Shop FinishMaster Customer Overview
https://www.shopfinishmaster.com/

Looking for more information? **Contact Us**
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Email: CustomerService@Finishmaster.com

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Log In

The **Log In** screen, allows a user to log in to an existing account or request a new user.

To Sign In:
Enter information and click the **Sign In** button.
You can use the User ID or the email address associated with the account.
Password minimum length is 8 characters. Password must contain a combination of uppercase and lowercase characters, at least one number, and one special character ($?%_).*

To Request a New User:
Click the New User! link in the upper right hand side of the Log In screen.

New User

From this page, users will need to select the appropriate option.

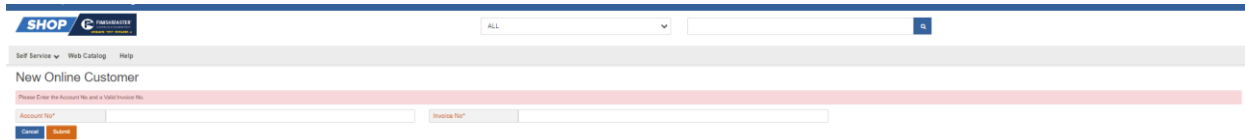**New Users** (already have an account with FinishMaster but have not signed up online)
This is used for current customers of FinishMaster that have an existing account.

New Users (do not have an account with FinishMaster)
This is used for new customers. A profile will need to be completed to proceed with obtaining a User Name.
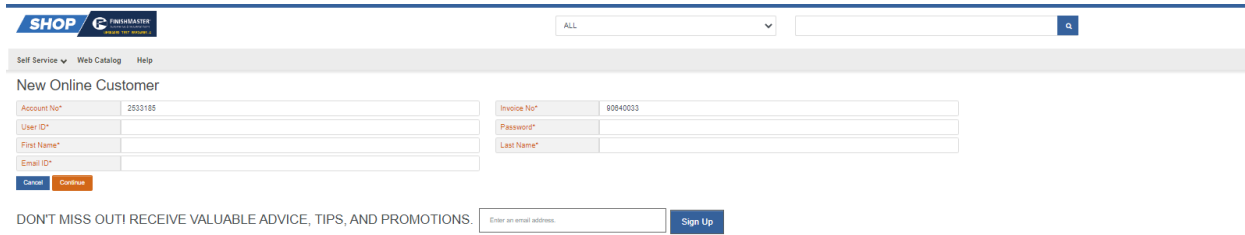
New User – Existing Account

If creating a New User with an active FinishMaster account, user will need to provide a valid

Account No and Invoice No.*

*This can be any invoice associated with this customer. *

Once Submit was selected from previous screen, user will be required to enter valid information for the following fields:

Account No
Invoice No
User ID
Password*
First Name
Last Name
Email ID

Password minimum length is 8 characters. Password must contain a combination of uppercase and lowercase characters, at least one number, and one special character ($?%_).

Once all the required information is entered, the user can begin using Shop FM with no further action needed.

New User – Registration

If creating a New User without an active FinishMaster account, user will need to complete a New User Registration form.

Fill in the required information and click **Register**.

Once completed, users will have the option to Create and Continue Shopping/Browse Catalog. FinishMaster will be sent a request, and customers will be contacted to process the request. Users can only browse at this point.

