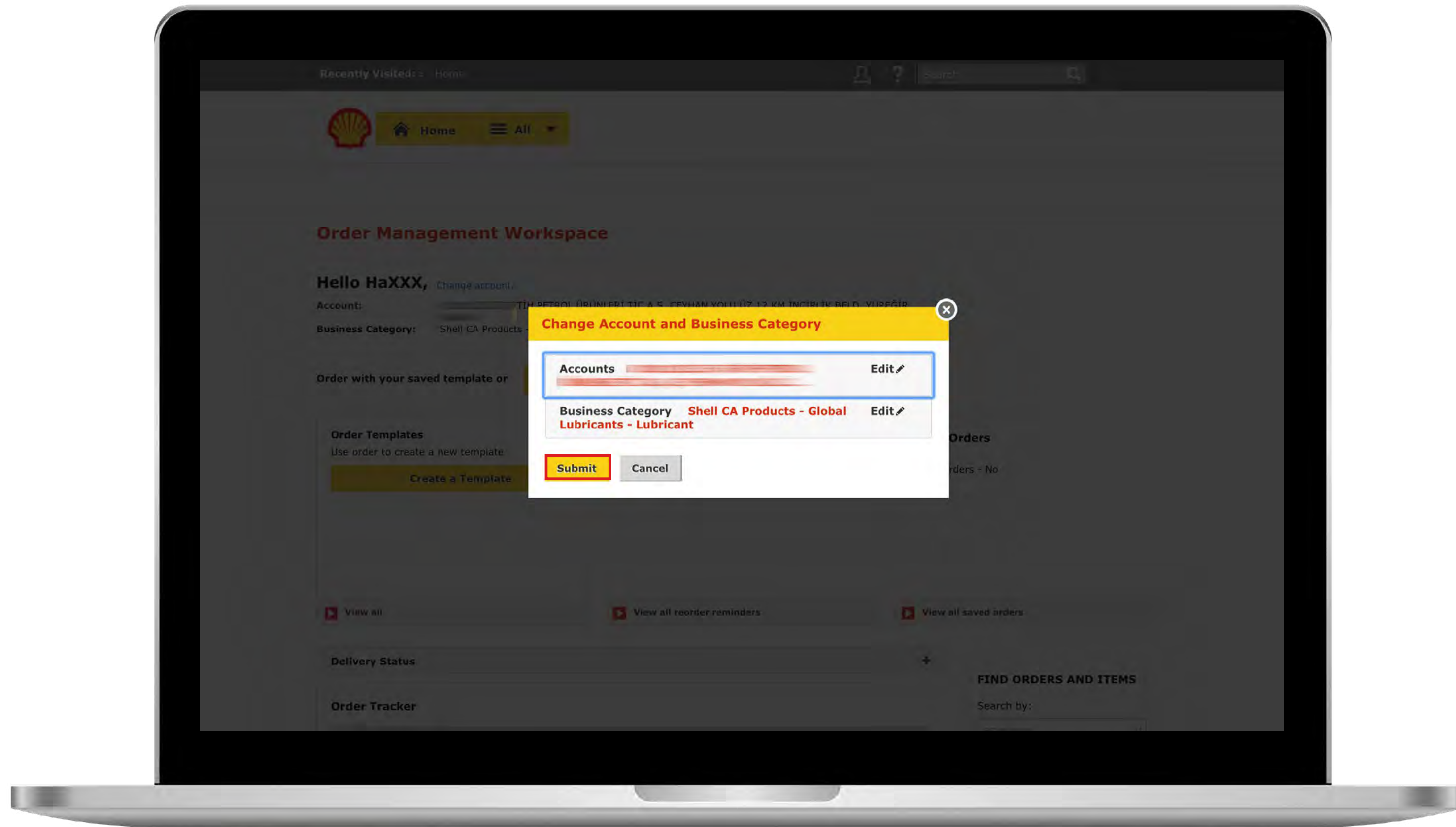
Step
3

You will be able to choose between all
Accounts from the drop down list



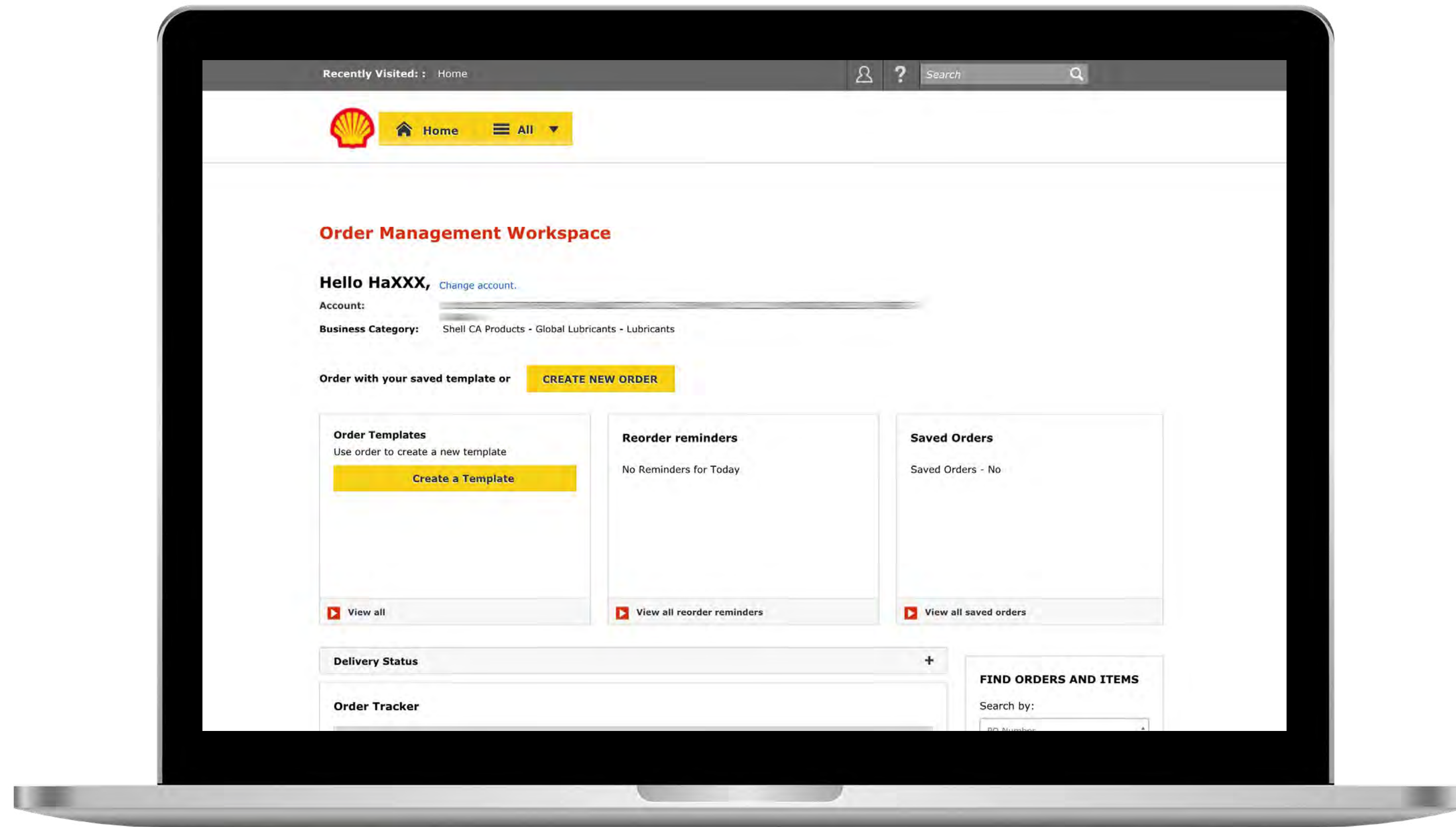
Step
4

At this stage you must also choose one of the options from **Business Category** available for the chosen **Accounts**



Step
5

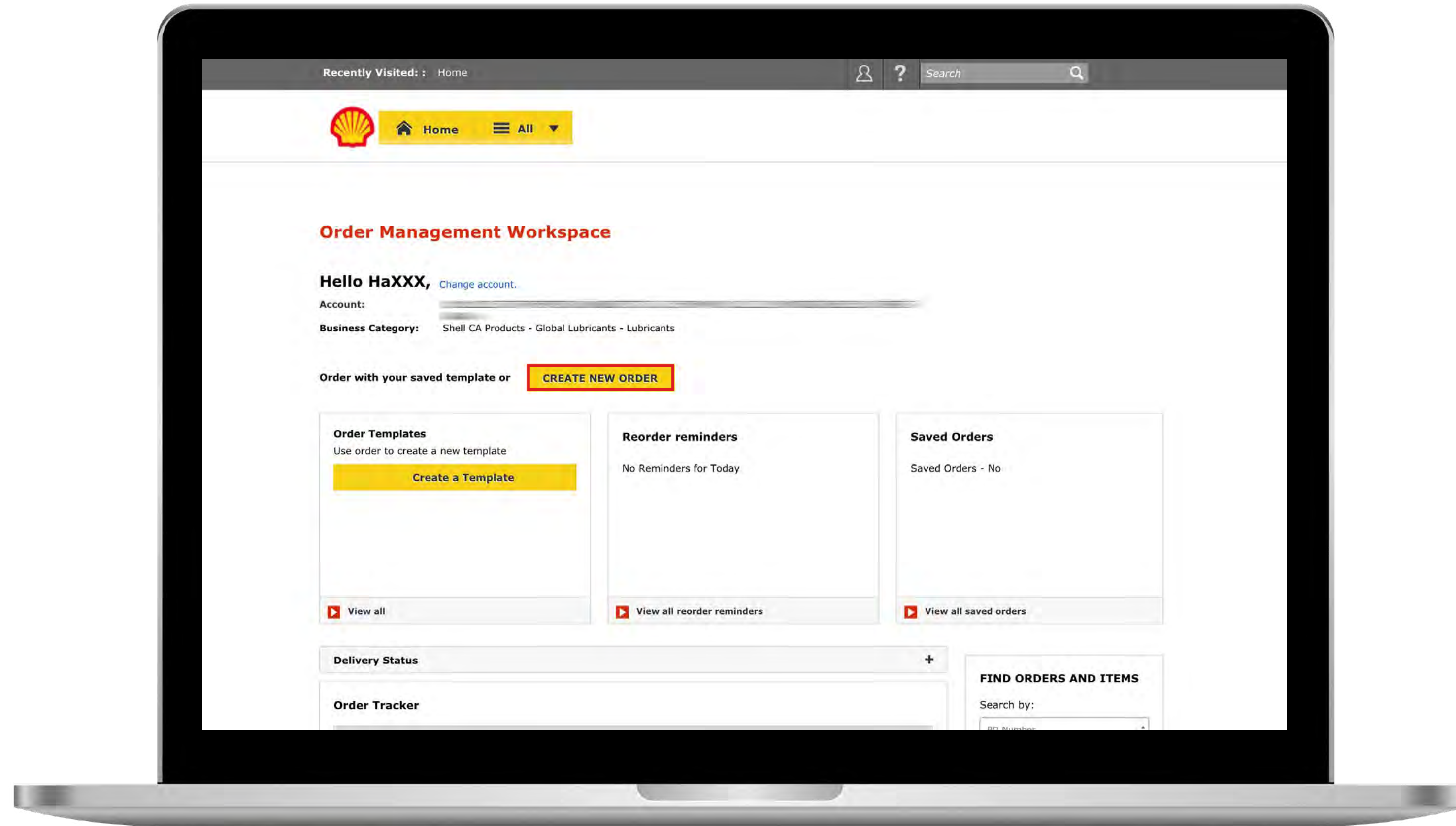
If you are happy with you're choice click the **Submit** button



Step
6

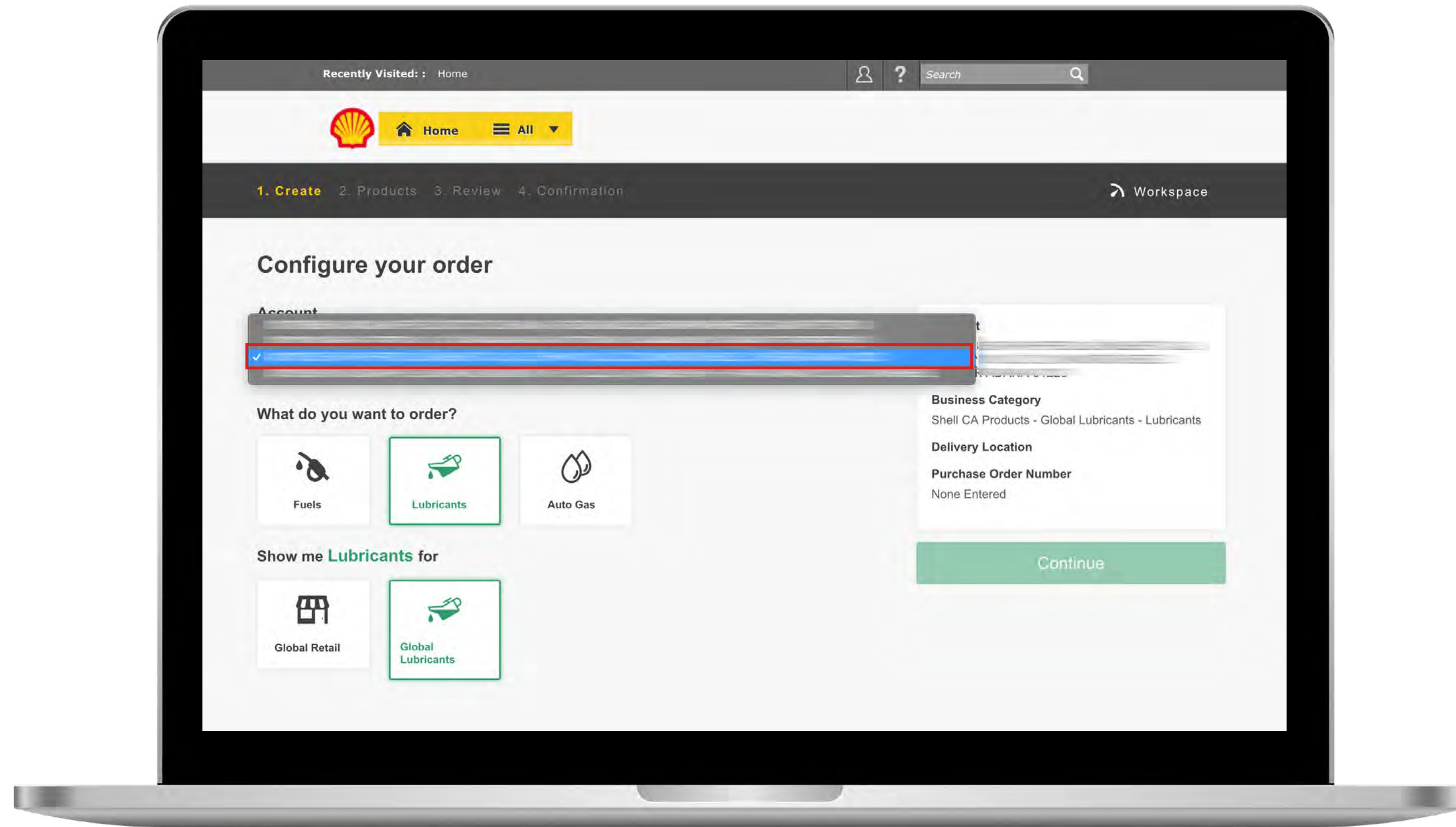
The chosen **Account** and **Business Category** will be visible on the Configure Your Order screen

You can still change it at this stage



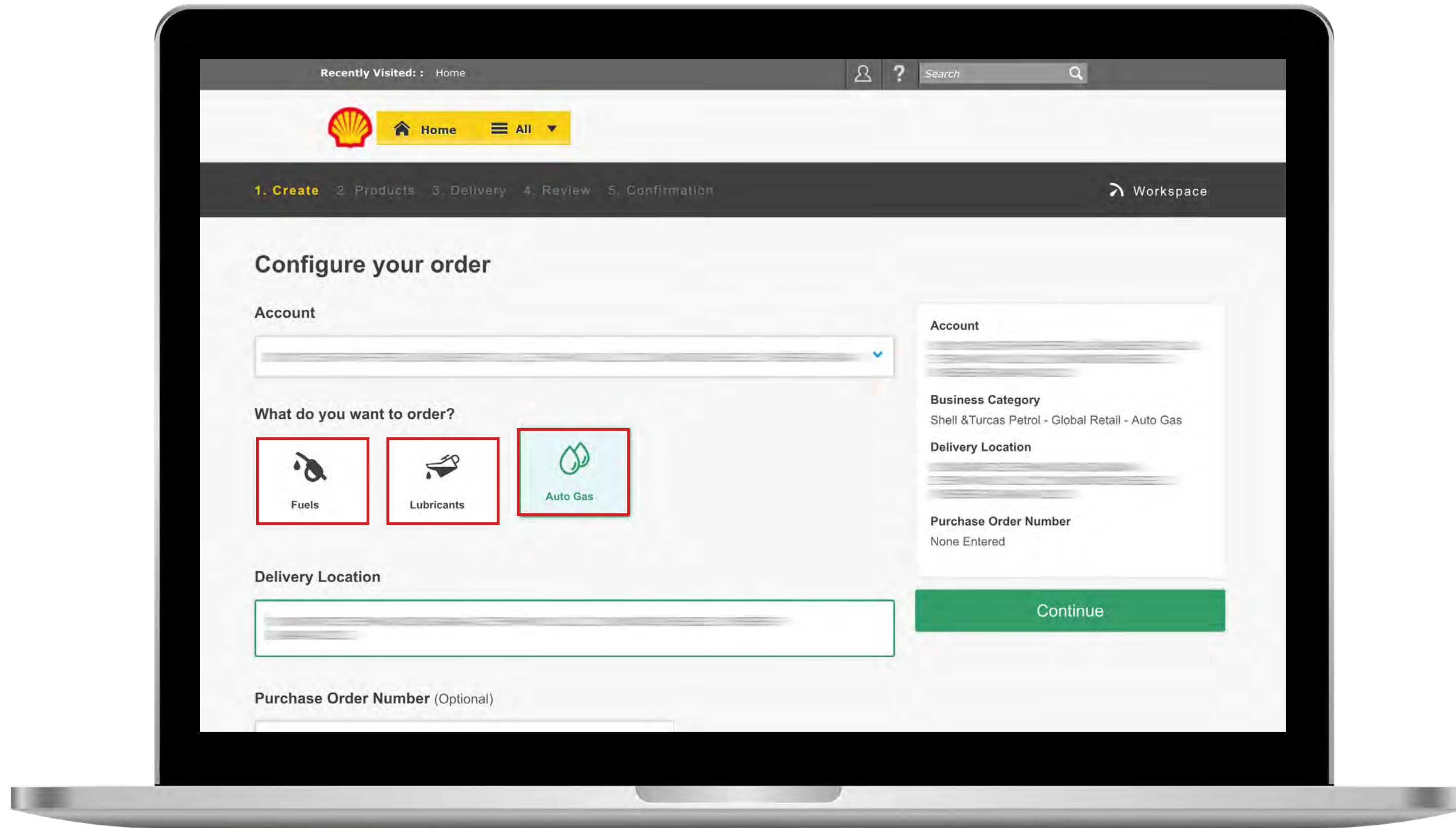
Step
7

In the **Order Management** screen you can navigate to **CREATE NEW ORDER**



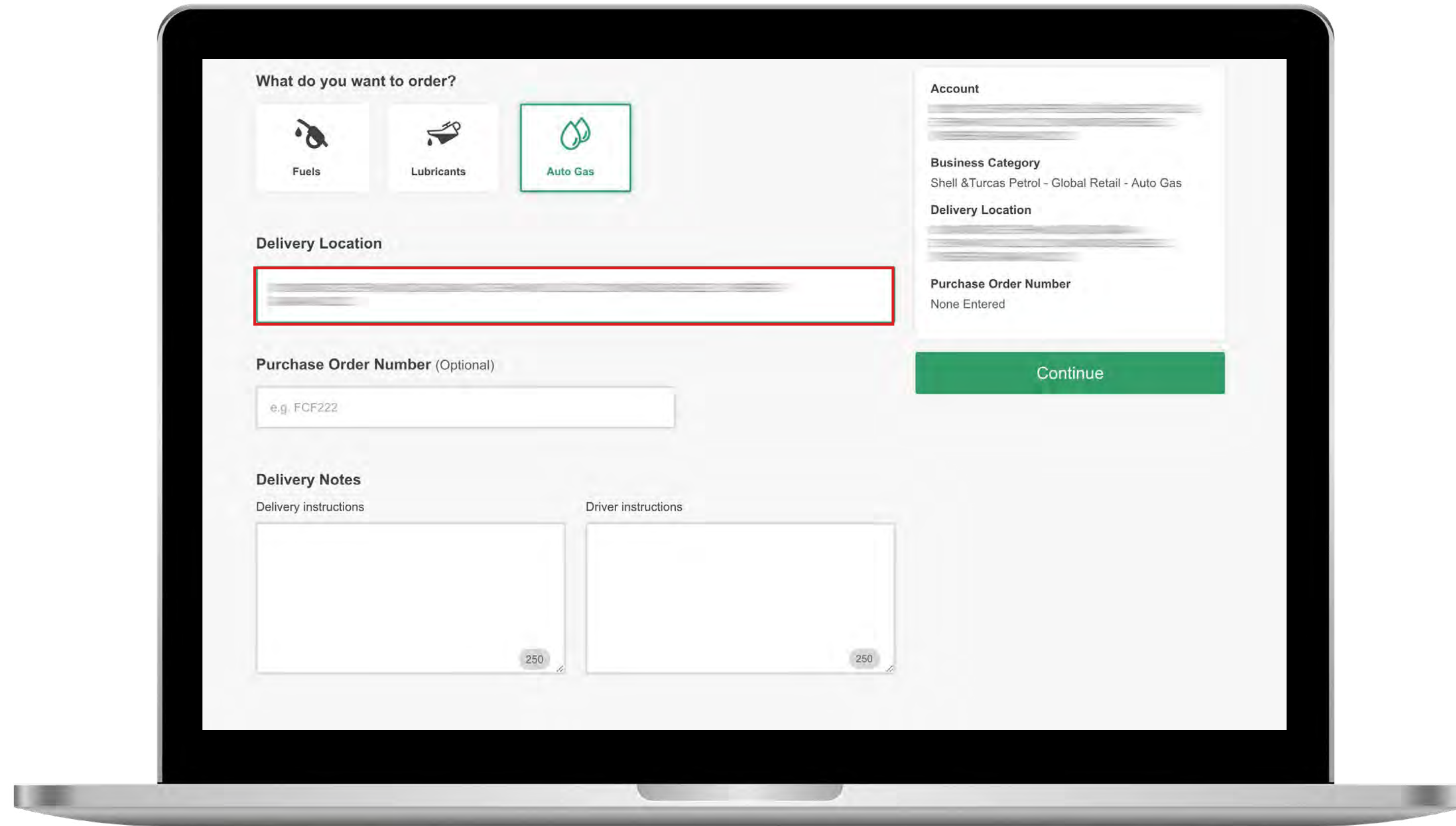
Step
8

Then choose the account form drop down list on the next screen



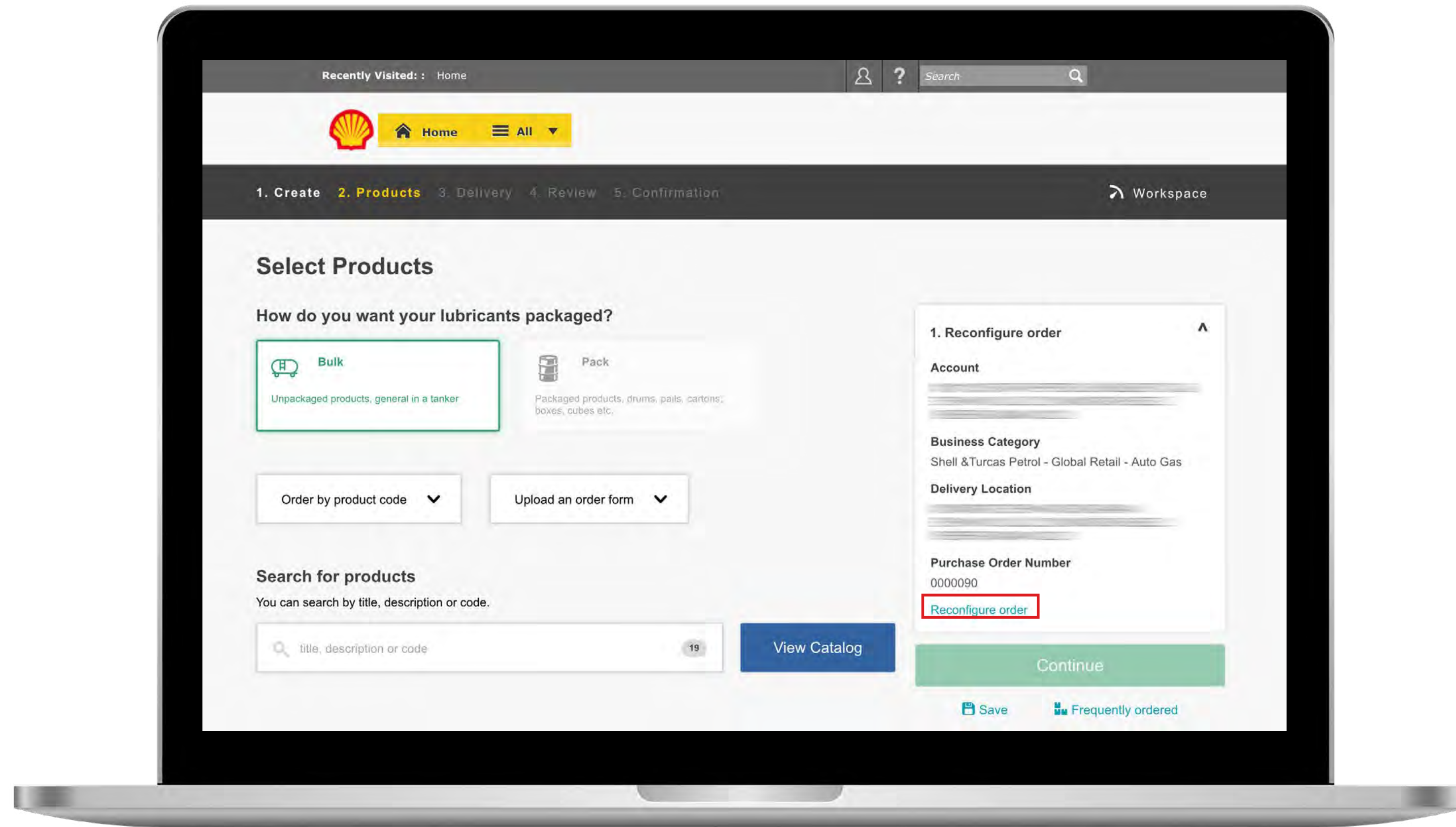
Step
9

Now choose the appropriate **Business Category**,
(What do you want to order)



Step
10

Next, determine your **Delivery Location** from the list



Step
11

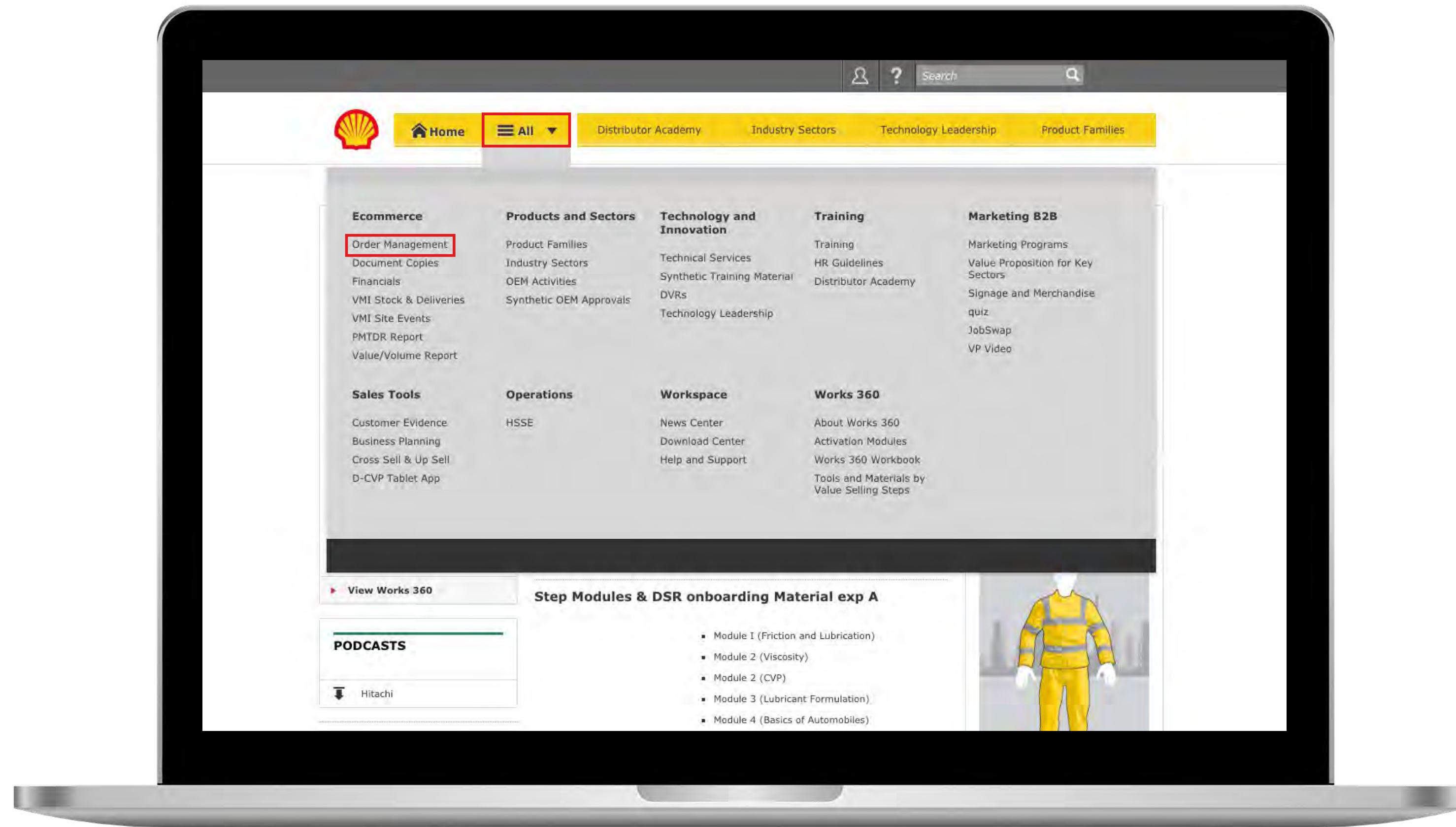
At any stage of placing an order, you can change your business category.

Use the **Reconfigure order** option

2.7

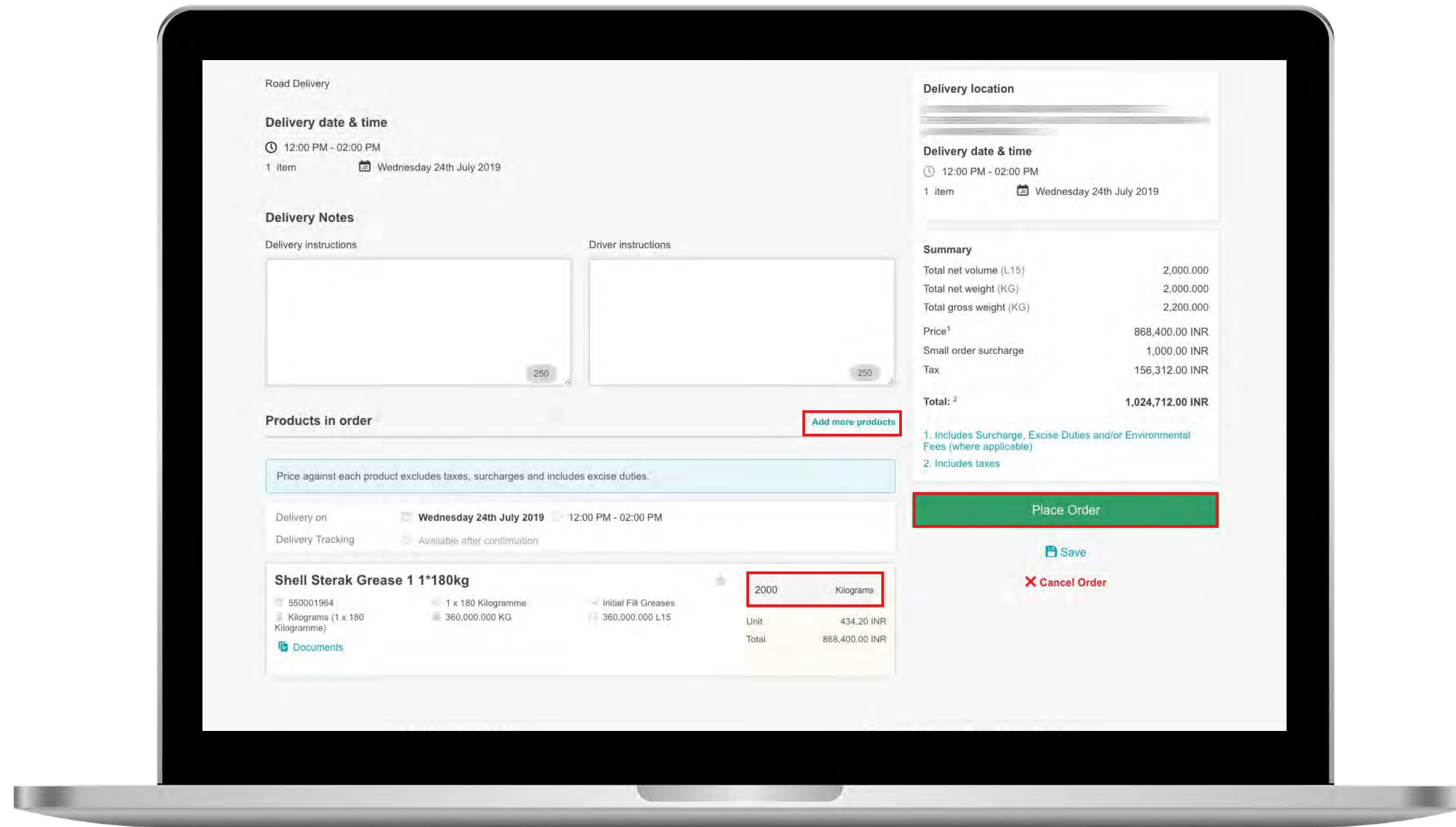
Order Management

How To Edit Products At The Preview Order Stage



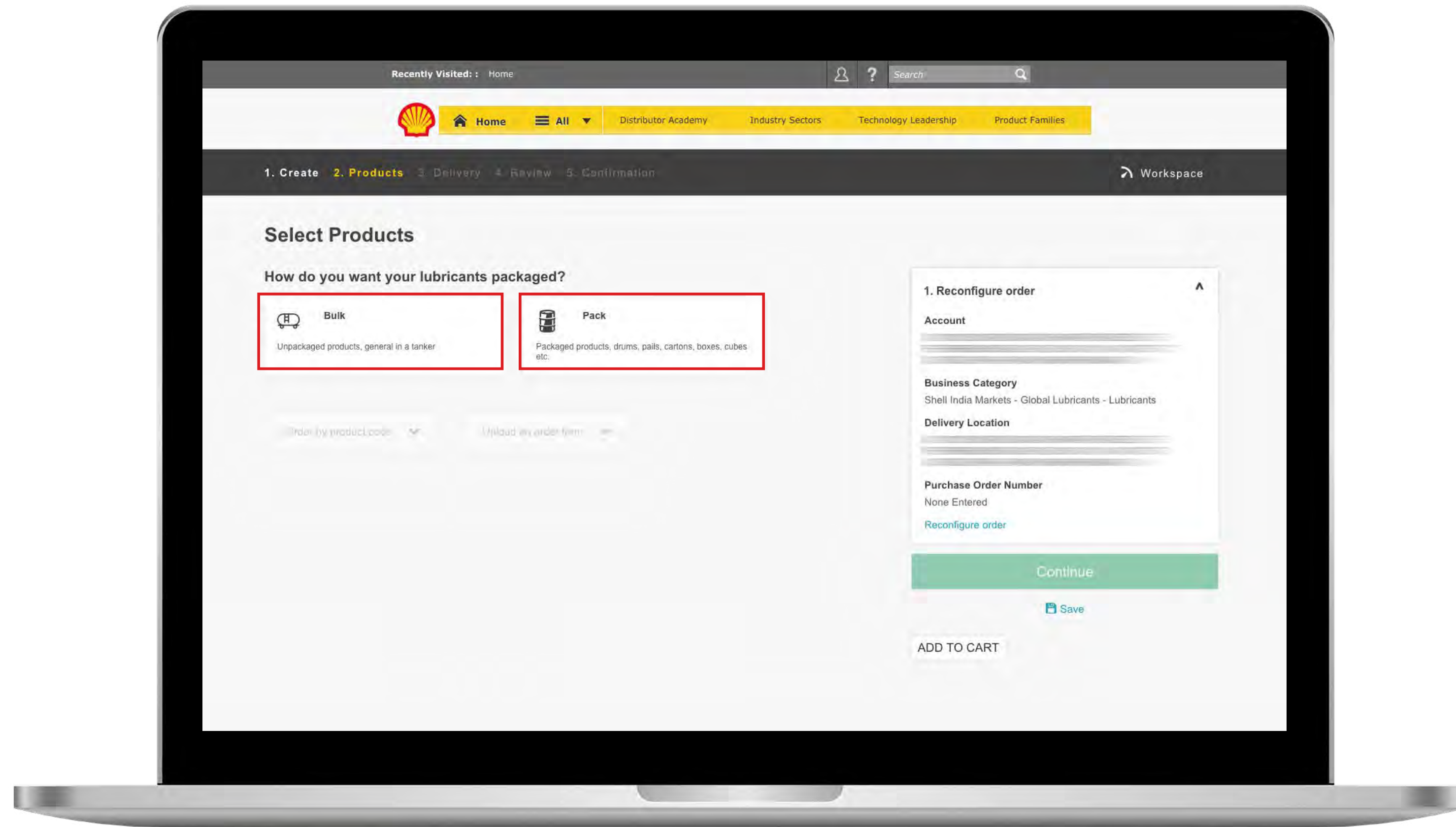
Step
1

Click **All** at the top of navigation and click on **Order Management**



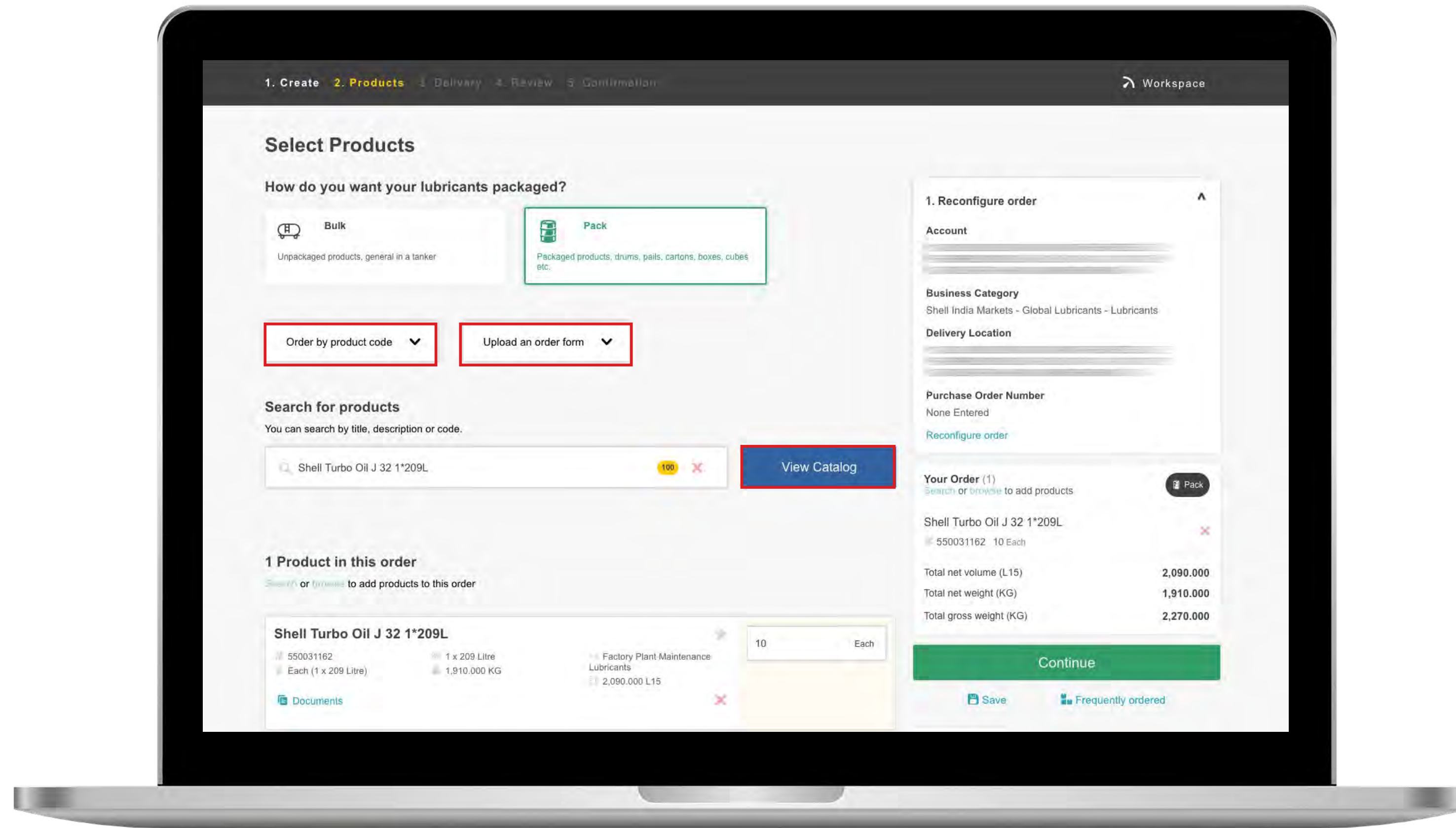
Step
2

After changing the parameters click **Place Order**



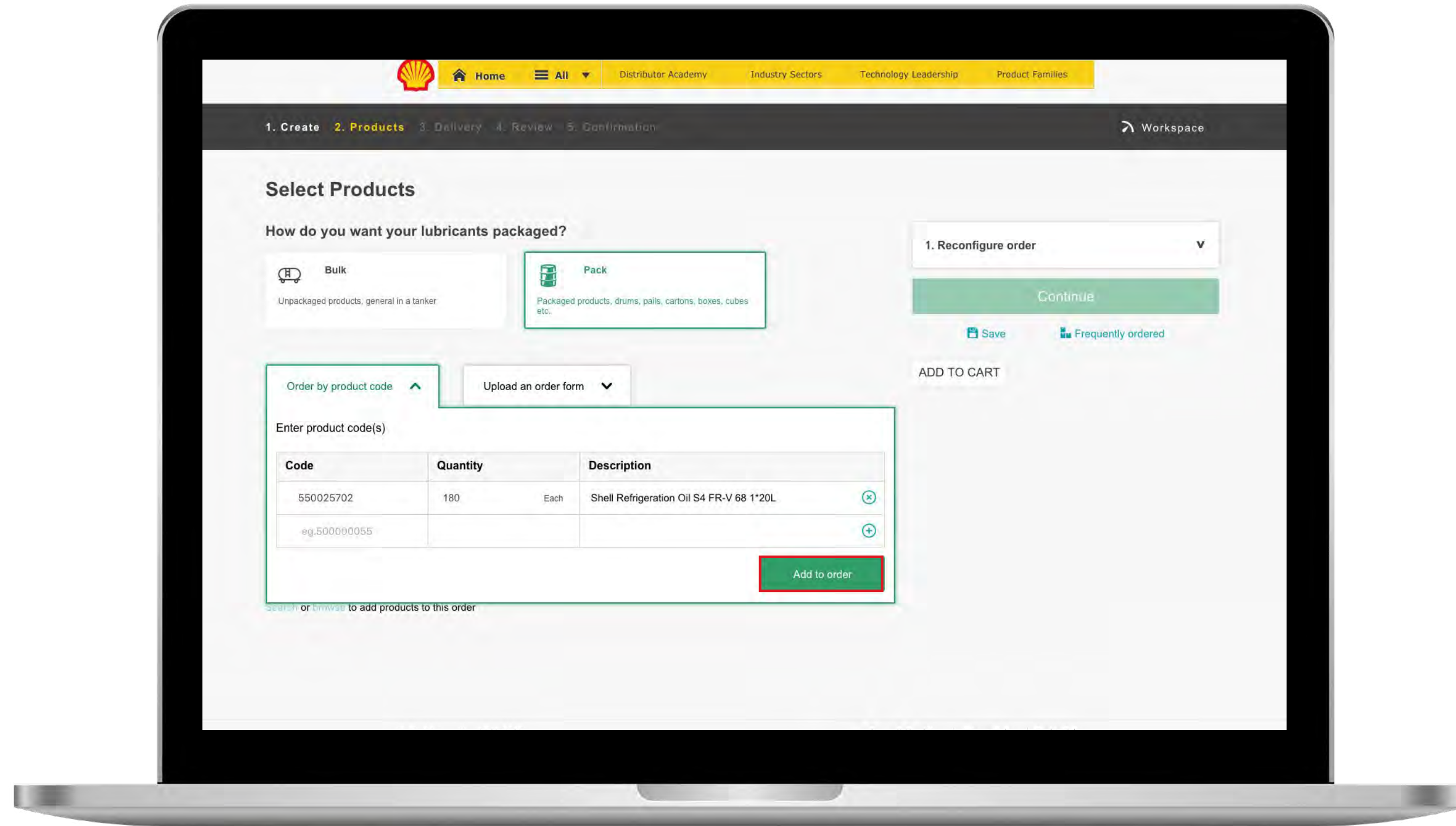
Step
3

Choose a product type using the **Select Products** panel.
You must choose between **Bulk** or **Pack**



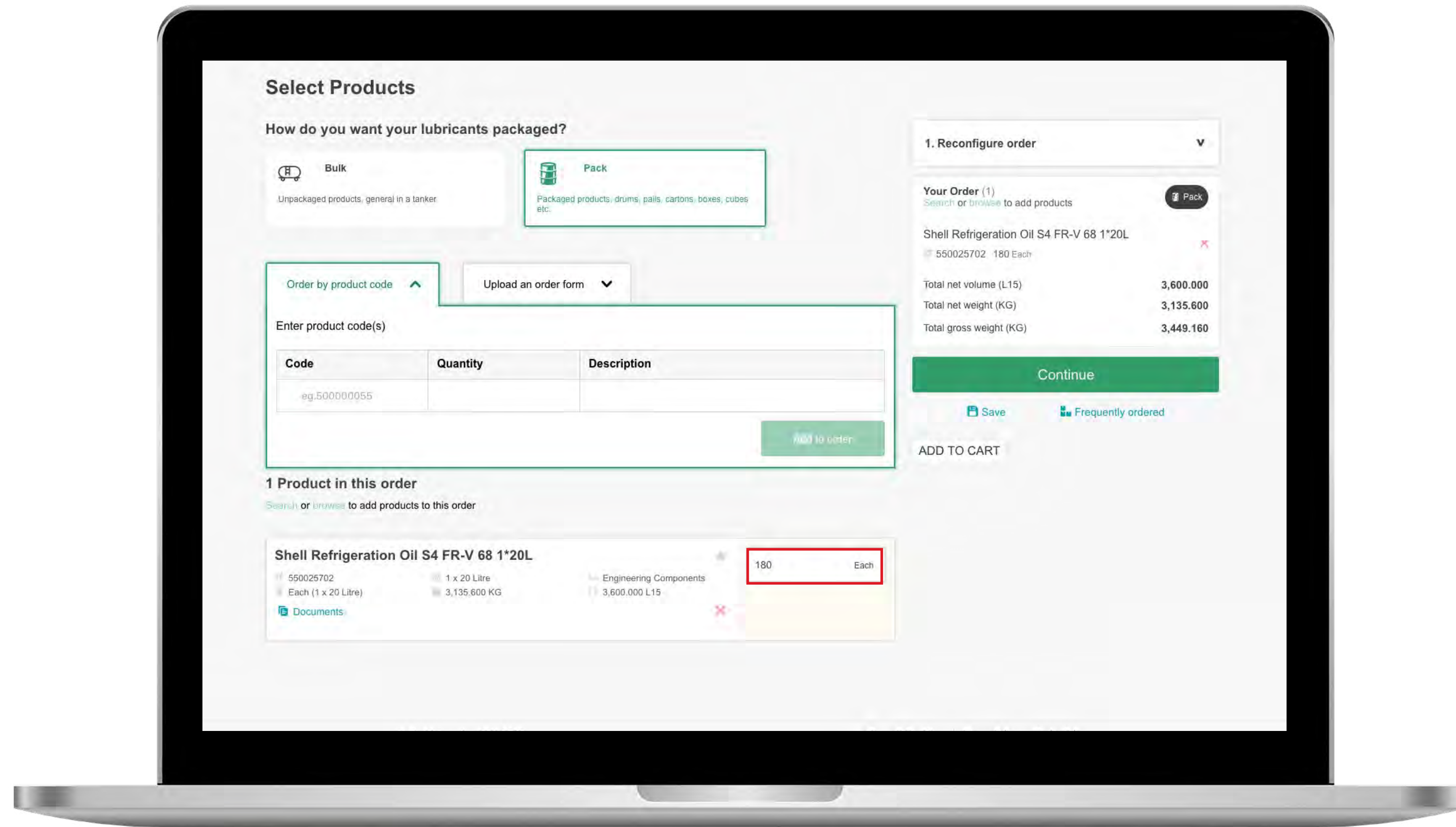
Step
4

You can set up products and search for a product here.
Click on **Order by product code** or
on **Upload an order form**.
You can use **View Catalogue** option



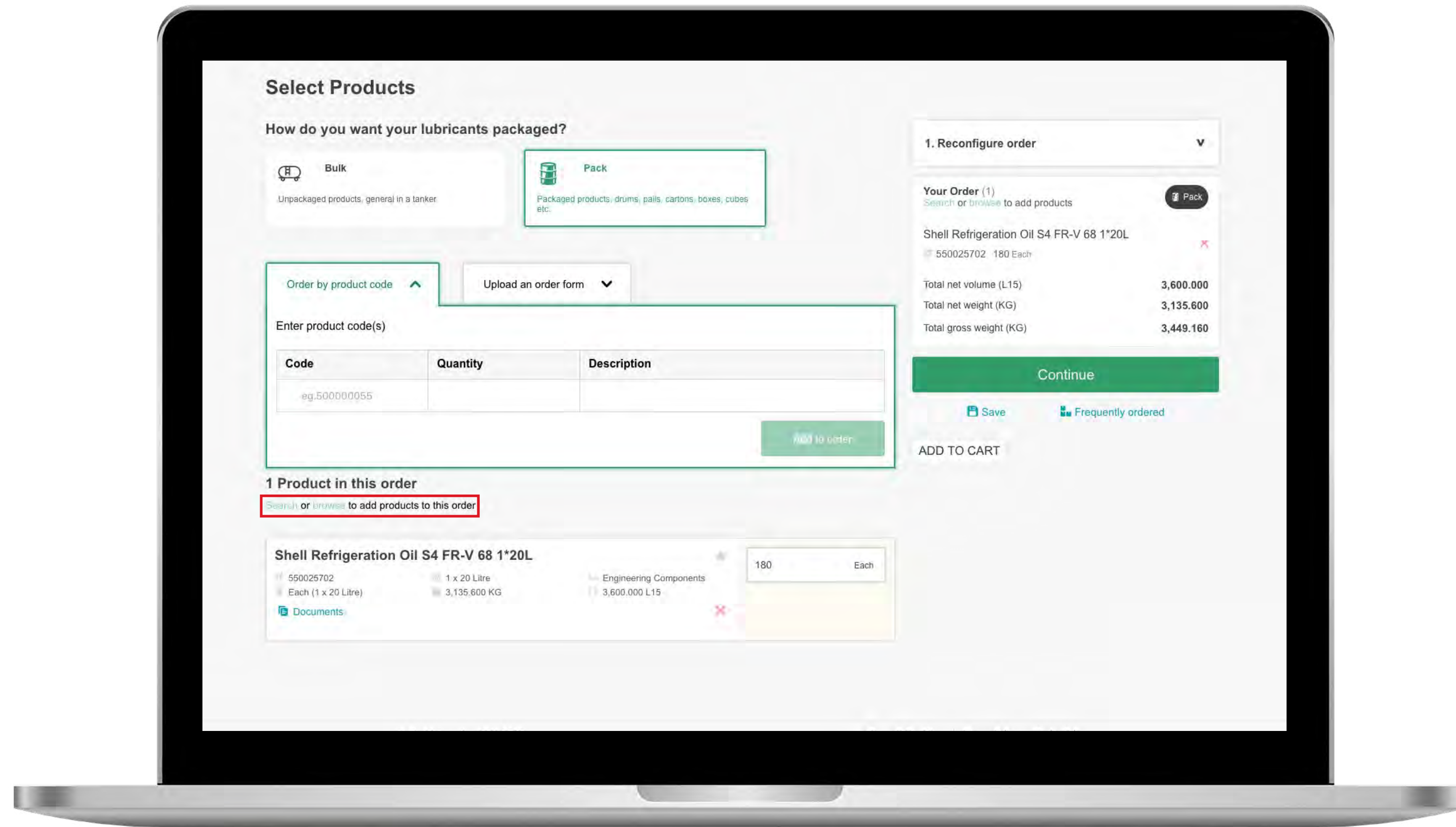
Step
5

Using **Order by product code** insert a product code and the quantity. You can add more products if needed. Click **Add to order**



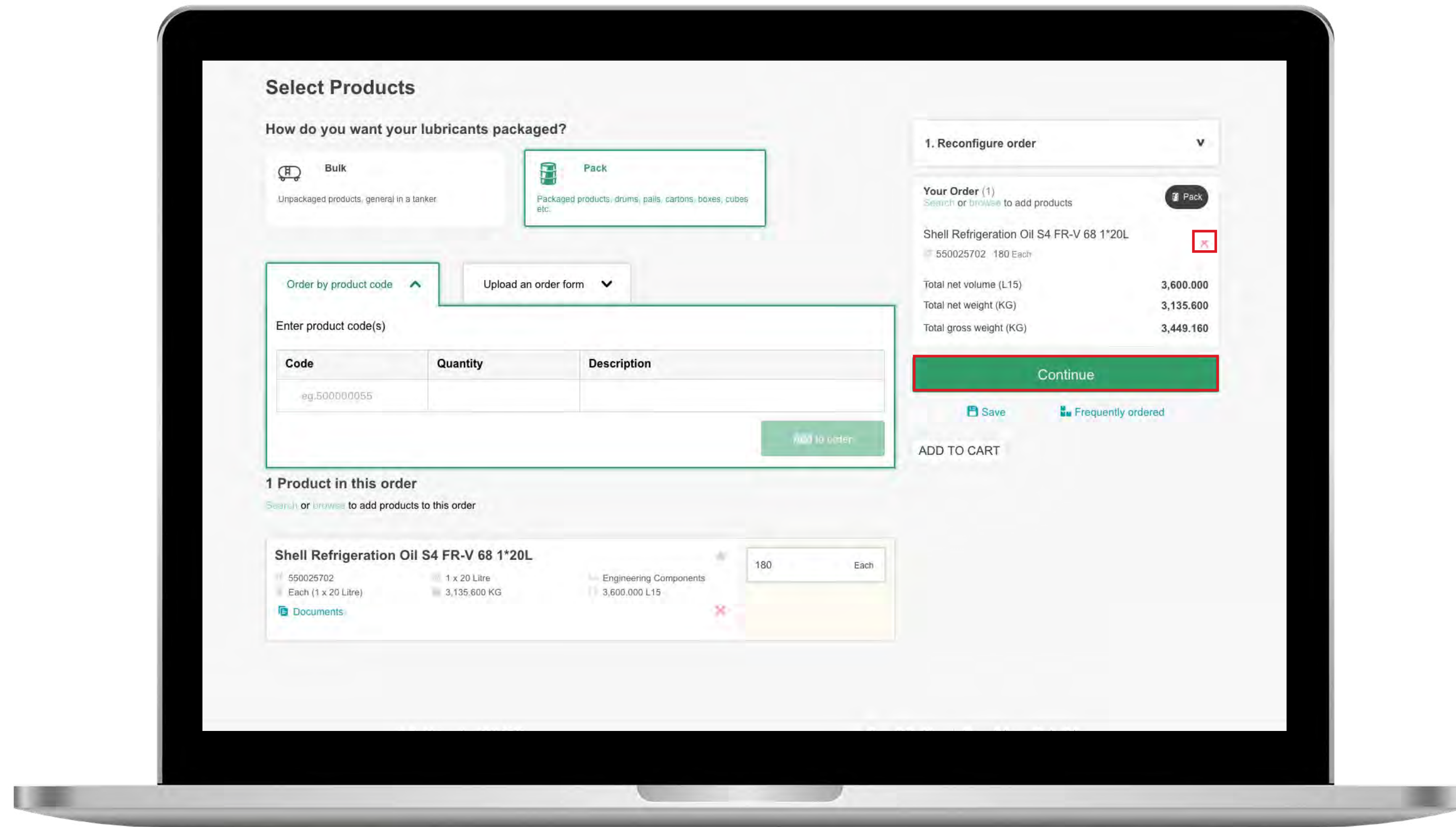
Step
6

Any additional products will be visible
at the bottom of the screen.
At this stage you can change the amount of products,
or remove them by clicking on the **X** button



Step
7

On the same screen you can add new products to this order.
Use the **Search** or **browse** buttons



Step
8

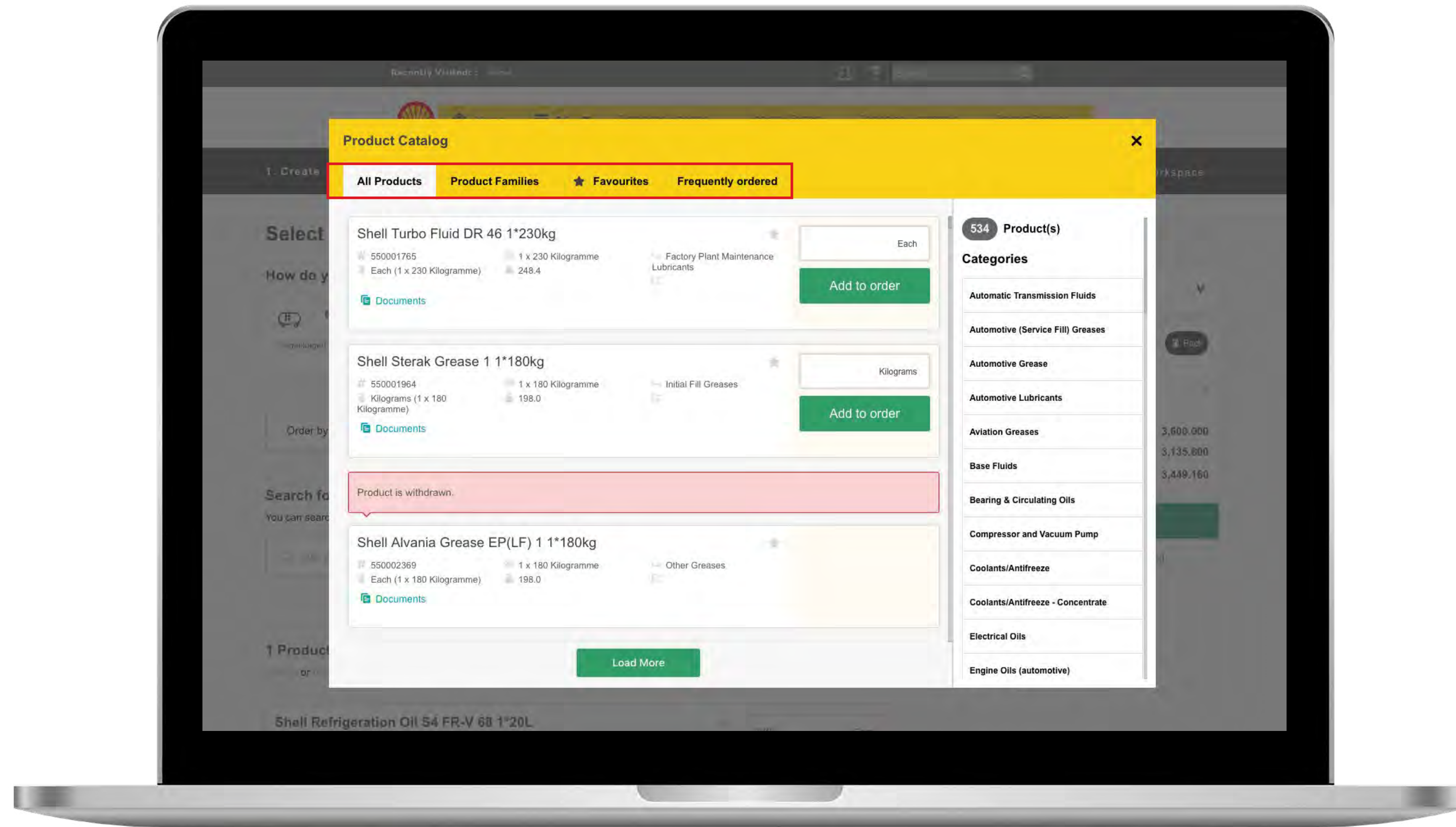
On the right hand side of the screen you can also add,
remove a product using the **X** button

Click **Continue** to review order

2.7

Order Management

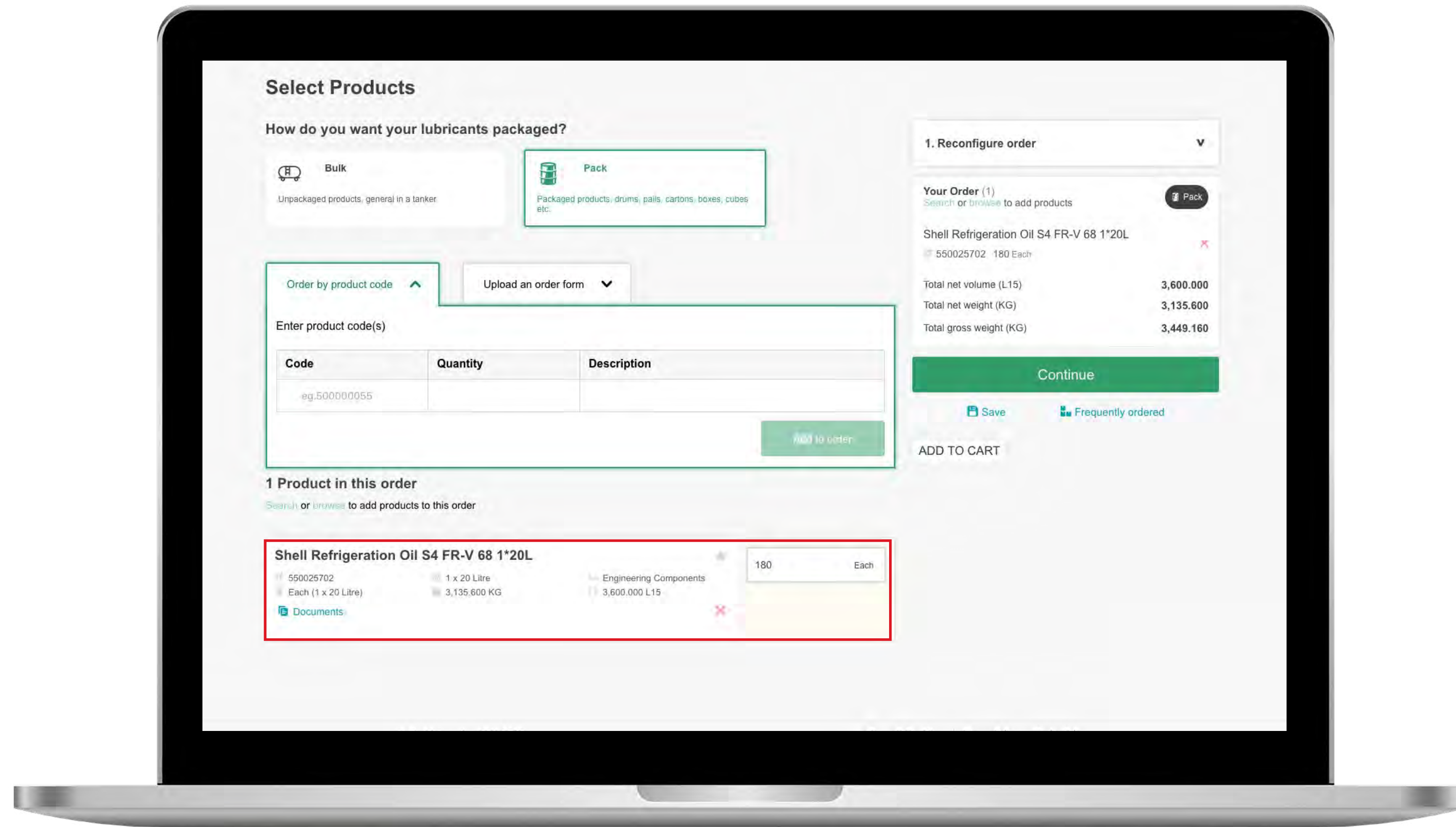
How To Edit Products At The Preview Order Stage



Step
9

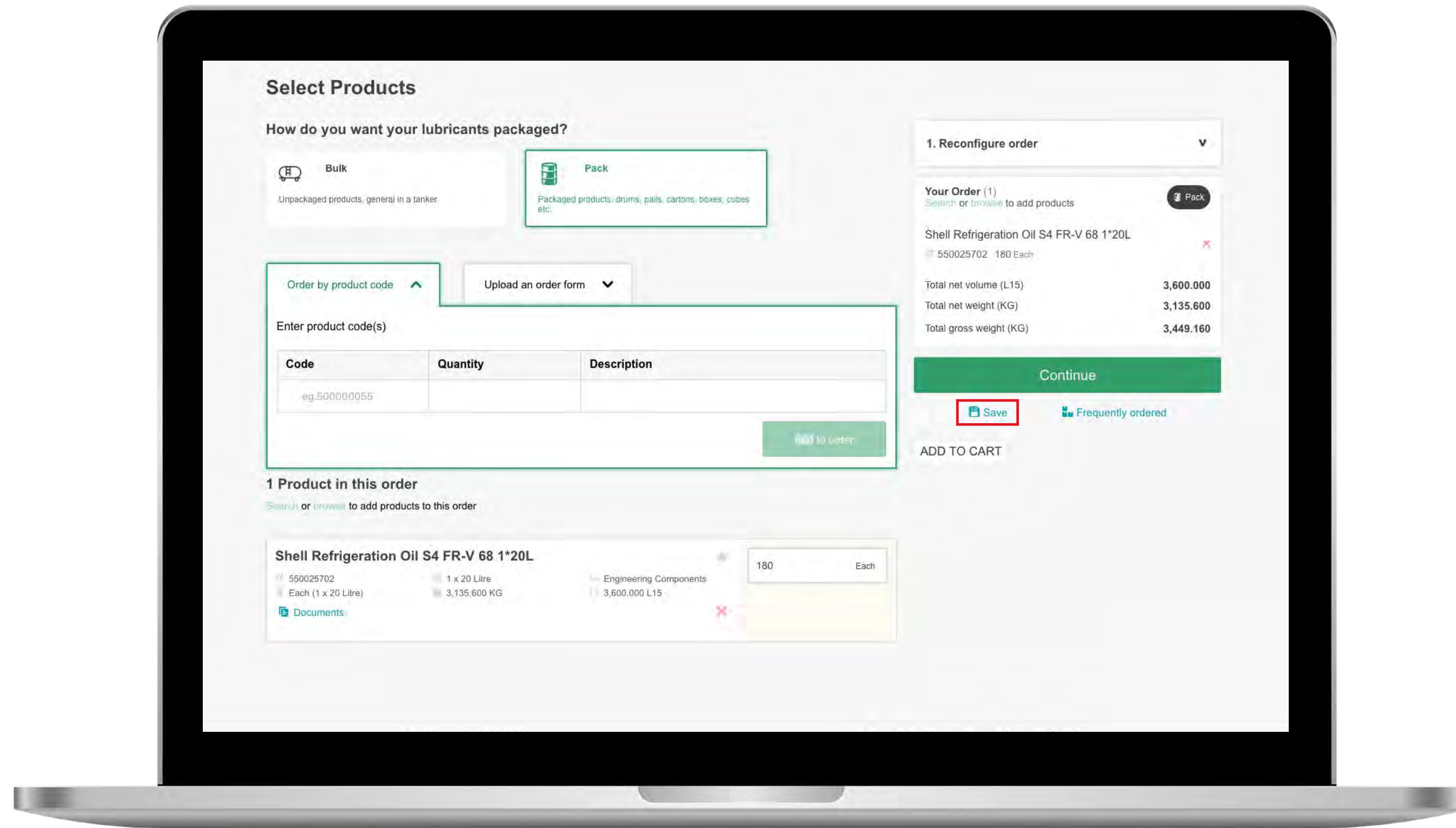
If you click on **Browse** you will be taken to the **Product Catalogue** where you can choose products and quantities

Here you can also choose from **Favourites** and **Frequently ordered** products



Step
10

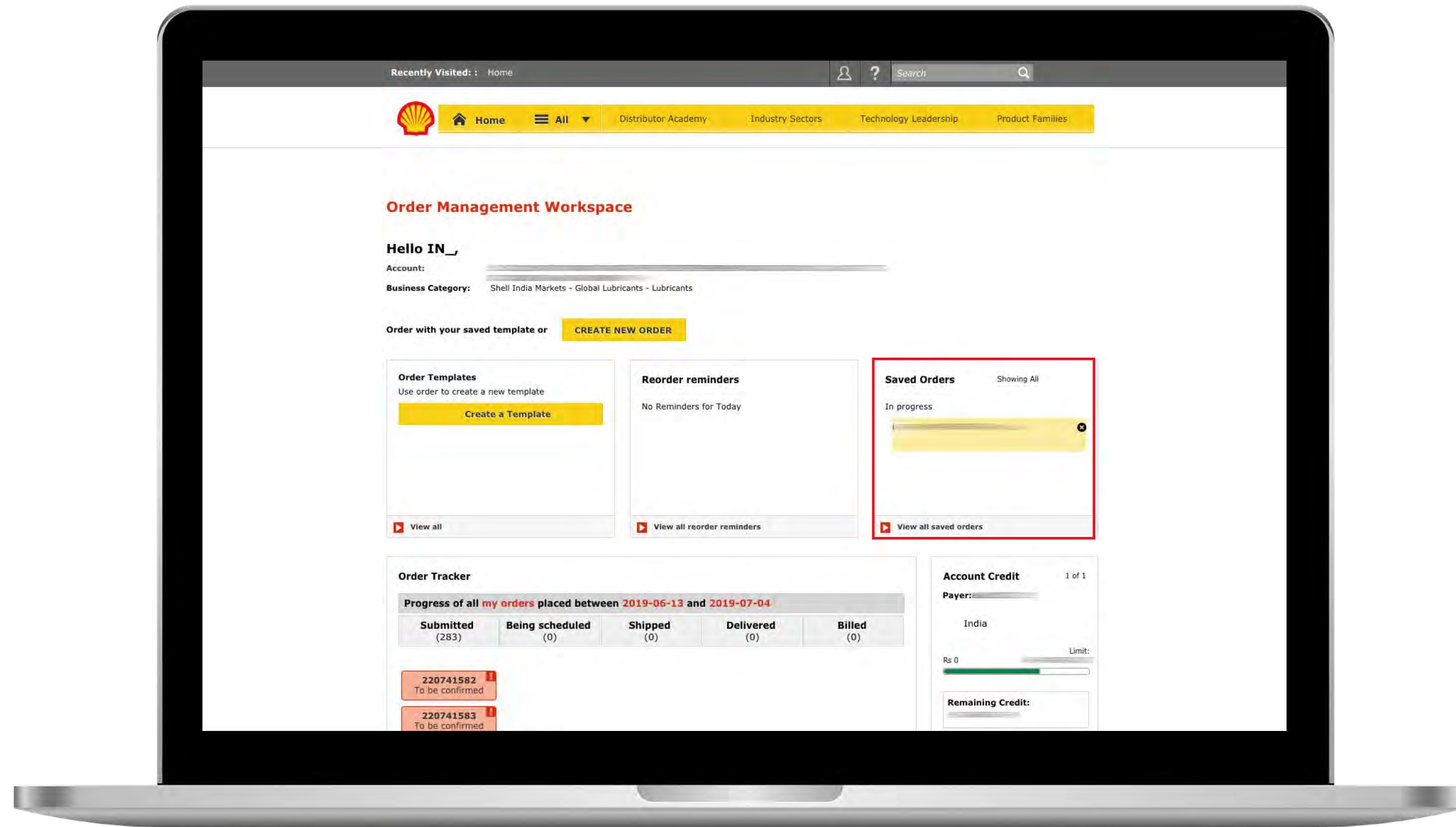
After adding a product to the order, you can again change quantity or remove it using **X** button



Step
11

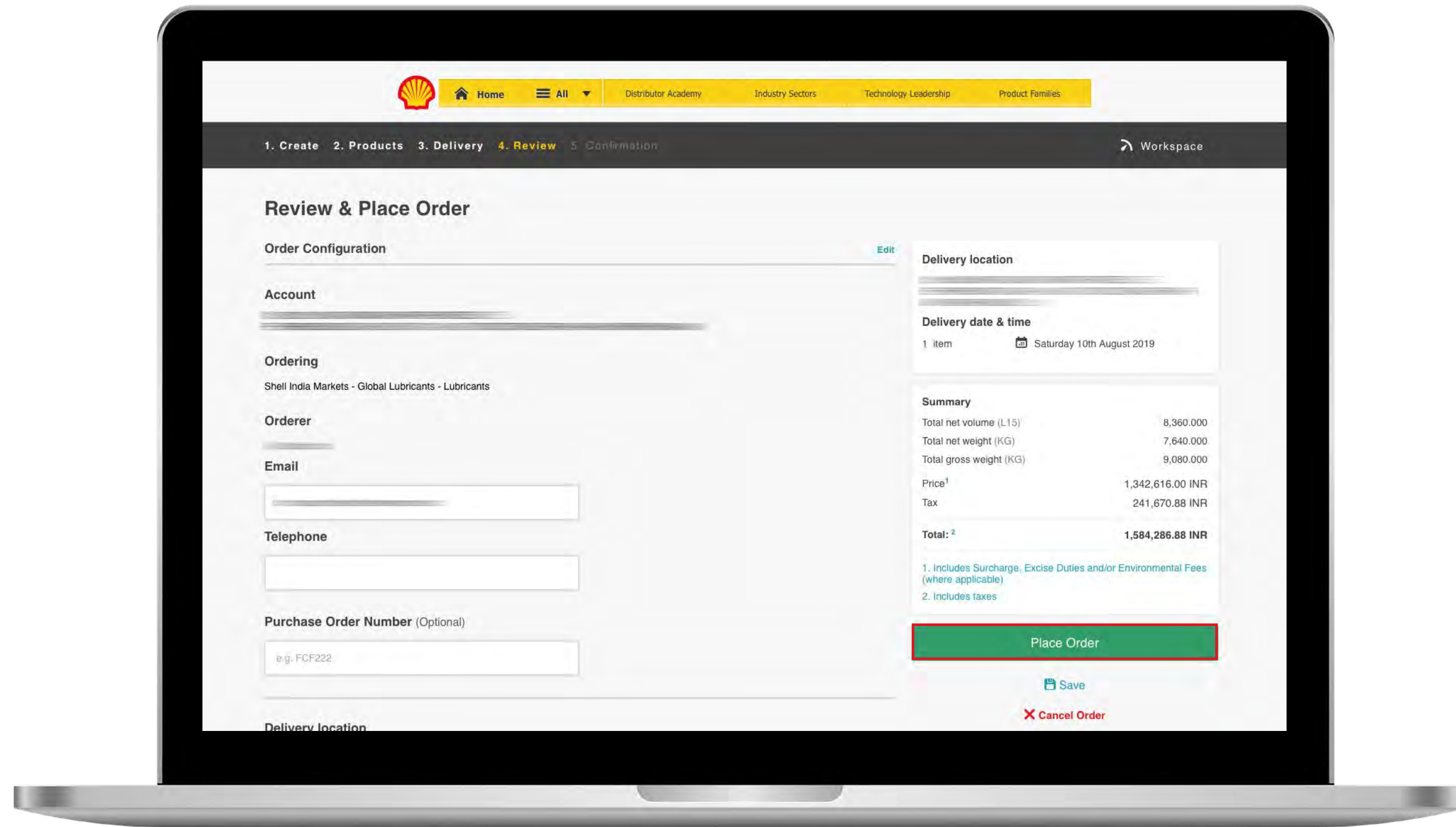
You can **Save** at this stage of the order
and return back to it at anytime

Remember: if you save an unconfirmed order the
delivery date can be redetermined



Step
12

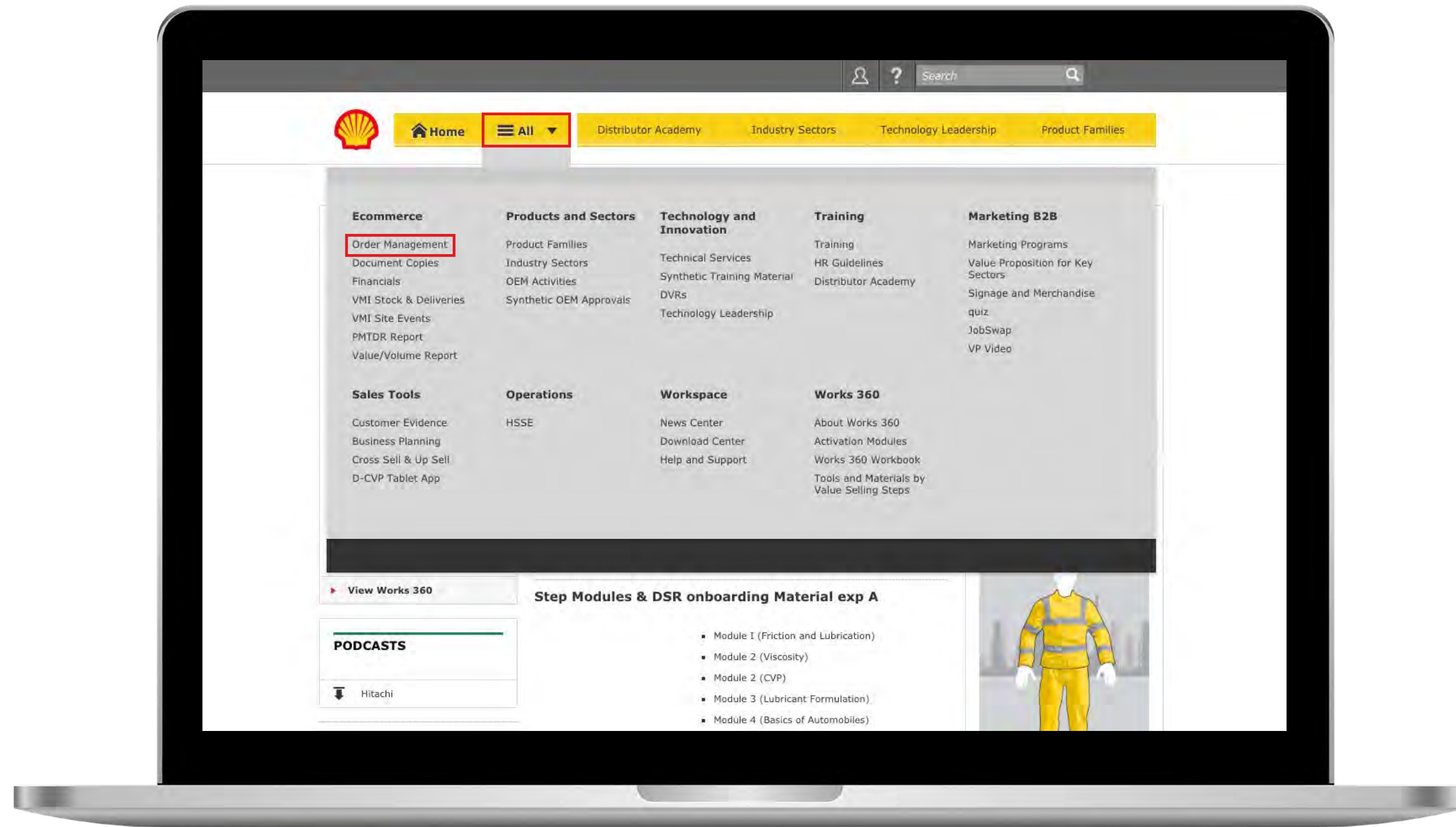
In **Order Management Workspace** click **View all saved orders** to enter your previously saved order (or click, order from list)



Step
13

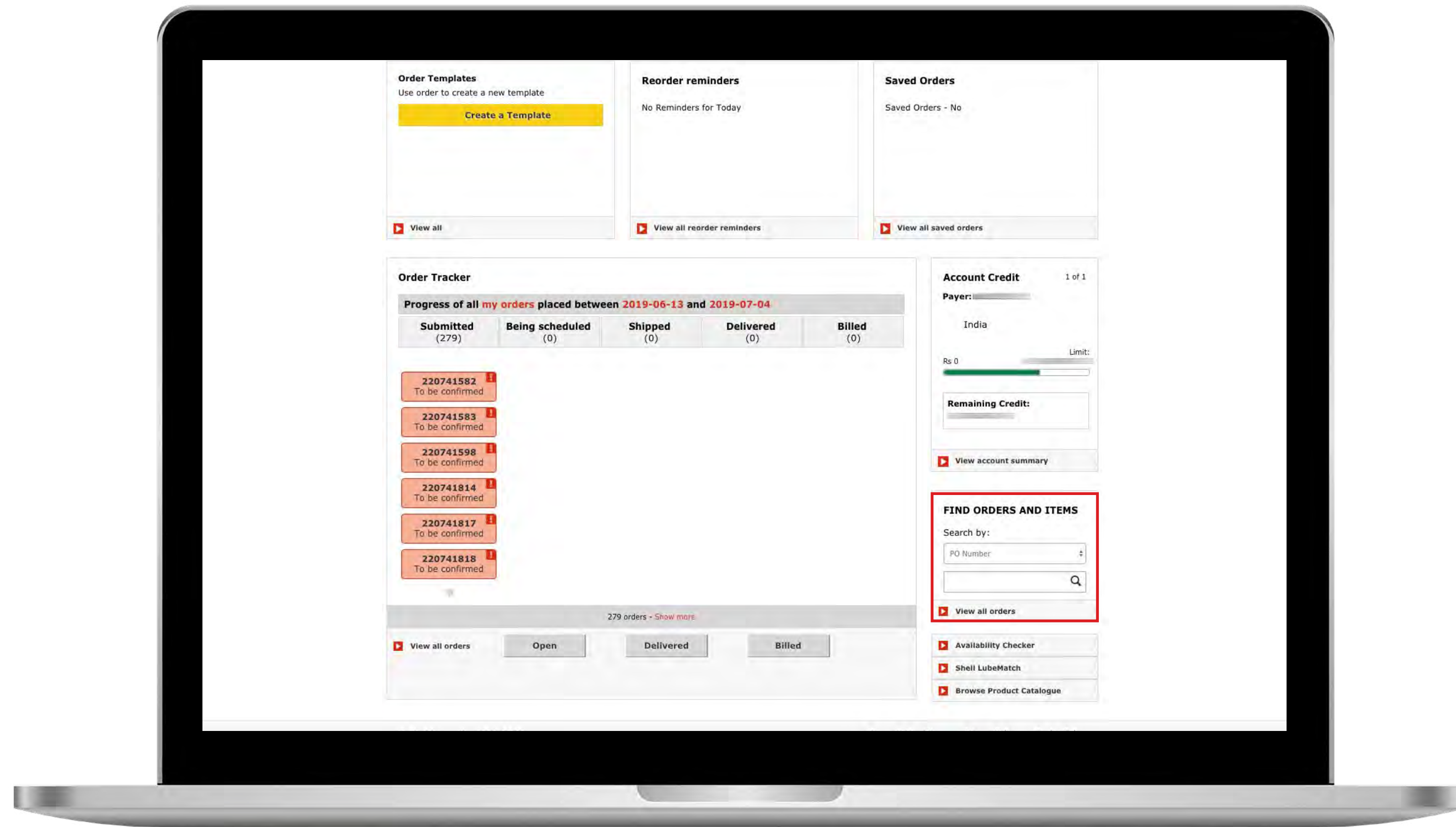
Now on the order details screen you can change,
add products and quantities

If you click on **Place Order**, editing products will not be possible



Step
1

Click **All** at the top of navigation and click on **Order Management**



Step
2

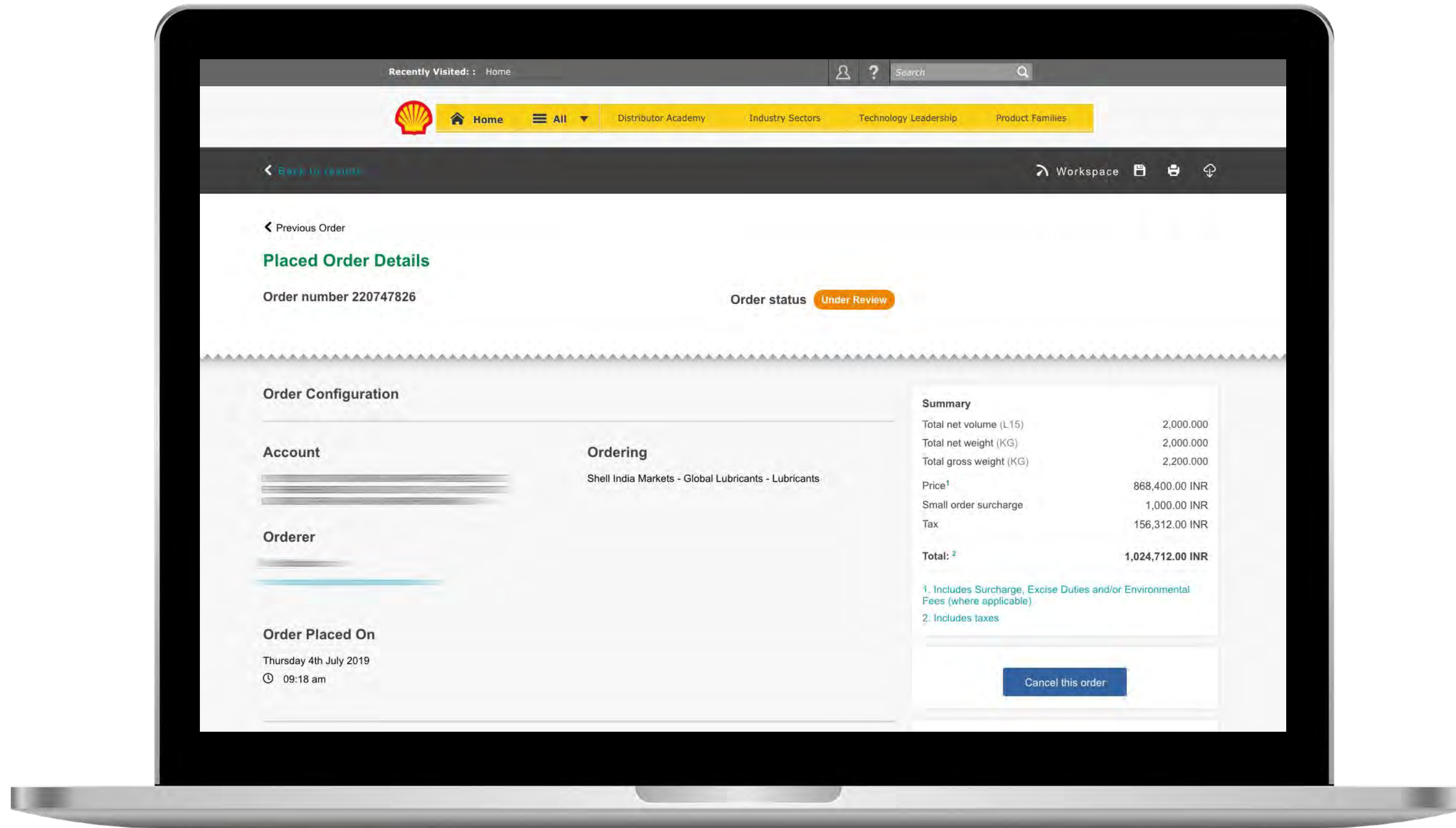
In Order Management click on **View all orders**

You can also search for an order you want to copy
by **FIND ORDERS AND ITEMS**

2.8

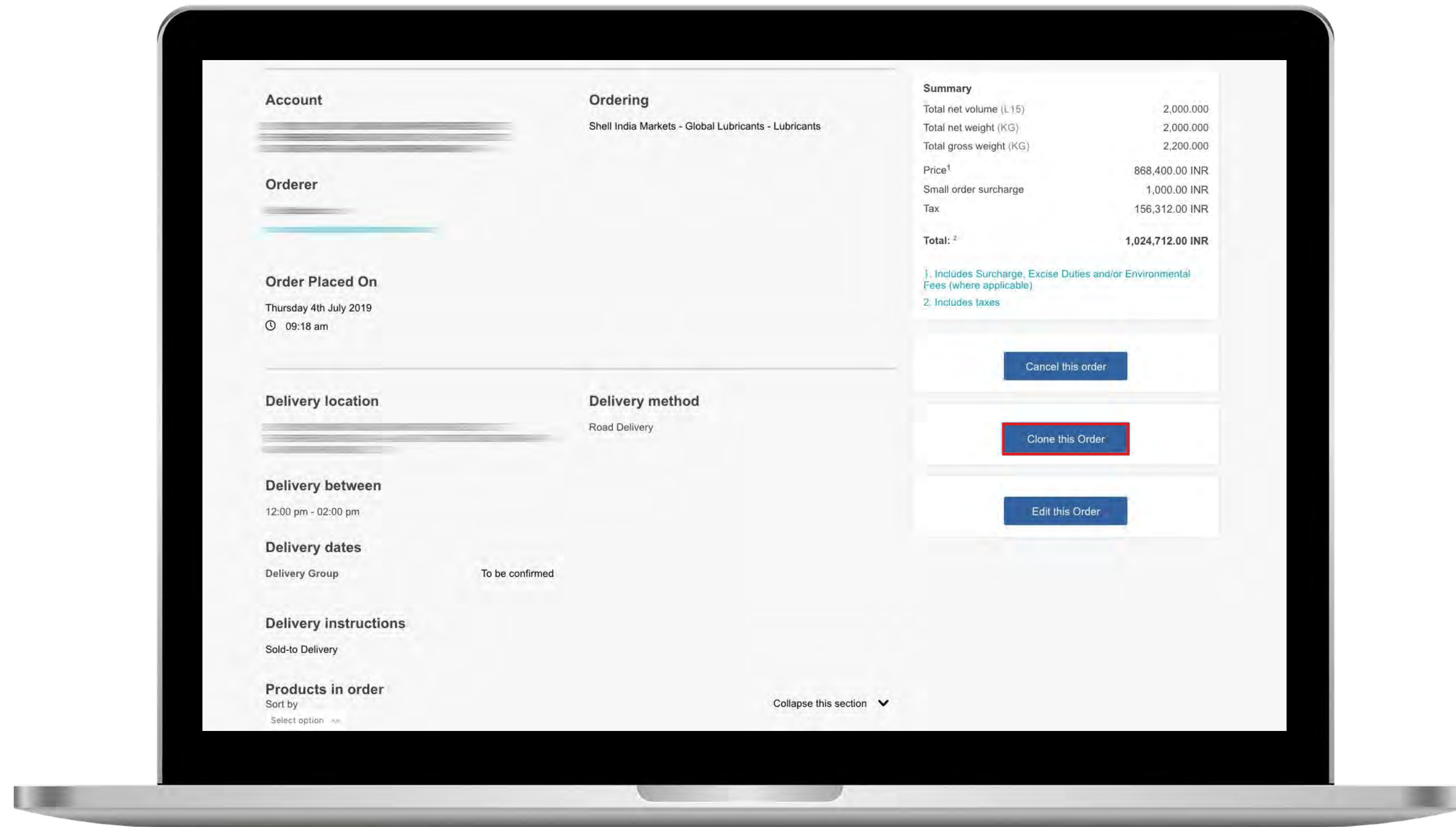
Order Management

How To Repeat A Previously Placed Order



Step
3

After clicking on the order you will be taken to the order details screen where you can view the following:
Accounts, Products, Quantities, Delivery Date, Status



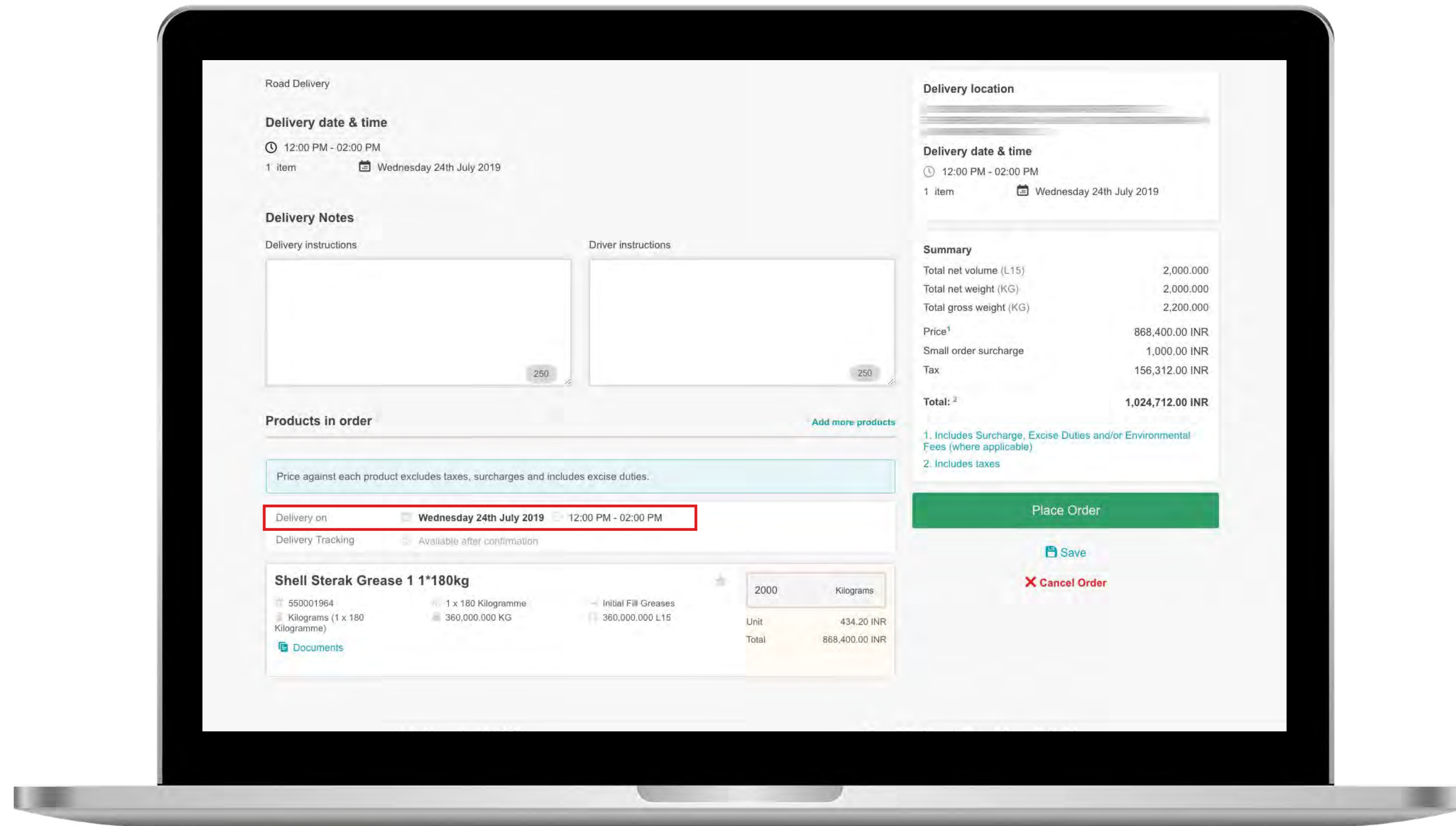
Step
4

At the bottom right hand side of the screen
you will see additional options.
Click on **Clone this Order**

2.8

Order Management

How To Repeat A Previously Placed Order



Step
5

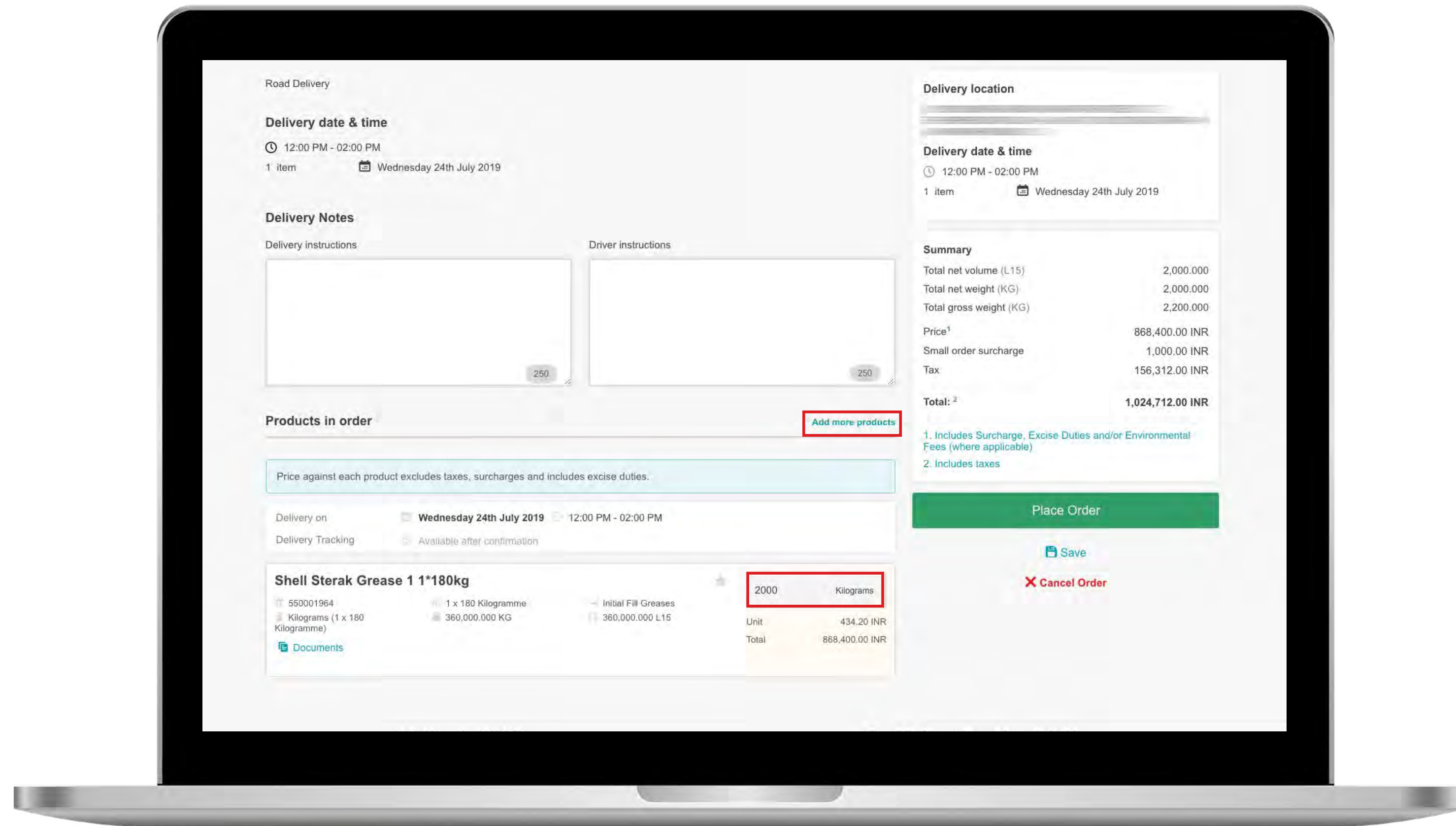
Once you have clicked on clone all order details will be copied to new one (Account, Delivery Location, Products and Quantity)