Home
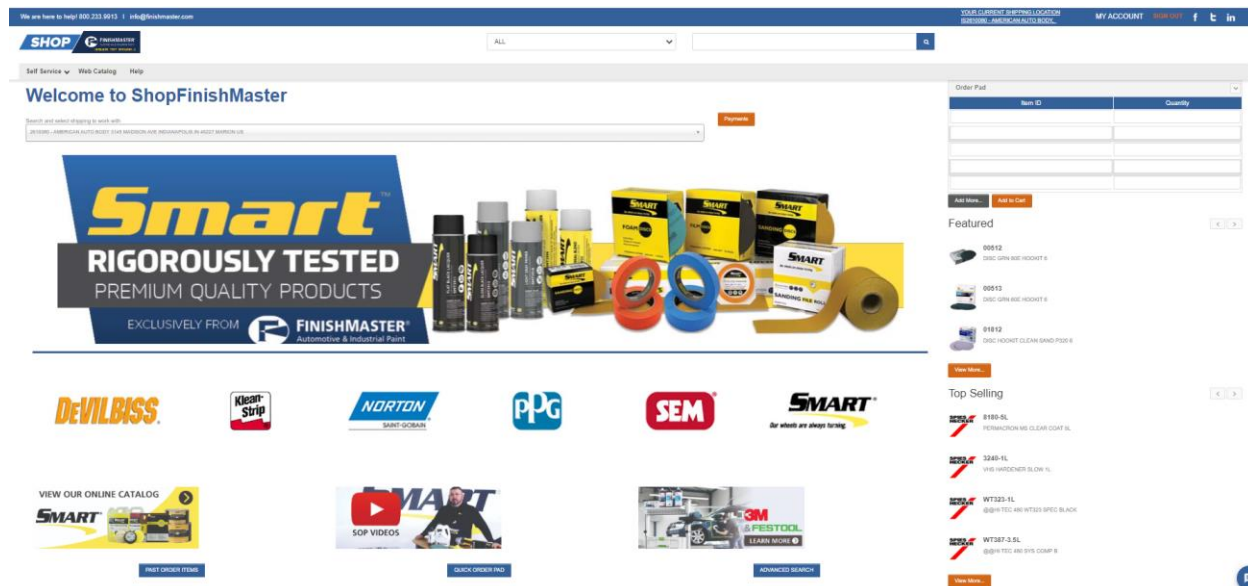
The **Home Page** displays the accounts that a user has access to. From here, users can review Account Information, Change Password, work with My Lists, Upload Items from Excel, access the Order Pad, view Order Inquiry, view Quote Inquiry, view Invoice Inquiry, view Past Ordered Items and work with Open Invoices.

This overview will take users through each page. To get to any one of the pages, click on the **Self Service** drop down and select the desired link, i.e.: Click on the **Order Inquiry** link from the drop down to display the **Order Inquiry** page.

Users can do a quick order, with 5 or less items, by utilizing the Order Pad on the right side of the page.

*To return to **Home Page**, click on the **Shop FinishMaster** banner at the top to be directed back to this page.

Placing an Order

Orders can be placed in a number of ways.

- Order Pad
- My List
- Catalog Search

Once the cart is populated follow these steps to complete the order.

If the order needs to be shipped to an alternate address, click the **Override Shipping** button. Key in the shipping address and click **Continue**. This will only apply to this order.

Review the order for accuracy. Then click **Proceed to Checkout**.

Enter any additional information such as **Customer PO #, Delivery instructions** and **Comments.** Click **Continue**.

Review the order details and click either **Confirm Order** (to order with an existing FinishMaster account) or **Pay & Confirm Order** (to pay with credit card or ACH.)

For **Pay & Confirm Order** the Authorization screen will display. Click Submit after choosing the desired payment method.

A screen with the order number will display.

Account Information

The **Account Information** page displays account information, like Amount Due, Open Order Amount, etc. for the selected customer.

Change Password

To change user's password, fill out the information as required.

Password minimum length is 8 characters. Password must contain a combination of uppercase and lowercase characters, at least one number, and one special character ($?%_)*

My List - Manage

Select a **My List** to Manage and click **Manage Item Associations.**

From **Manage List Item Associations** page, users can change sequence of items in list, can select items to be uploaded to cart, or select ALL items to be uploaded to the cart, delete items, etc.

Upload Items

Upload Items from Excel

Requirements for Excel file upload:

- Row 1 can contain any content (this row will not be uploaded).
- Row 2 through 1000 will be uploaded and any rows after row 1000 will be ignored. The maximum is 999 items per upload. To upload more than 999 items, upload the items in separate batches.
- Column 1 must contain the item #. Note that you cannot upload configured items or kit items.
- Column 2 must contain the item quantity.
- Column 3 must contain the item UOM for the quantity. Any columns after column 3 will be ignored. To view a list of UOM codes and descriptions.click here.To bypass UOM upload, leave column 3 empty.
- Enter the correct sheet name.
- To download a sample Excel file, click here.