You will see a new delivery date and time

2.8

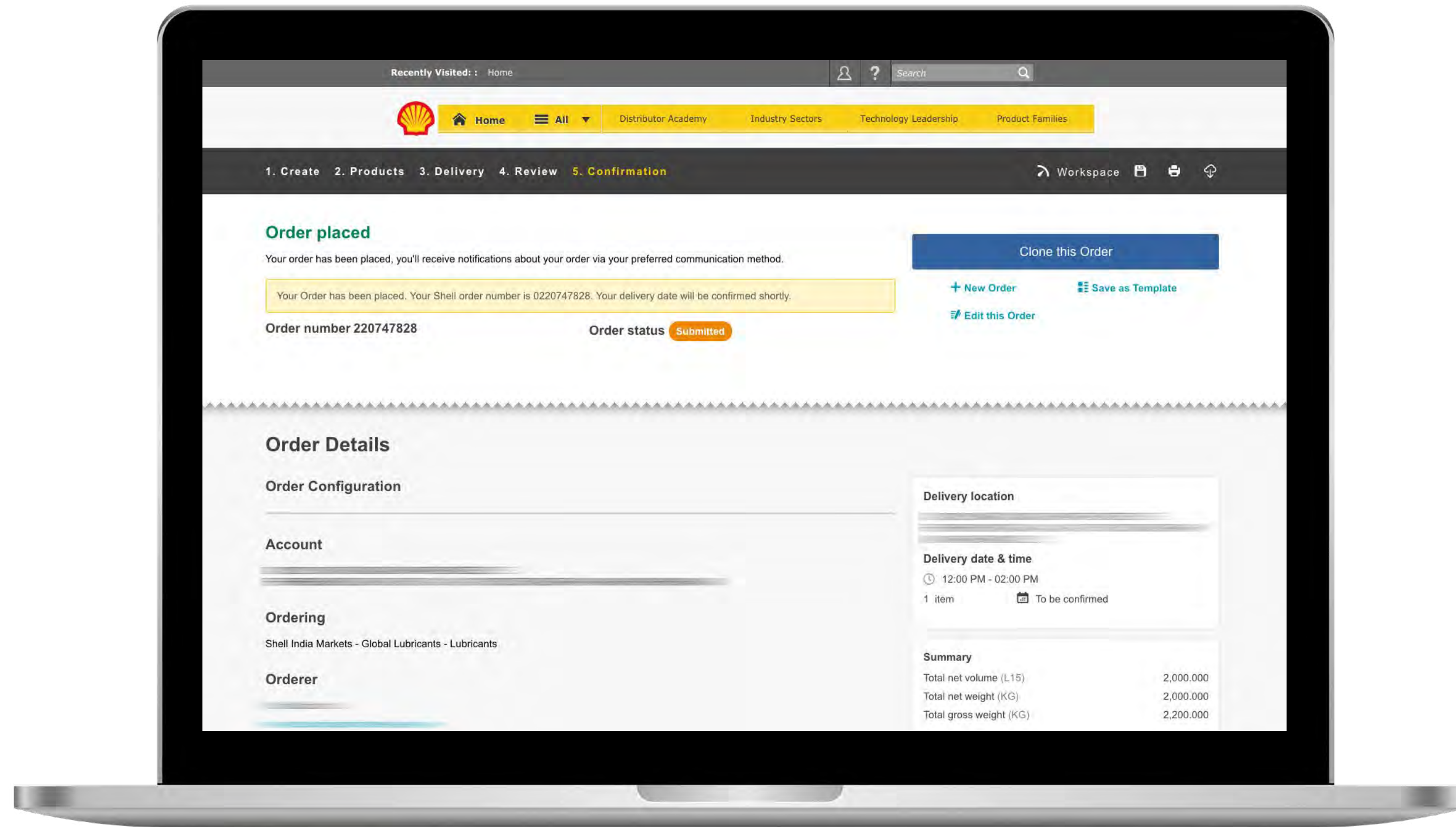
Order Management

How To Repeat A Previously Placed Order



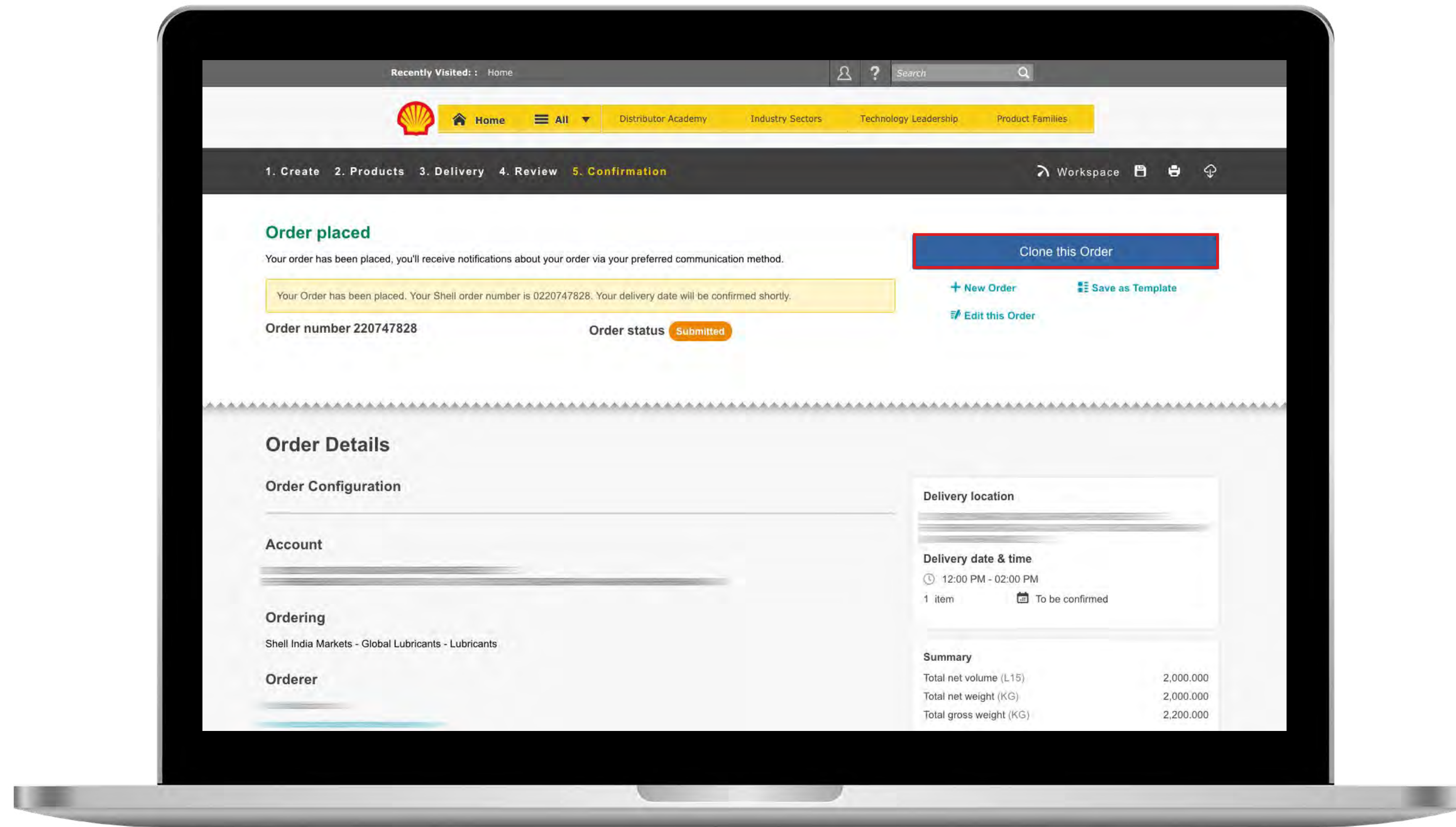
Step
6

At this stage, changing products, quantity or adding new products is still possible



Step
7

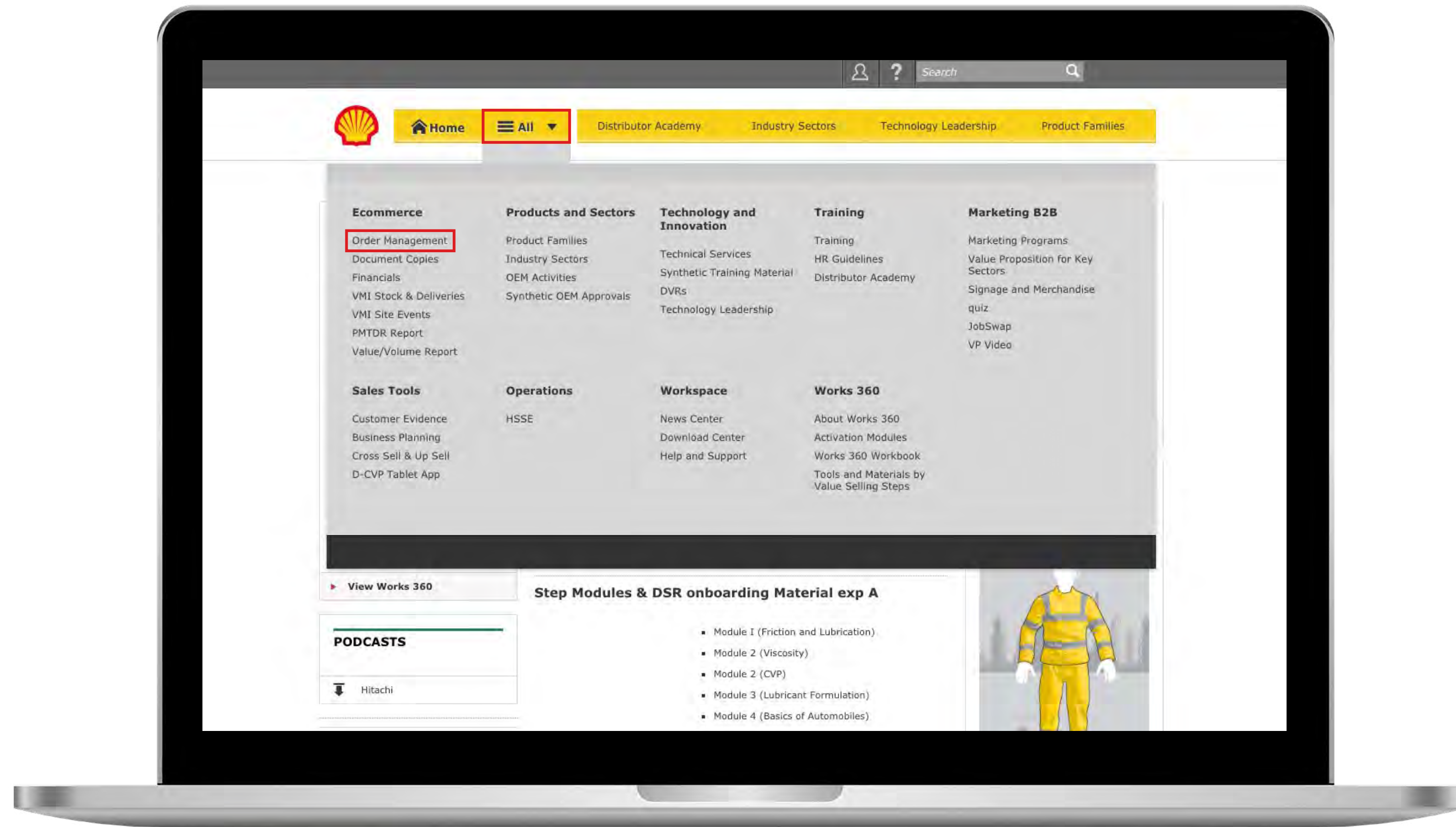
Confirmation about placing an order
will be visible on the screen



Step
8

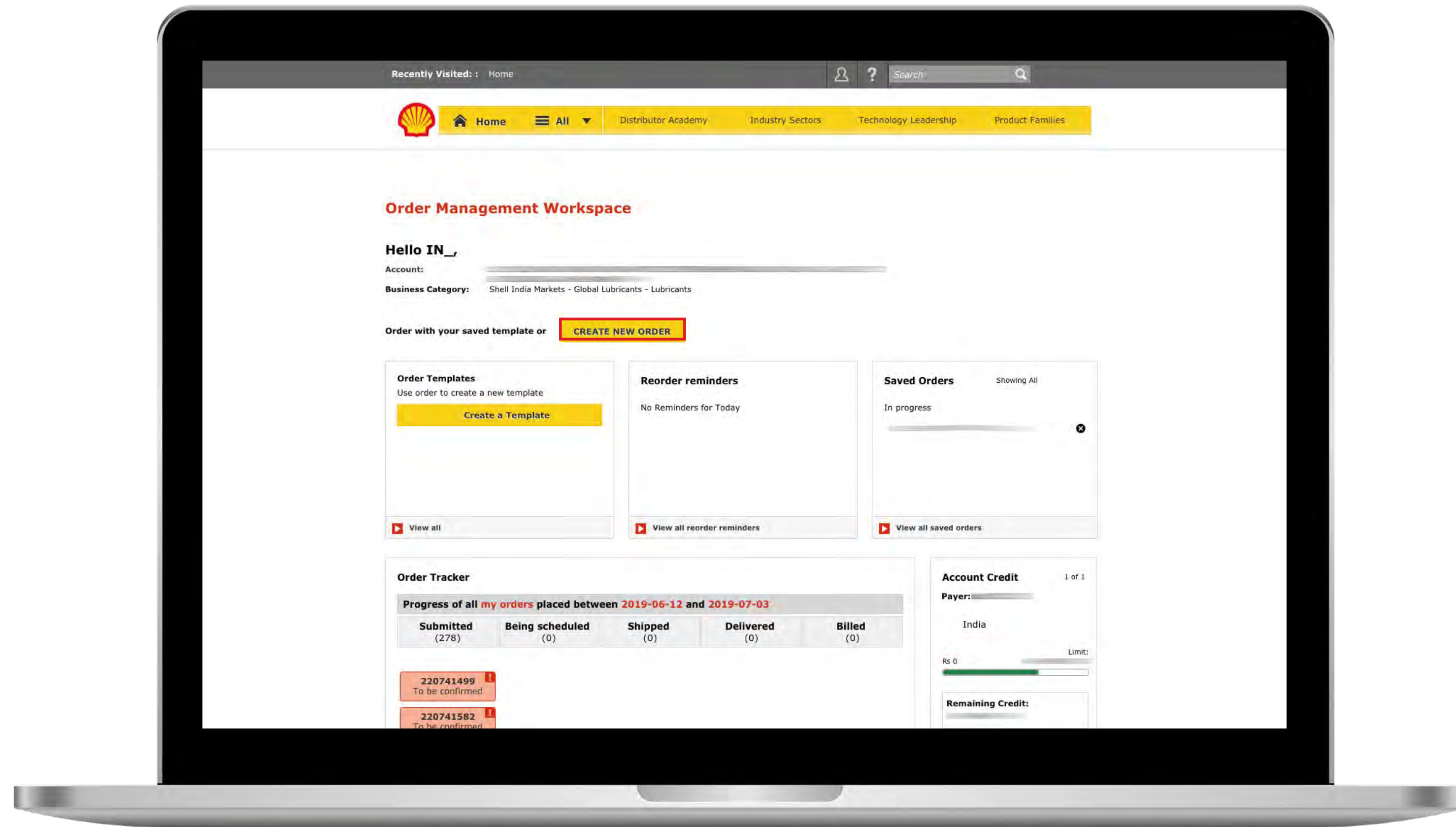
On the same screen you will see an option to immediately clone the same order

If you click it, all order details will be copied to a new one



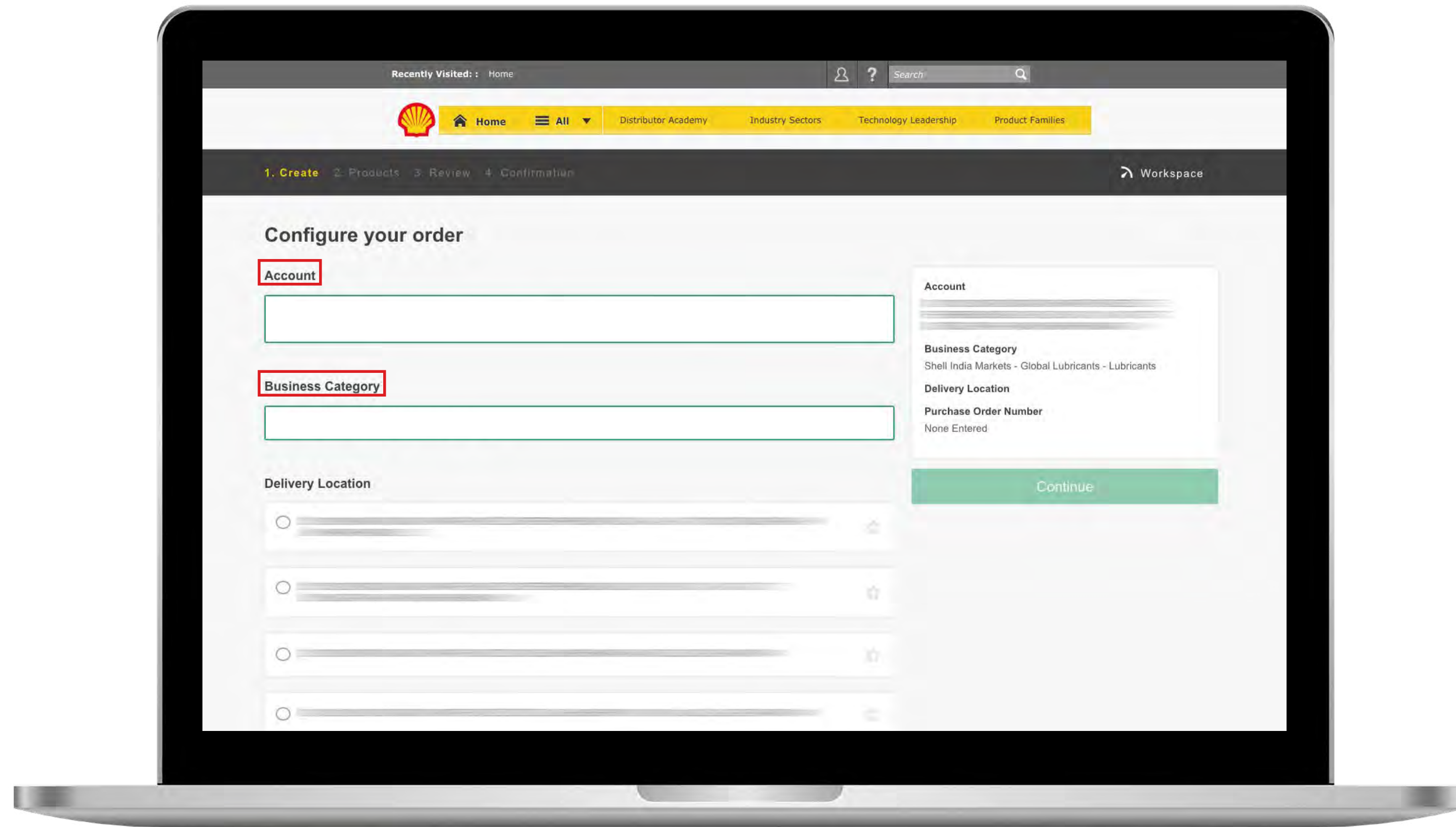
Step
1

Click **All** at the top of navigation and
click on **Order Management**



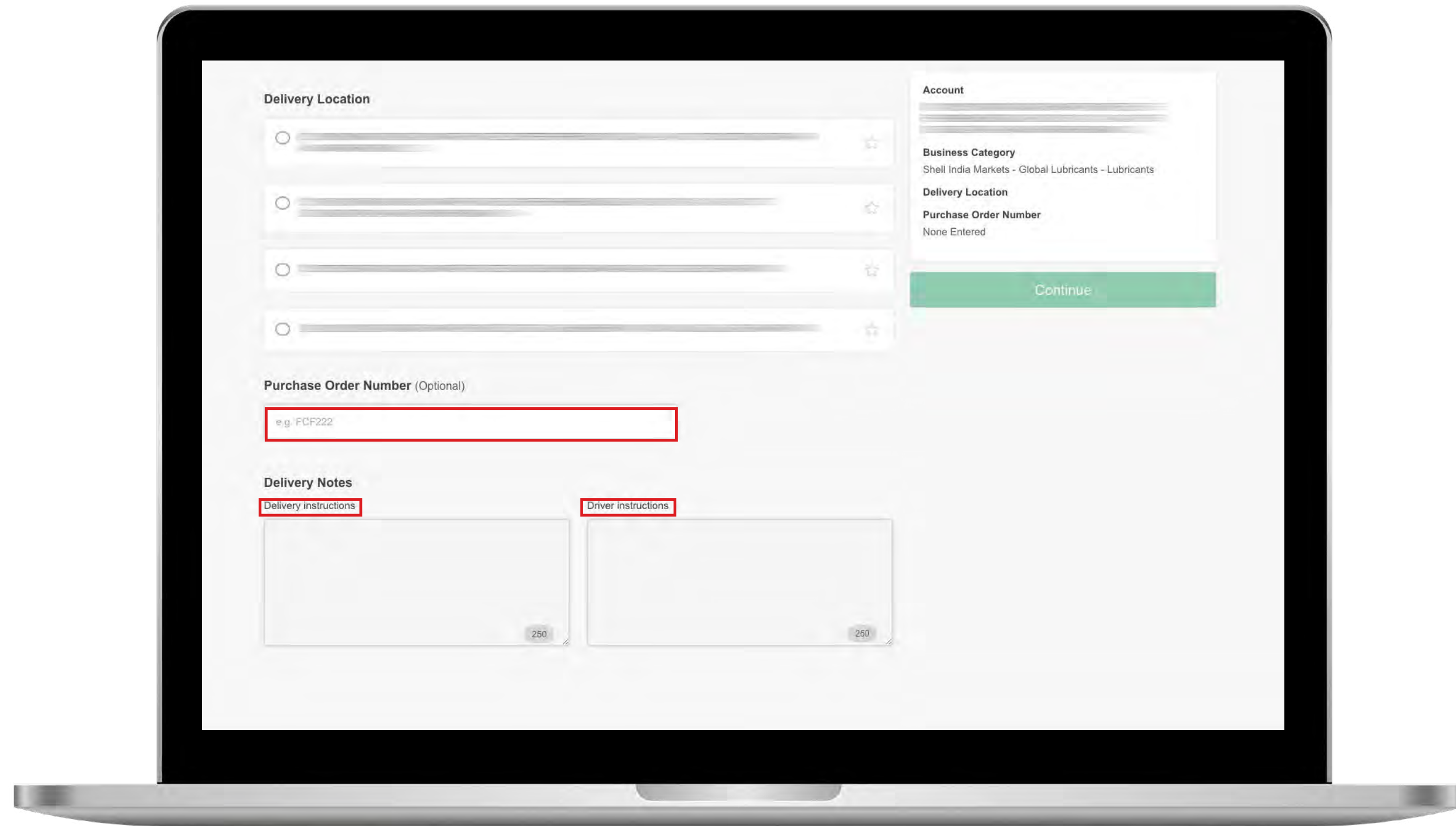
Step
2

In Order Management Workspace click **CREATE NEW ORDER**



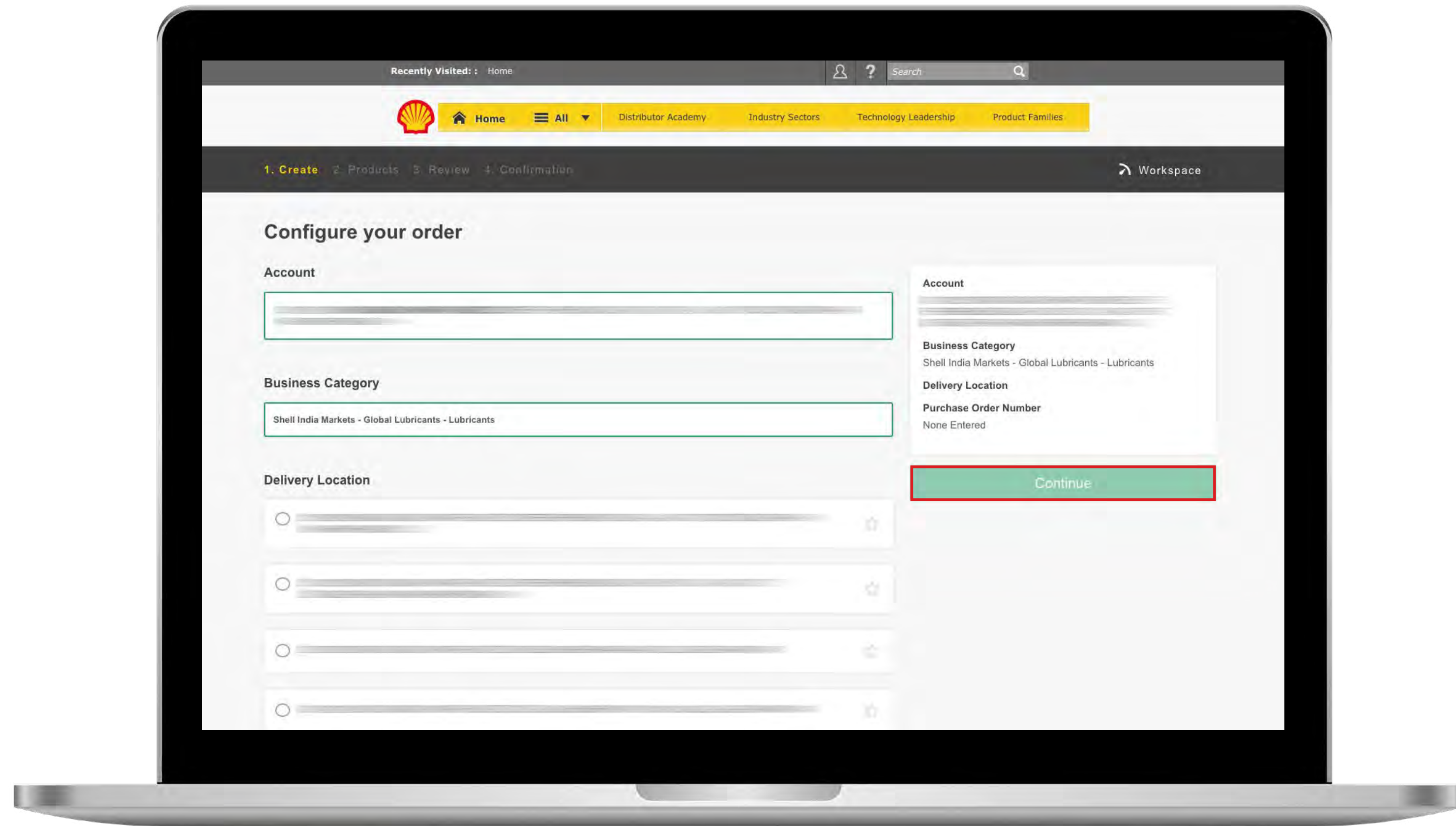
Step
3

Select your **Account** number and **Business Category**



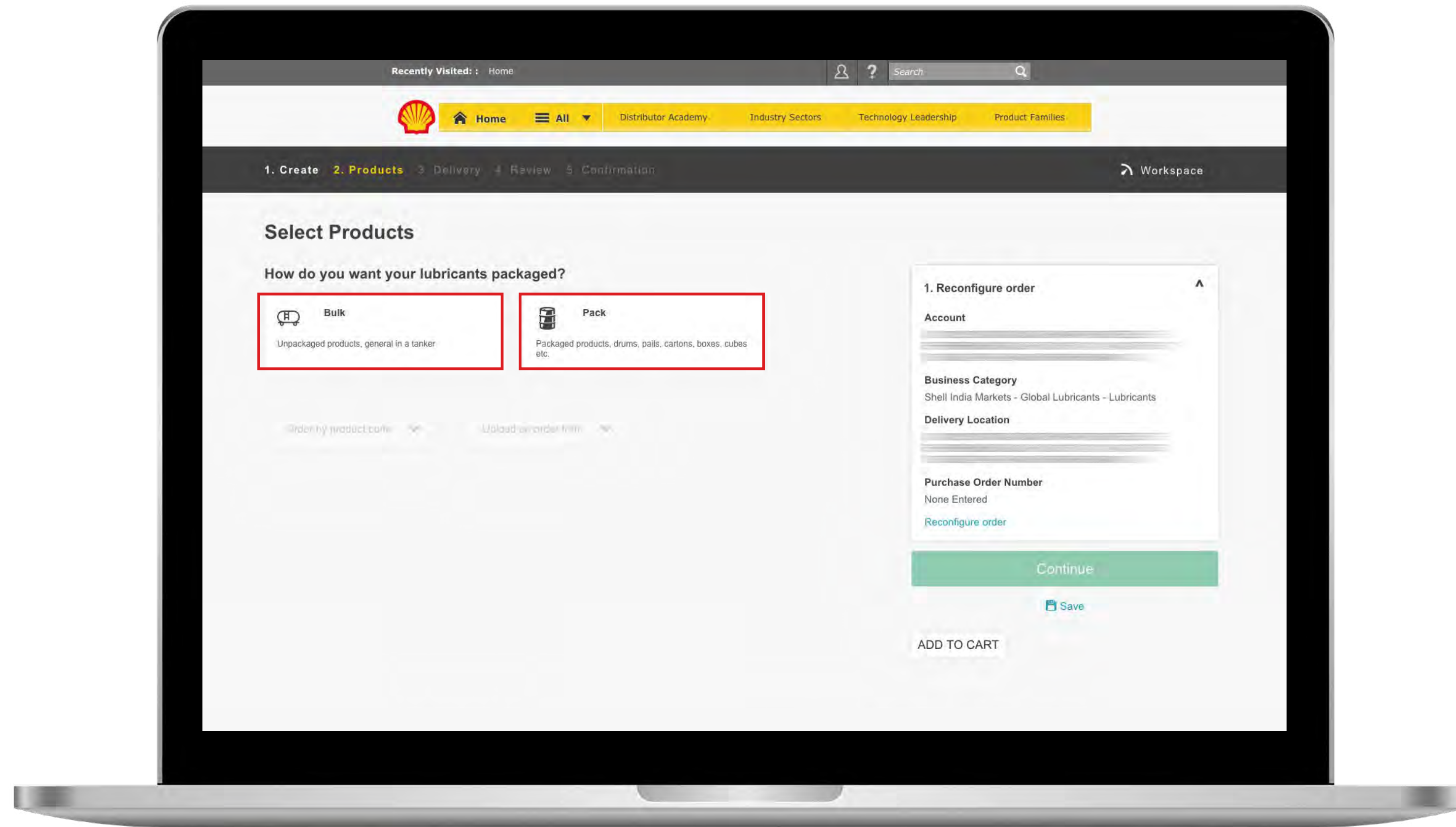
Step
4

You can add your **Purchase Order Number** or provide here any **Delivery/Driver instructions**



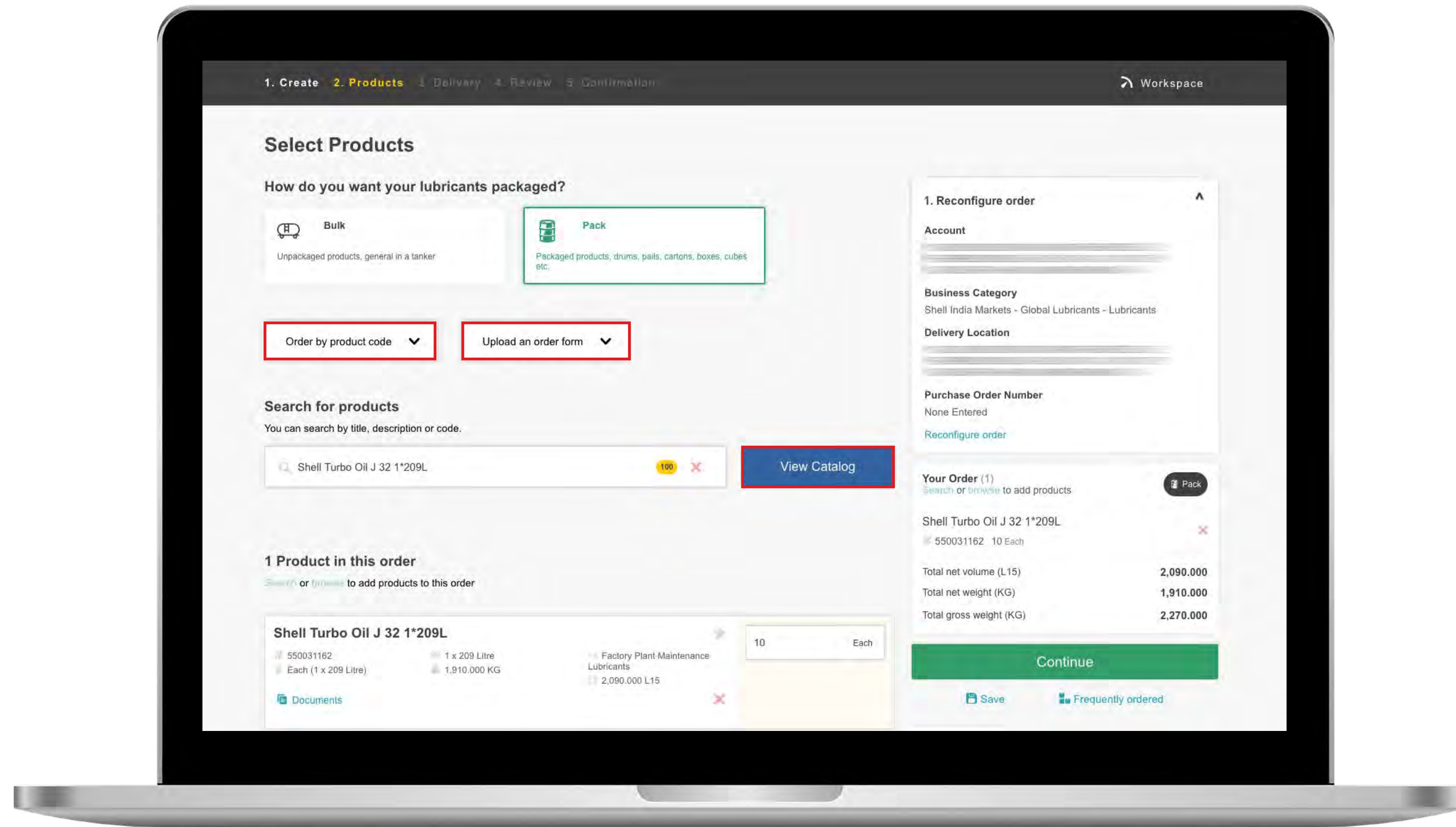
Step
5

Click **Continue** after selecting delivery details



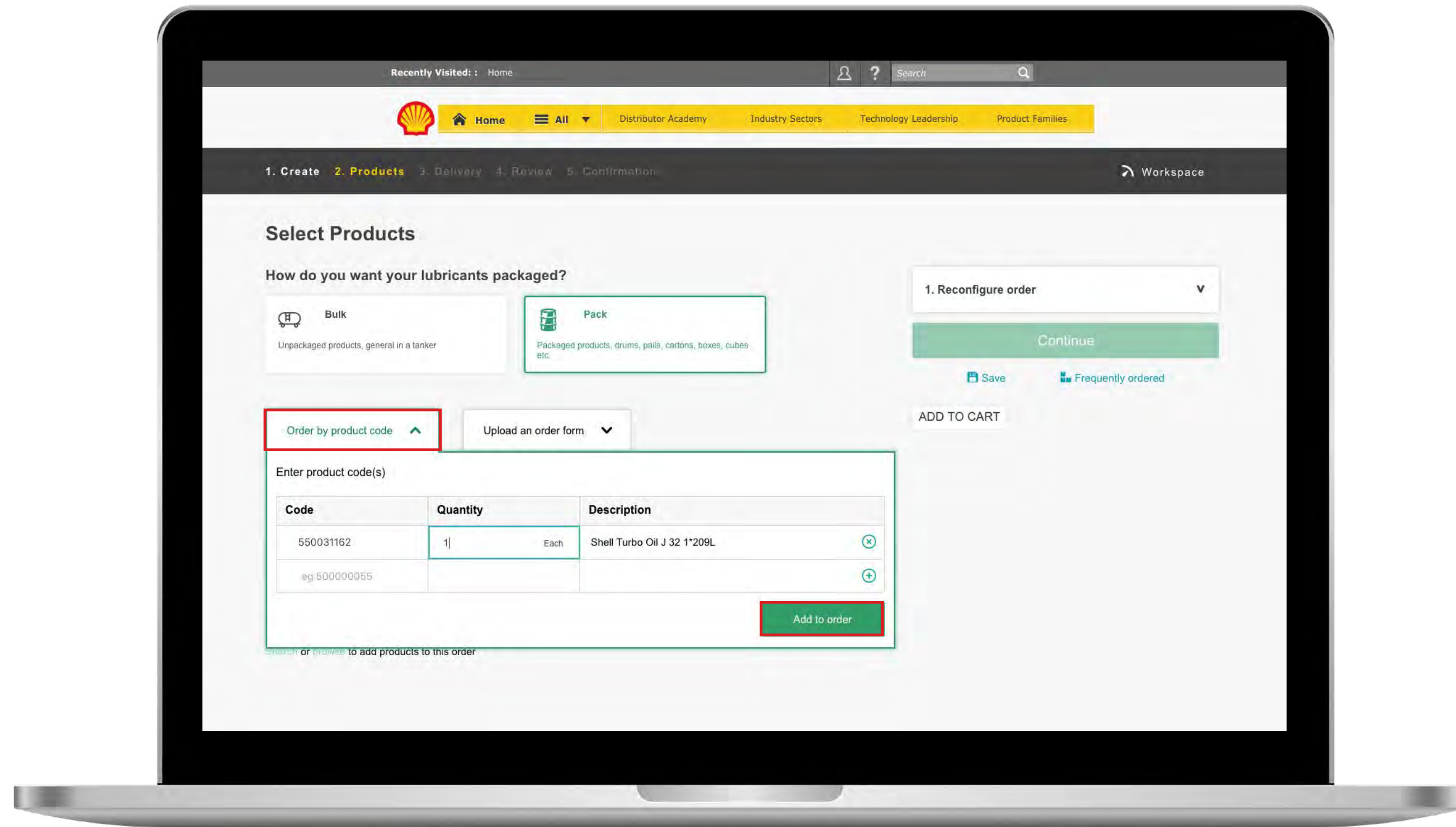
Step
6

Choose a product type using the Select Products panel
You must choose between **Bulk** or **Pack**



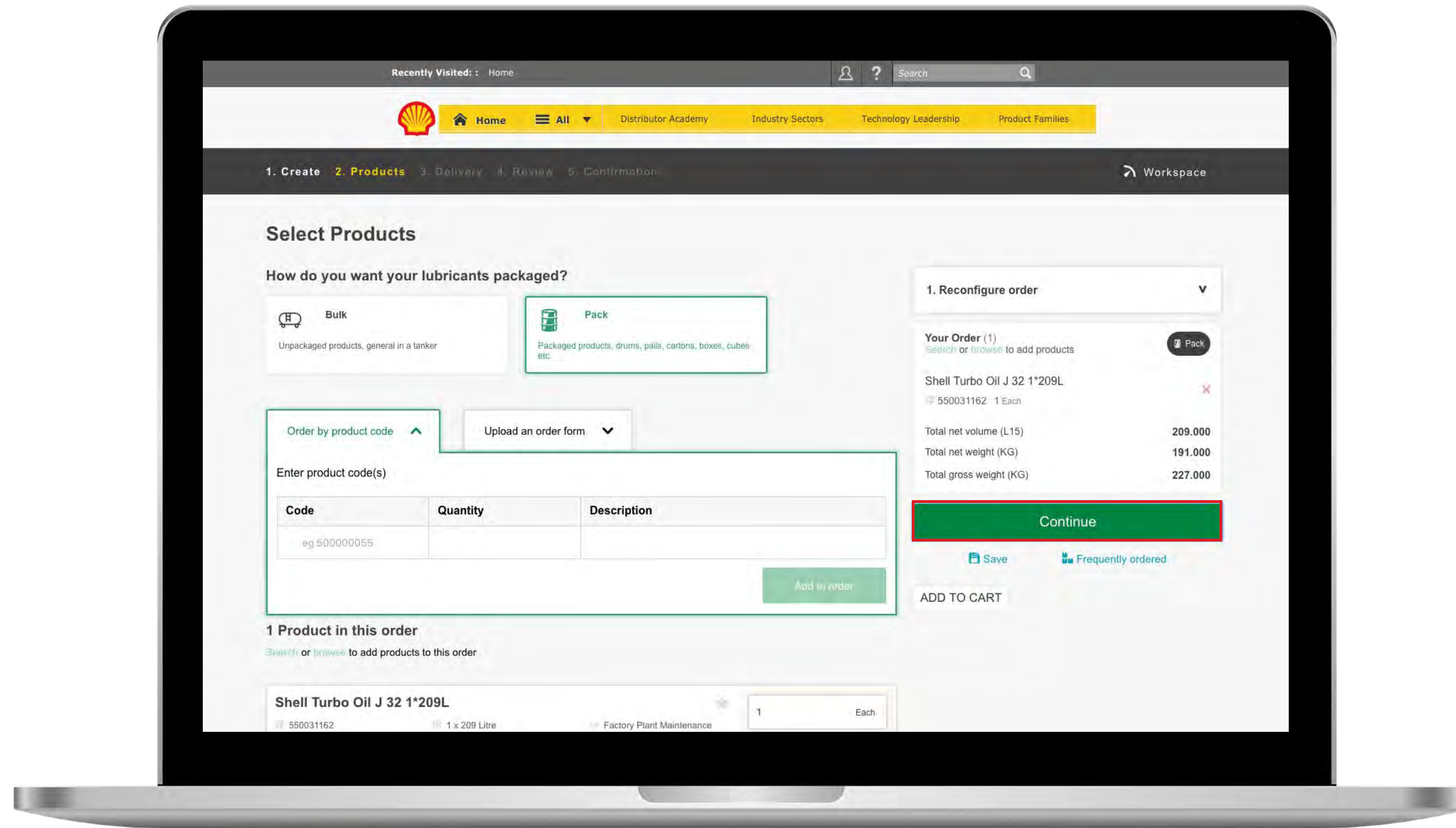
Step
7

Now you can set up products.
Click on **Order by product code** or
on **Upload an order form**.
You can also use the **View Catalogue** option



Step
8

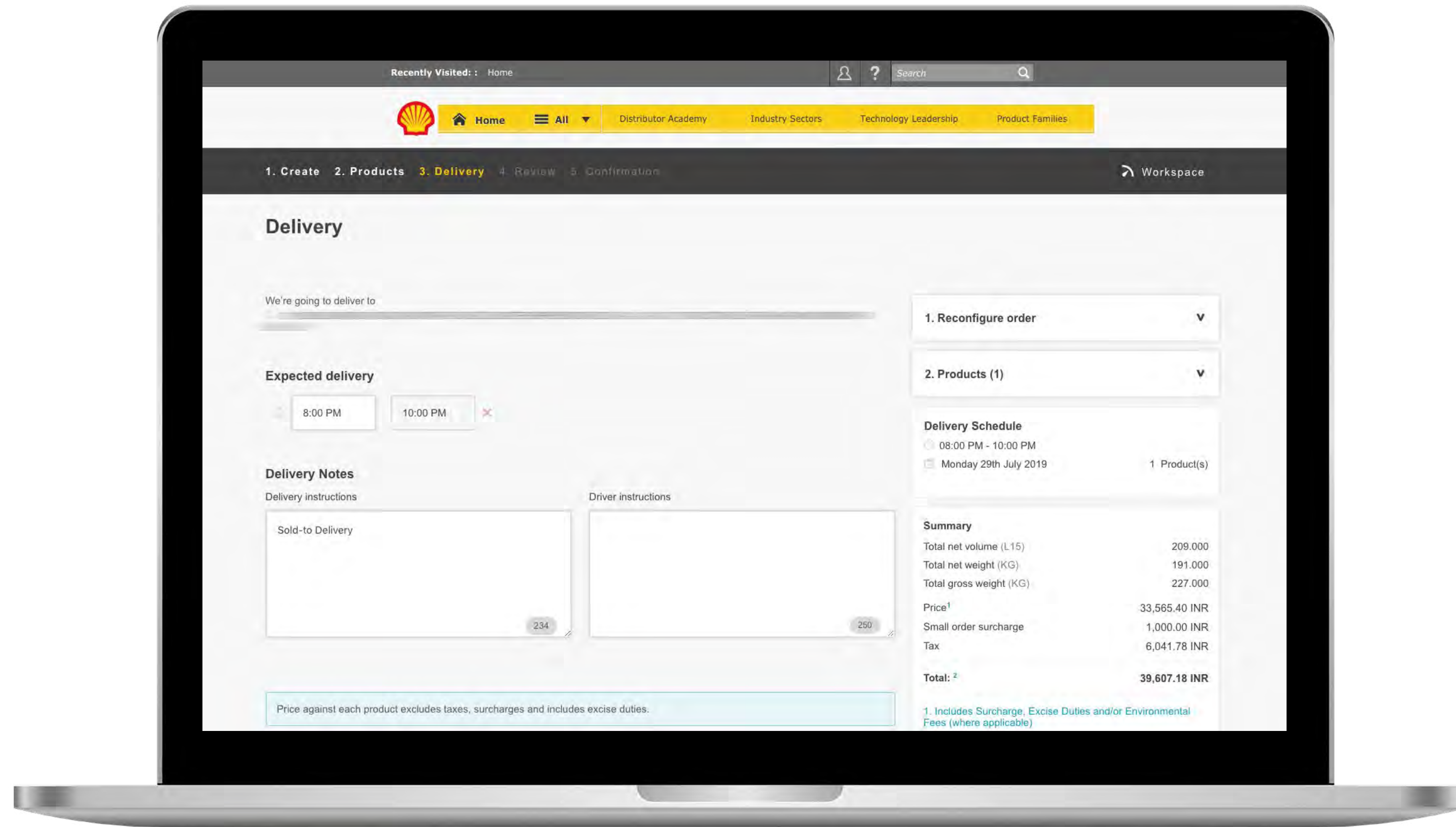
Using **Order by product code** choose a product code and quantity. You can add more products if needed. Click **Add to order**



Step
9

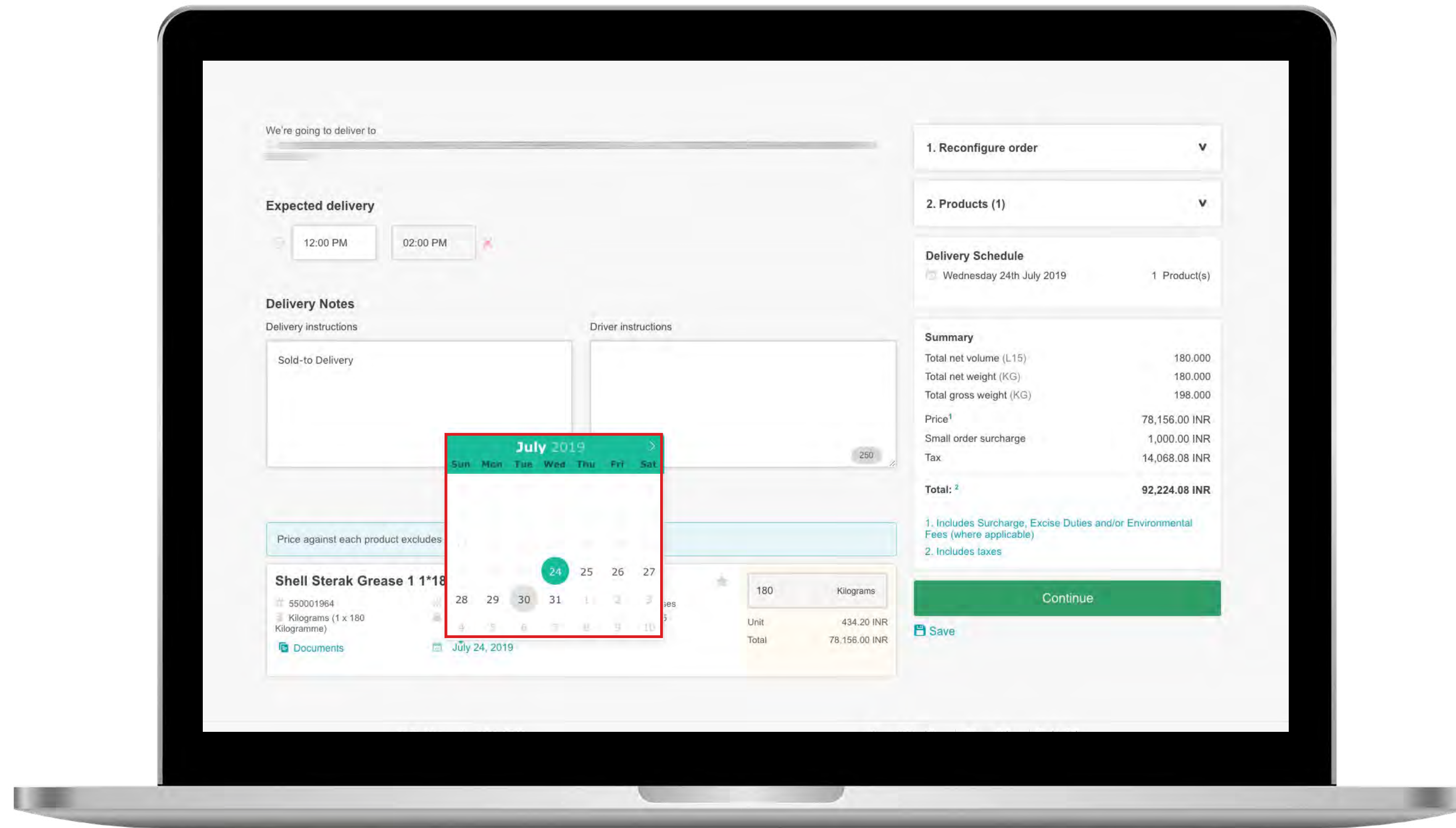
Click the **Continue** button to get to next step

During the order placing process you can define a delivery date and time at the order header level or at an item level – it all depends on your individual settings



Step
10

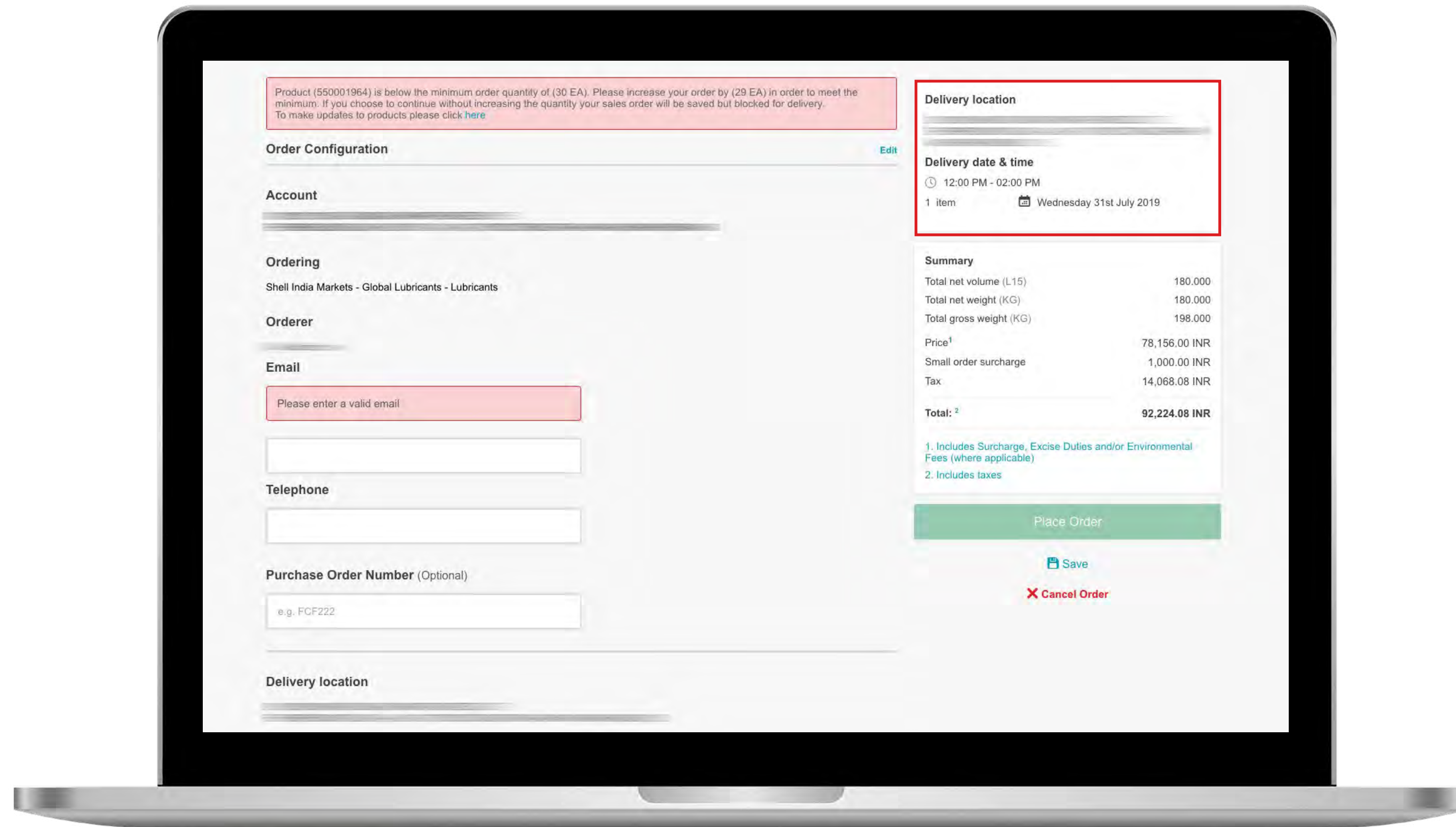
When this setting is applied to your account, you will be able to define a specific delivery date and time



Step
11

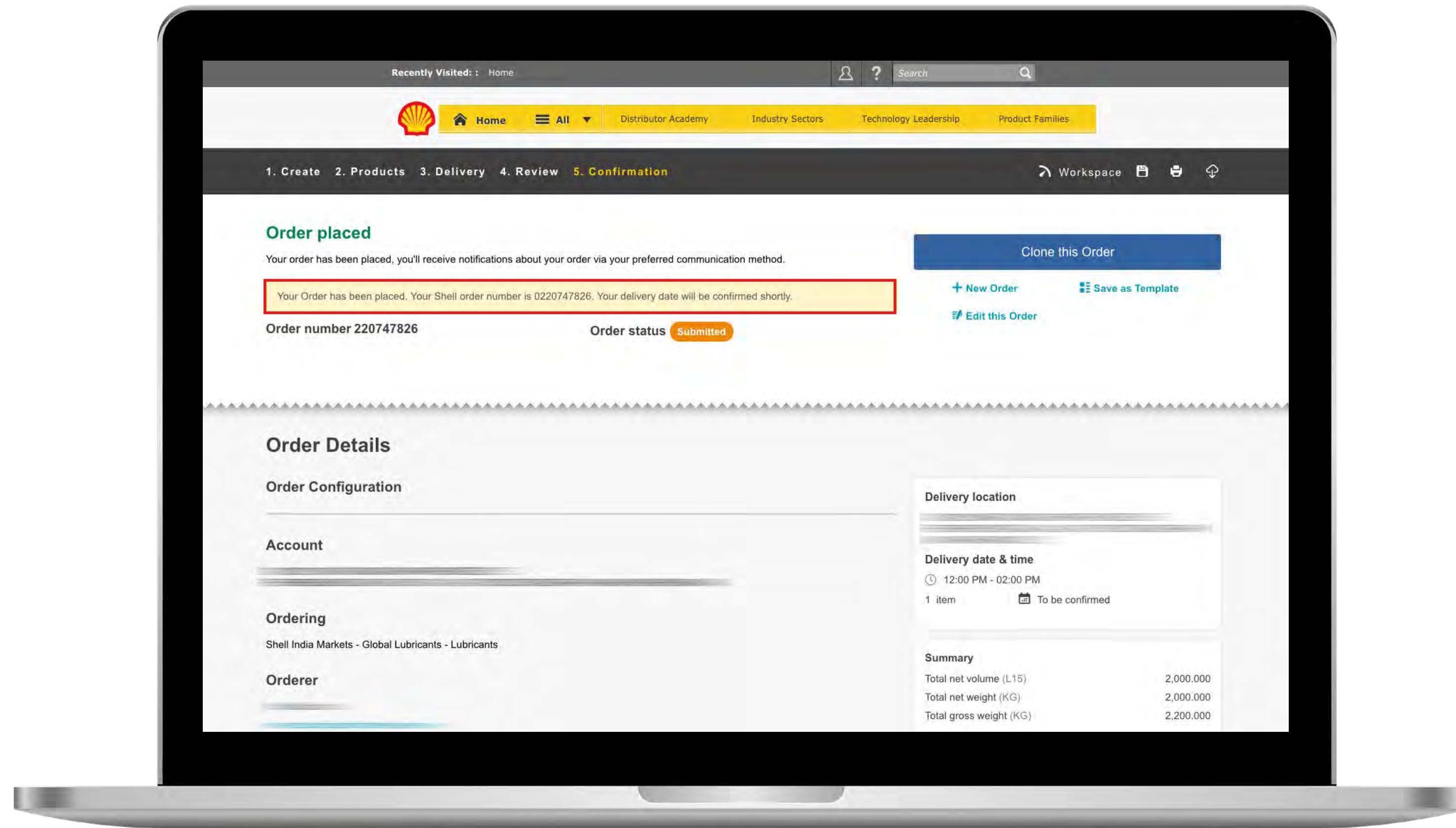
You can select a date manually or use the drop-down calendar option

NOTE: You can either choose item or order level delivery (i.e. do you want to arrange for delivery of a specific item or receive the full order). Also, depending on your contract agreement with Shell you will be allocated a 'delivery by' or 'delivery on' date



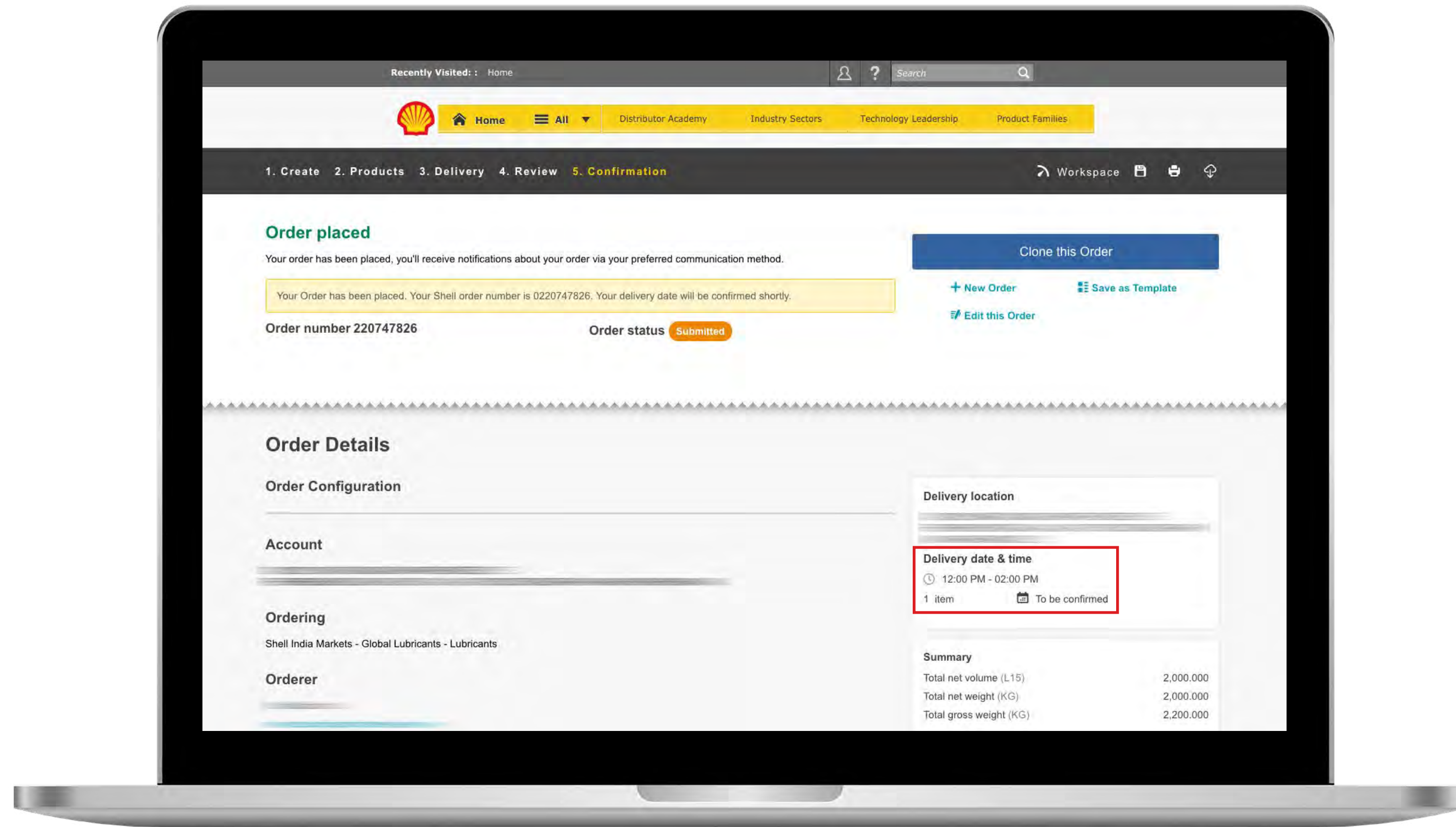
Step
12

After clicking **Continue** button your chosen Delivery date and time will be visible on right hand side of the screen (in order Summary area)



Step
13

After finishing the order placing process, you will receive information that the chosen delivery date will be confirmed



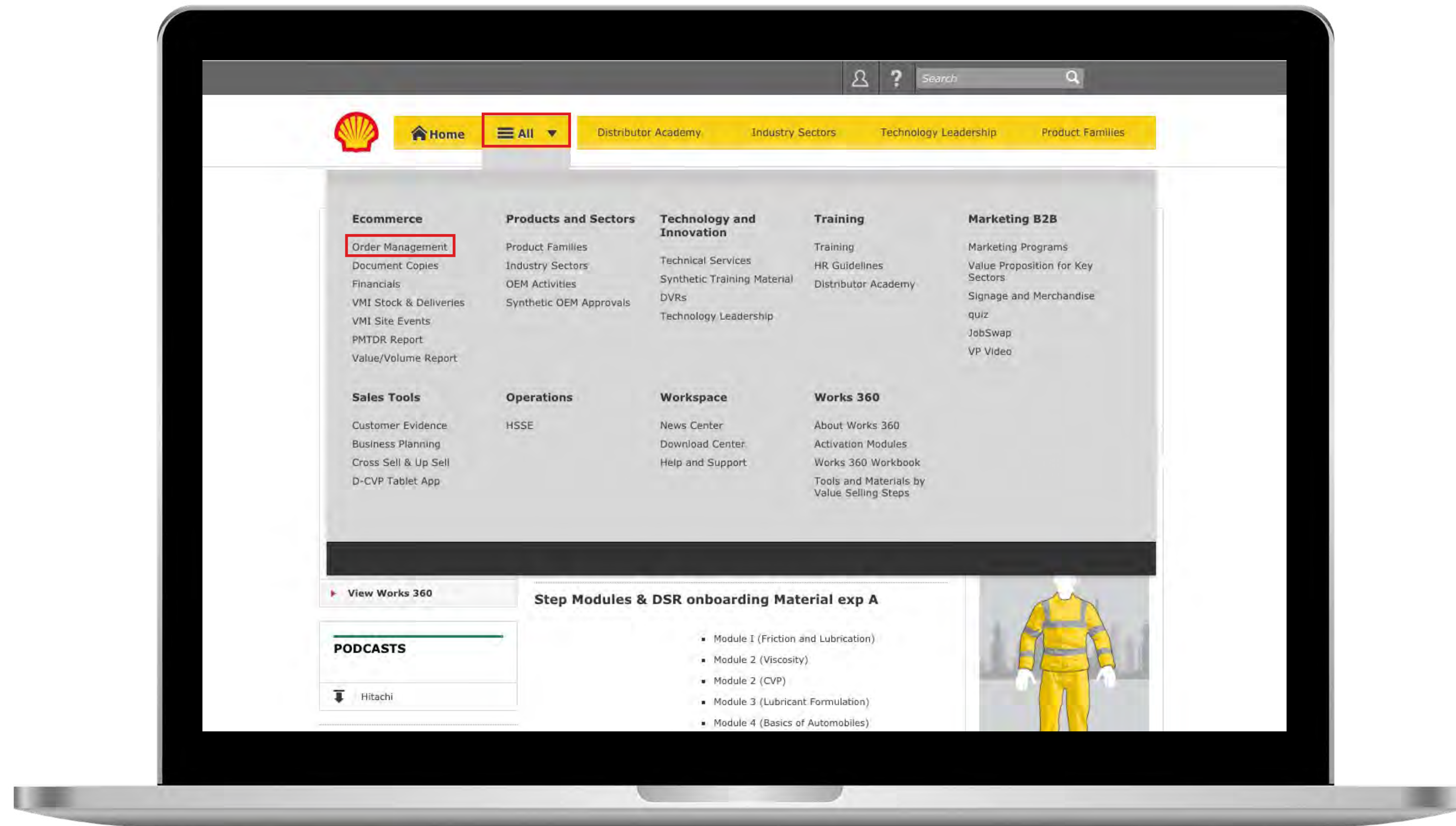
Step
14

You will see this information in the order summary screen

2.10

Order Management

How To View Delivery Shipping And Order Details Of A Placed Order



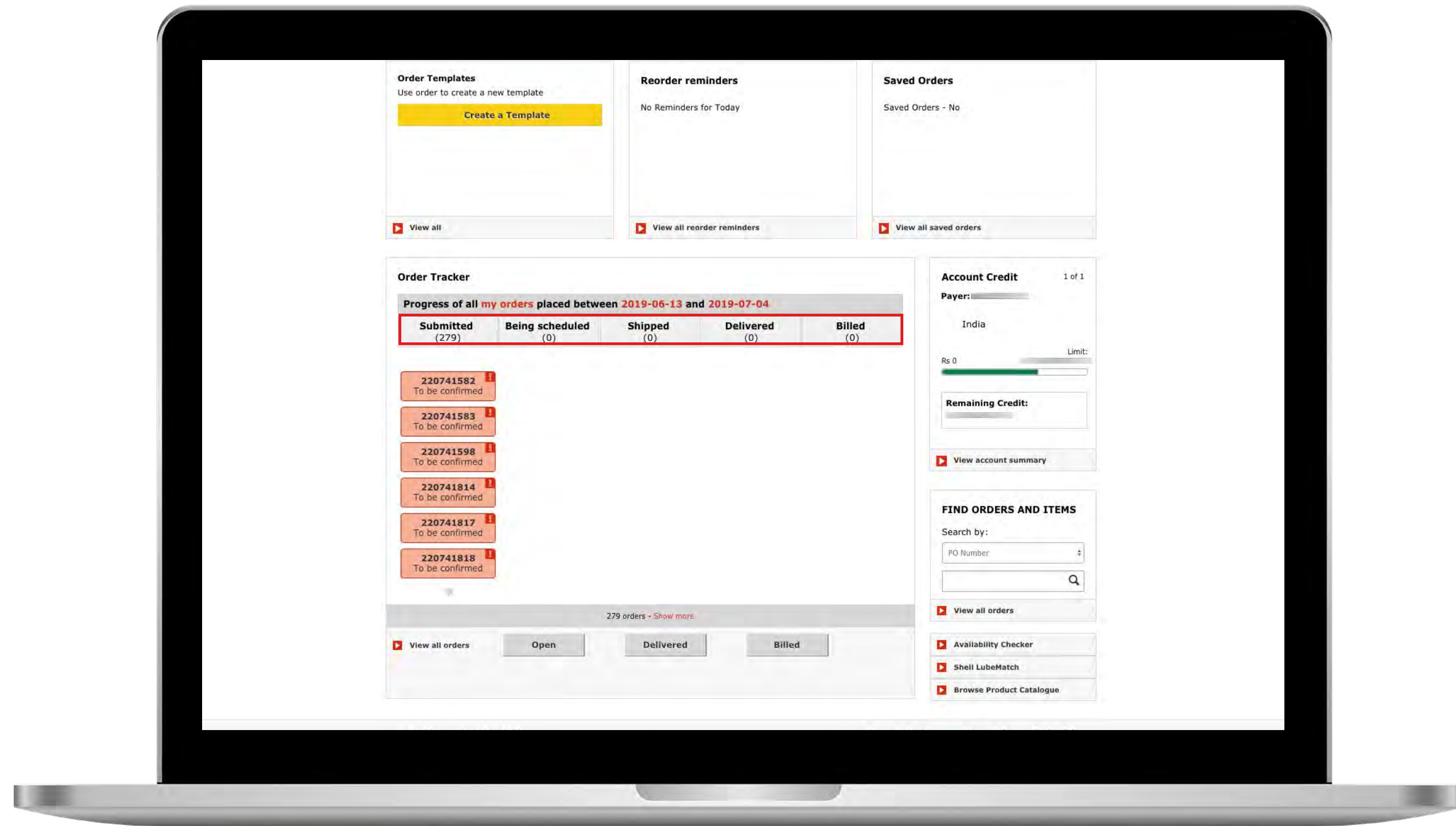
Step
1

Click **All** at the top of navigation and click on **Order Management**

2.10

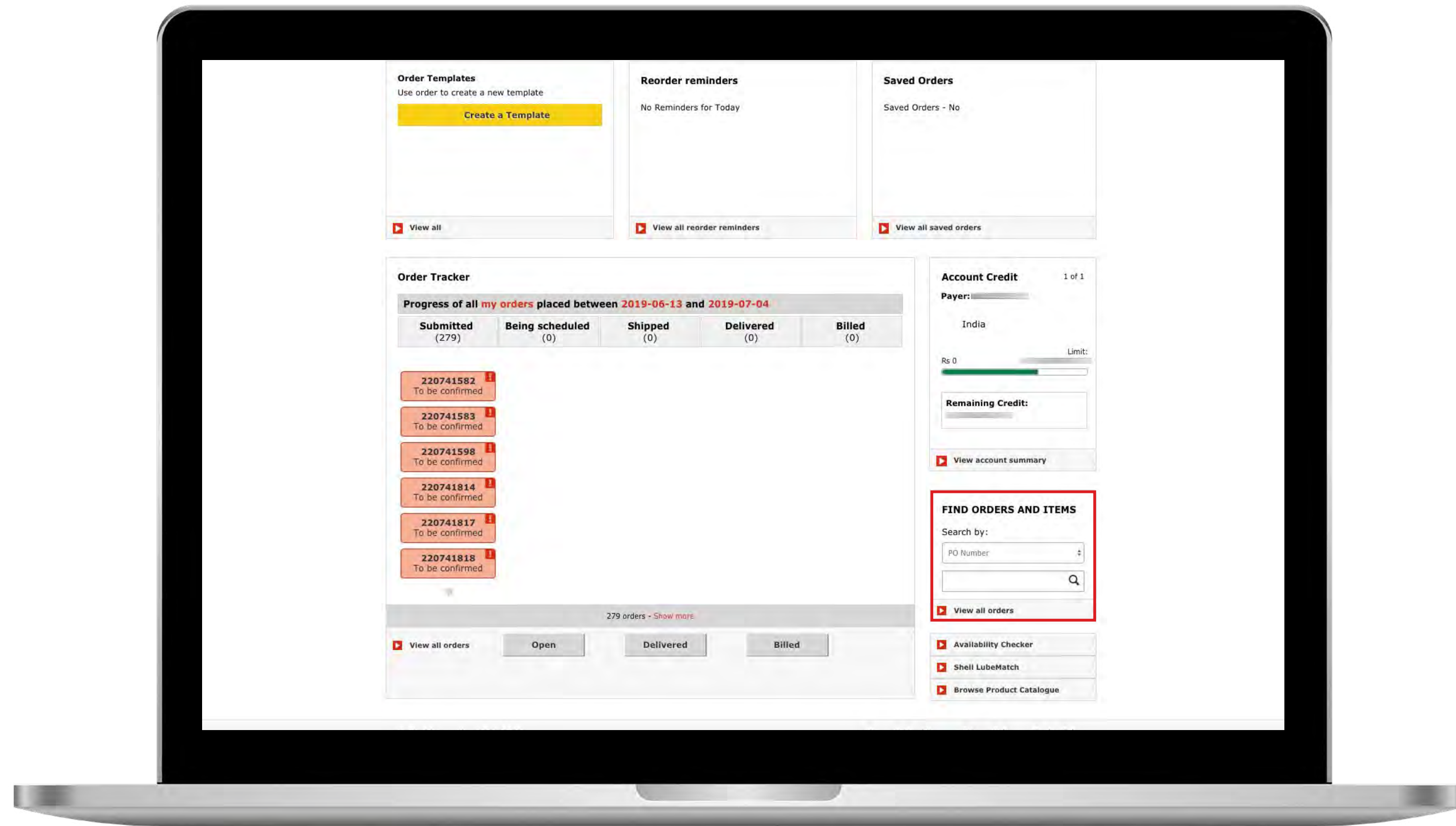
Order Management

How To View Delivery Shipping And Order Details Of A Placed Order



Step
2

In **Order Management** at the bottom of the screen you will see **Order Tracker**, you can easily check the status and details of all your orders here by simply clicking on an order



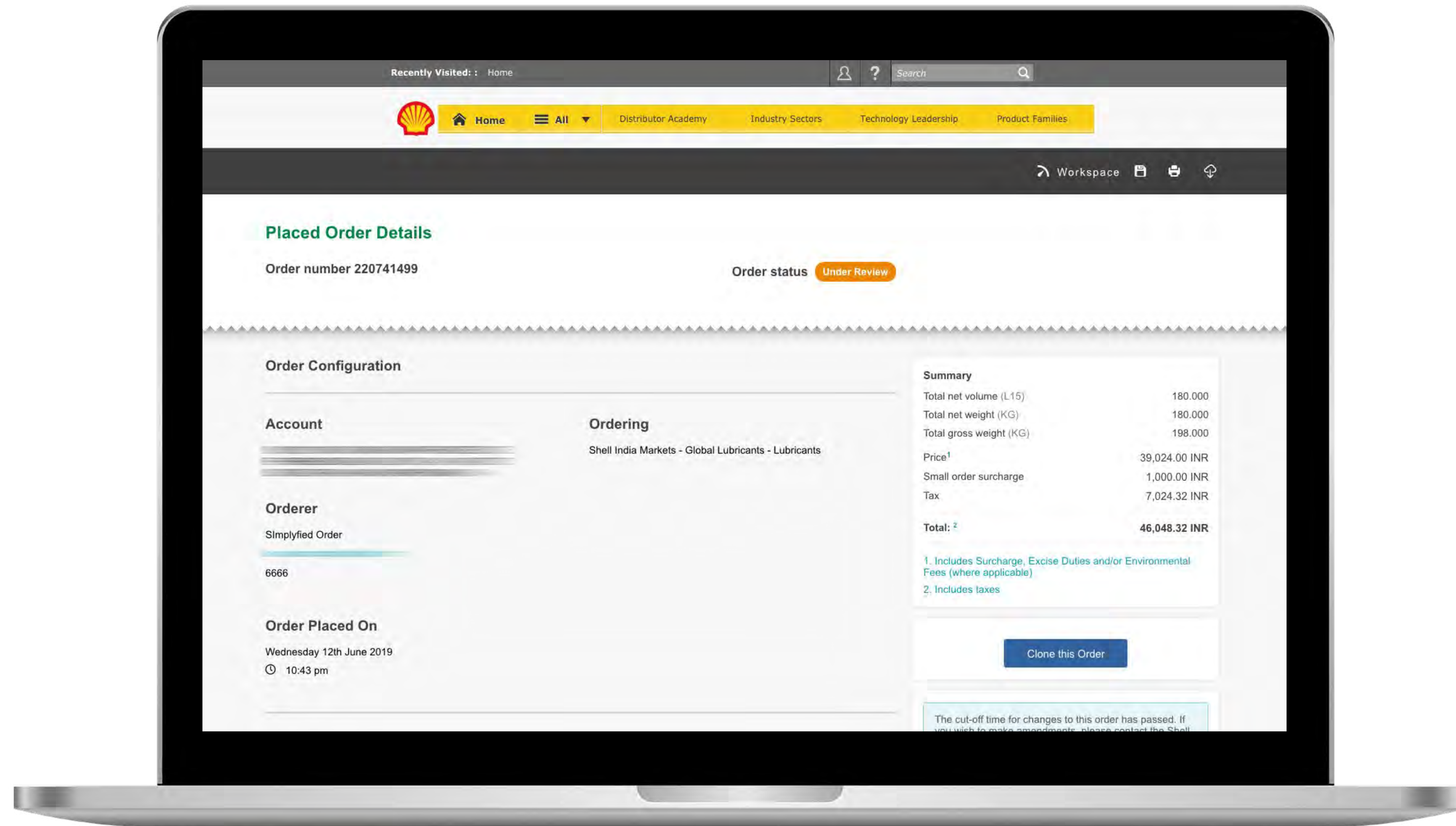
Step
3

You can also check **View all orders** or find an order in the **FIND ORDERS AND ITEMS** option

2.10

Order Management

How To View Delivery Shipping And Order Details Of A Placed Order



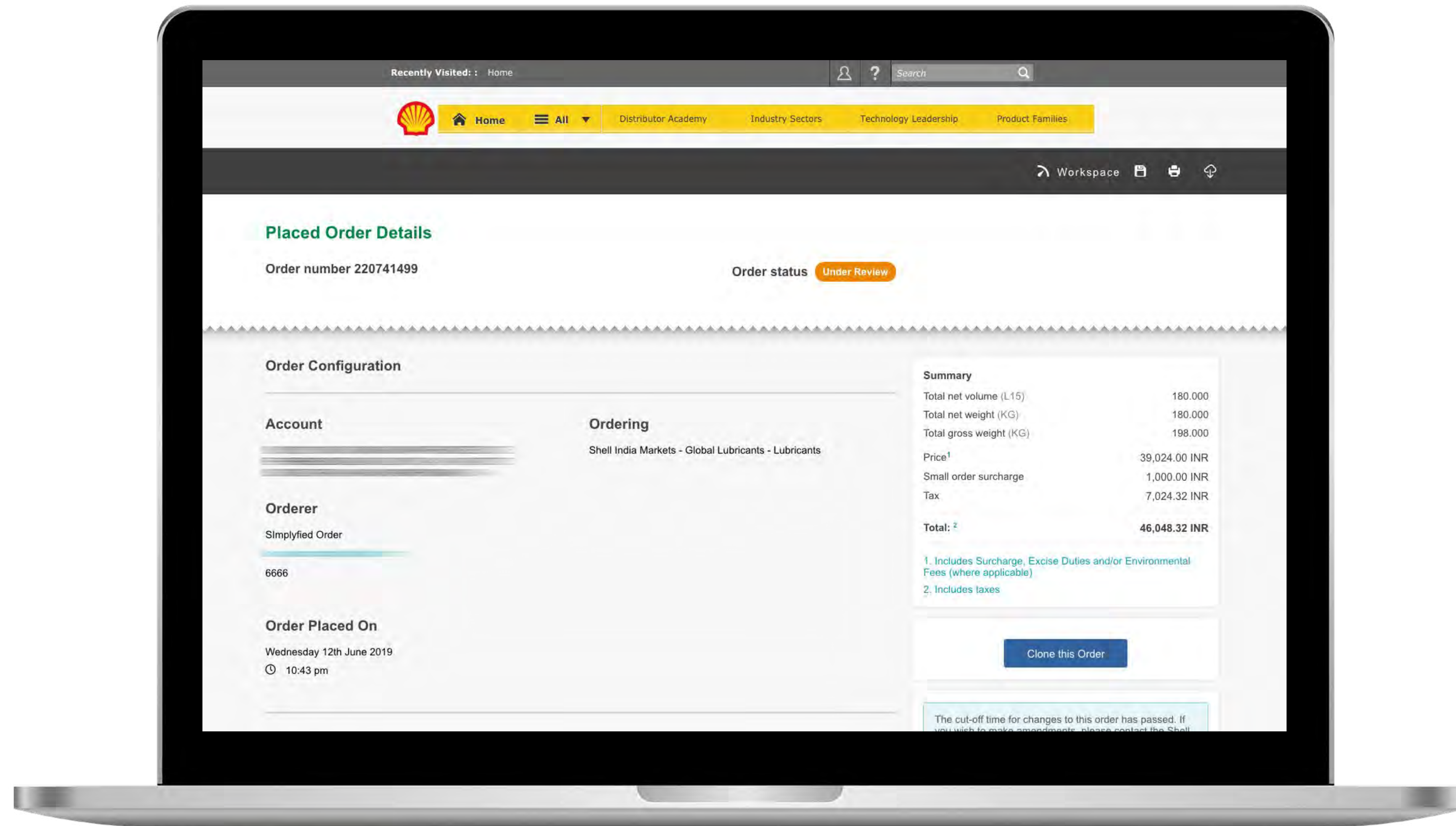
Step
4

When you enter your chosen order, you will see the status here.
This order is already scheduled (planned for transportation)

2.10

Order Management

How To View Delivery Shipping And Order Details Of A Placed Order



Step
5

Here you can see all other possible statuses of your orders:

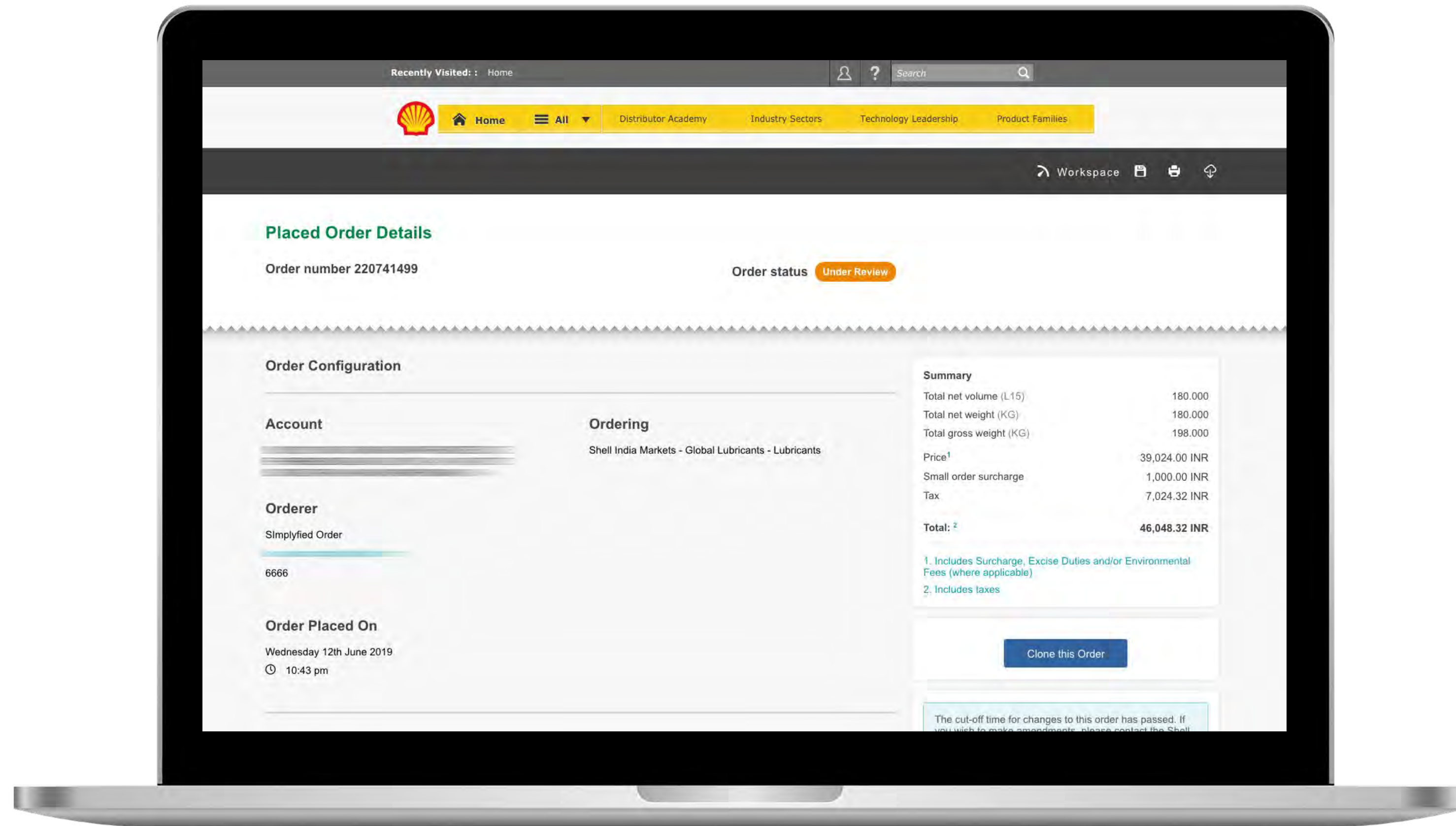
Shipped – fully delivered

Partially Shipped – part of products was delivered

2.10

Order Management

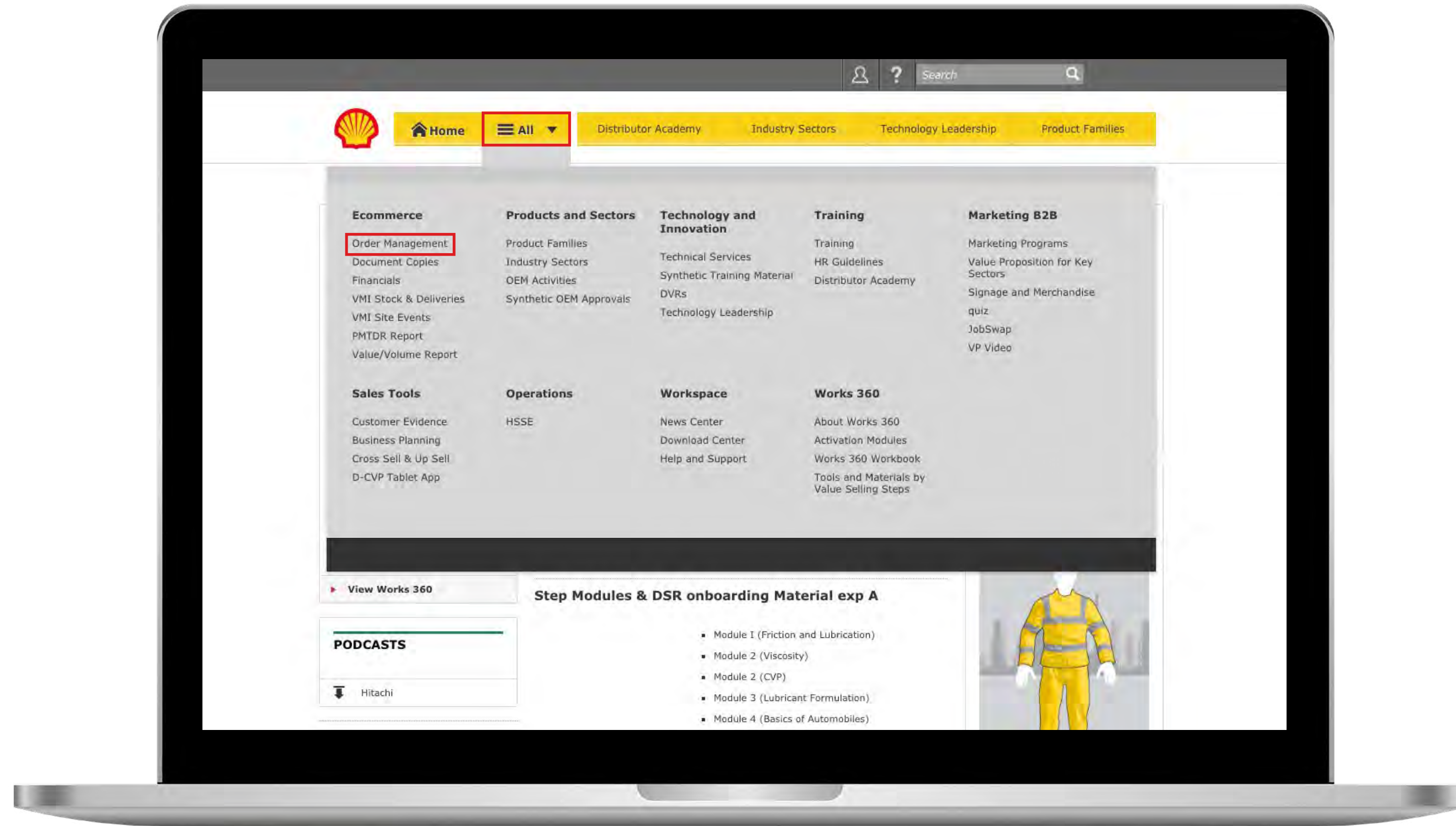
How To View Delivery Shipping And Order Details Of A Placed Order



Step
6

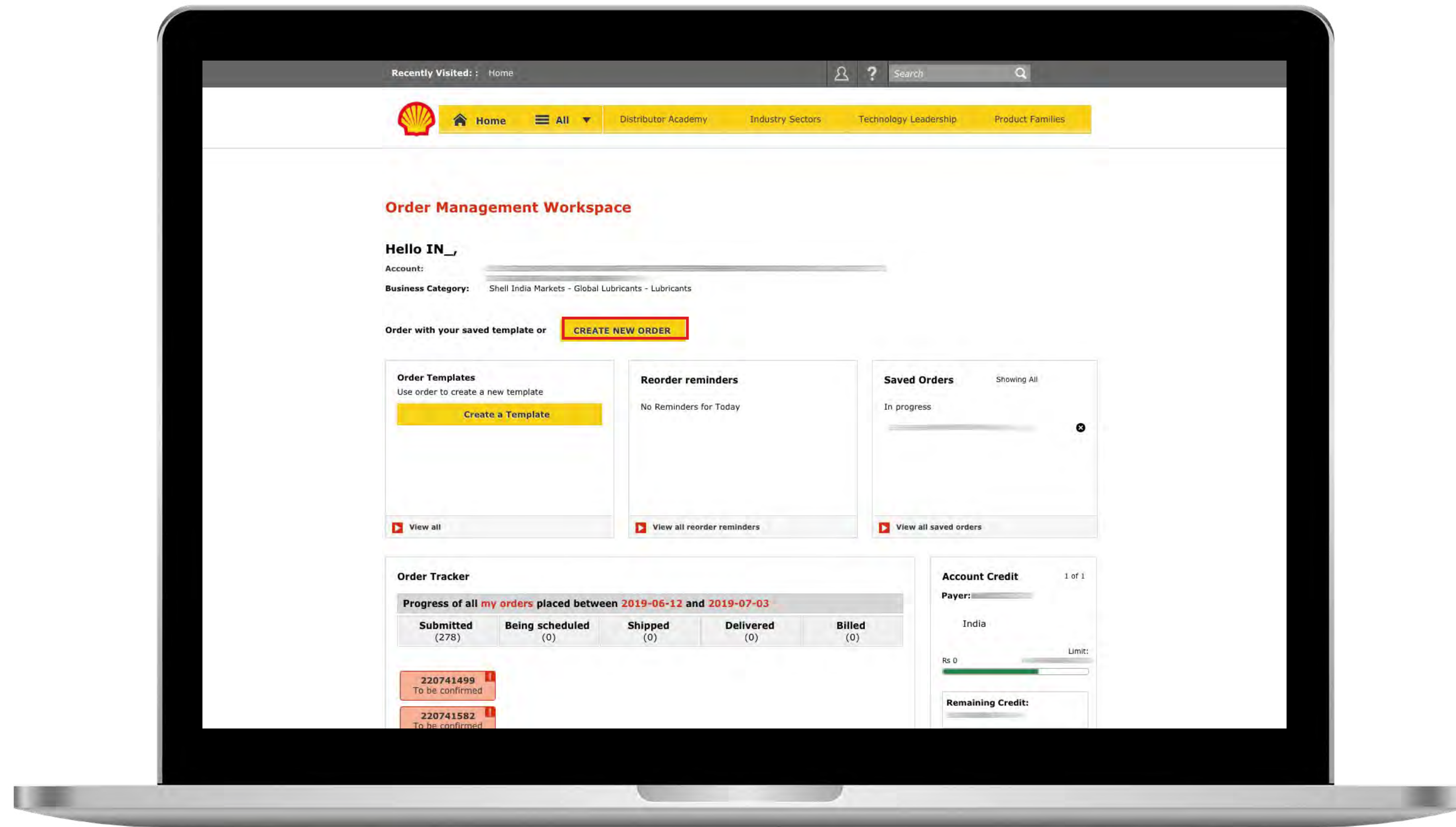
Billed – invoice/invoices were issued for all products form this order

Partially Billed – invoices were issued for this order but not for all products yet



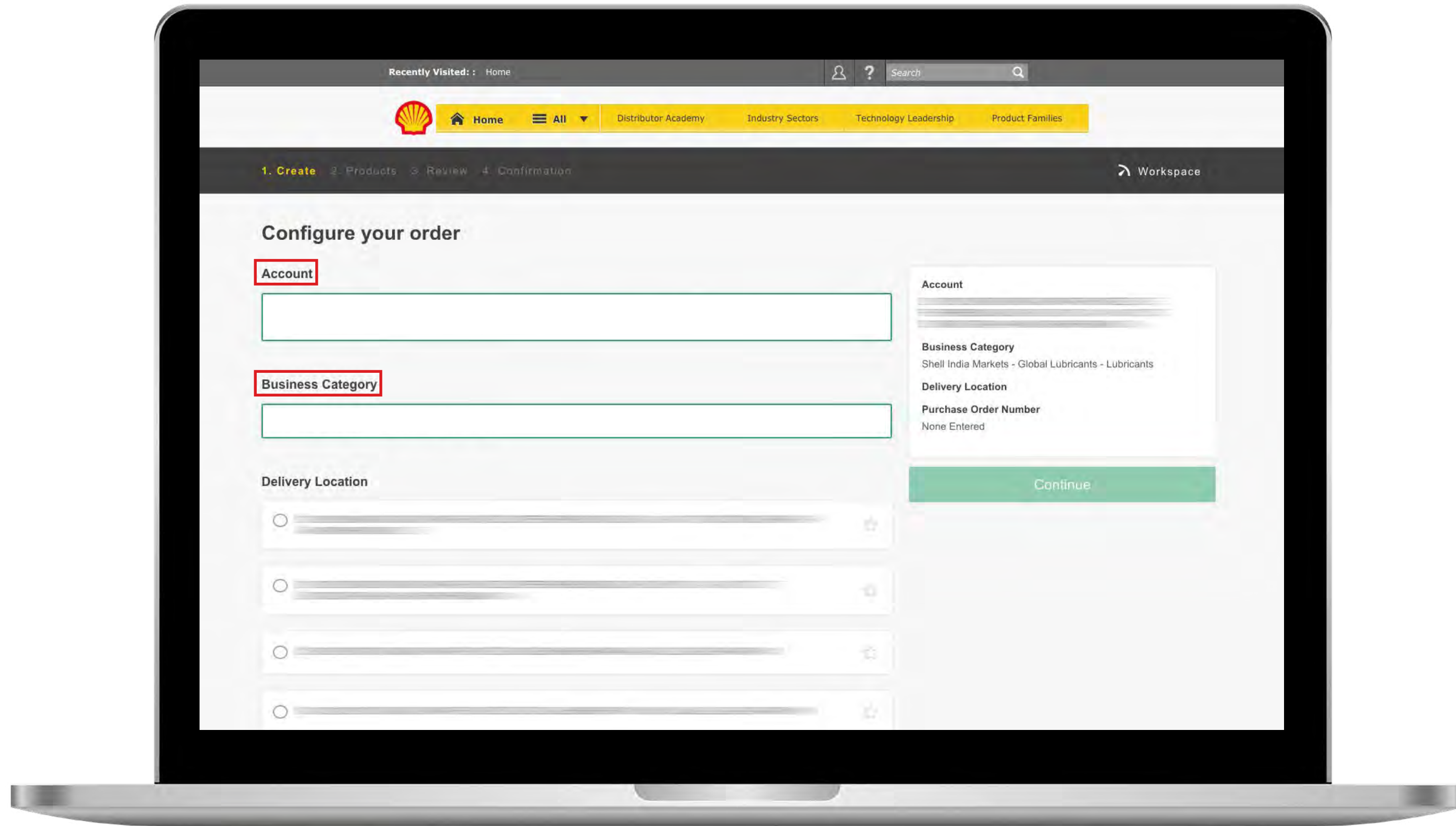
Step
1

Click **All** at the top of navigation and
click on **Order Management**



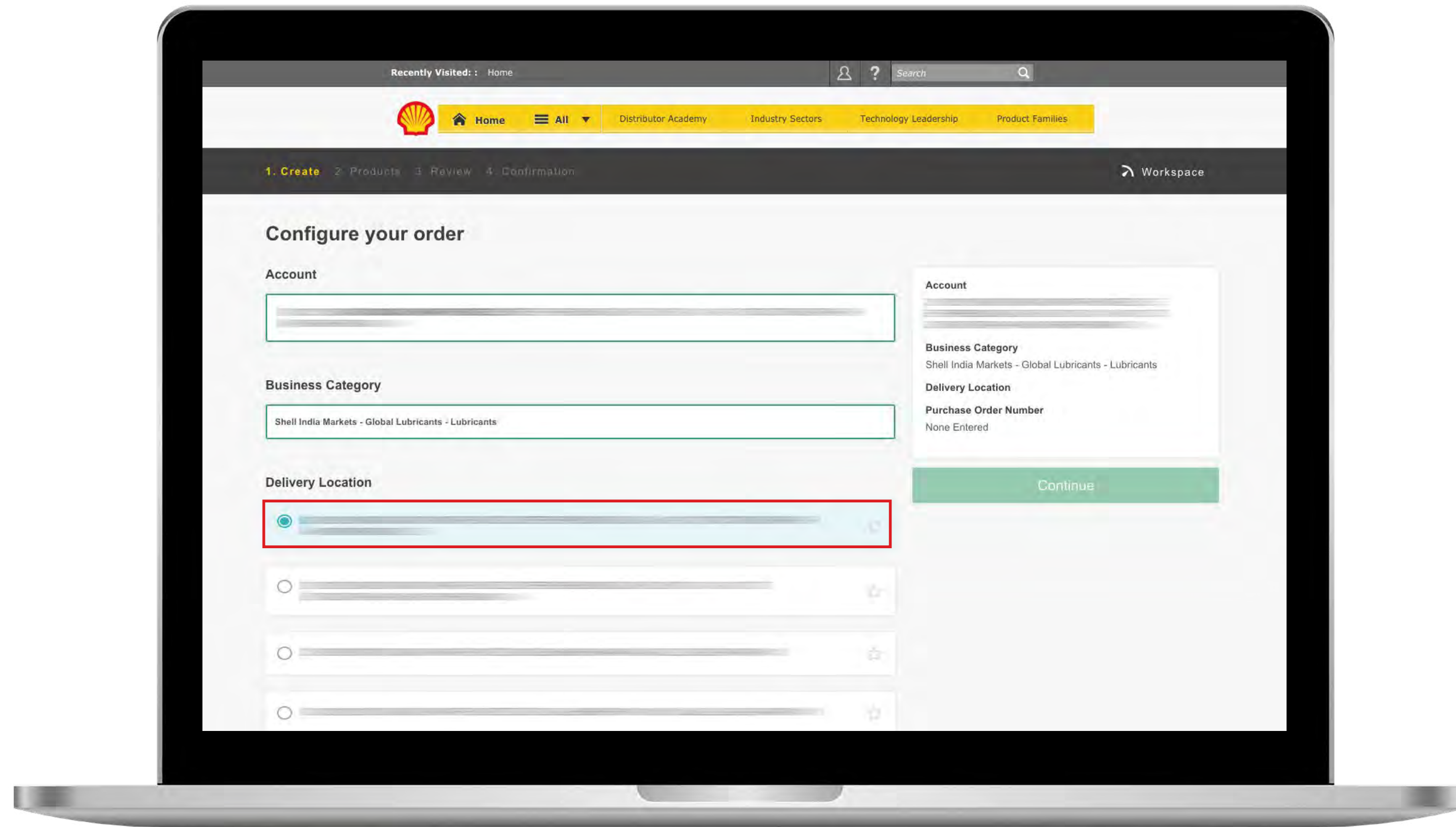
Step
2

In **Order Management Workspace**
click **CREATE NEW ORDER**



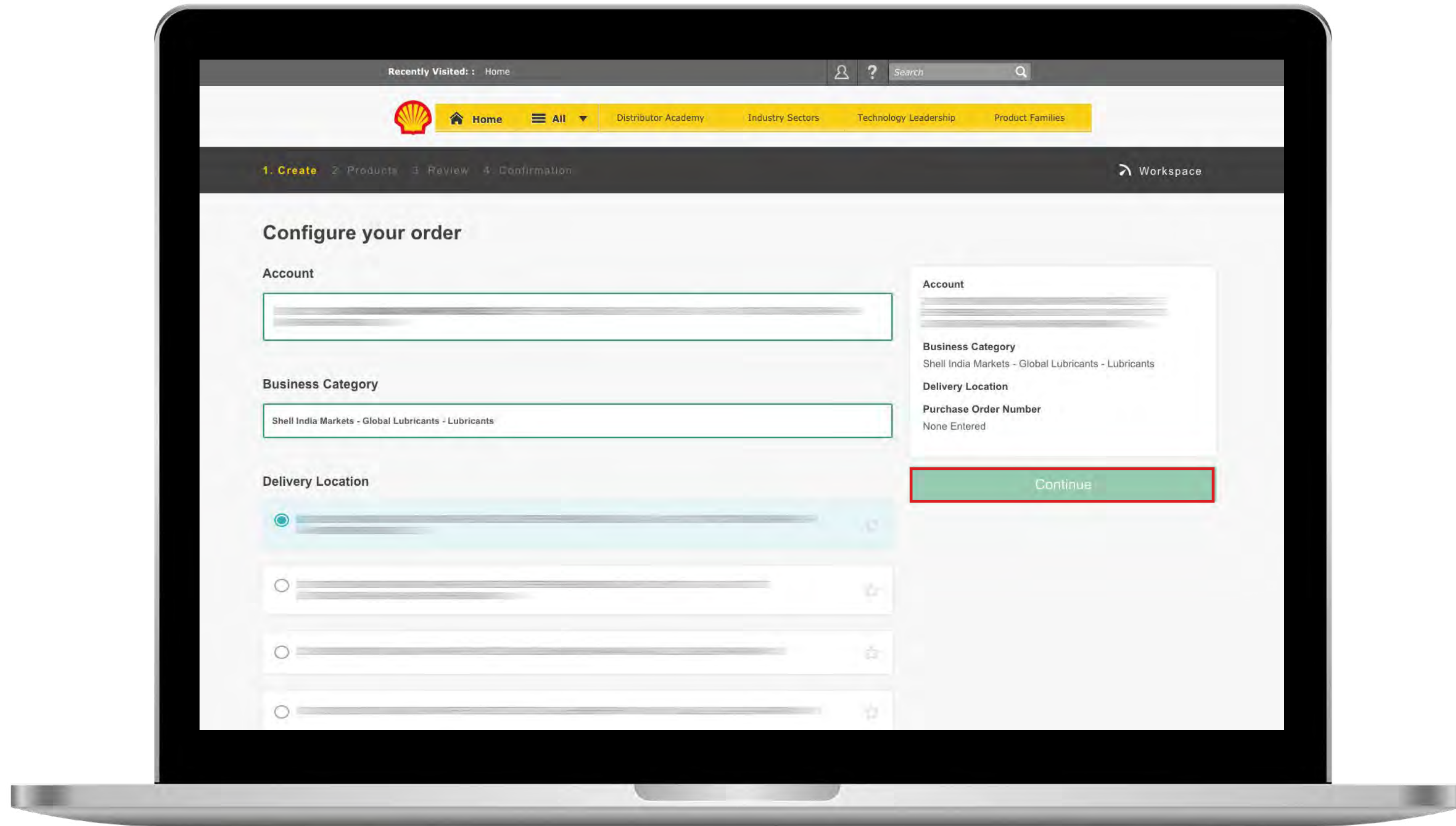
Step
3

Select your **Account** number and **Business Category**



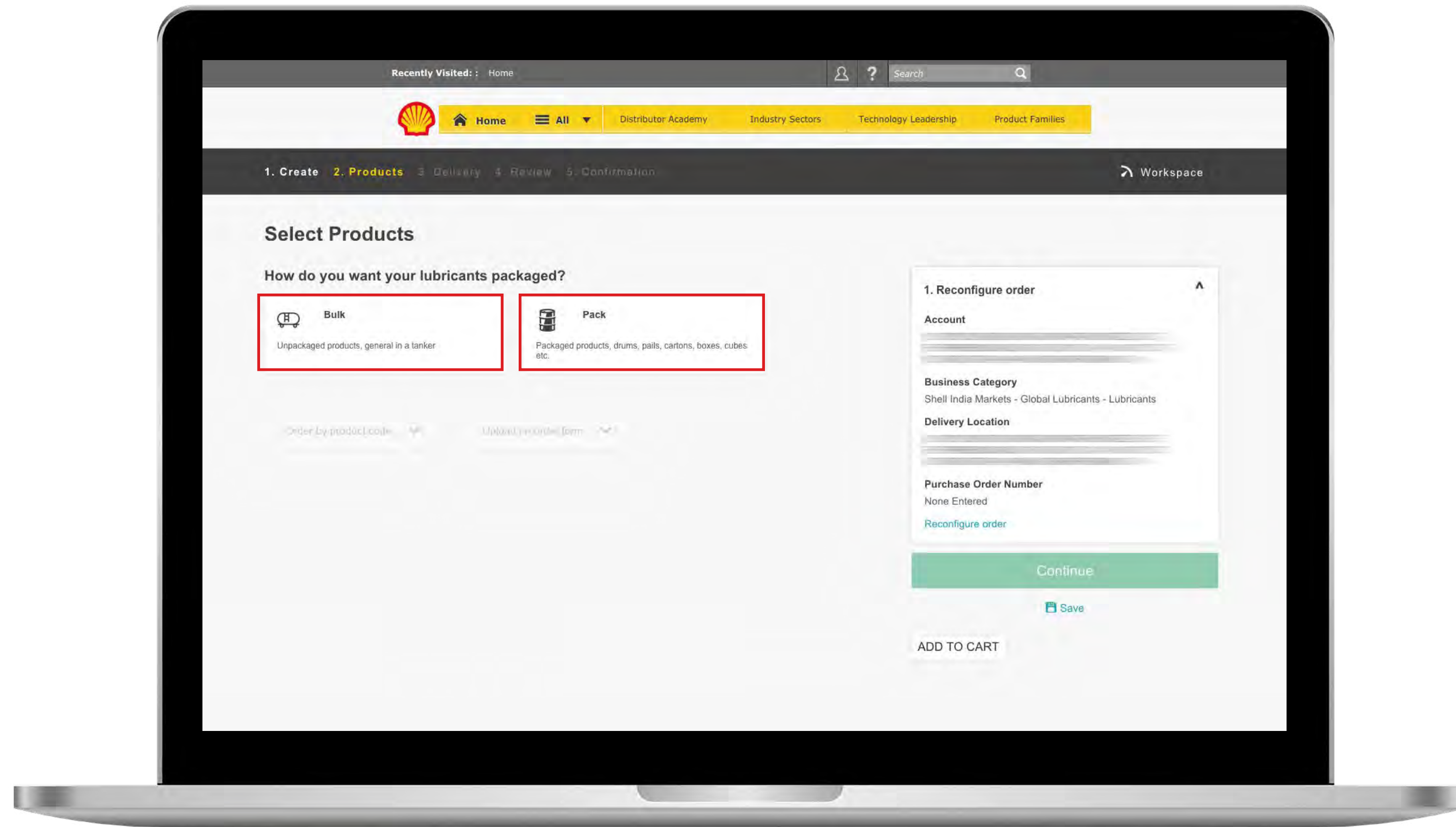
Step
4

Next, choose a **Delivery Location** from the list.
All delivery locations for your account will be listed