Enter the Excel details below and then click **Upload to Cart** or **Add to List**.

| Path | Choose File | No file chosen |
| Sheet Name | Sheet1 | |

Upload To Cart **Add To List**

The **Upload Items from Excel** page allows users to upload an Excel document to either items to the cart or add items to the list.

Users will select **Browse** and then select the correct file to upload. Once the correct file is selected, users will need to select if they uploading to **My List** or **My Cart**.

Upload Items – Upload to Cart

Upload to Cart:

Once file is selected in the Path, click on Upload To Cart to add all items on selected Excel document to **My Cart**.

Once upload is completed, click on **Cart** to view the items uploaded.

Upload Items – Upload to My List

Add To List:

Once file is selected in the Path, click on **Add To List** to add all items on selected Excel document to **My List.**

Choose the **My List** from the **Select a List** panel and click **Add Items**.

Order Pad

The **Order Pad** page displays the order pad, where up to 100 items can be selected and placed into the shopping cart.

Order Inquiry

The **Order Inquiry** screen allows users to see different details about the order and to resend an email.

To View Details:
Select the desired order # and click **Show Details** to display the order details.

To Resend Email:
Select the desired order # and click **Resend Email** (the email will send automatically).

To View Comments:
 Select the desired order # and click **Show Comments** to display the order comments.
The following 2 options will only display when the Order has been invoiced and shipped.

 To View Invoices:
Select the desired order # and click **Show Invoices** to display invoice details.

To Track Shipments:
Select the desired order # and click **Track Shipments** to display the tracking details.

Example Order Types:
S5 - Order created in Shop FM
SO - Order created in E1
SQ - Sales Quote

Order Inquiry – Details

The **Order Details** page displays the details for the selected order #, like PO#, special instructions, addresses, etc.

To Print Order:
Click on **Print Order**. A printer window will display and the order can be printed.

To Download to Excel:
Click on **Download to Excel** and an Excel document will be created with the order details.

To Reorder:
Click on **Reorder.** A new order will be created in the **Cart.** Proceed to the Cart and process the order. Changes to the original order can be made from the Cart.

Order Inquiry – Comments

The **Order Comments** page displays the **Order Number**, **Order Type** and any **Comments** and **Delivery Instructions** that were added when the order was placed.

Quote Inquiry

The **Quote Inquiry** page displays all quotes available for the selected customer.

To View Details: Select the desired quote # and click **Show Details** to display the quote details page.

To Resend Email: Select the desired quote # and click Resend Email (the email will send automatically).

To View Comments: Select the desired quote # and click Show Comments to display the quote comments.

To Convert to a Sales Order: Select the desired quote # and click Convert to Sales Order to display **Quote Details (Convert Quote)** page.

When converting to a sales order user can convert selected items or all the items from the quote.

Invoice Inquiry

The **Invoice Inquiry** page displays all invoices available for the selected customer.

To View Details: Select the desired Invoice # and click **Show Invoice Details** to display the invoice details page, where users can Print or Download the invoice.

To Print Invoice: Select **Print Invoice**. A PDF of the original invoice will display and can be printed.

To Download to Excel: Select **Download** and an Excel document will be created.

Past Ordered Items

The **Past Ordered Items** page displays all past items ordered for the customer selected.

From this screen, users can view **Your Price**, add to **My Cart** or **My List** and **Compare** items.

Users can change how many items per page are listed, how they are sorted, and what view the screen is displayed in (Table, Expanded or List).

Open Invoices

Click on **Payments** then click **Invoices.**

Any unpaid invoices will display on this screen.

Select the invoices to be paid and click the **Pay Now** button on the top right.

Payments and Payment Methods

Pay Now – No Payment Method Exists

Choose either **Credit Card** or **ACH** from the **Payment Mode** box.
Click on **New** under **Payment Method** to add a new payment method**.**

For a credit card, complete the information on this screen. Then click **Submit.**

For ACH, complete the information on this screen. Then click **Submit**.

To save the payment information for future transactions, click **Save For Me.** Then click **Continue**.

To process the payment, click **Submit**.

A screen will display showing that the transaction was successful and the invoices paid will no longer display.

Pay Now – Payment Method Exists

To process the payment, click **Submit**.

Saved payment methods will display. After choosing the desired payment method, click **Submit**.