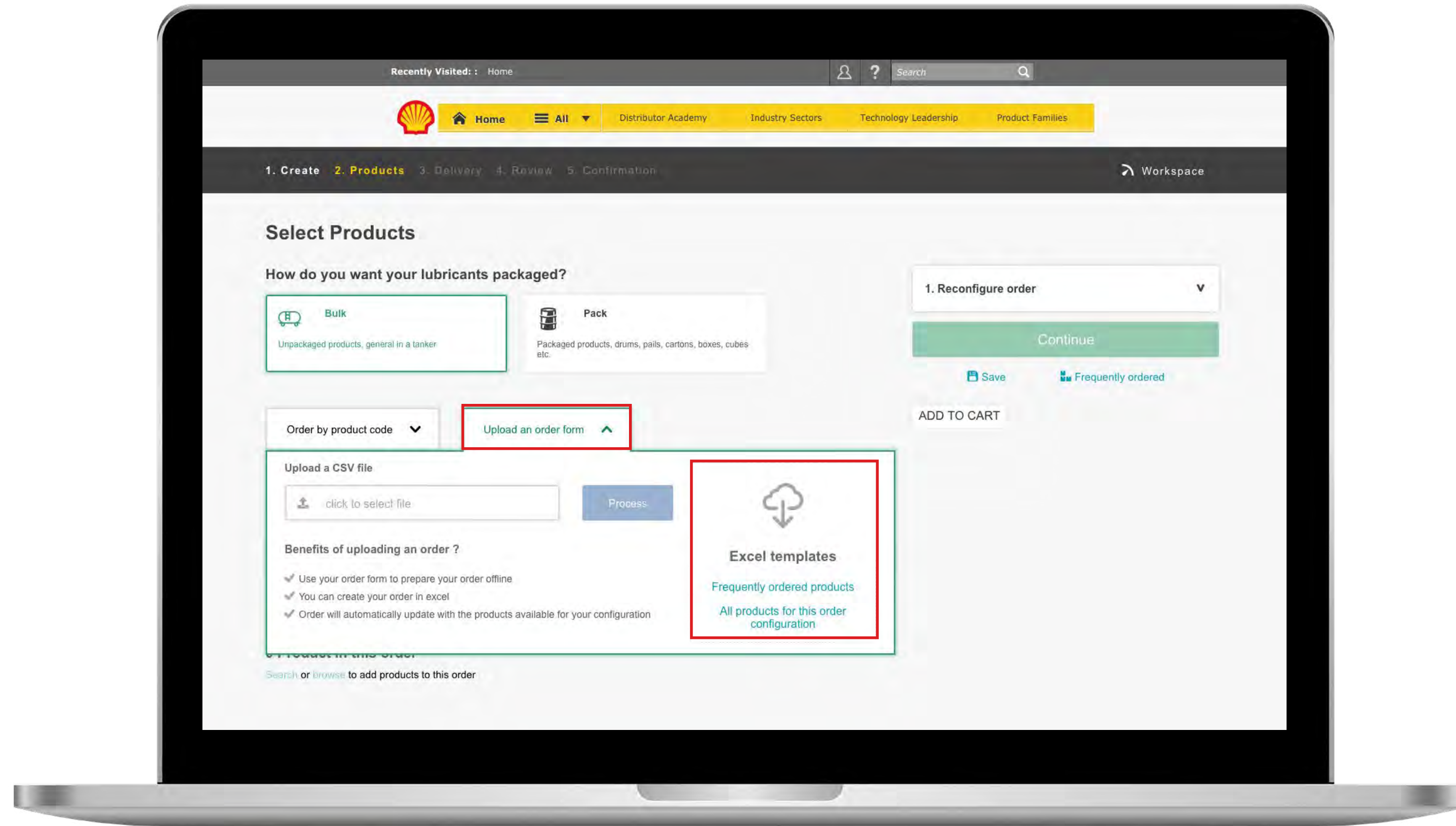
Step
5

Click **Continue** after selecting delivery details



Step
6

Choose a product type using the **Select Products** panel.
You must choose between **Bulk** or **Pack**



Step
7

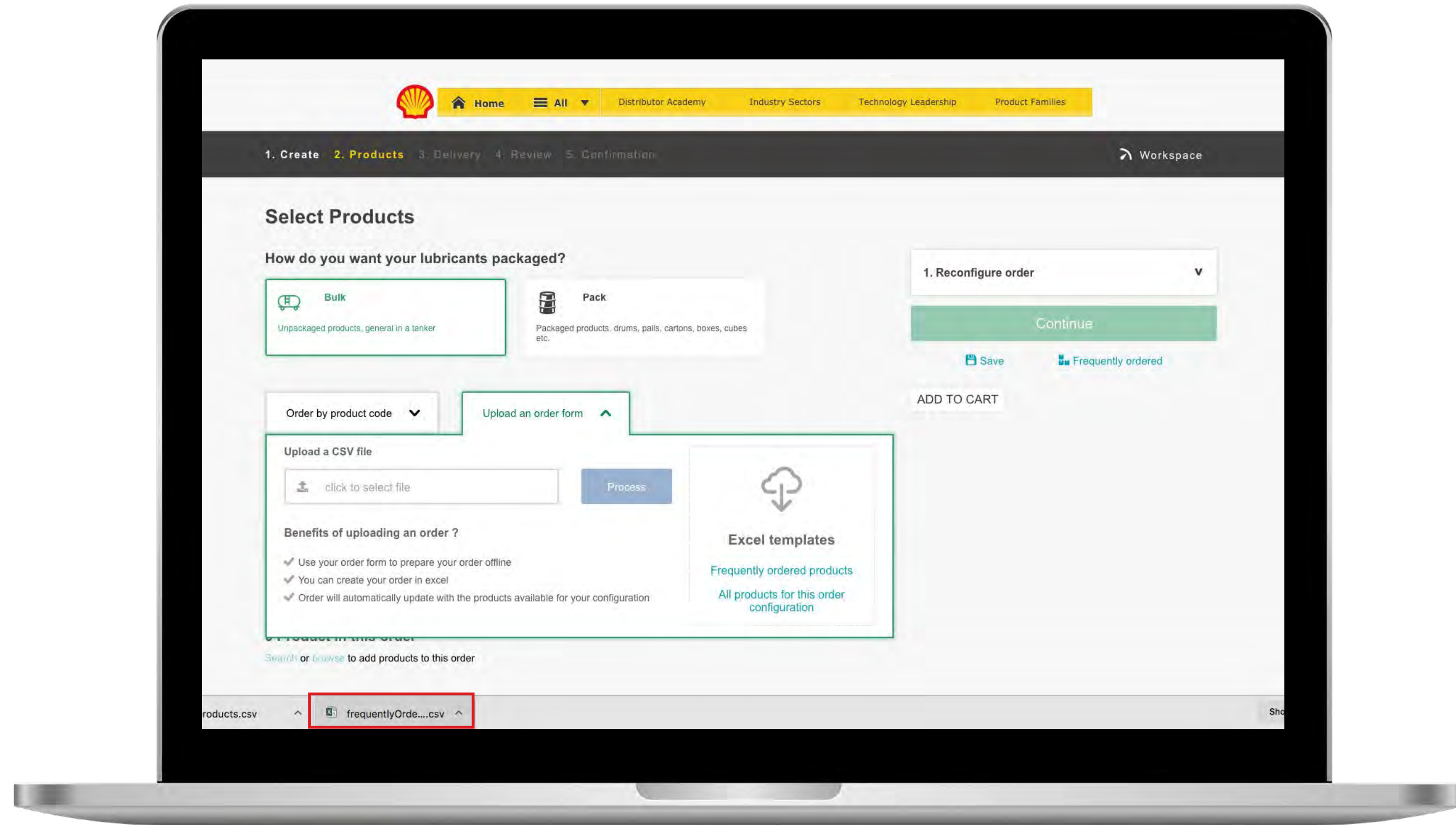
To make a bulk upload for products click on
Upload an order form

Here you will see a template option that must be completed
and used for a bulk upload order

2.11

Order Management

How To Bulk Upload Products Of An Order



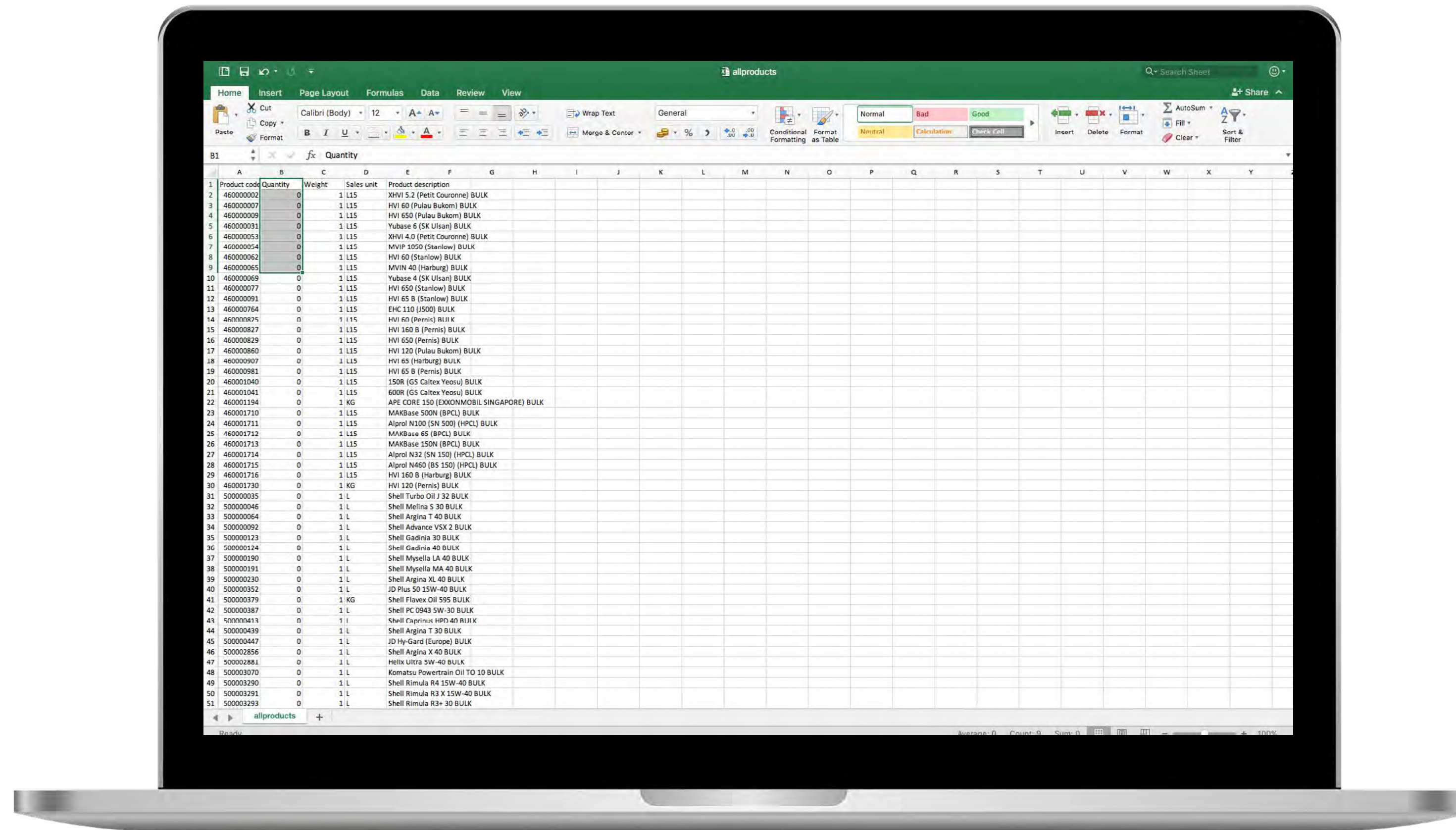
Step
8

You need to download the template to your computer.
It can be done easily just by clicking on it

2.11

Order Management

How To Bulk Upload Products Of An Order



Step
9

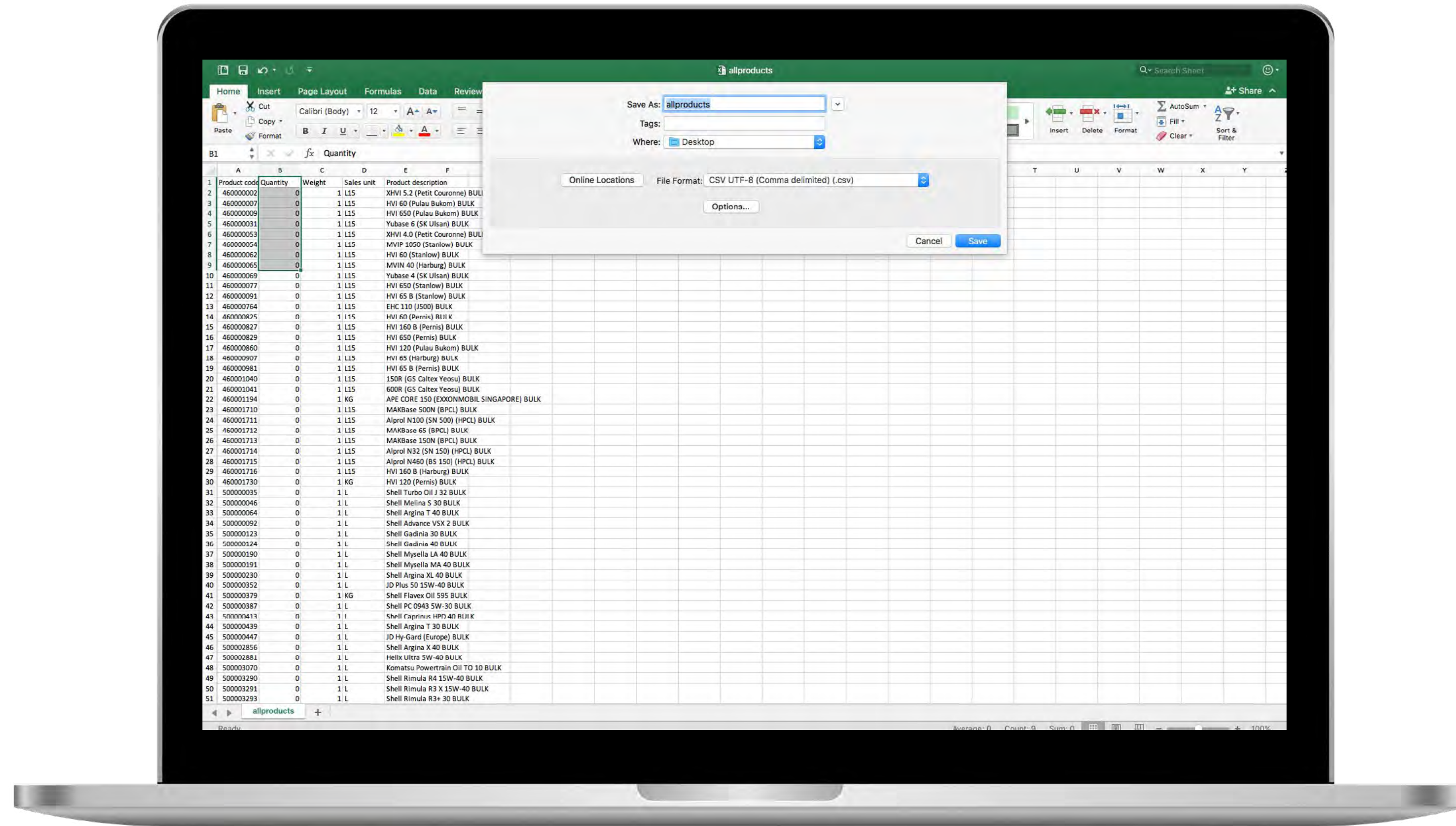
When you click on downloaded document
you will see a list of products

Now you can add the needed quantity of each product
that you want to add to this bulk order

2.11

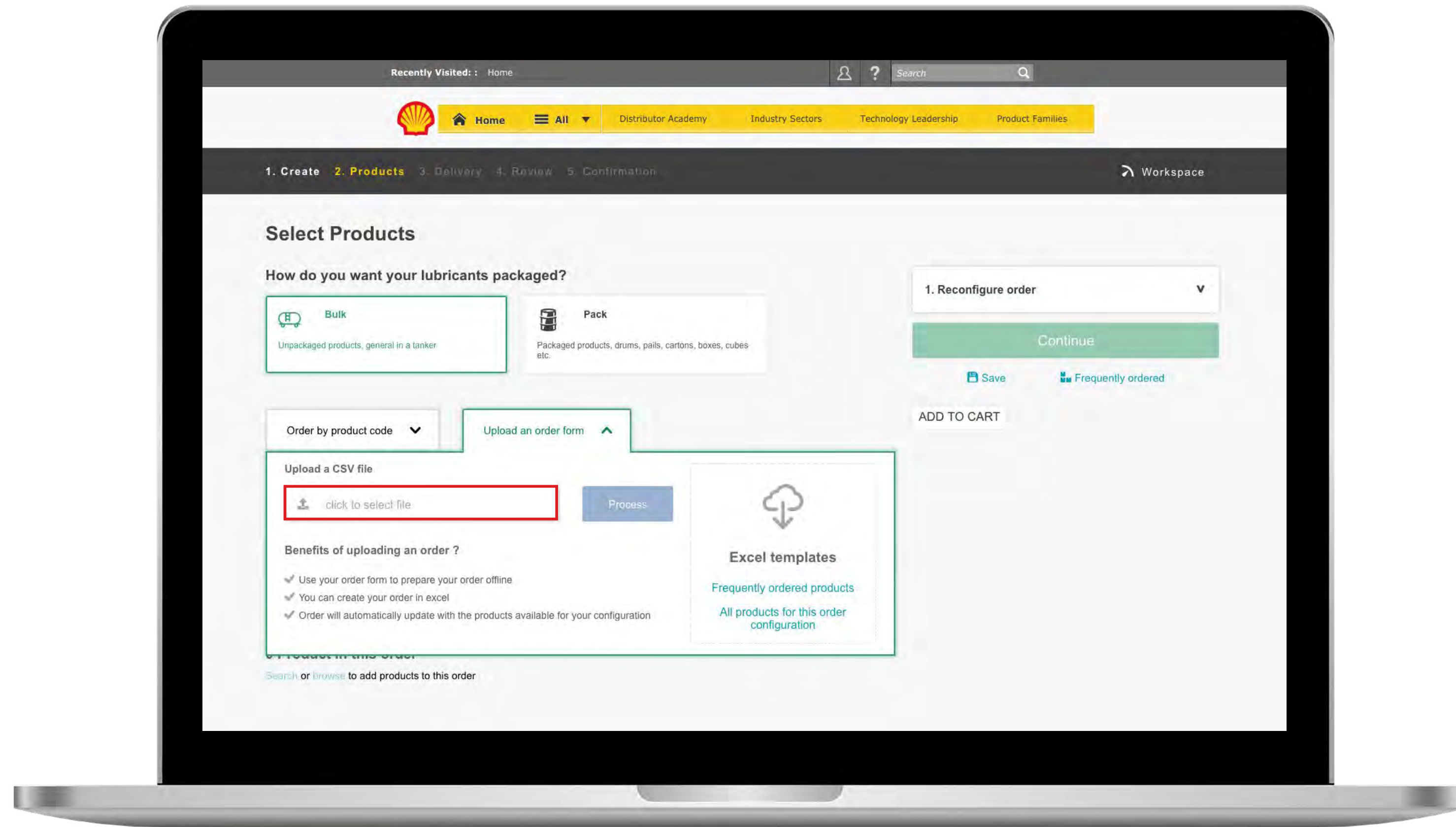
Order Management

How To Bulk Upload Products Of An Order



Step
10

Then save this document on your computer.
It's good to save it in a place you can easily upload from
(e.g. on desktop using "Save as CSV" option)



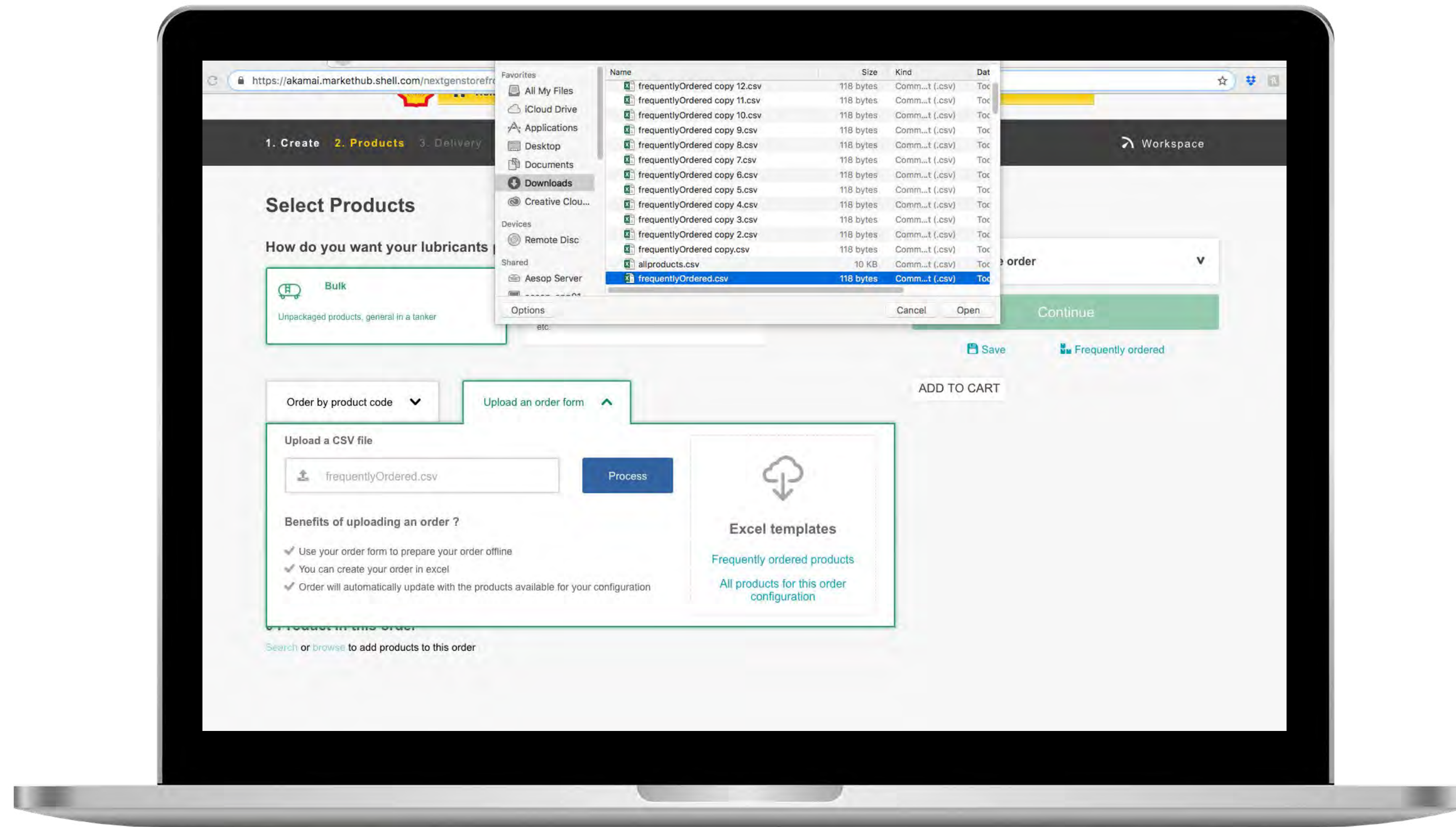
Step
11

Click on **click to select file** to upload the saved document

2.11

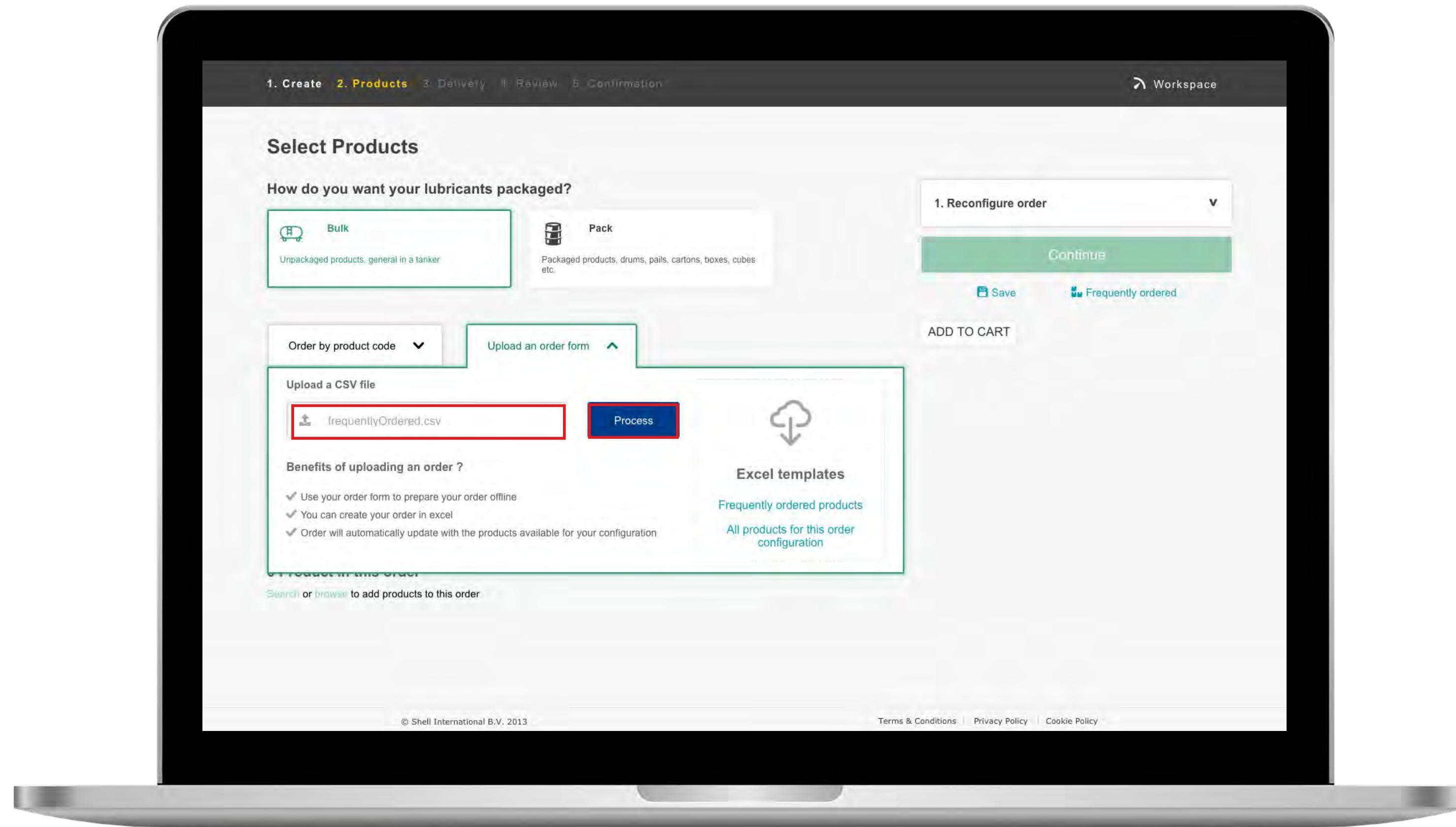
Order Management

How To Bulk Upload Products Of An Order



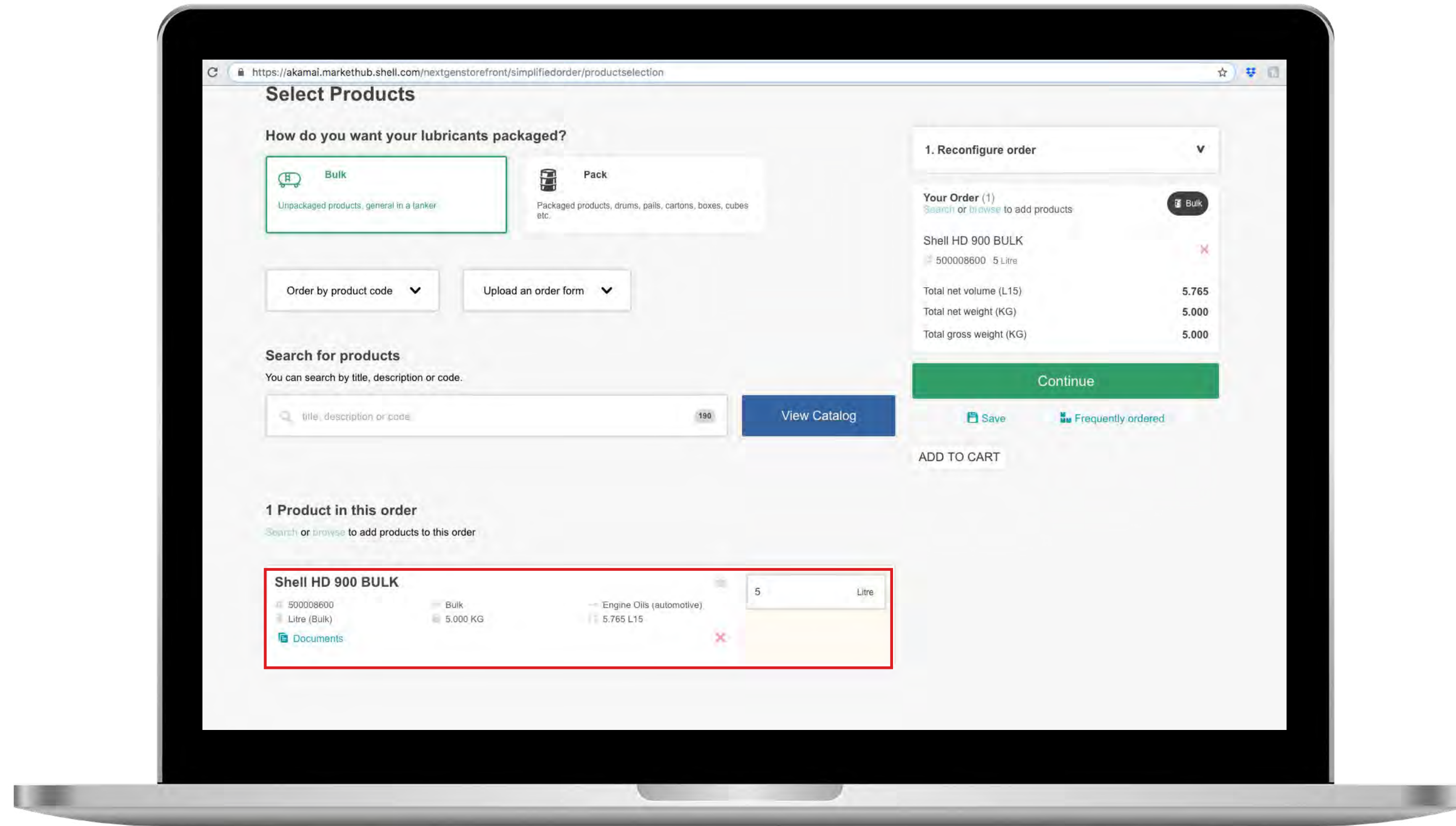
Step
12

The list of available documents will be shown.
Choose the CSV document and double click to upload



Step
13

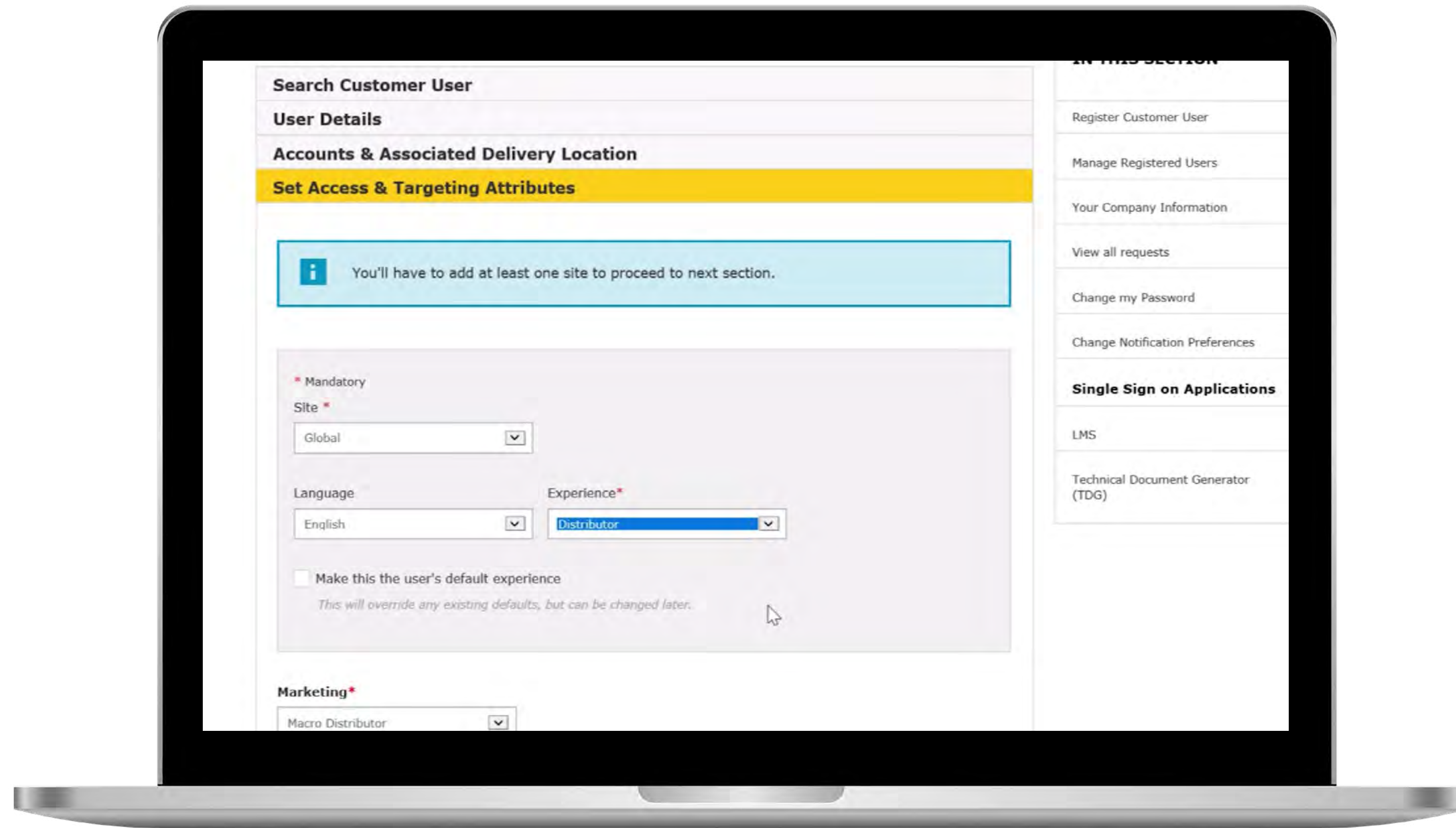
Once the file has uploaded, you can see this in the box.
Click on the **Process** button



Step
14

After that you will see that all products you added
and the quantity, appear in your order

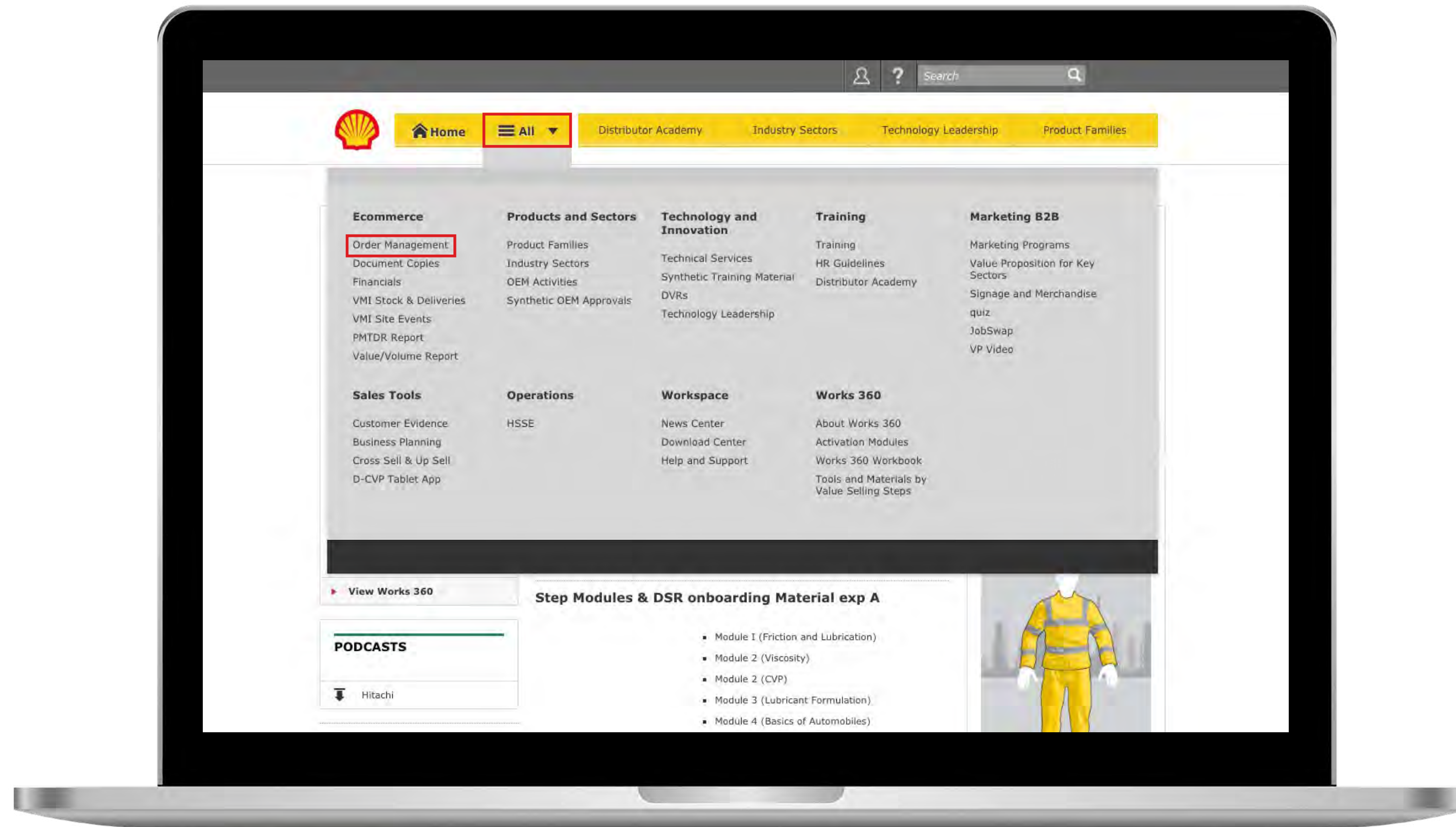
You still have the option to change the quantity and products



Step
15

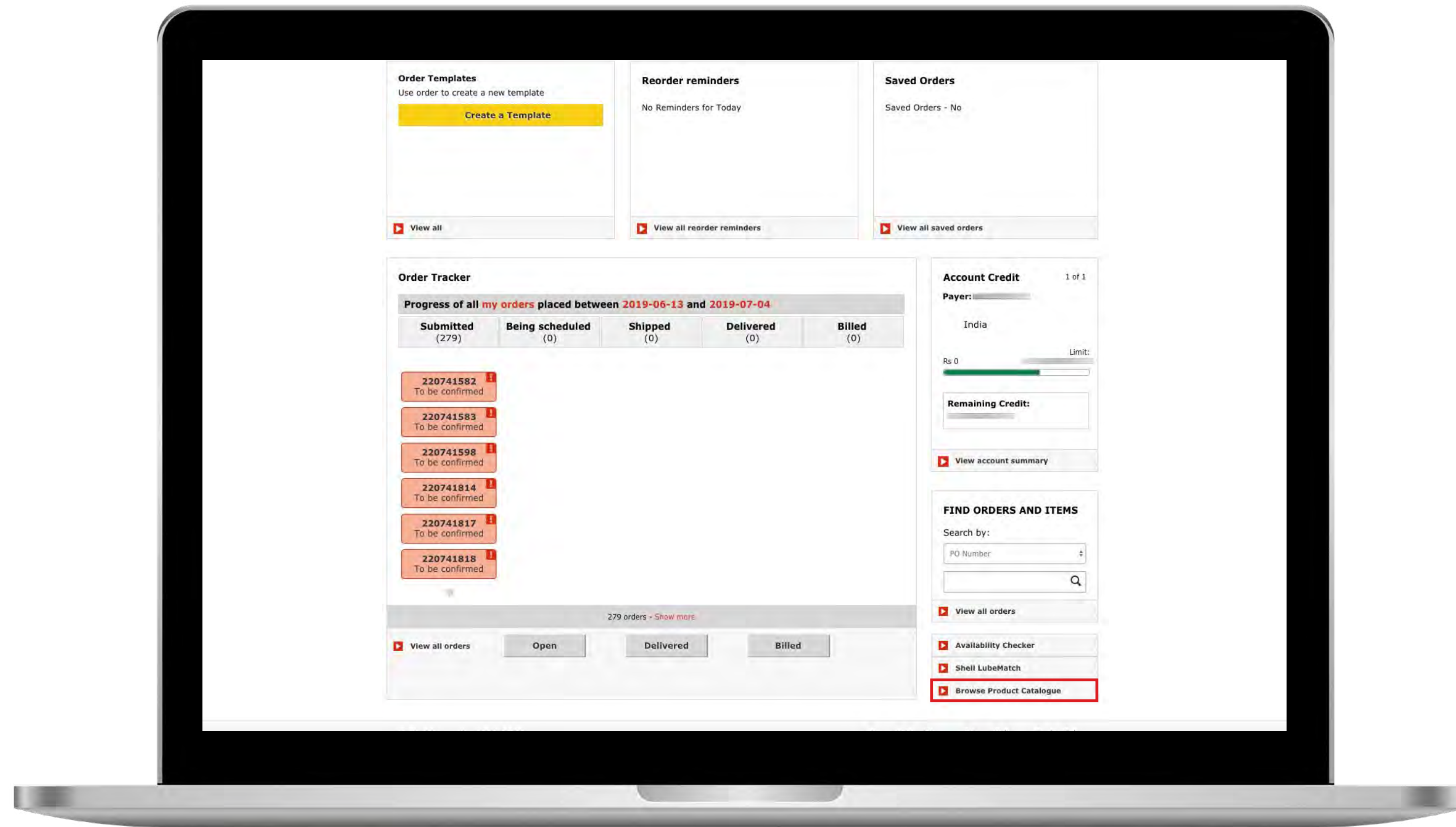
Please save this order then select **Place Order**
or **Change Order Details** (reconfigure order)

Remember: You can save as many forms as you need
and use them independently



Step
1

Click **All** at the top of navigation and
click on **Order Management**



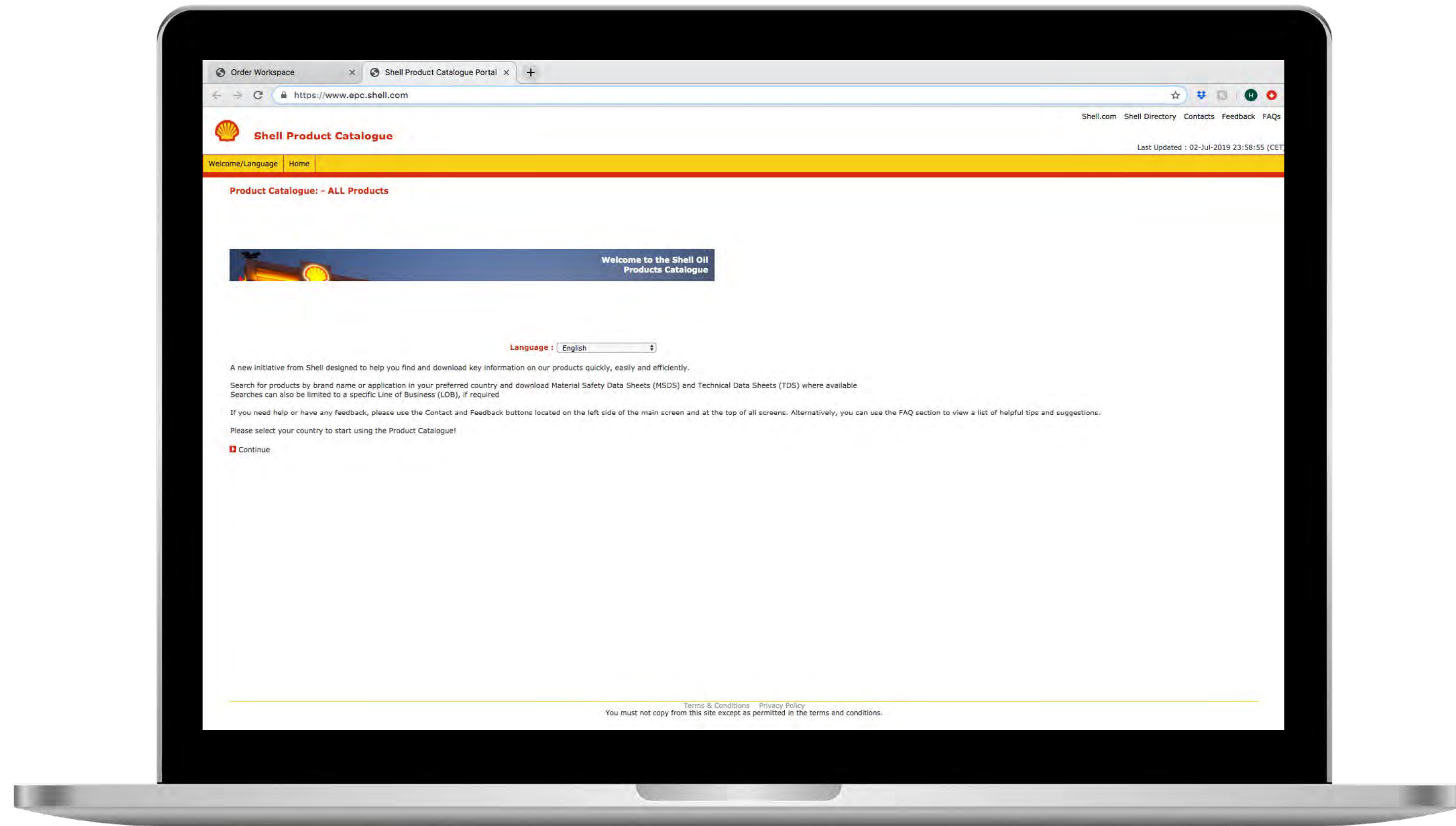
Step
2

In Order Management at the bottom of the screen
you can find the **Browse Product Catalogue** option

2.12

Order Management

How To Find All The Information Of The Products



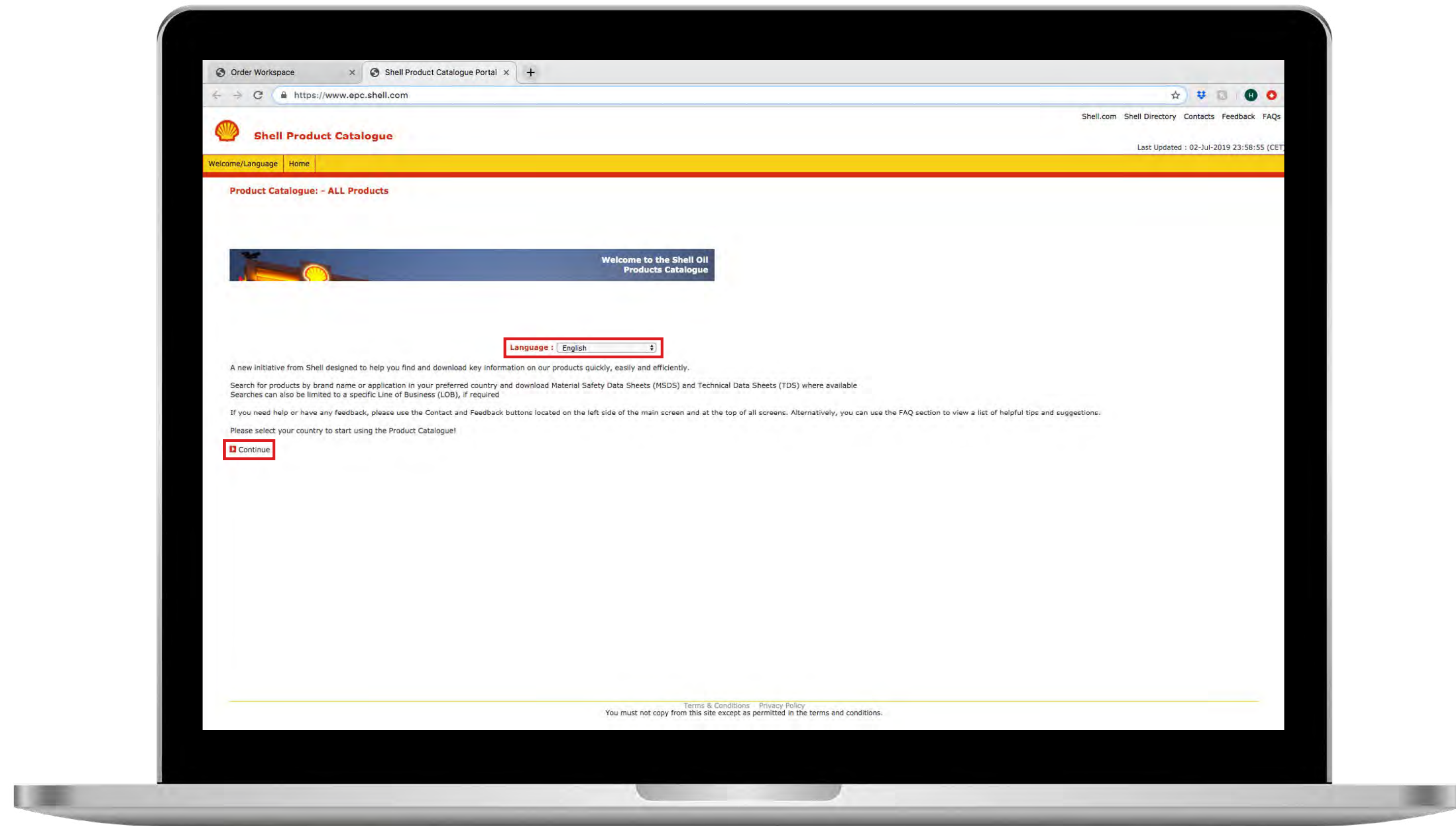
Step
3

This will take you to a new window where you can look up documentation for products available in your country

2.12

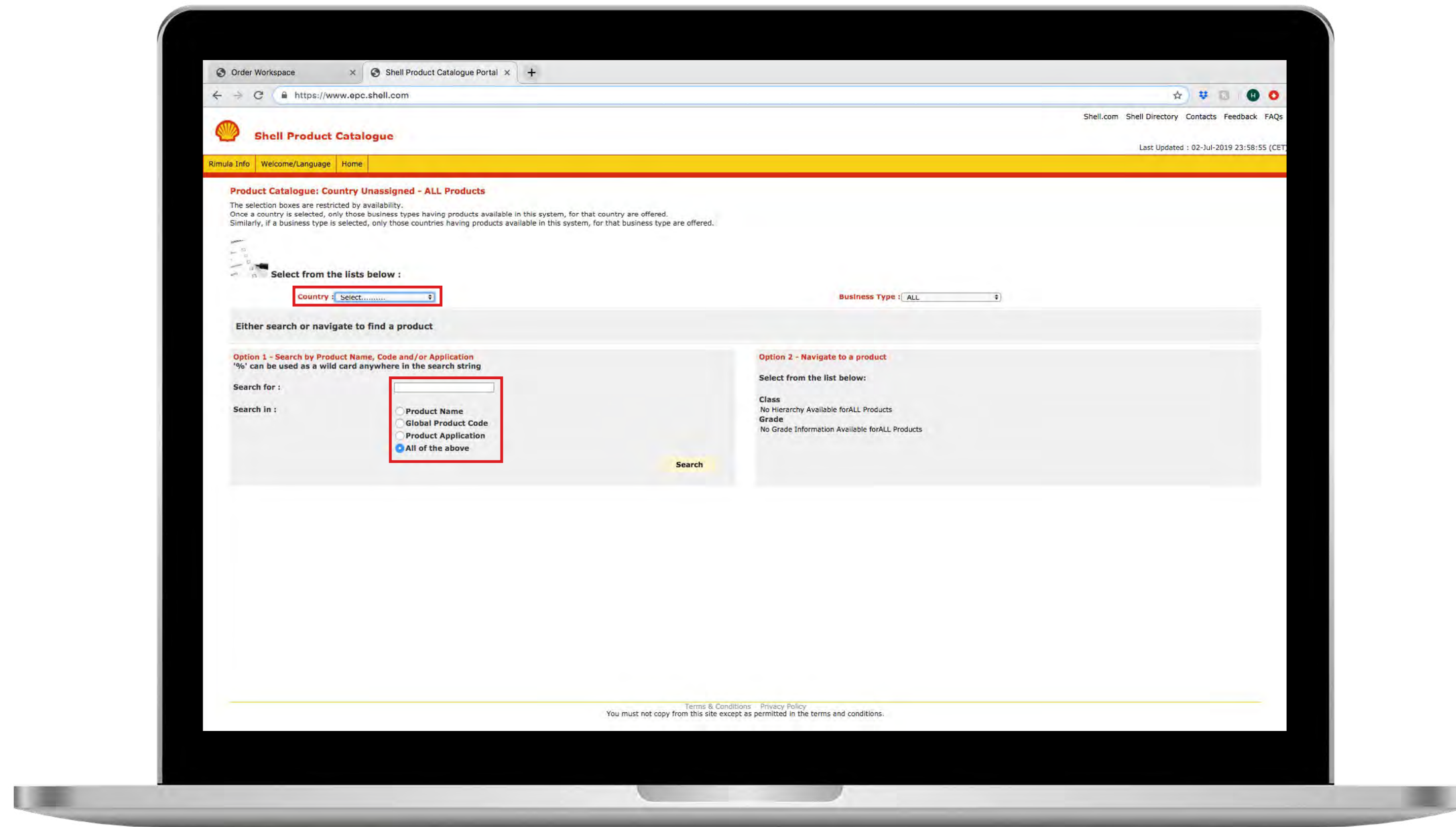
Order Management

How To Find All The Information Of The Products



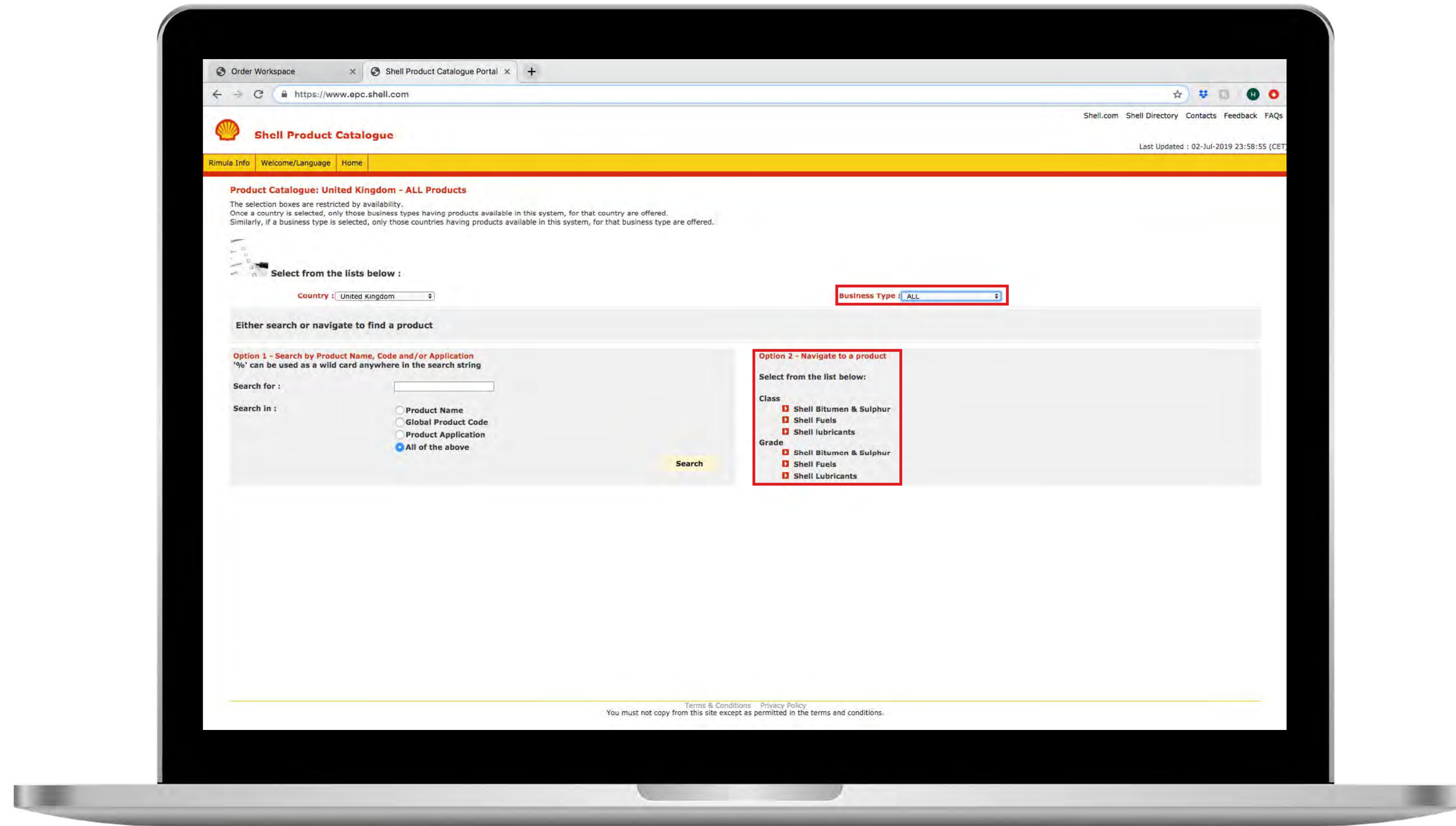
Step
4

Choose your language from the list and click **Continue**



Step
5

On next screen you can choose/change **Country** and search for a product by code, name and other products parameters (**Option 1**)

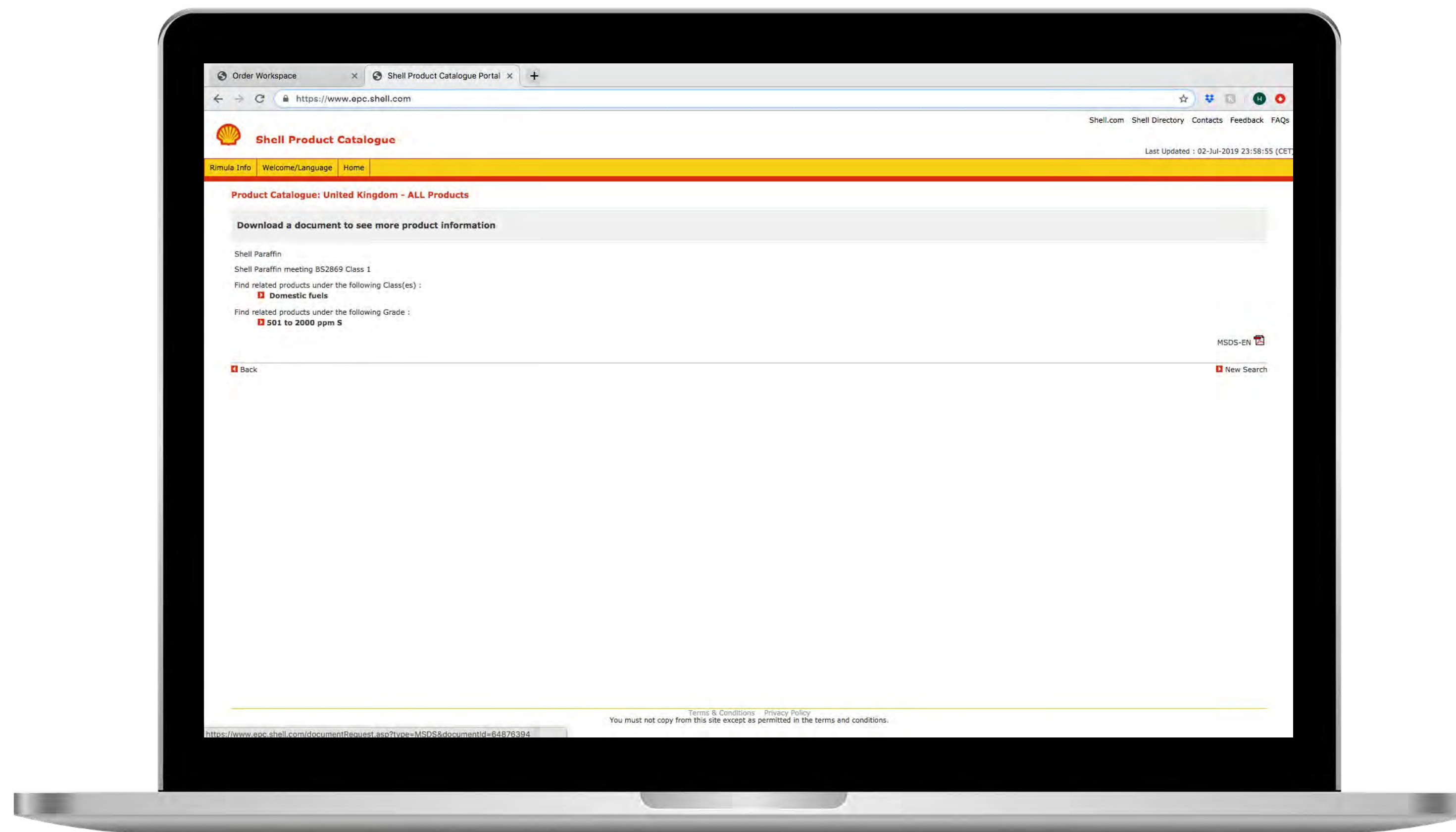


Step
6

You can choose a **Business Type** or product parameters from the **Class and Grade (Option 2)**

2.12 Order Management

How To Find All The Information Of The Products



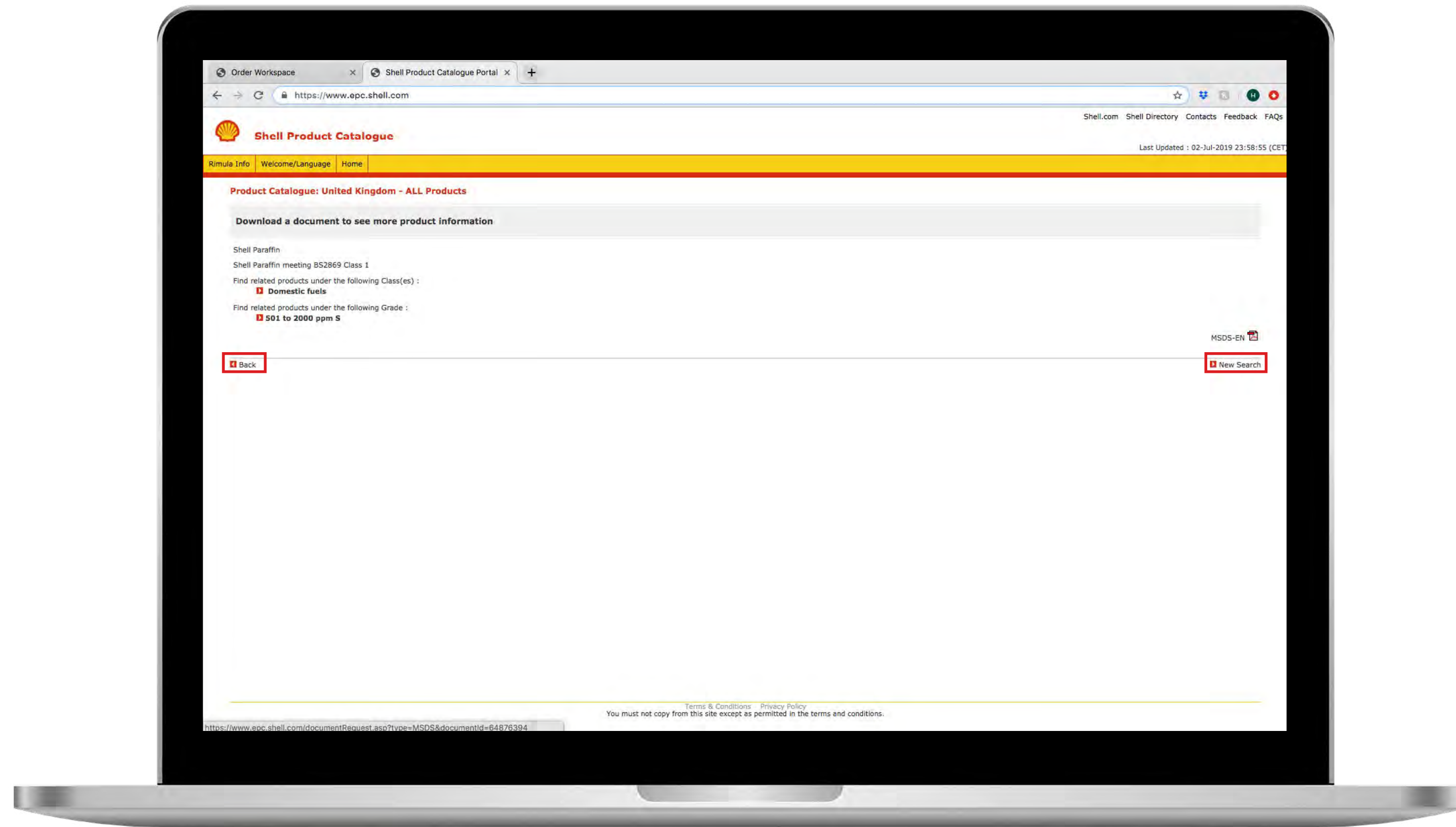
Step
7

When you navigate to a product, you can download the information in the chosen language

2.12

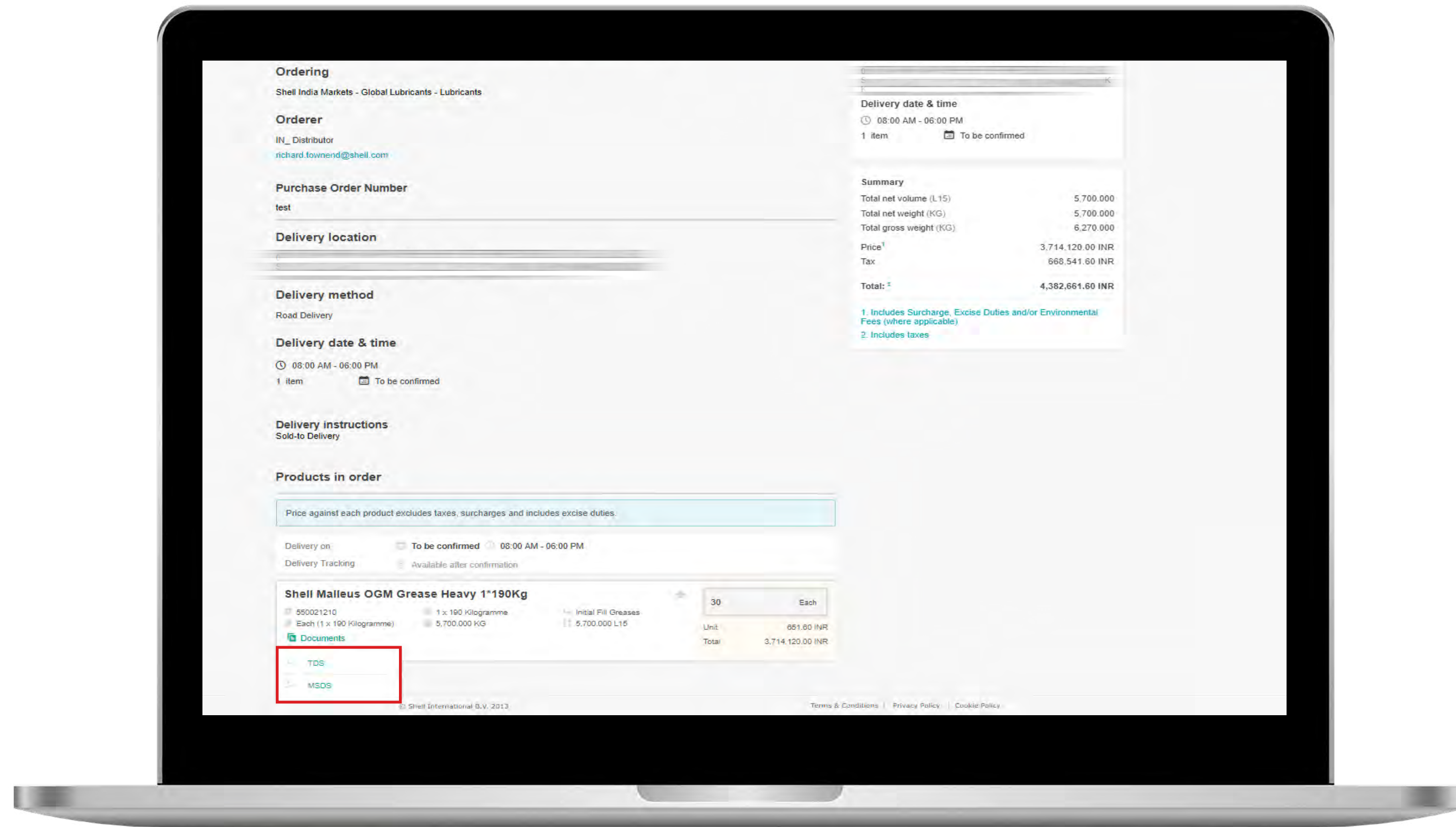
Order Management

How To Find All The Information Of The Products



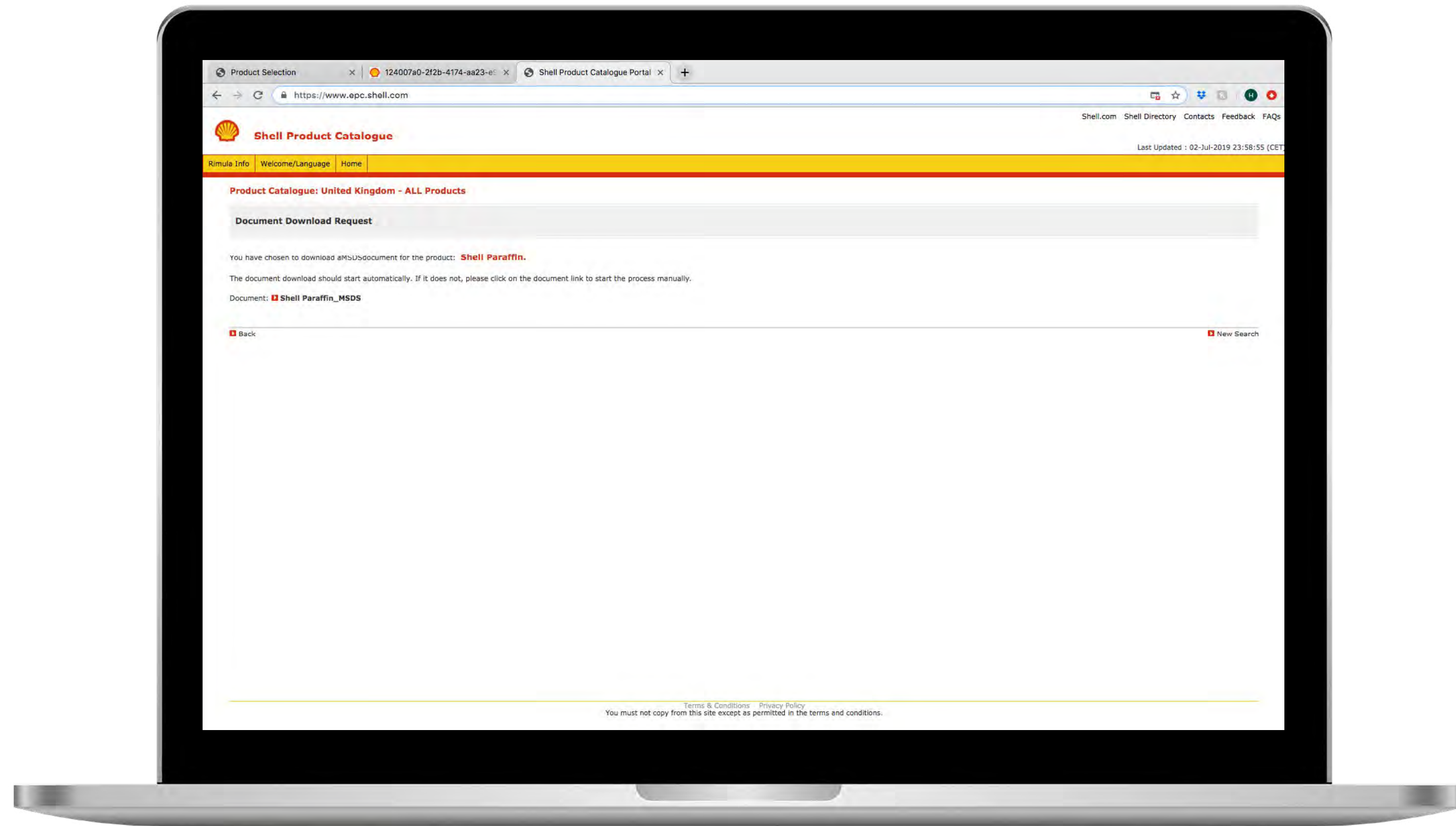
Step
8

Use the **Back** and **New Search** buttons to move towards the menu (change the parameters of your search or find new product)



Step
9

Another option to get information about a product is to download it during placing an order (at the products choosing stage)



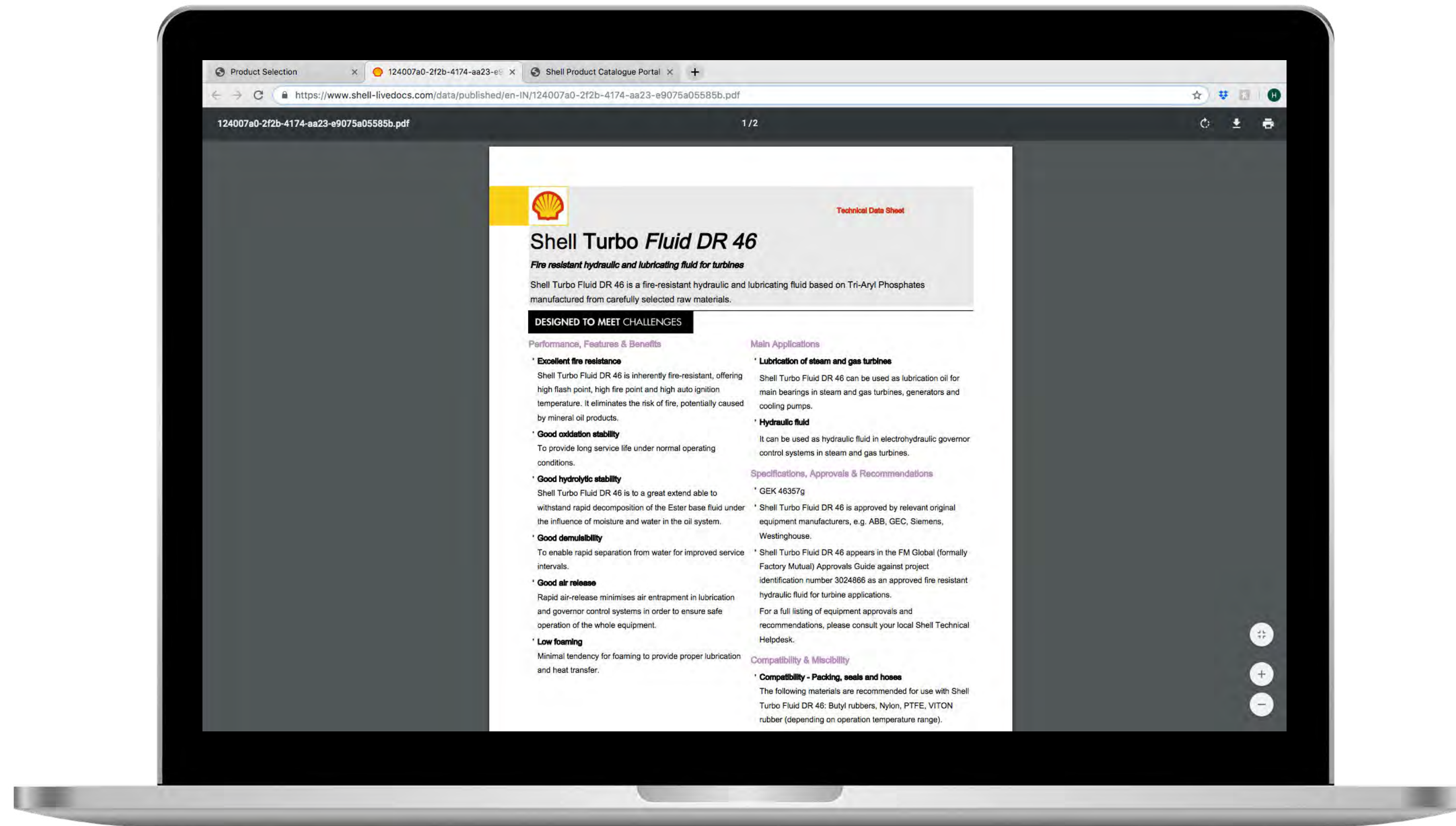
Step
10

Information about the downloaded document will appear
in the bottom left corner of the screen

2.12

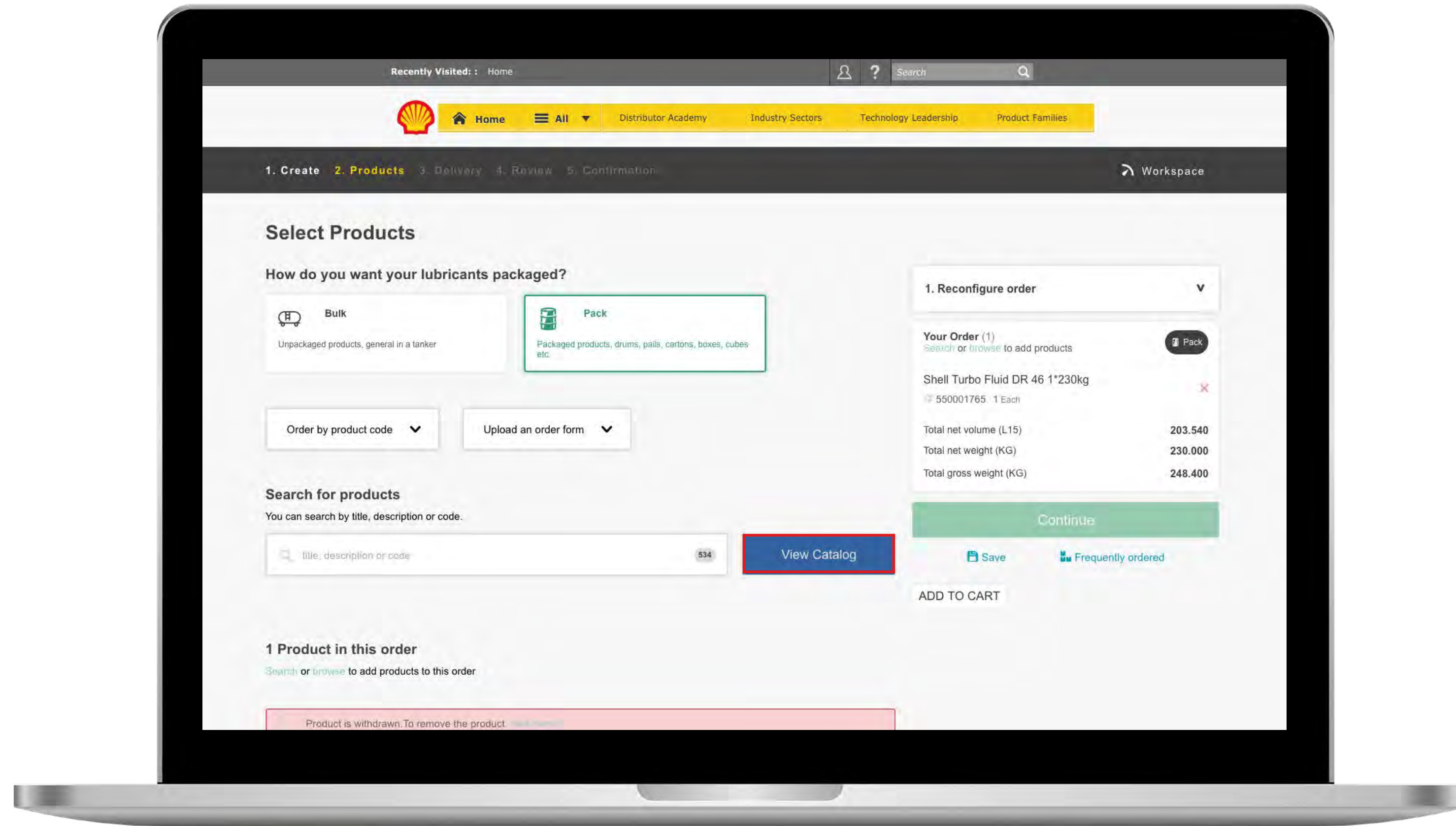
Order Management

How To Find All The Information Of The Products



Step
11

When you click on the document it will open in a new tab of your internet browser and show in a PDF format

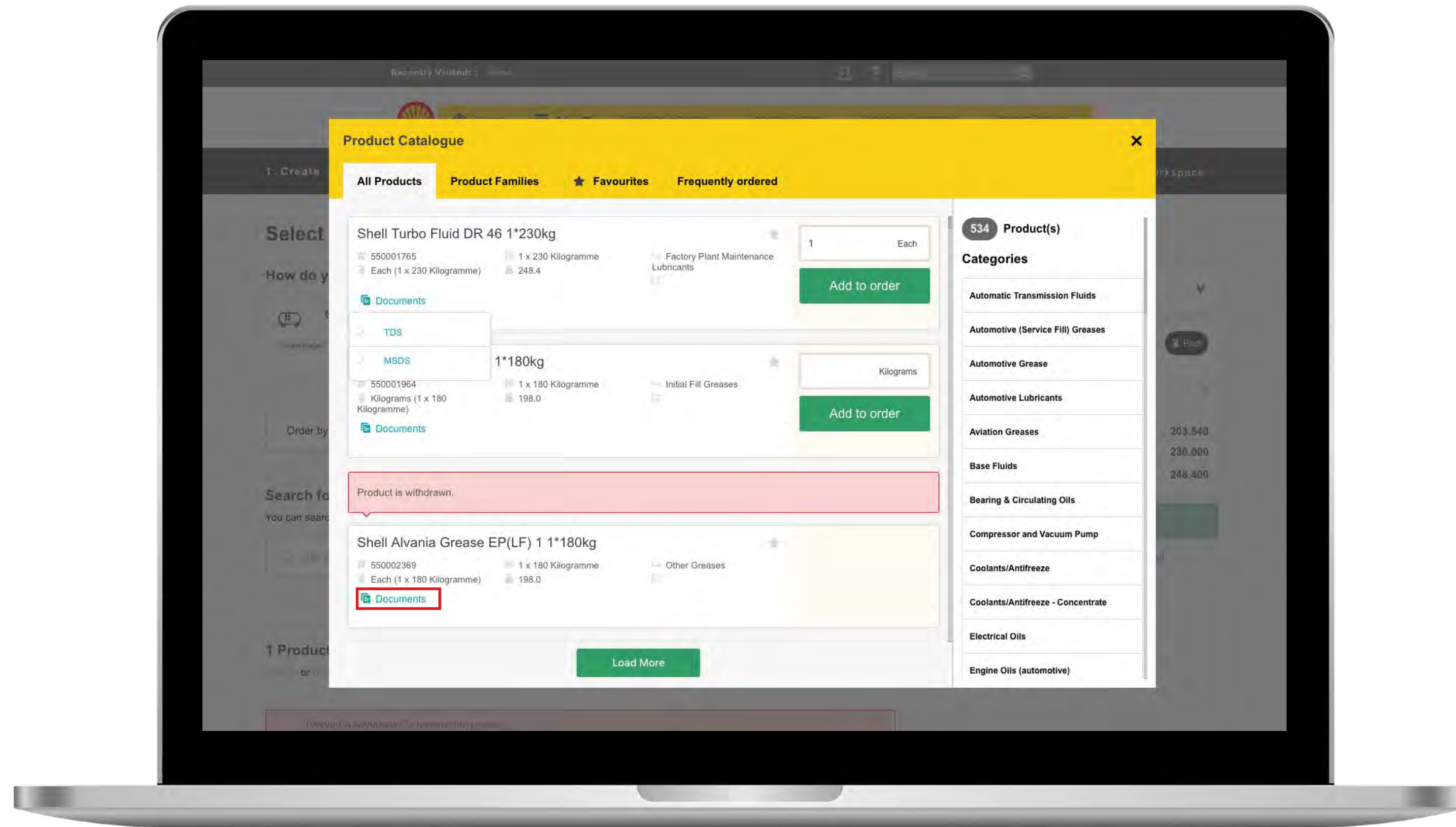


Step
12

You can also get information about products when searching through product catalogue – click **View Catalogue**

2.12 Order Management

How To Find All The Information Of The Products

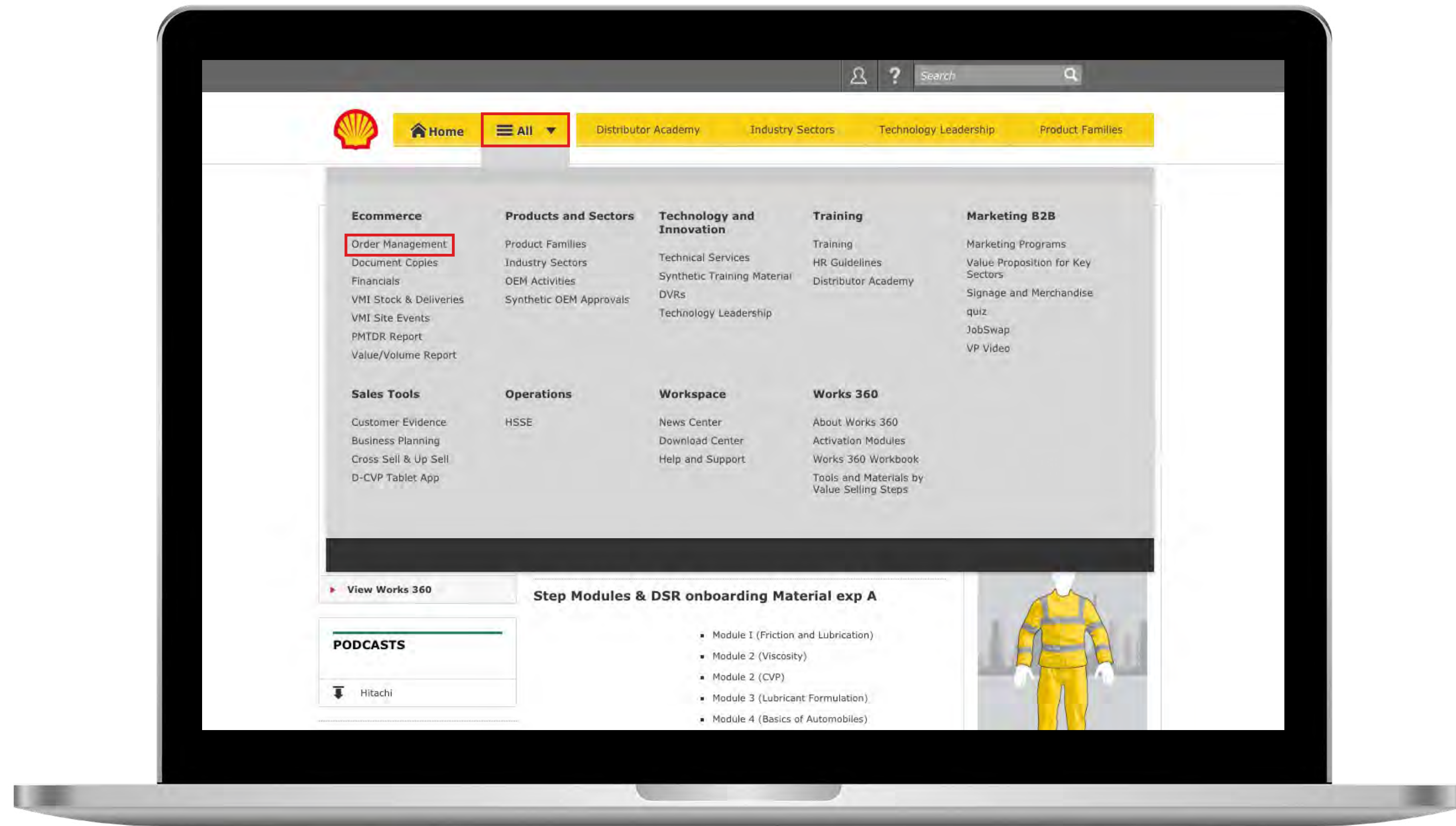


Step
13

The **Documents** button will be visible under the product name within the **Product Catalogue**

2.13 Order Management

How To Check The Status Of My Order

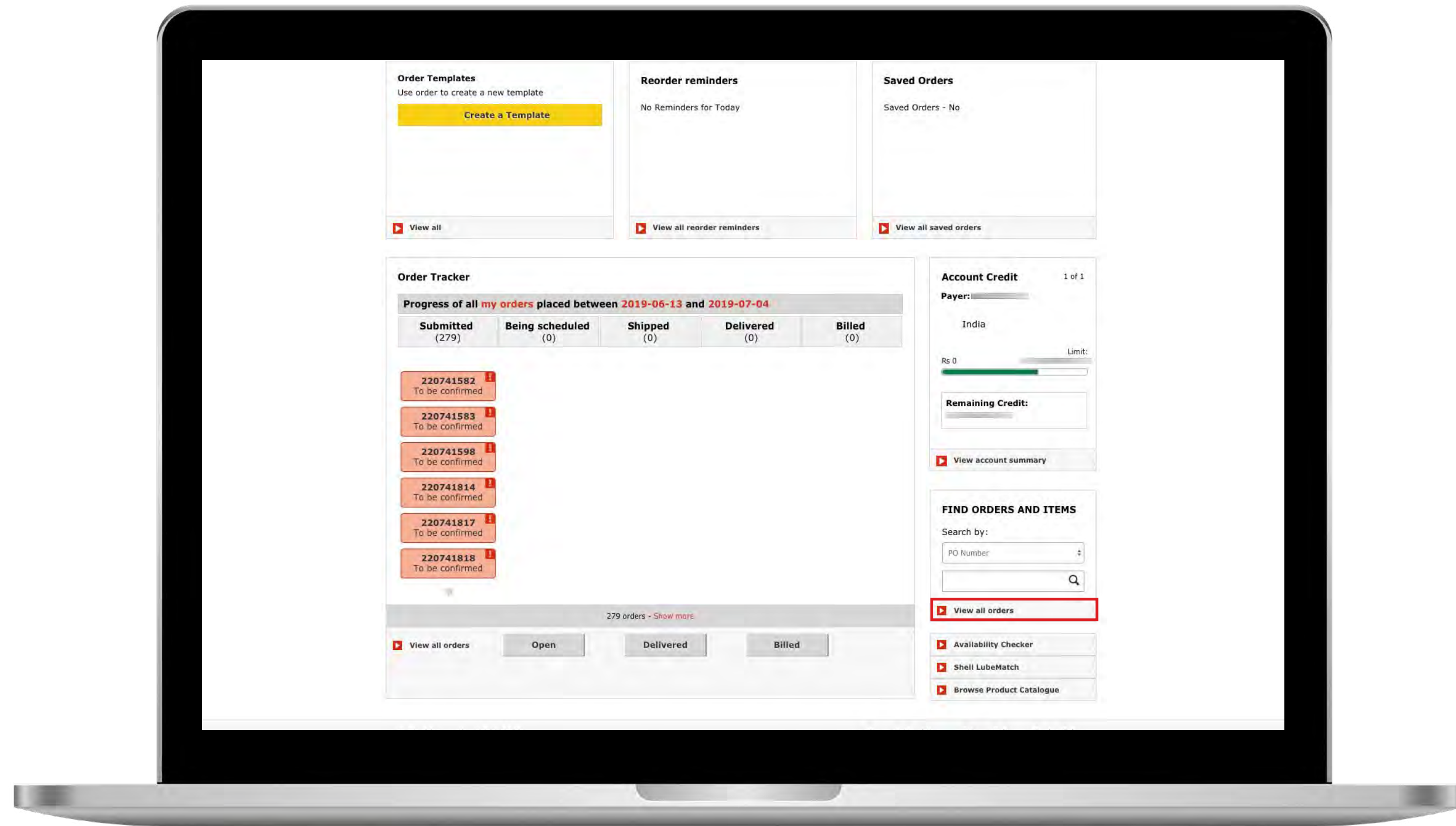


Step
1

Click **All** at the top of navigation and click on **Order Management**

2.13 Order Management

How To Check The Status Of My Order

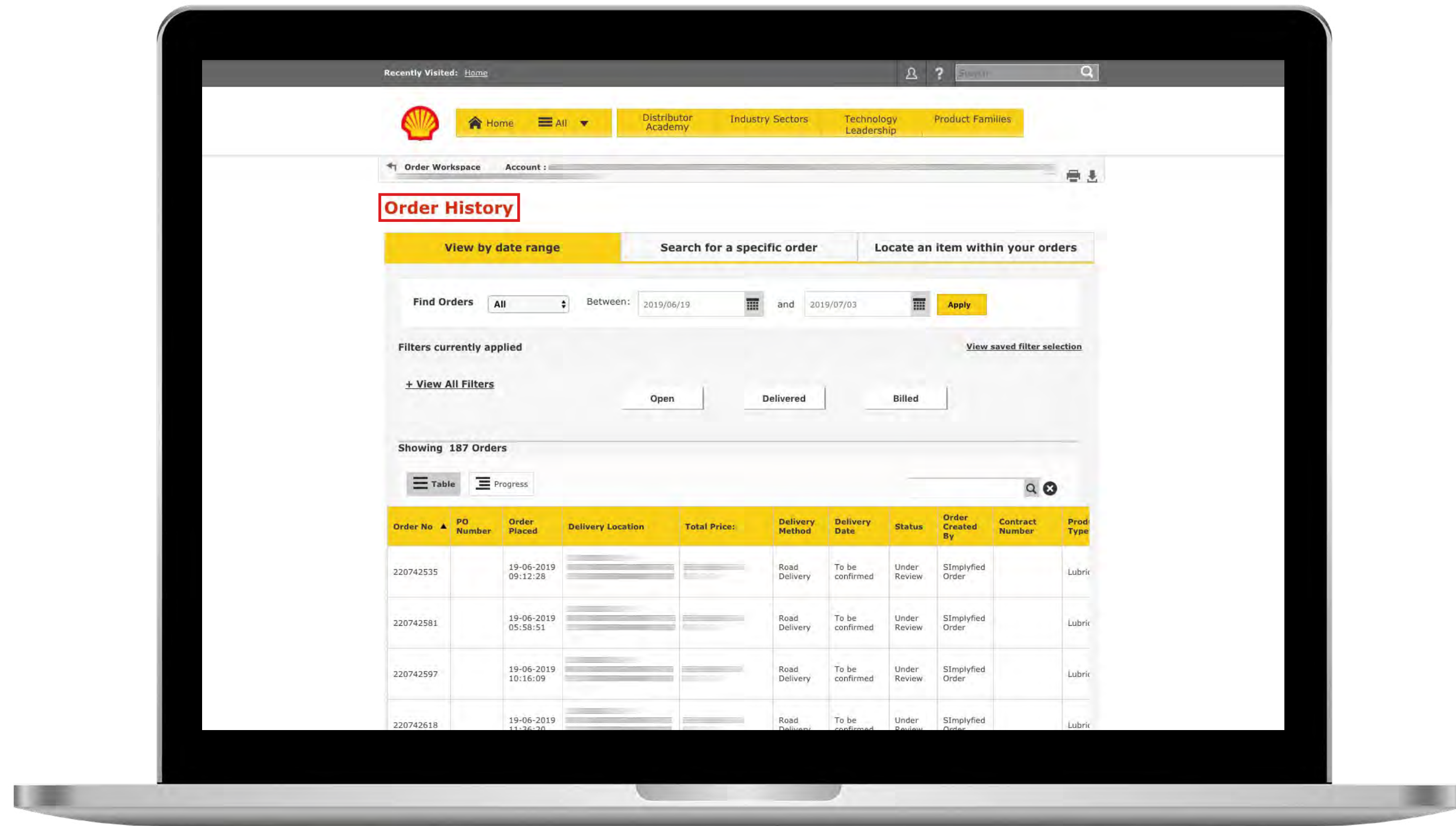


Step
2

In **Order Management** go to the bottom right hand side of screen and click **View all orders**

2.13 Order Management

How To Check The Status Of My Order

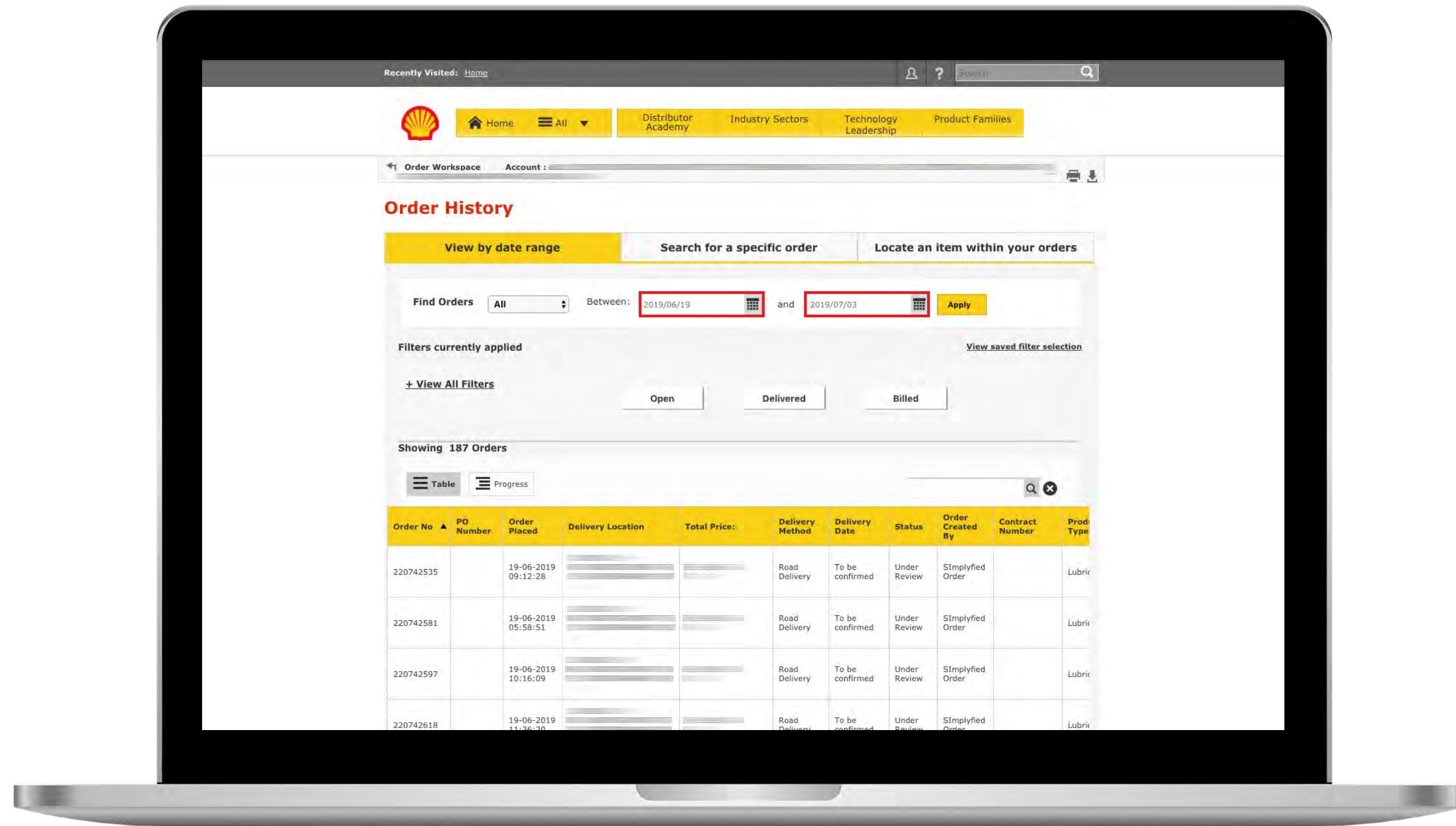


Step
3

You will be taken to the **Order History** panel where you can look up your orders using different search options

2.13 Order Management

How To Check The Status Of My Order

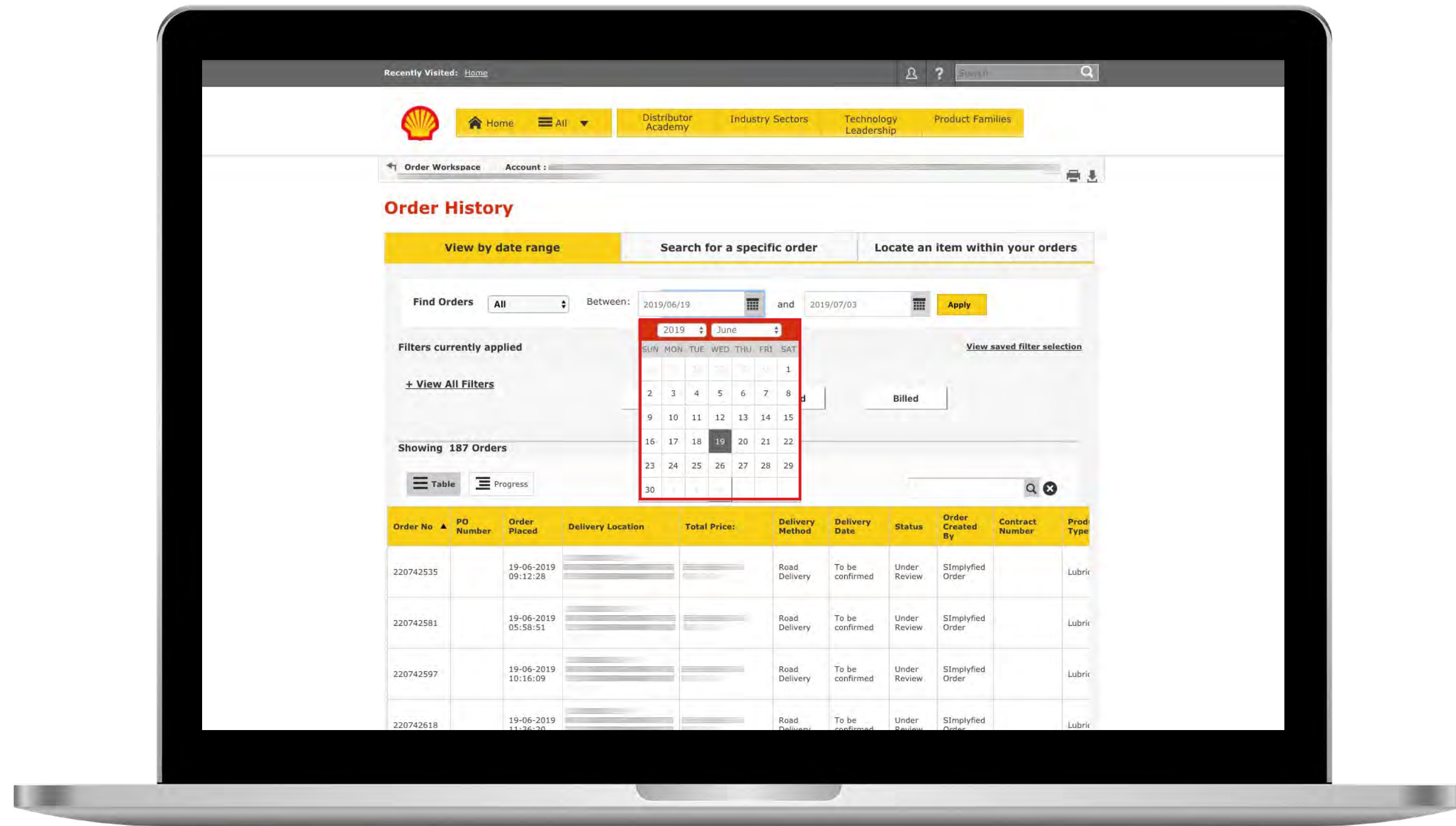


Step
4

The first option is to search for order using a date range.
Enter the dates then click **Apply**

2.13 Order Management

How To Check The Status Of My Order

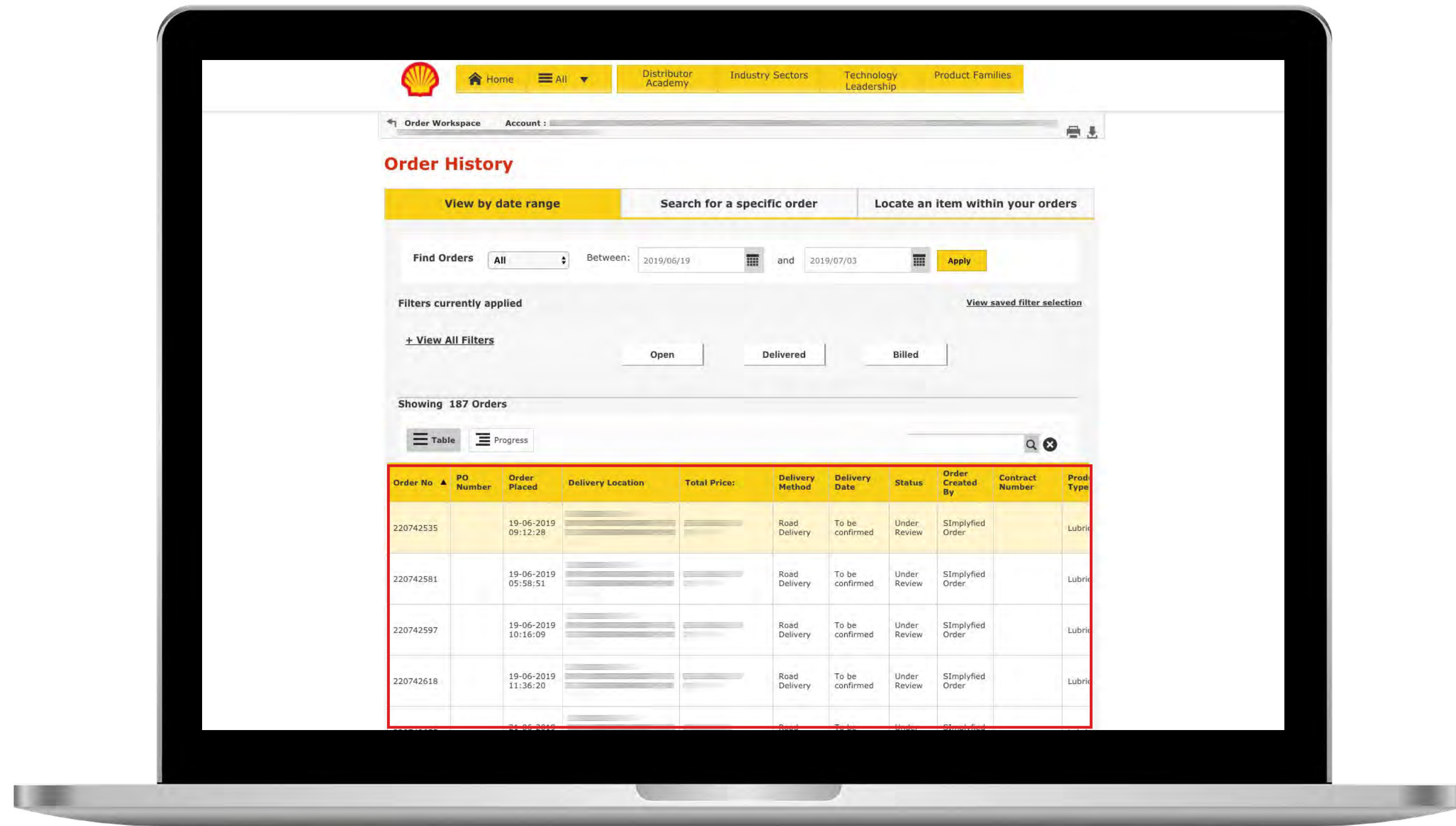


Step
5

You can type a date in manually or click on the calendar icon

2.13 Order Management

How To Check The Status Of My Order



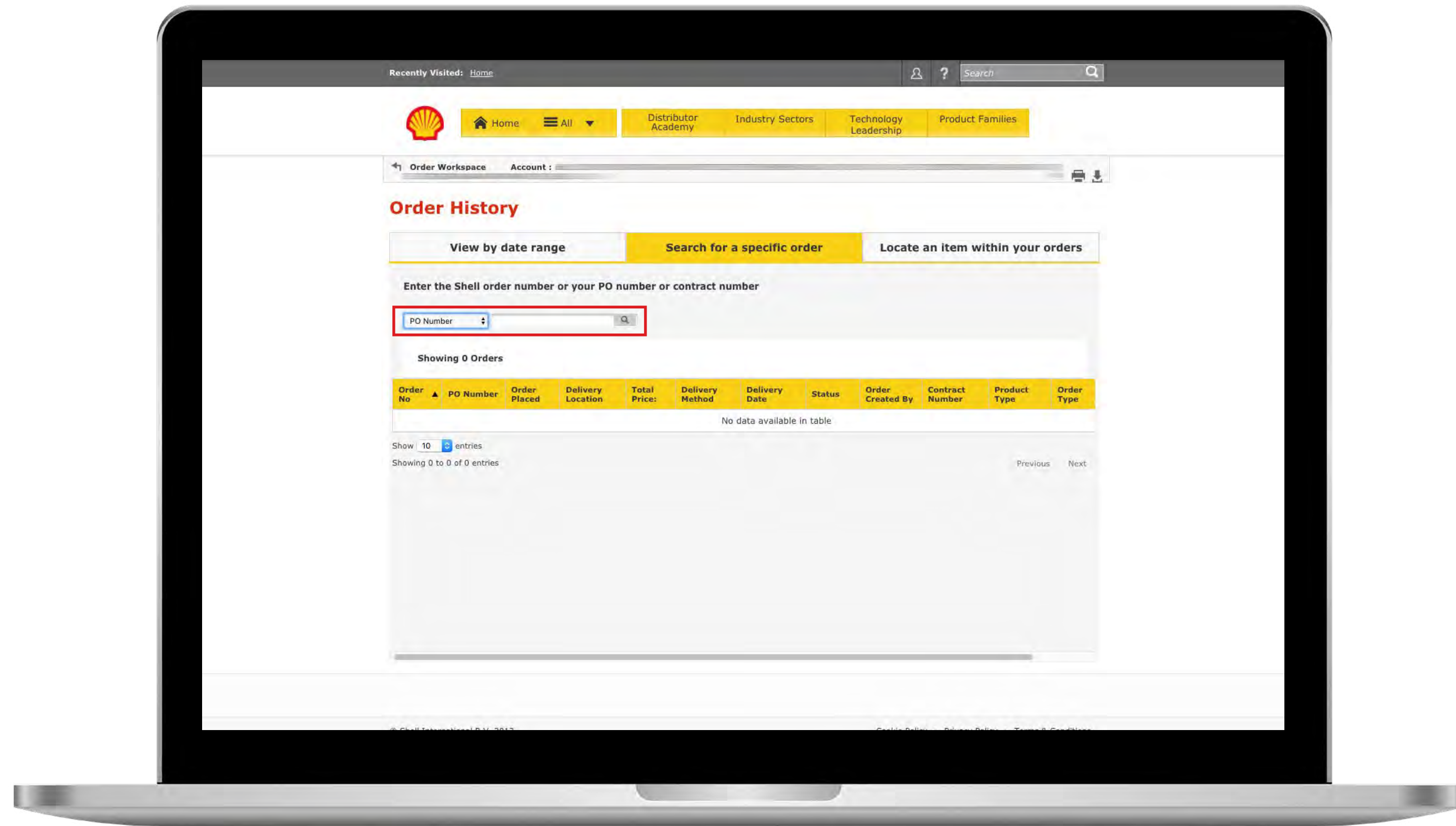
Step
6

When you click **Apply**, the list below will show orders only with that specific date range

If you want to see the order details simply click on the order

2.13 Order Management

How To Check The Status Of My Order

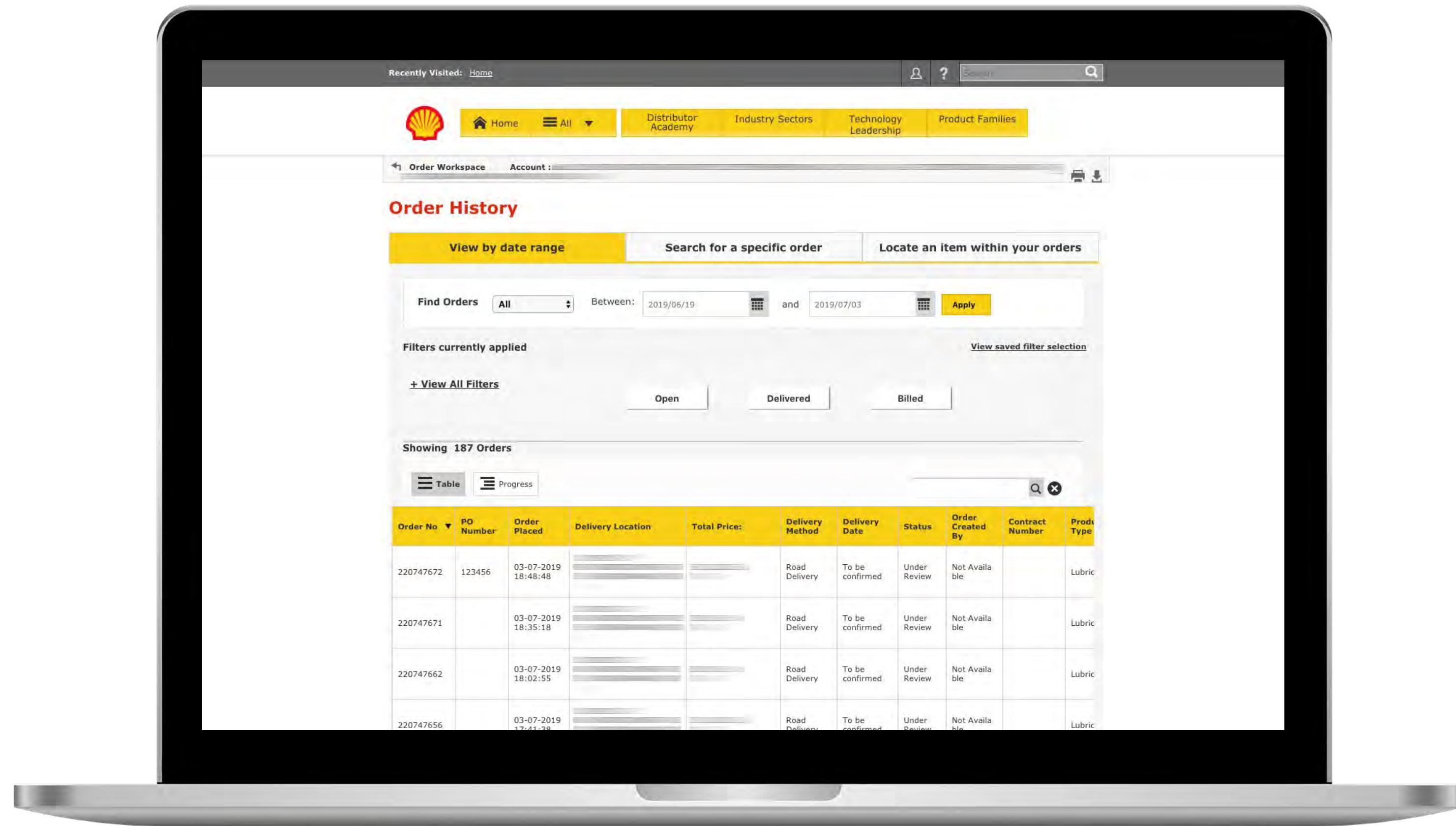


Step
7

Another way to find order is to use option
Search for a specific order.
Choose searching criteria (PO Number, Order/Contract Number)
and click magnifying glass

2.13 Order Management

How To Check The Status Of My Order

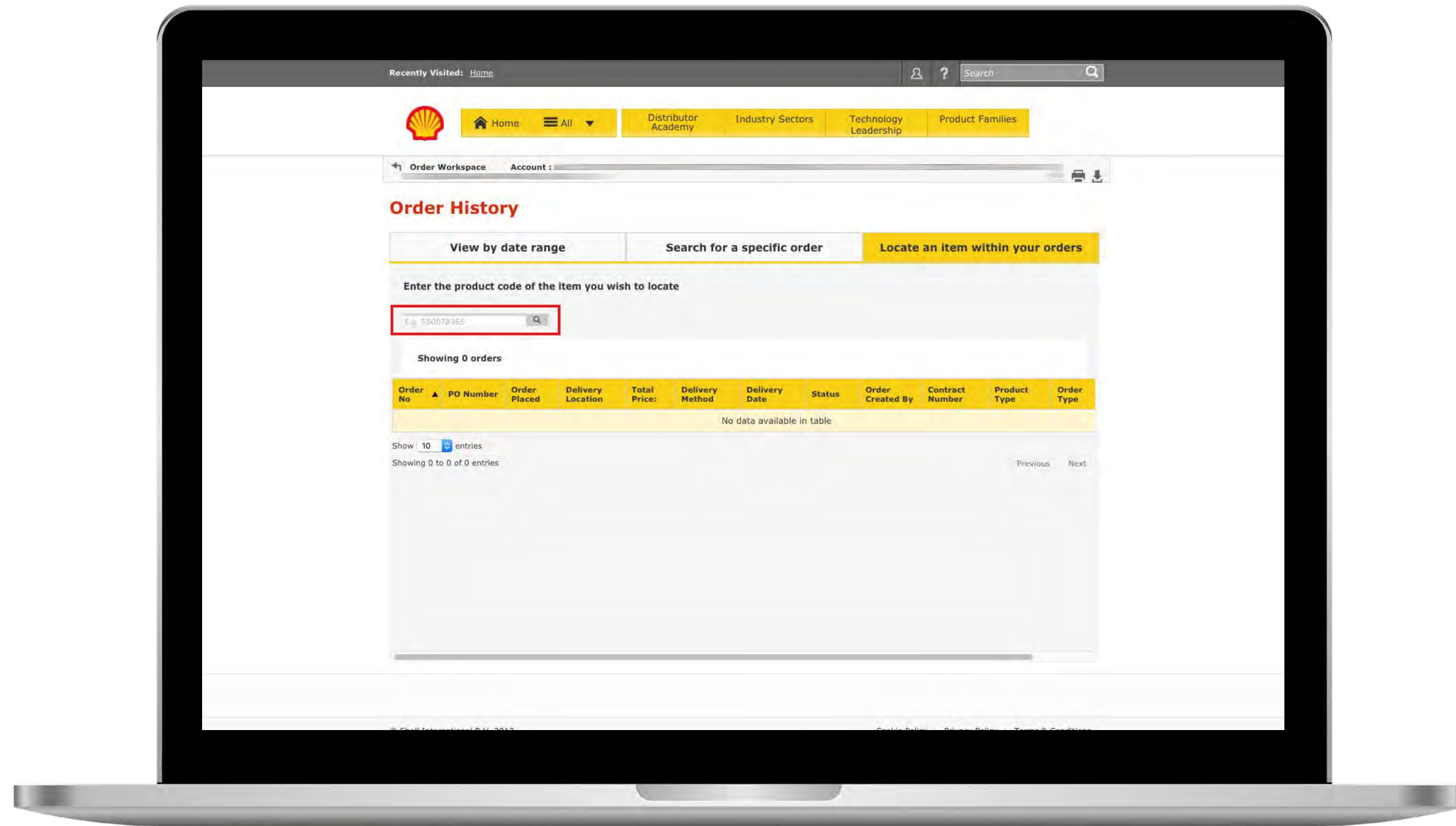


Step
8

Here again, list below search menu will show orders only with chosen parameter

2.13 Order Management

How To Check The Status Of My Order



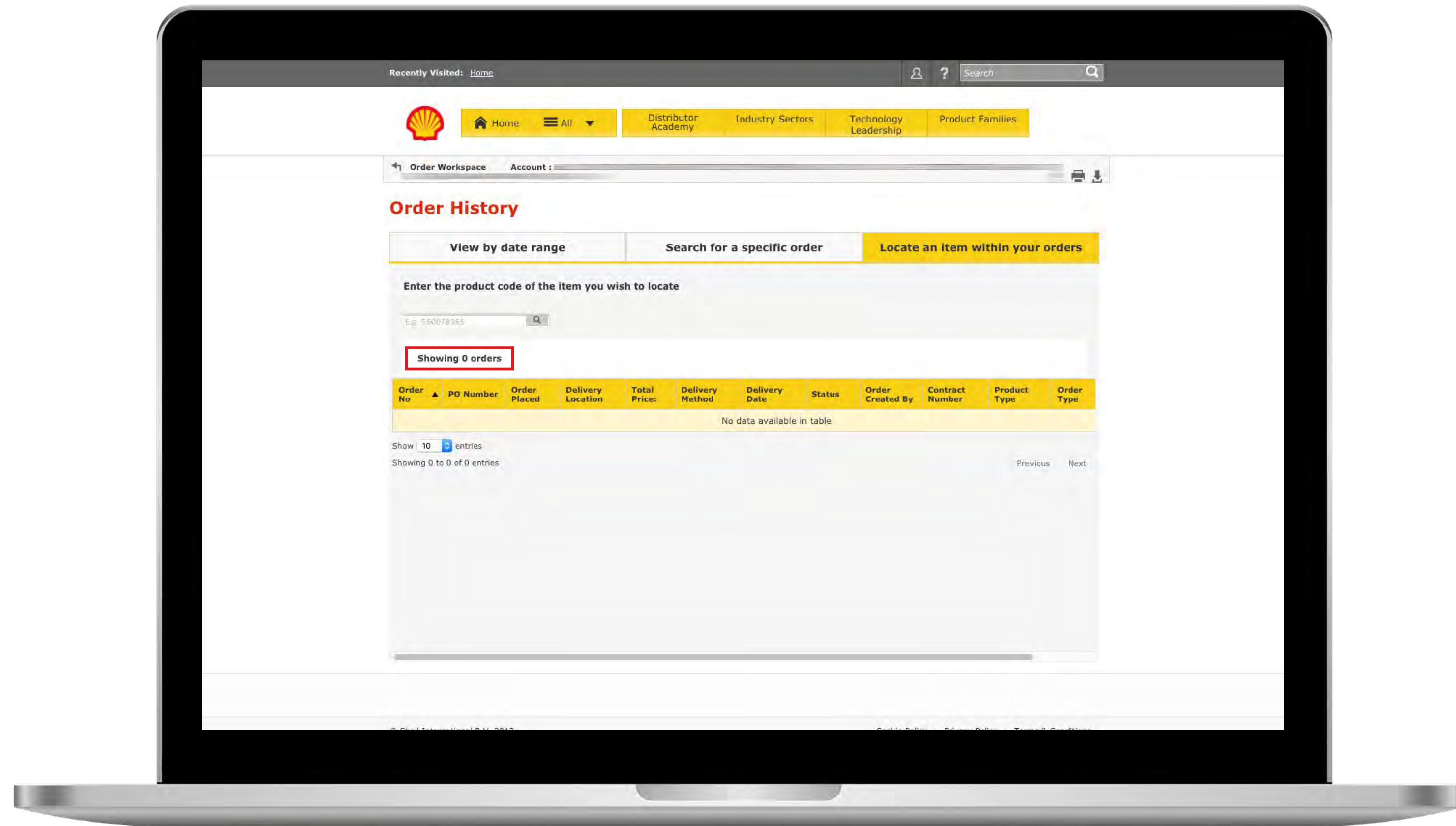
Step
9

Using option **Locate an item within your orders**, allows you to look for all orders with specific product

Choose product code and click magnifying glass

2.13 Order Management

How To Check The Status Of My Order

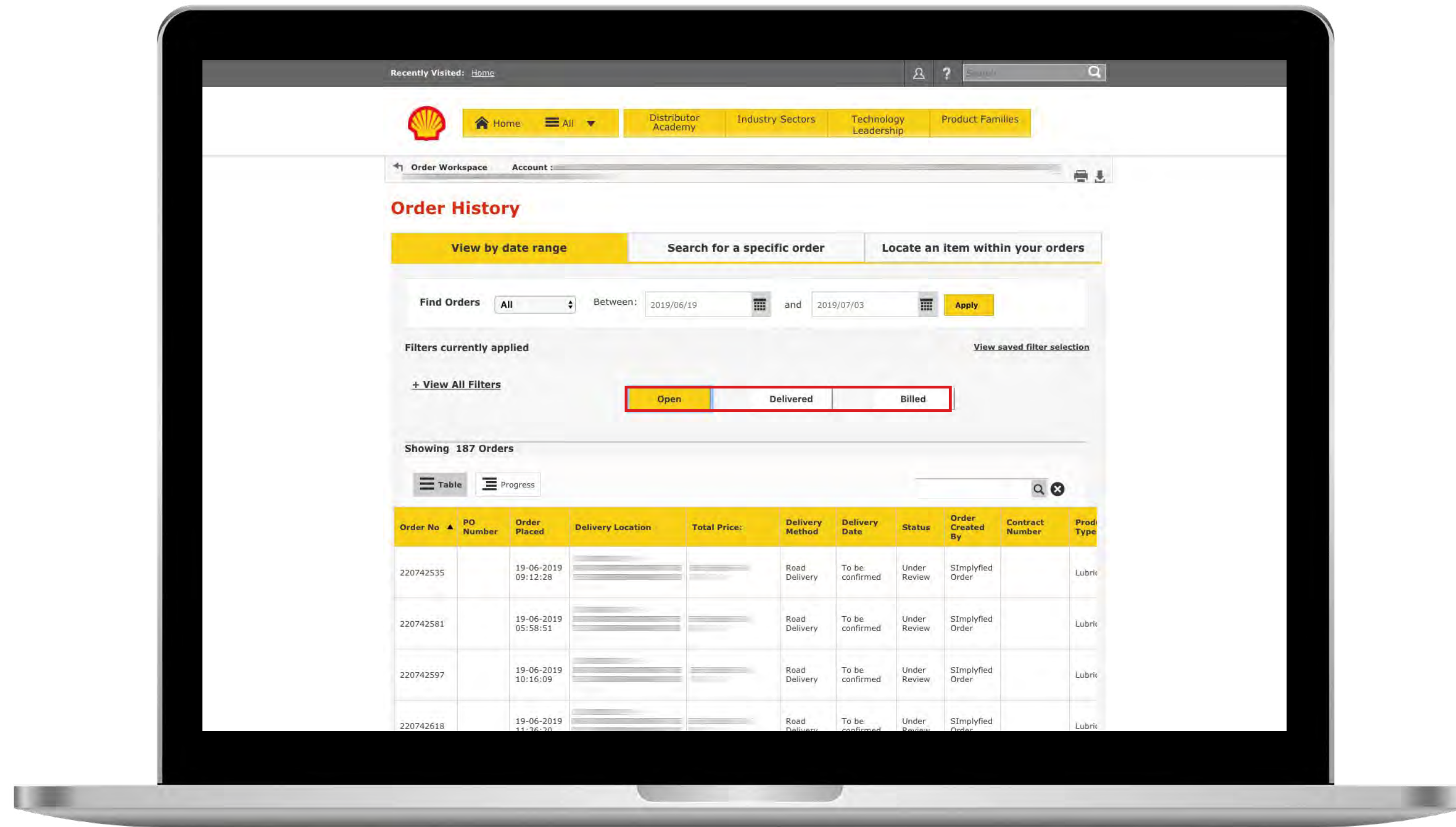


Step
10

As before, the list of results will show only orders which contain this product (despite order status)

2.13 Order Management

How To Check The Status Of My Order



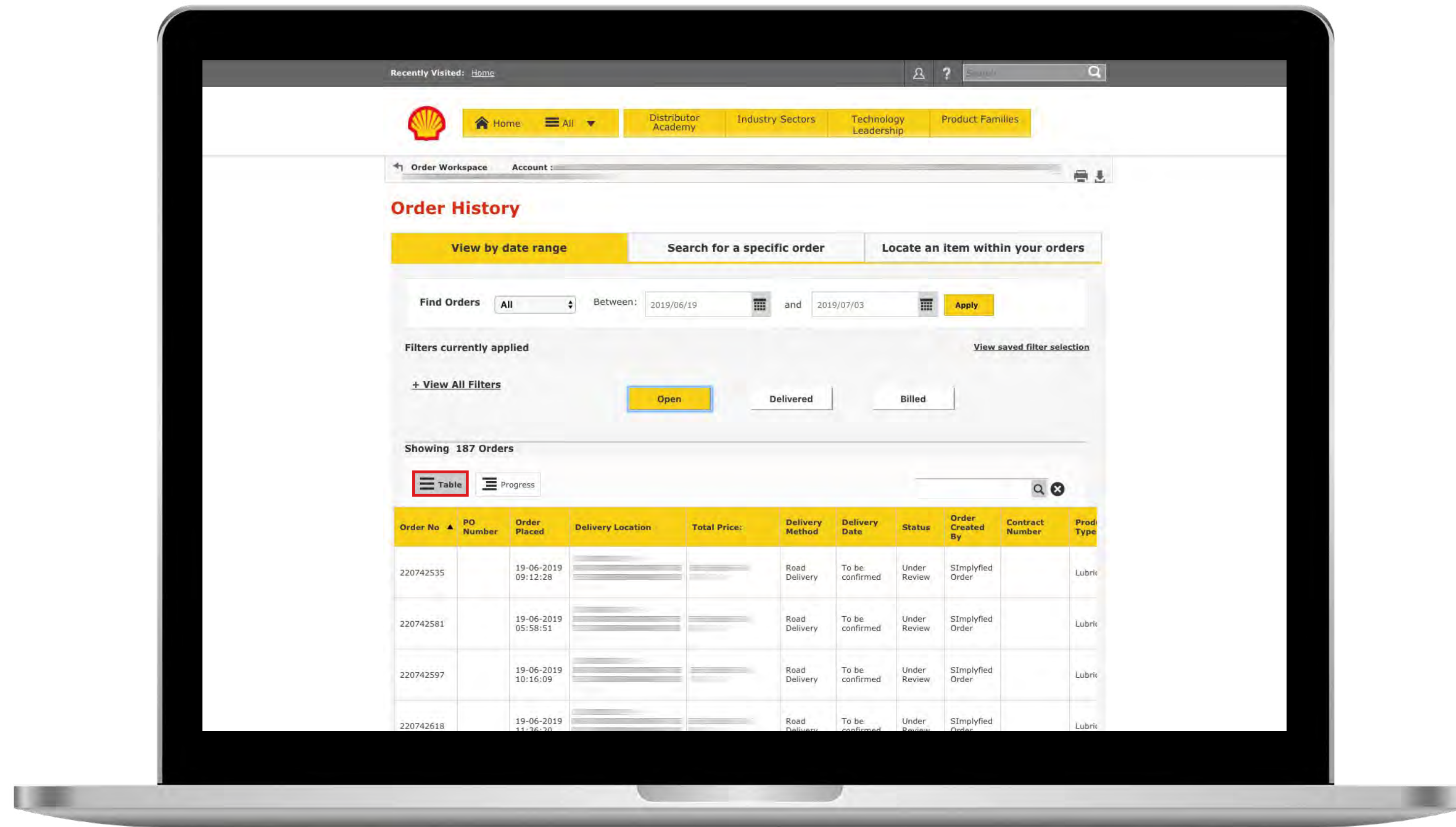
Step
11

In the middle menu you can also set a quick filter:
Open, Delivered, Billed

Here you can also check/change all applied filters

2.13 Order Management

How To Check The Status Of My Order

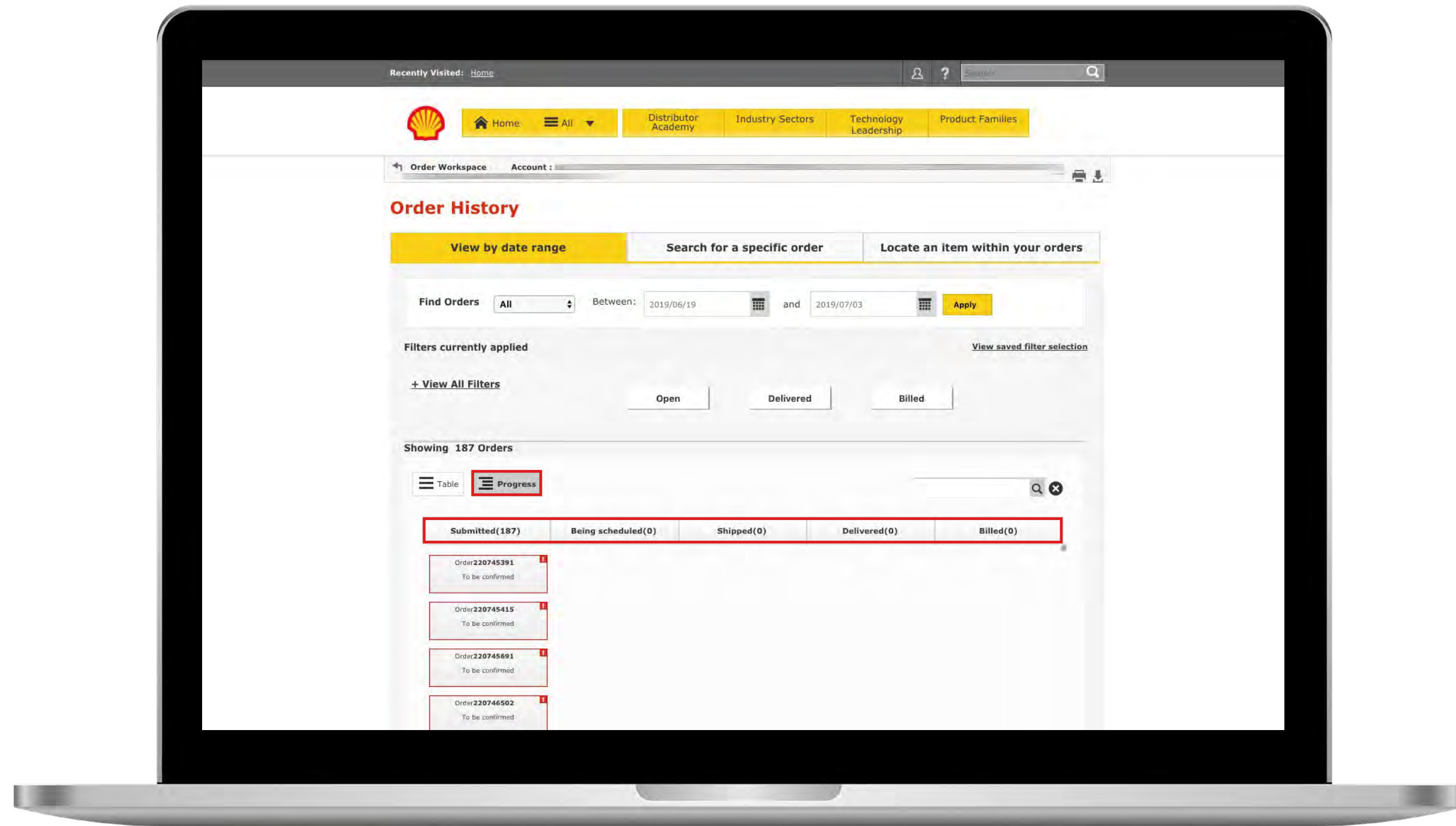


Step
12

You can change layout of result table.
You can choose standard one by clicking option **Table**

2.13 Order Management

How To Check The Status Of My Order

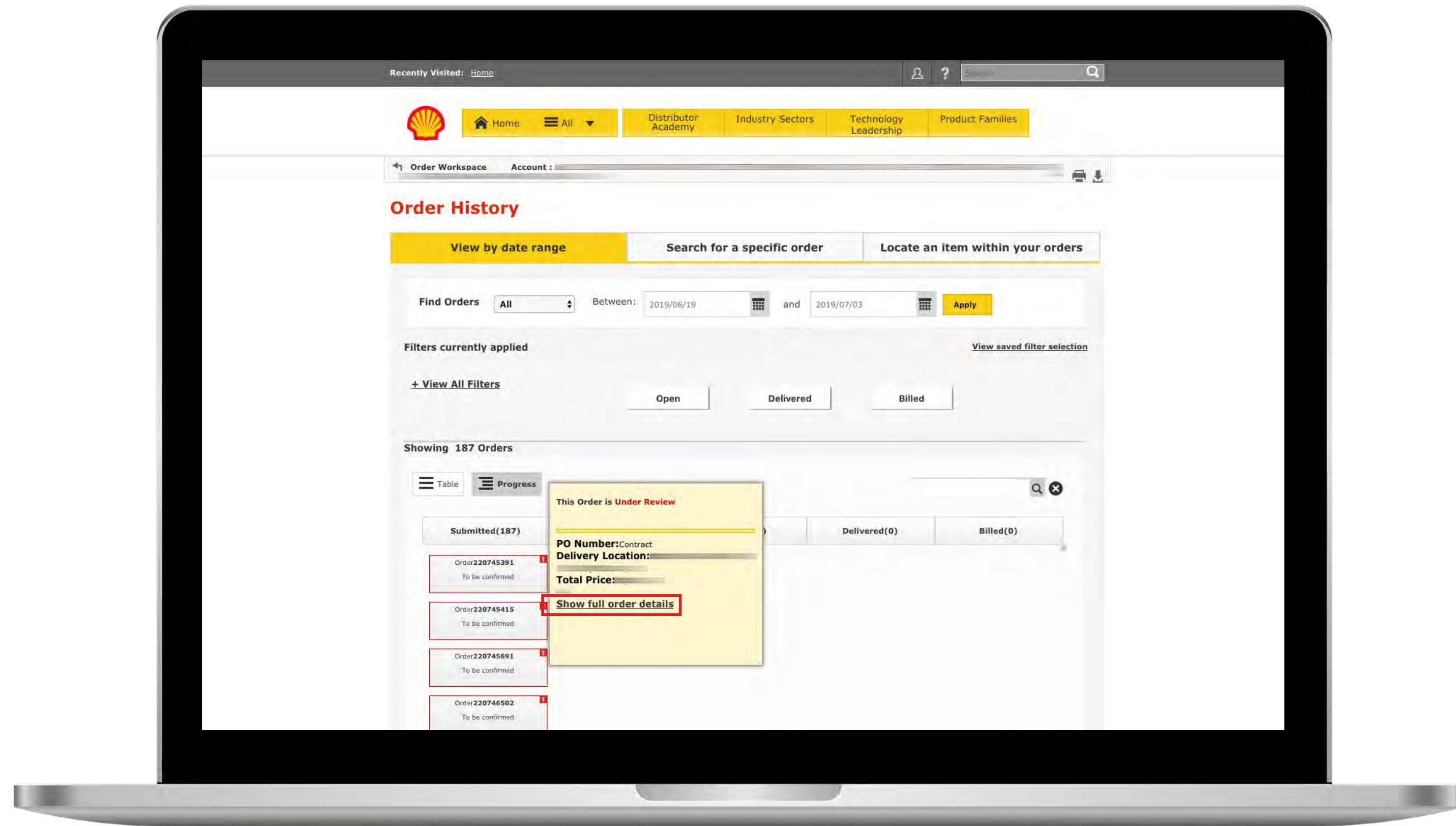


Step
13

If you click on **Progress**, you will see list of your orders split by the progress status (Submitted, Being scheduled, Shipped etc.)

2.13 Order Management

How To Check The Status Of My Order

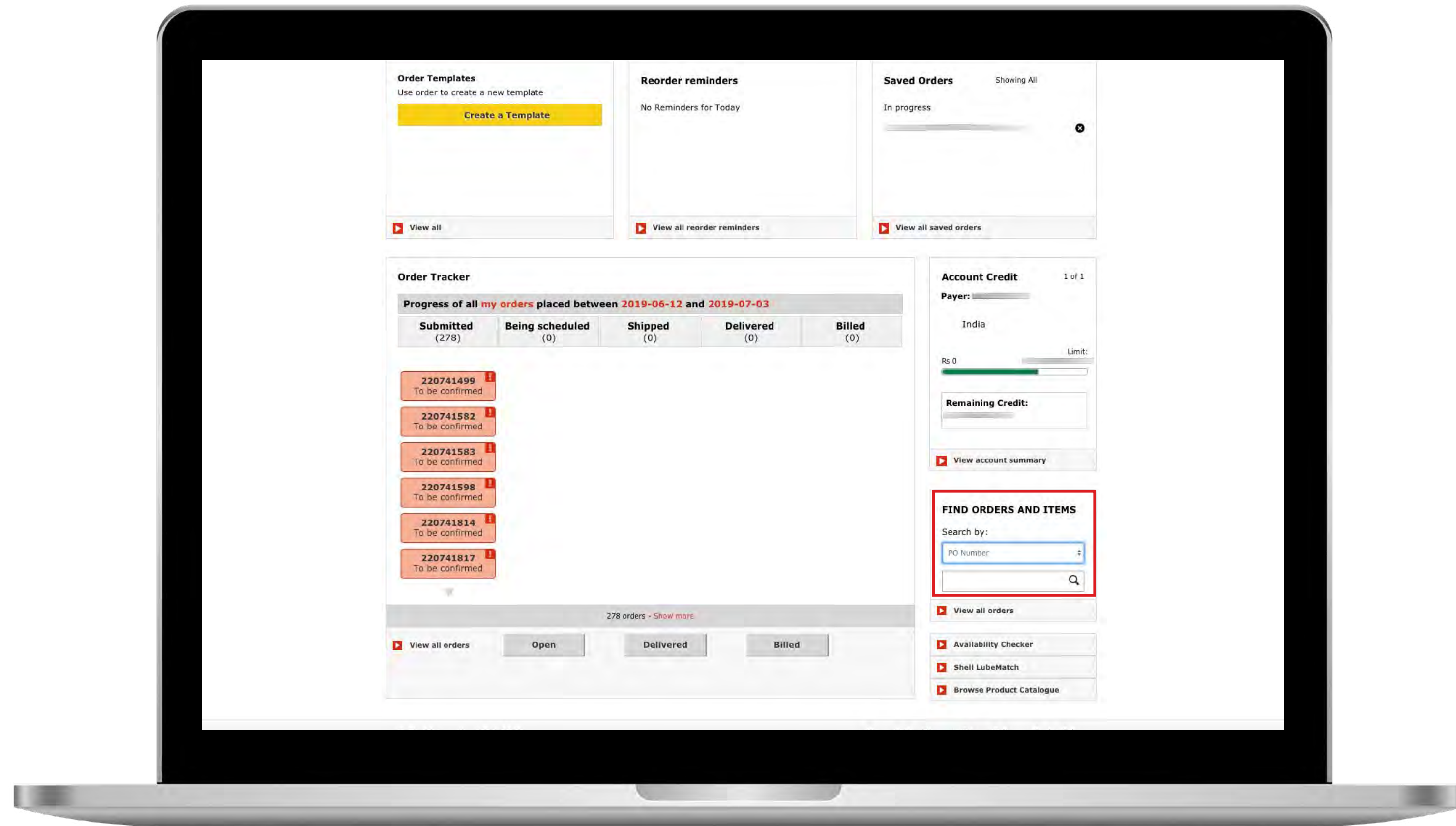


Step
14

If you hover over your order number you will see a short order preview. To see more click on **Show full order details**

2.13 Order Management

How To Check The Status Of My Order



Step
15

Remember: for a quick search you can also use the **Search by** option

Choose your parameter from the list, and click on the magnifying glass

3

Records and Reporting

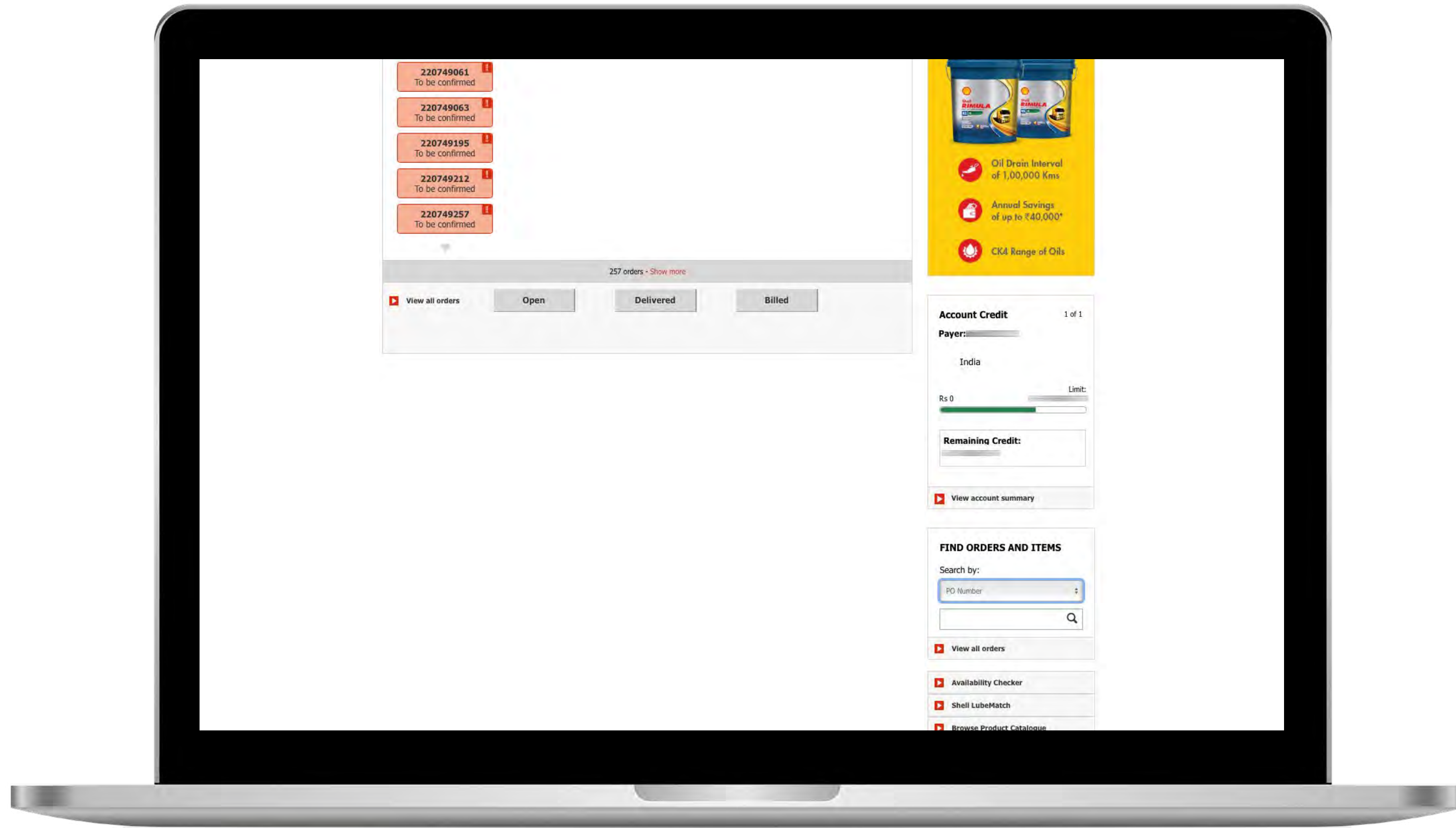
Enabling you to track orders, credits and financials quickly and accurately.



3.1

Recordings and Reporting

Orders



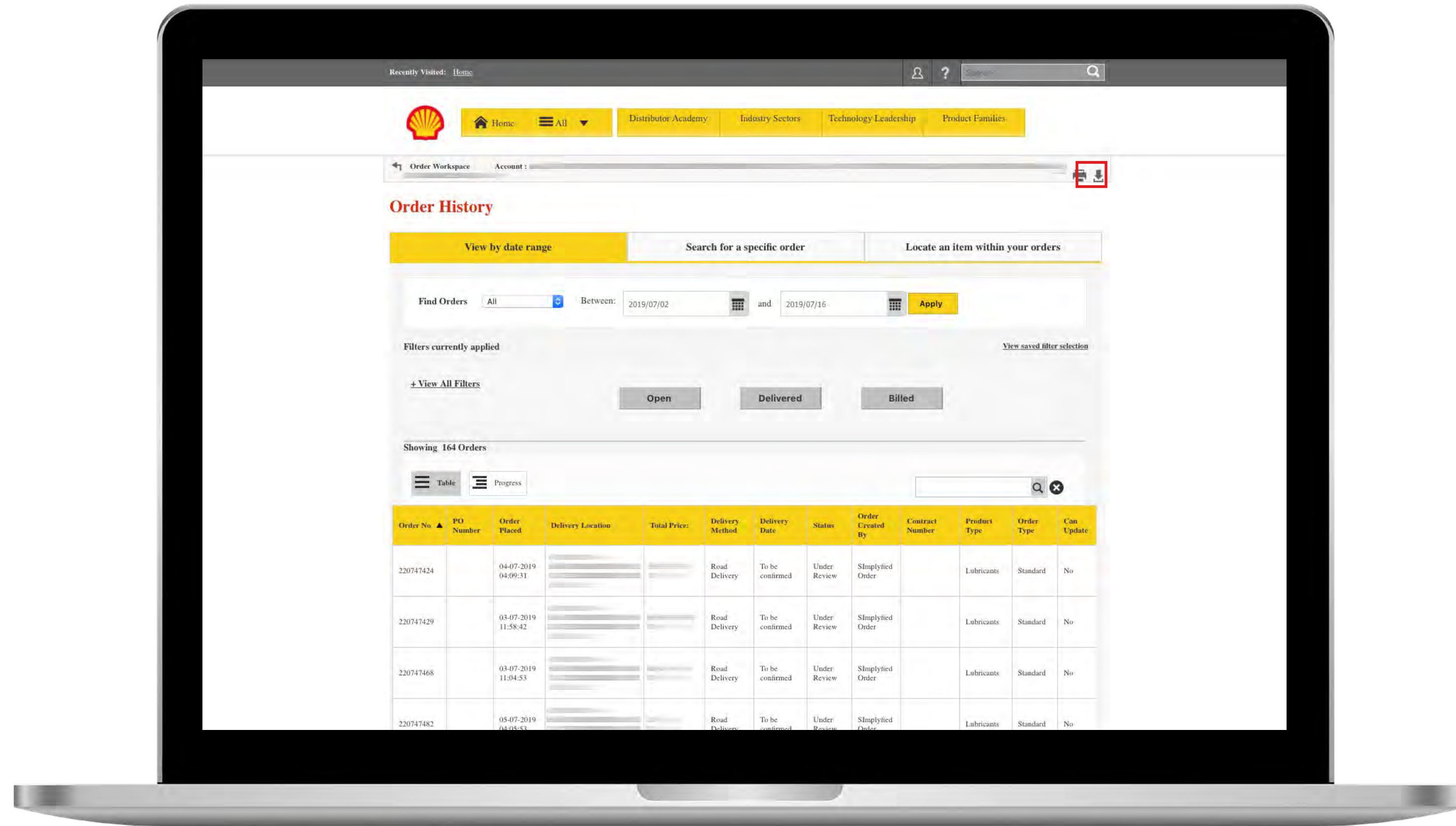
Step
1

Filter results by Date, Product, Deliver to Location,
PO Number, Invoice

3.1

Recordings and Reporting

Orders



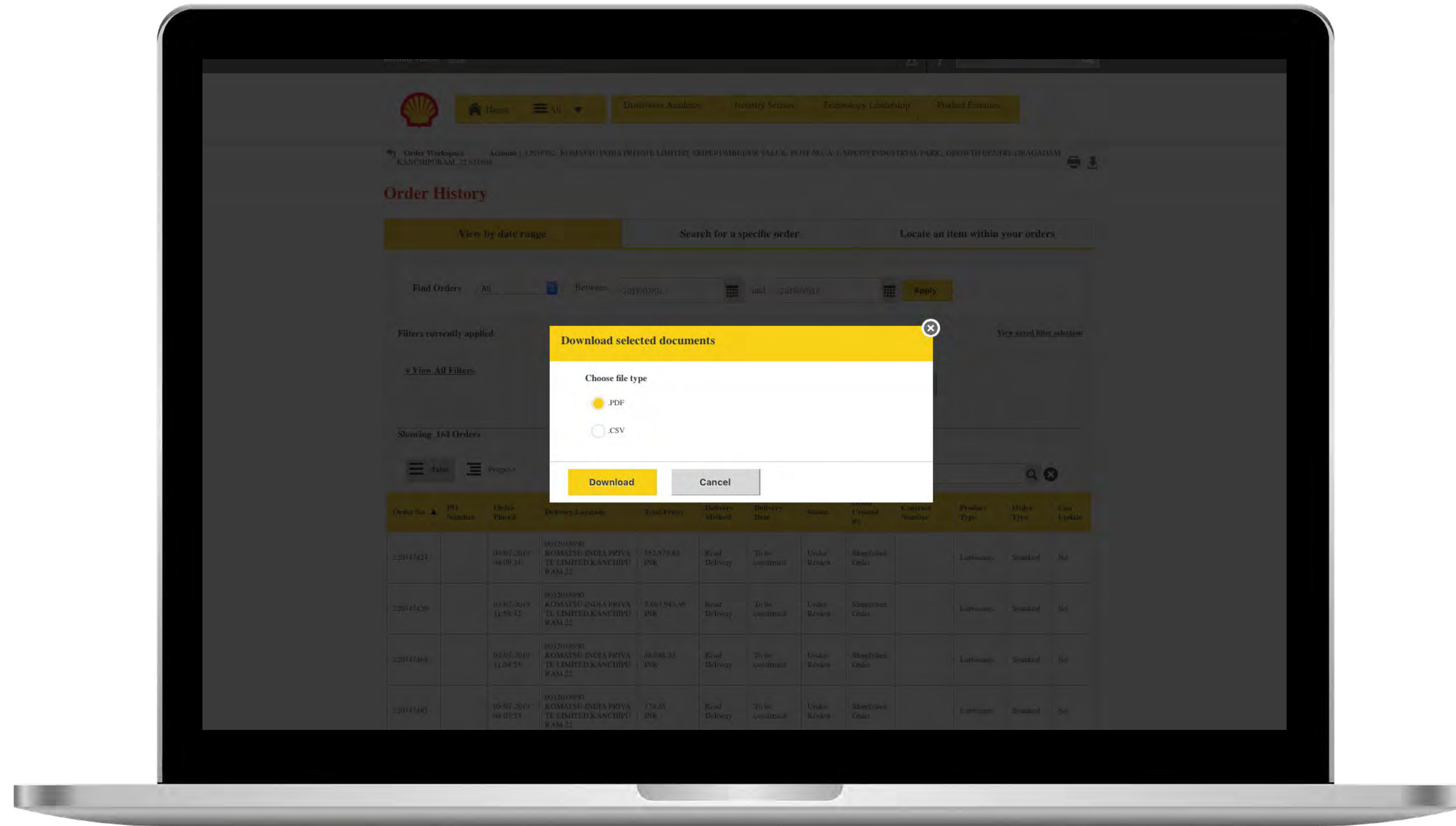
Step
2

Expand summary invoice data for further details then click download icon in top right of screen

3.1

Recordings and Reporting

Current Orders



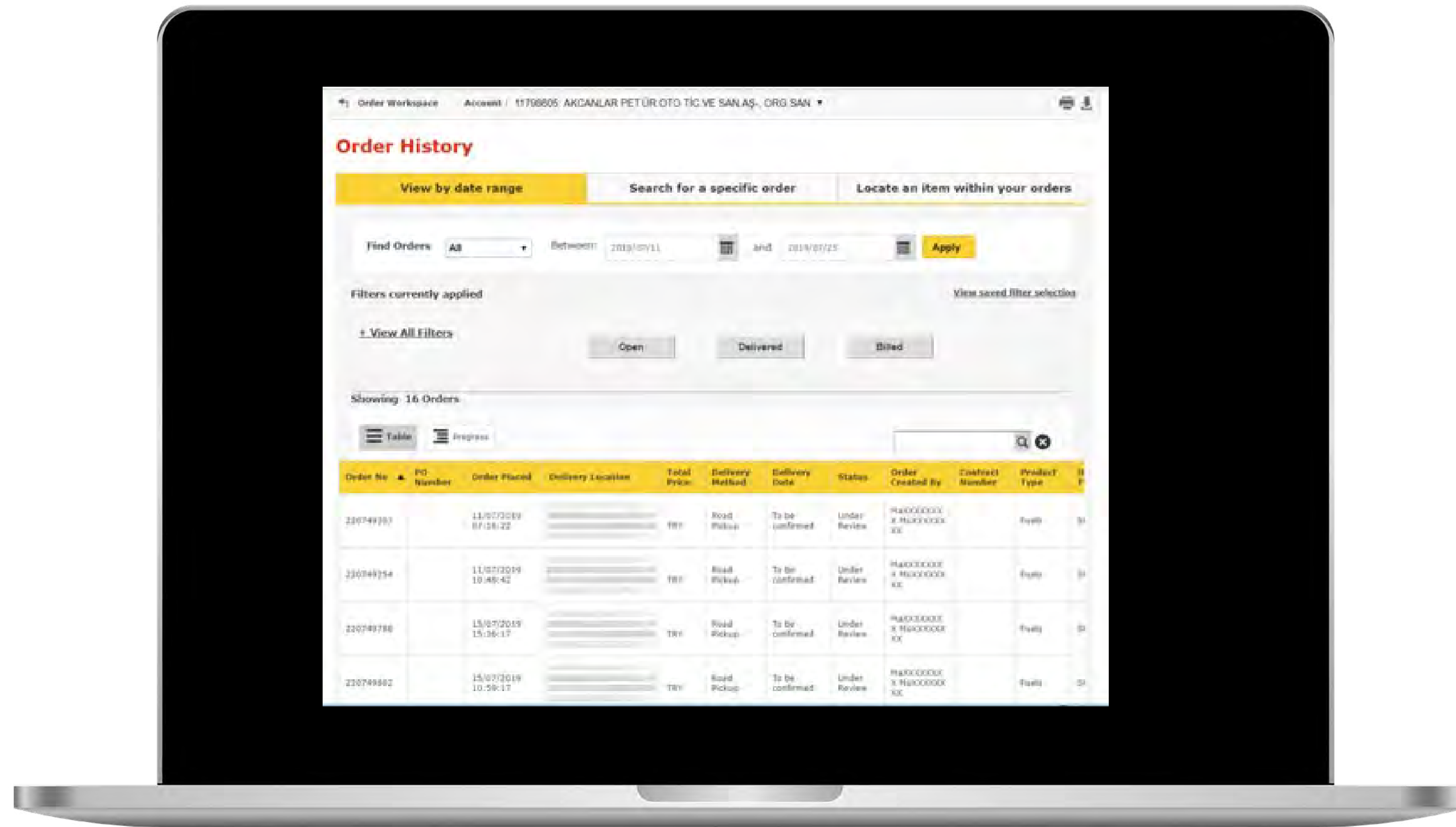
Step
3

Generate a report from the invoice date
or download as an Excel file

3.1

Recordings and Reporting

Orders

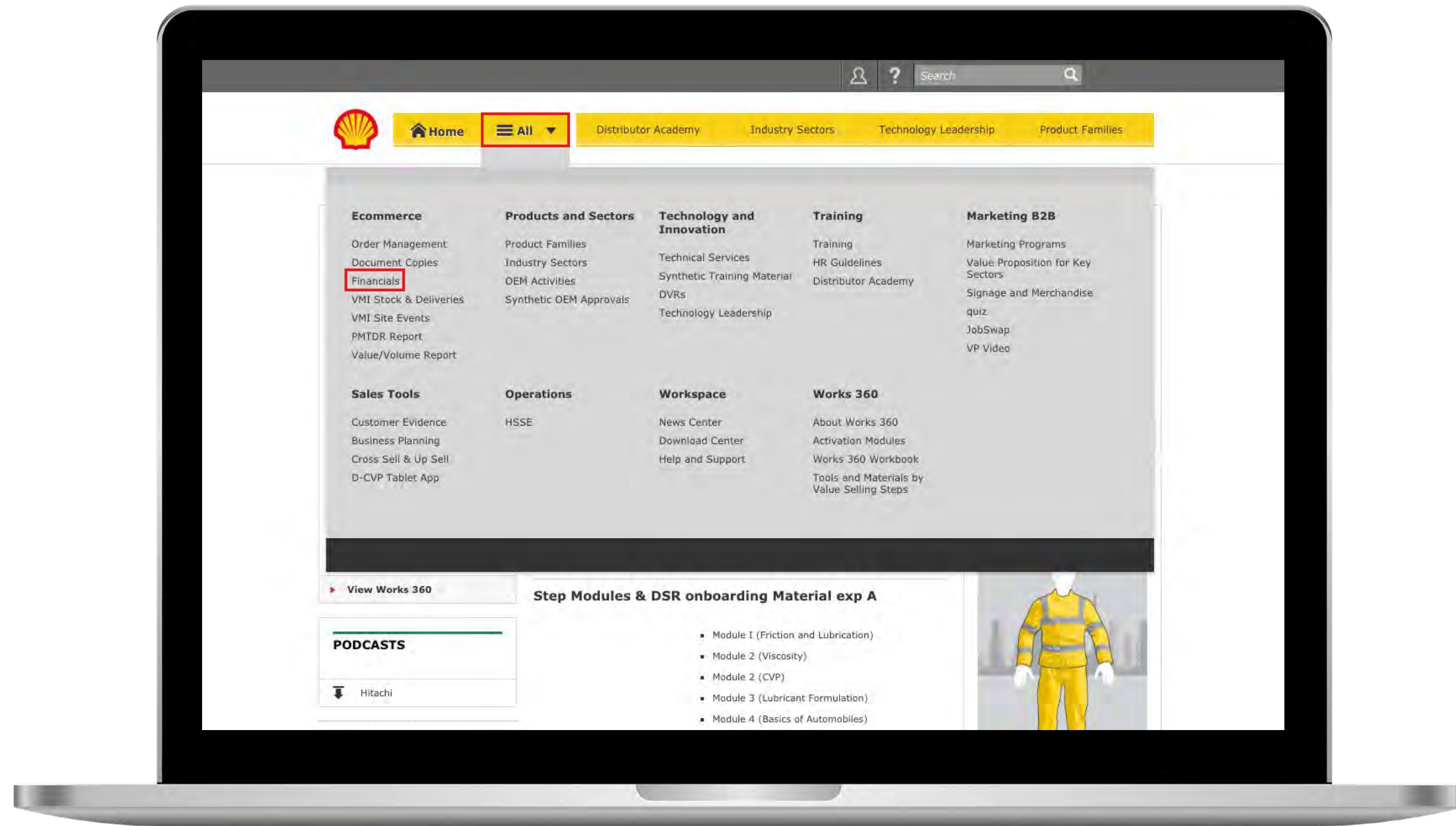


Step
4

View open, delivered and billed orders by filtering data.
This can be done by clicking on **Open**, **Delivered** or **Billed** buttons.

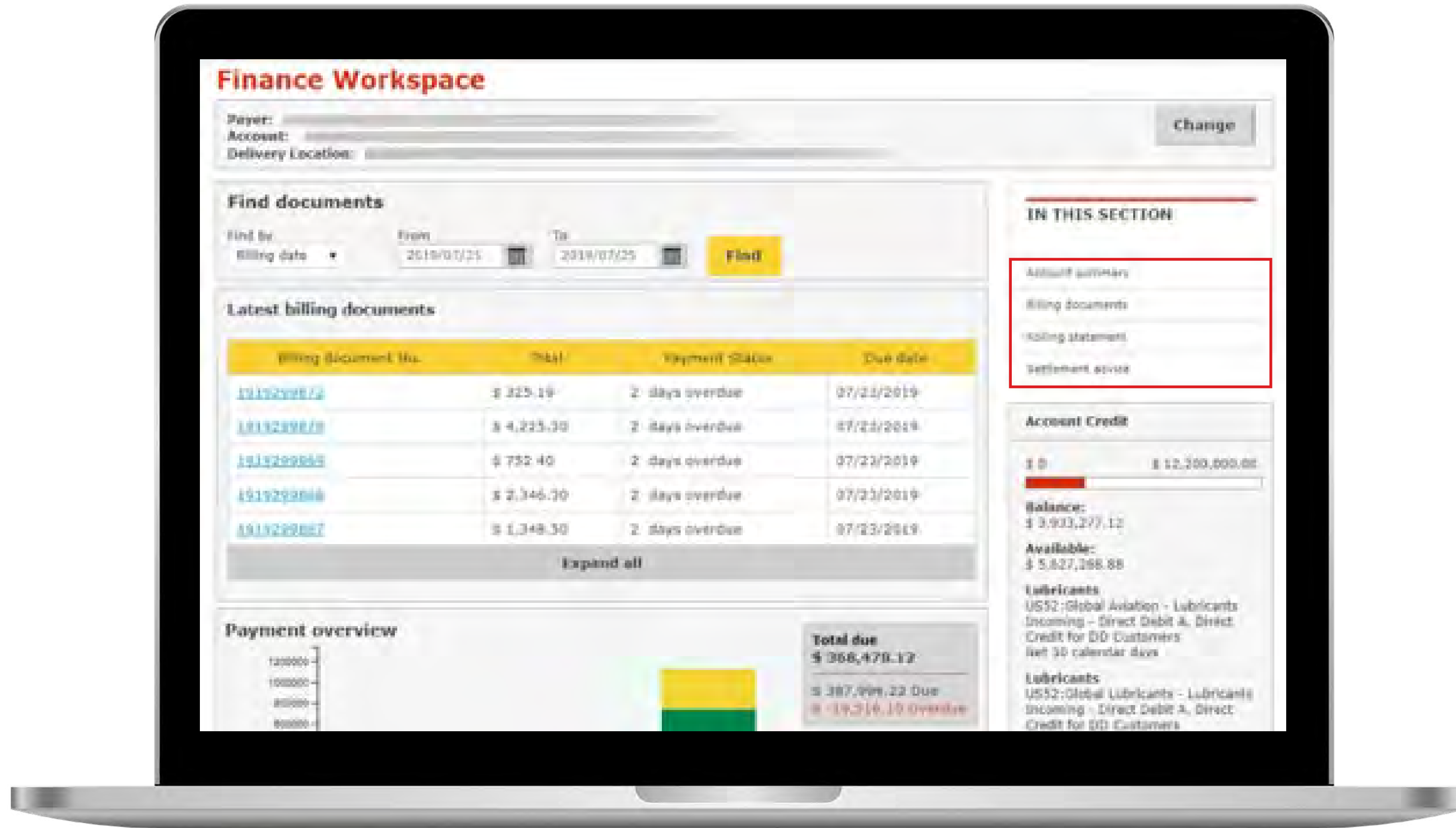
3.2 Recordings and Reporting

Financials



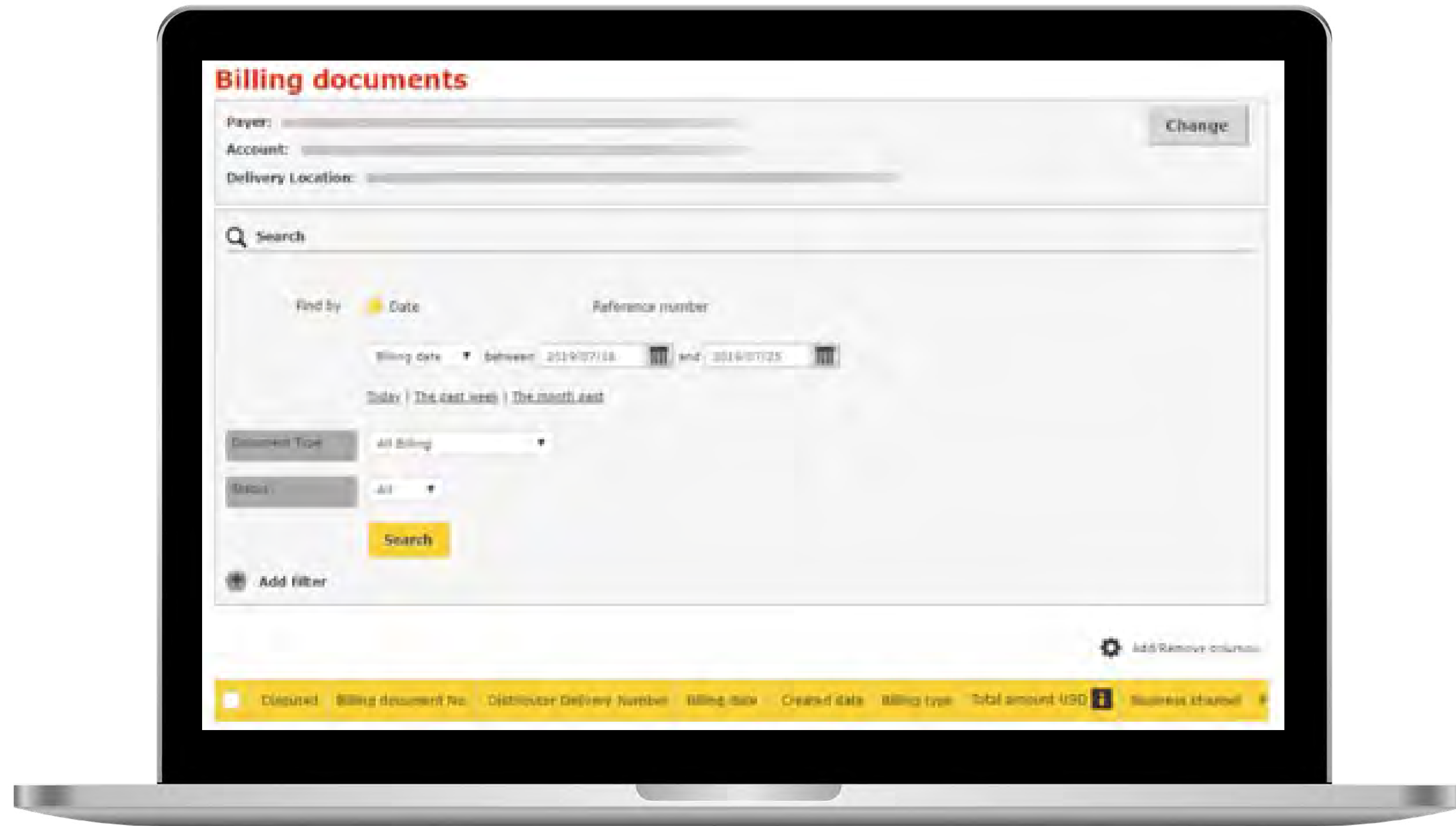
Step
1

Click **All** at the top of navigation and click on **Financials**



Step
2

Here you can view all financial information and get access to billing and other financial documentation.



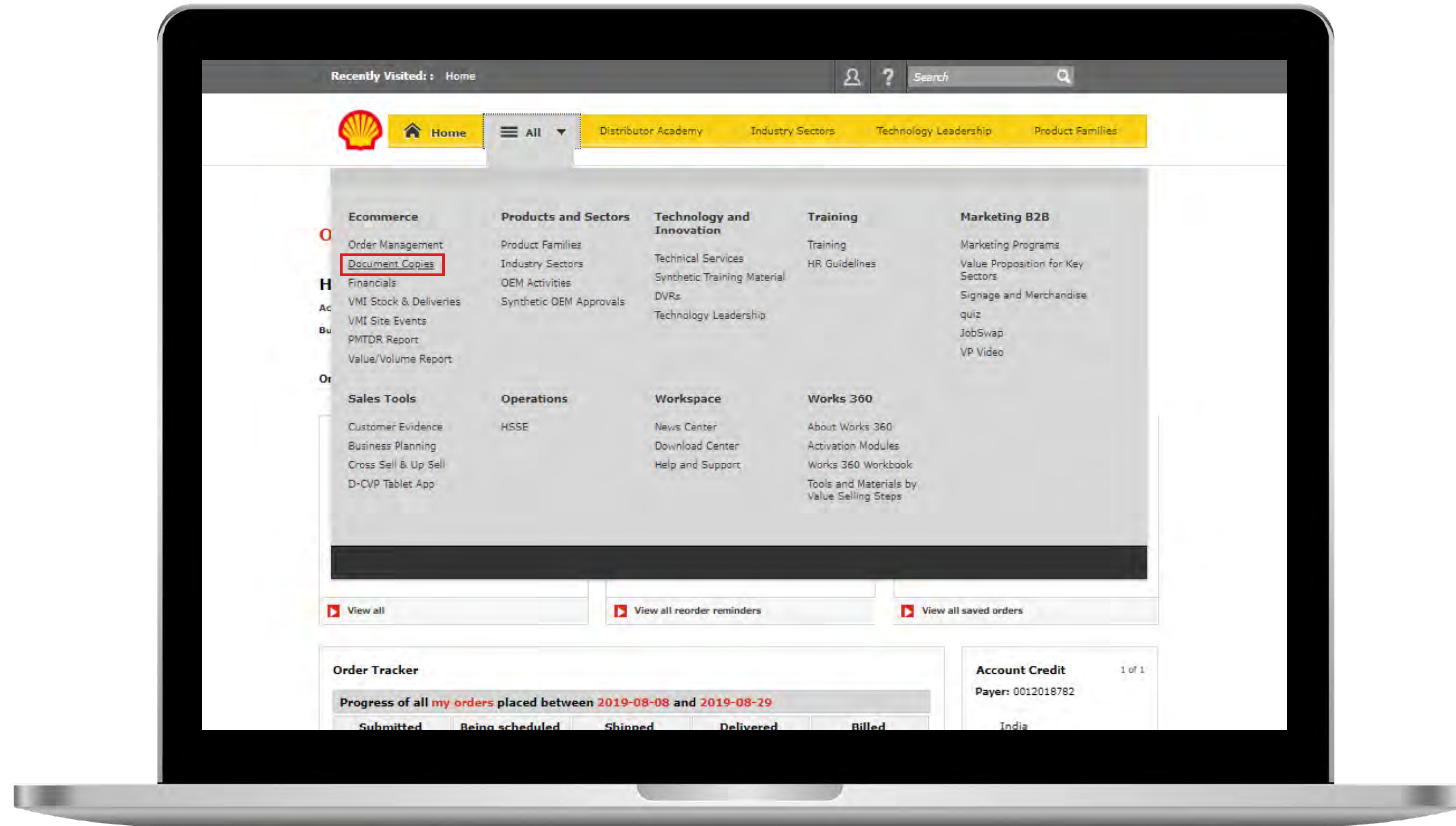
Step
3

Here you can use specific search criteria including date range, document type and status to access billing information.

3.3

Recordings and Reporting

Document Copies



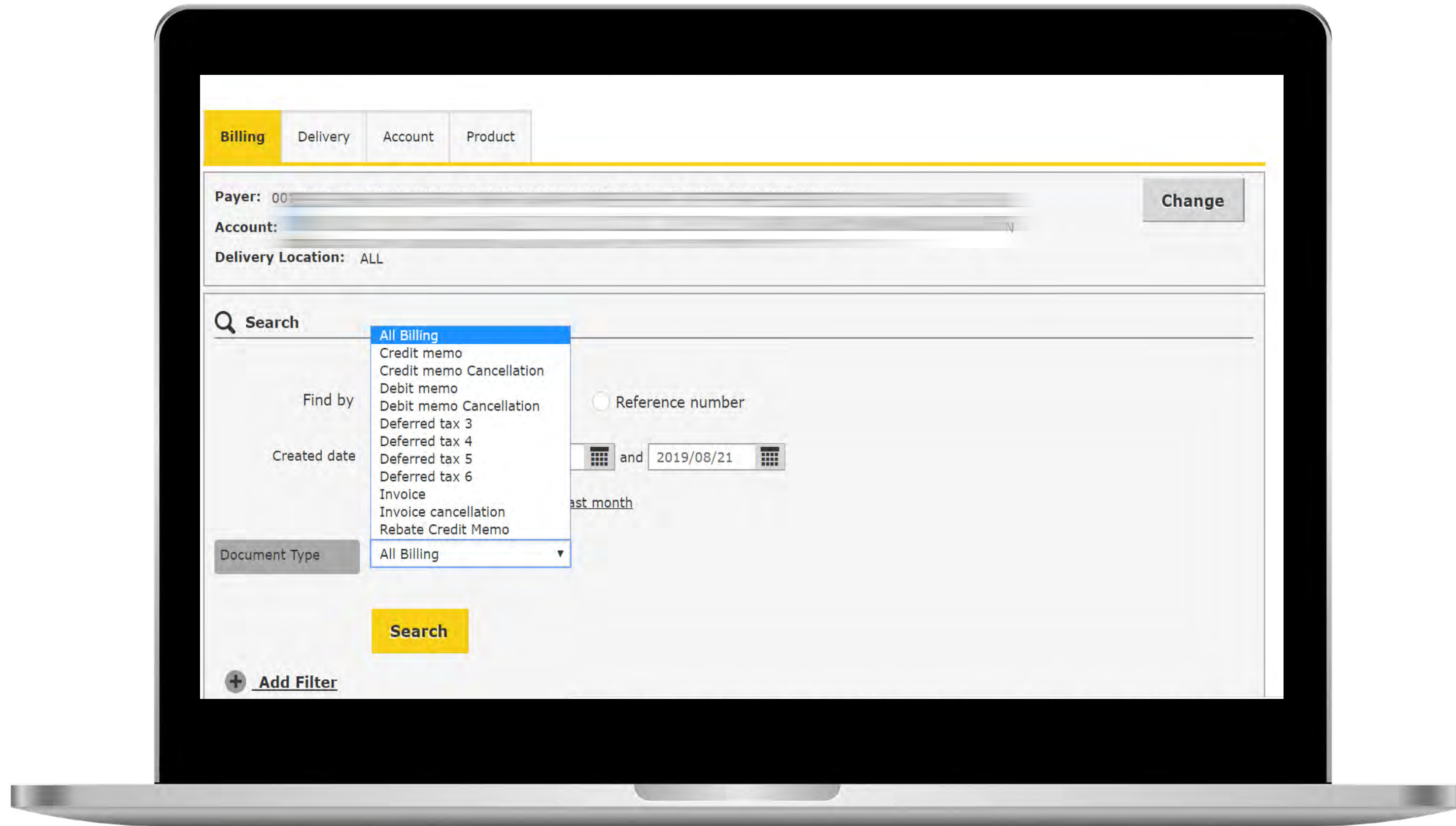
Step
1

Click **All** at the top of navigation and click on **Document Copies**

3.3

Recordings and Reporting

Document Copies



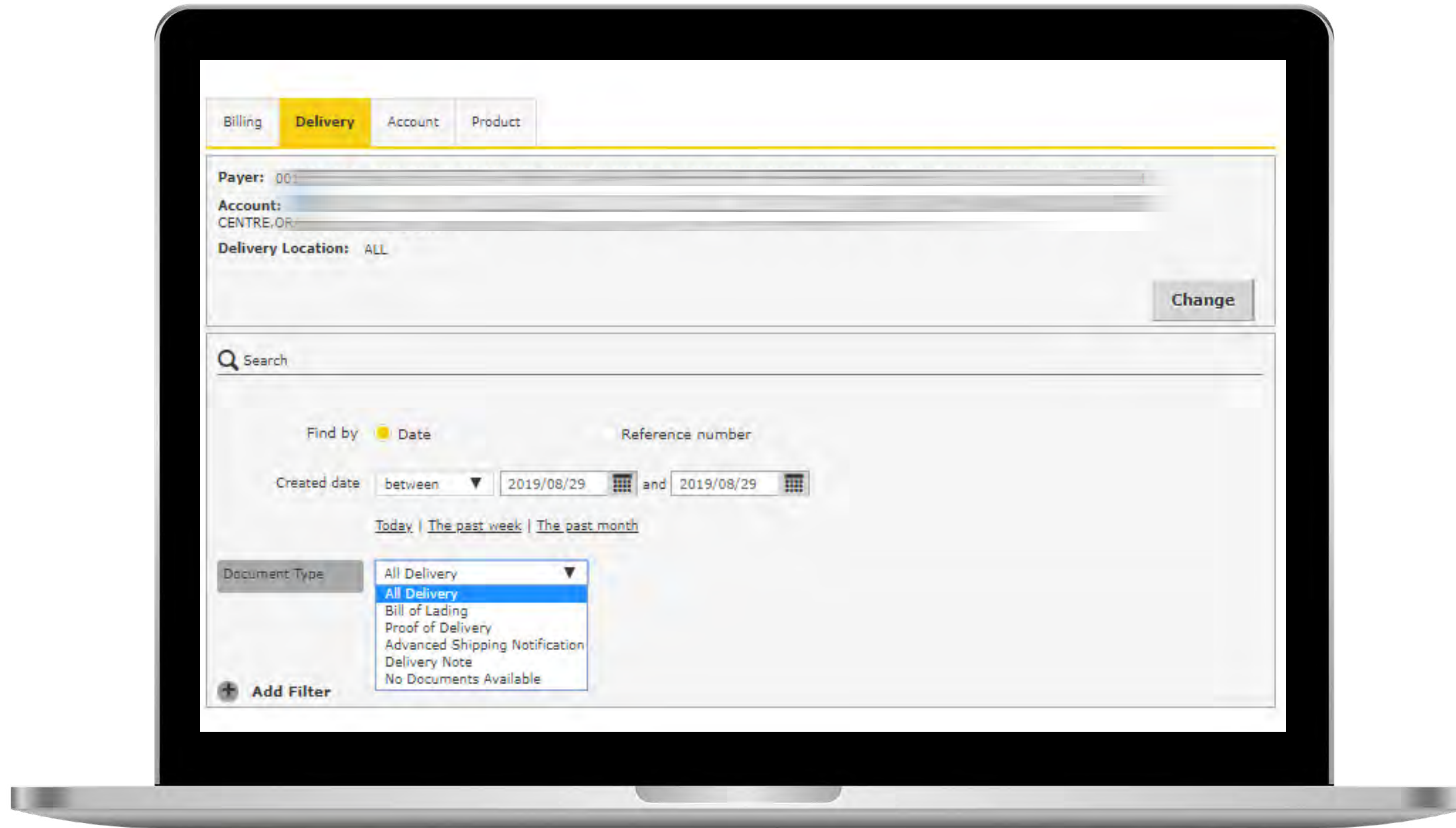
Step
2

Search for all relevant billing documentation using date range and document type

3.3

Recordings and Reporting

Document Copies



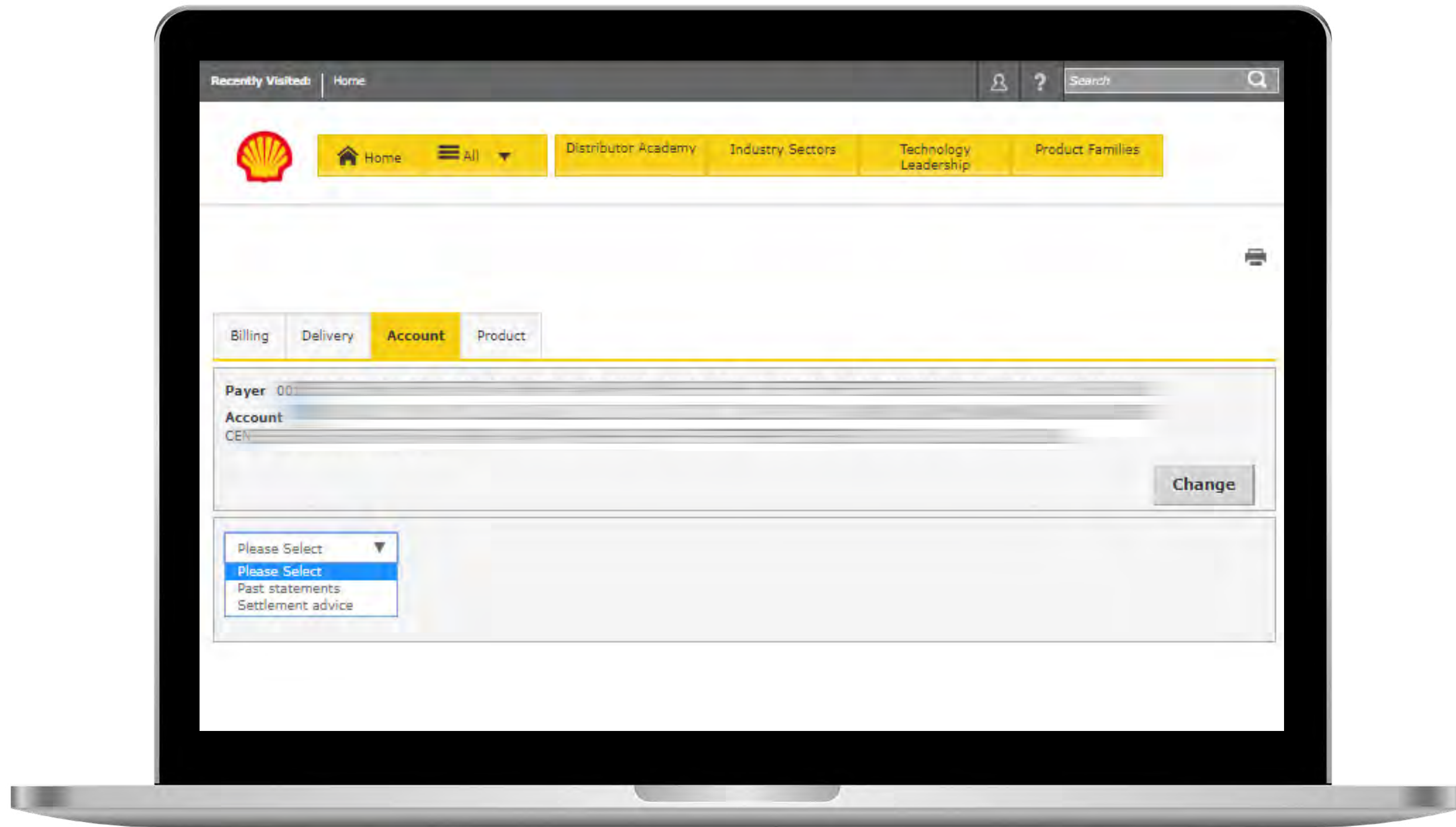
Step
3

Search for all relevant delivery documentation using date range and document type

3.3

Recordings and Reporting

Document Copies



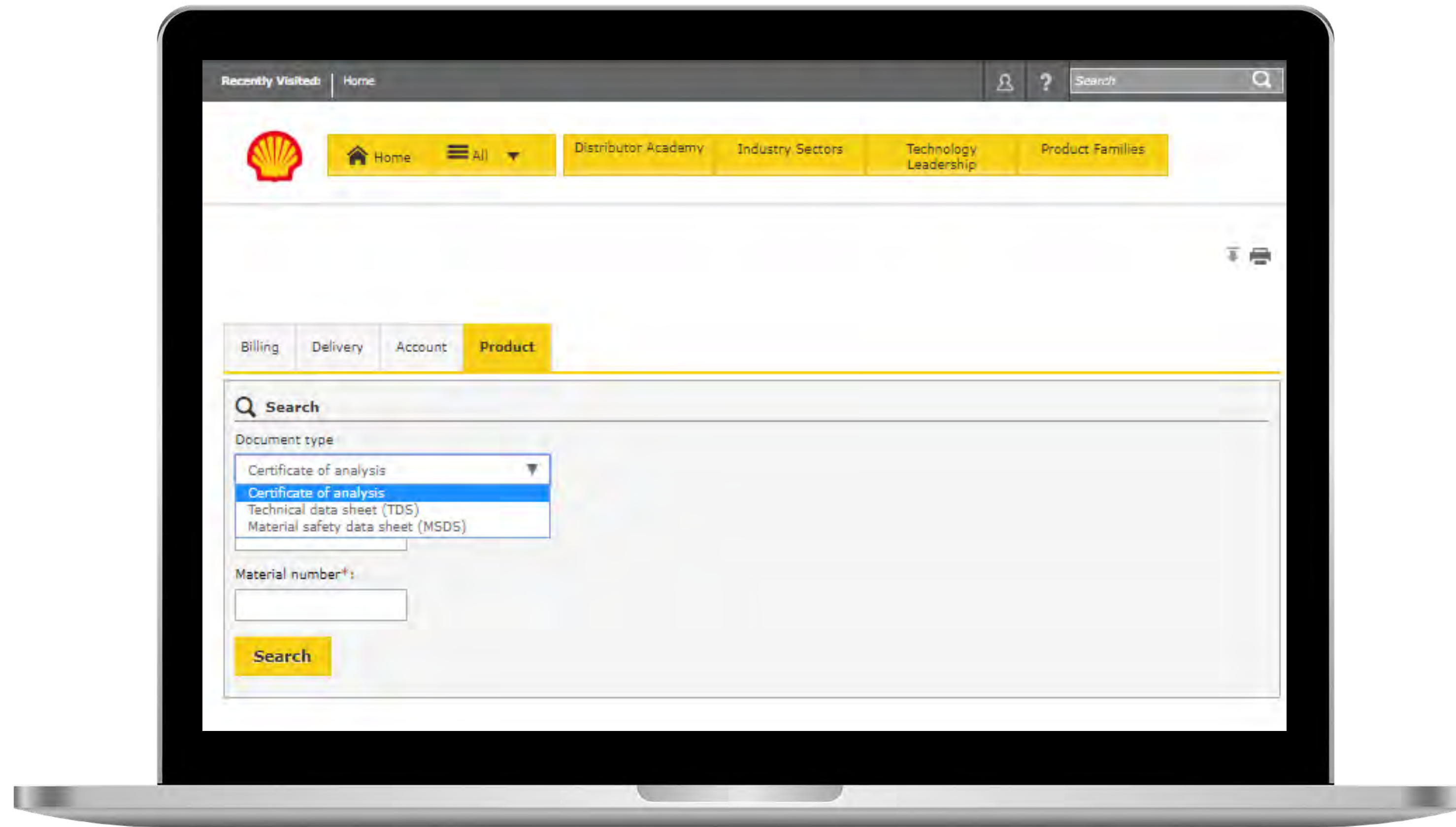
Step
4

Search for all relevant account documentation using date range and document type

3.3

Recordings and Reporting

Document Copies



Step
5

Search for all relevant product documentation using date range and document type

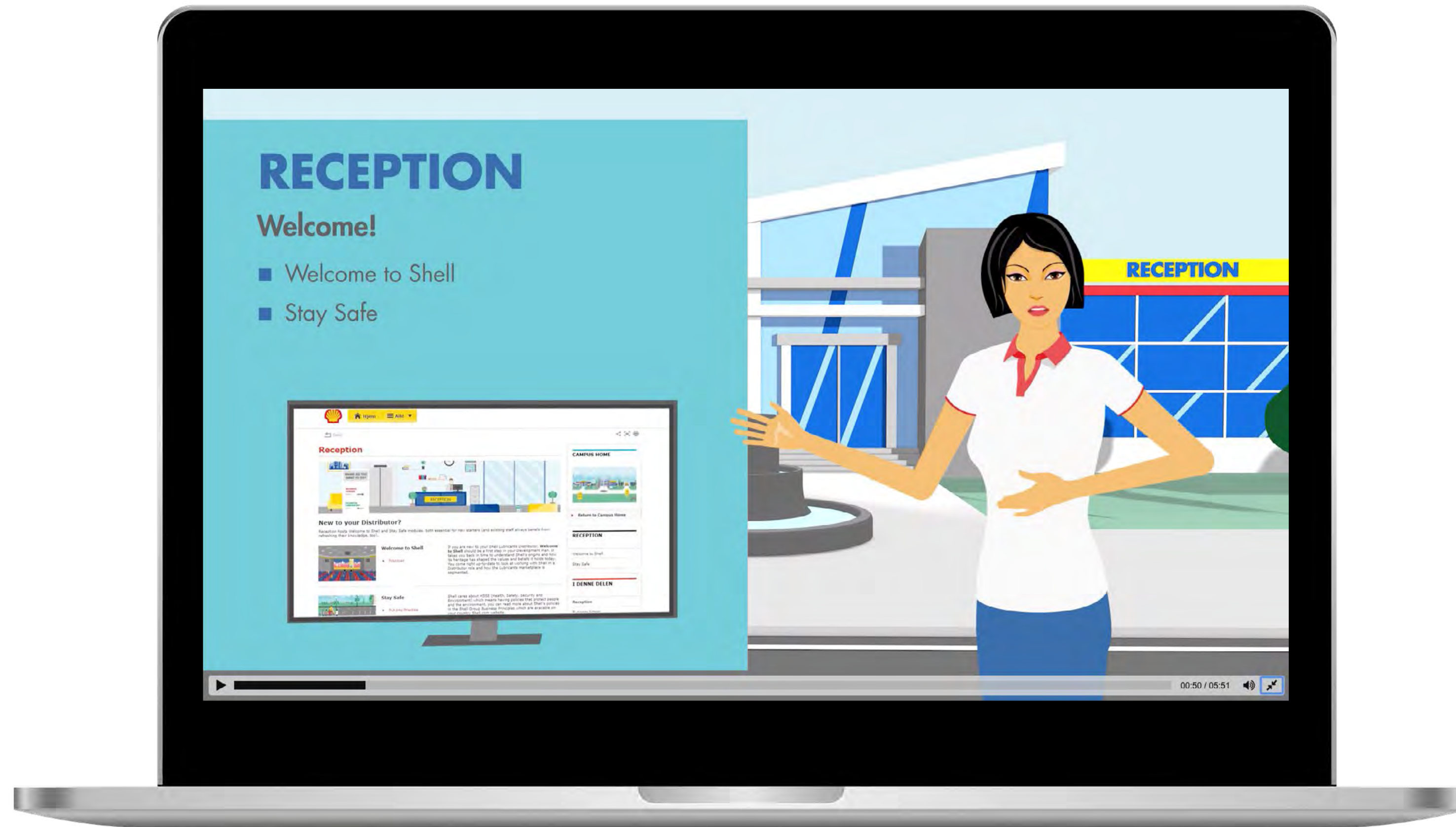
4 Training

Build you knowledge and capabilities through access to training, case histories and technical stories.





The Shell Distributor academy is designed to look like a university/college campus. Different learning zones each hosting a variety of courses and learning resources



Step
2

In the Reception area, Ana-Lee will help with your Welcome To Shell guide

You can also find the Stay Safe program. The purpose is to educate you on the best practices around you to keep you and everyone around you safe

**Step
3**

You can access the Development Tools to help on your learning journey such as the Prospectus guide to help you identify relevant modules and where to find them. Reception is always a good start. If you prefer to go straight to the learning modules then it's easy



Step
4

From campus home page, visit learning zones from navigation panel on the side of the screen



Step
5

Campus map: Business School. Place to come if you want to develop your selling skills and learn about the values of Shell's lubricant brands. Find out more about the key features of Shell's products so you can educate yourself and your customers and boost your sale's success

**Step
6**

Campus map: Technical Laboratory. Here you will find David Chang, Shell's lubricants expert. David presents lubricants series about how lubricants work to protect and clean equipment and engines. David breaks this down into simple terms. Award-winning technical knowledge and capabilities (TKC) in this area you can find the TKC program in the technical laboratory. Distributor Front Line Technical Staff can come here to access the DFLTS Tracks



Step
7

Campus Map: Marketing School. Head here to prepare and develop marketing strategies to effectively promote Shell products. Refer to the DMM Curriculum online to make a start



Step
8

Campus Map: Library. Here you would find additional reading, Quiz answers, Learning Aids. Features include: MindGym – Train Your Brain. Complete challenges and games



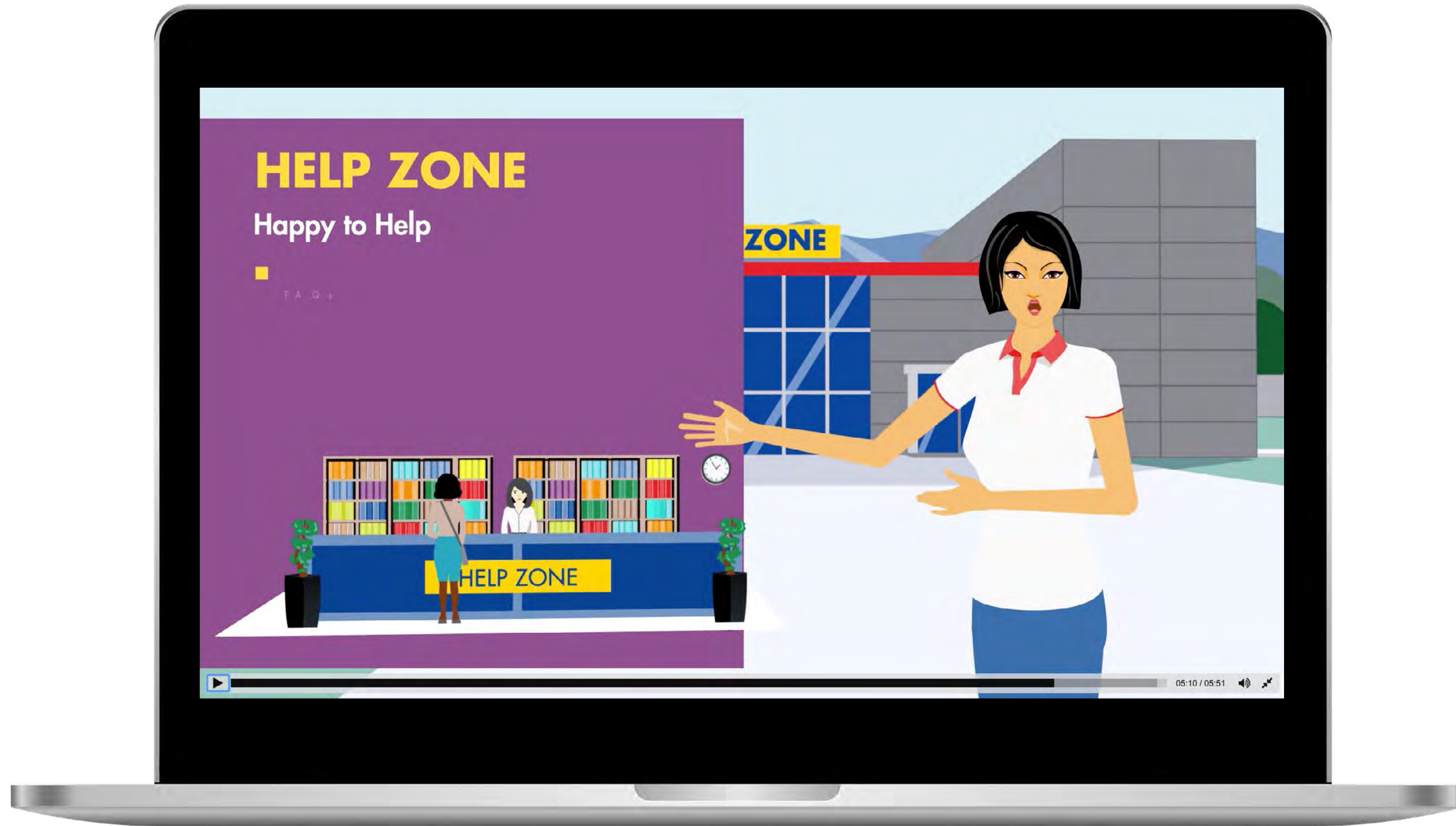
Step
9

Campus Map: Chill Out Zone. Browse through content in your own leisure. This will be updated regularly



Step
10

Campus Map: Go to Study Centre.
Take a learning Checkpoint



Step
11

Campus Map: Help Zone. FAQ, Jargon Buster.
Can contact Shell Account Manager