Web Catalog
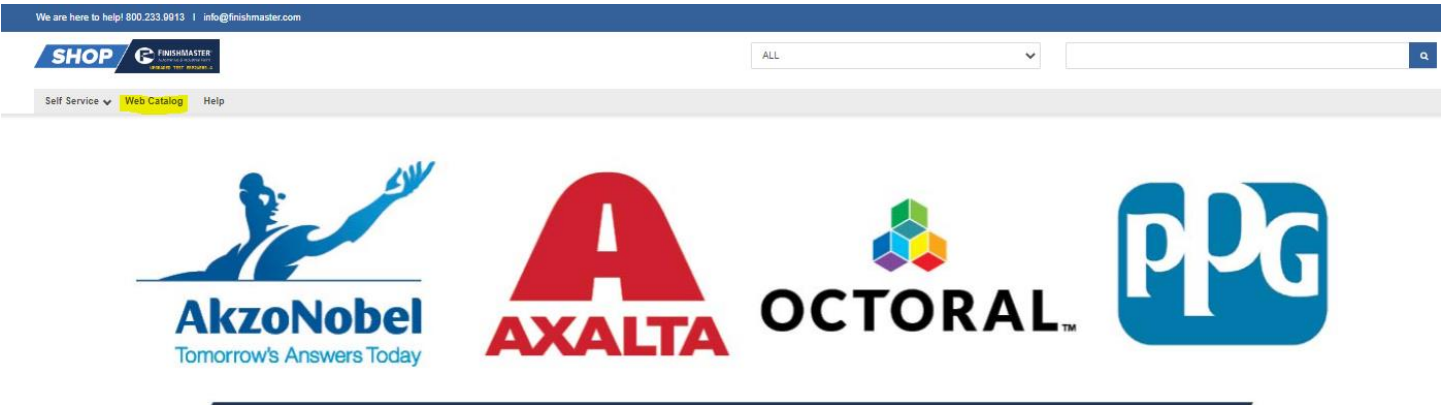
Click on **Web Catalog** to search for items by item categories.
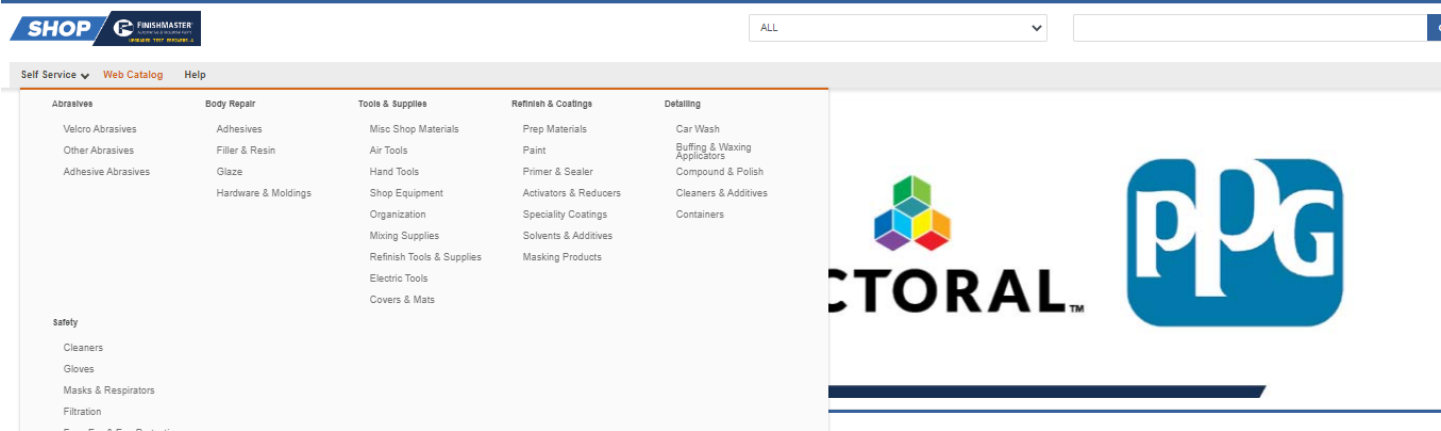
For example, to search for all gloves available, click on **Gloves.** Then click the type of glove desired. For example, **Safety Gloves.**
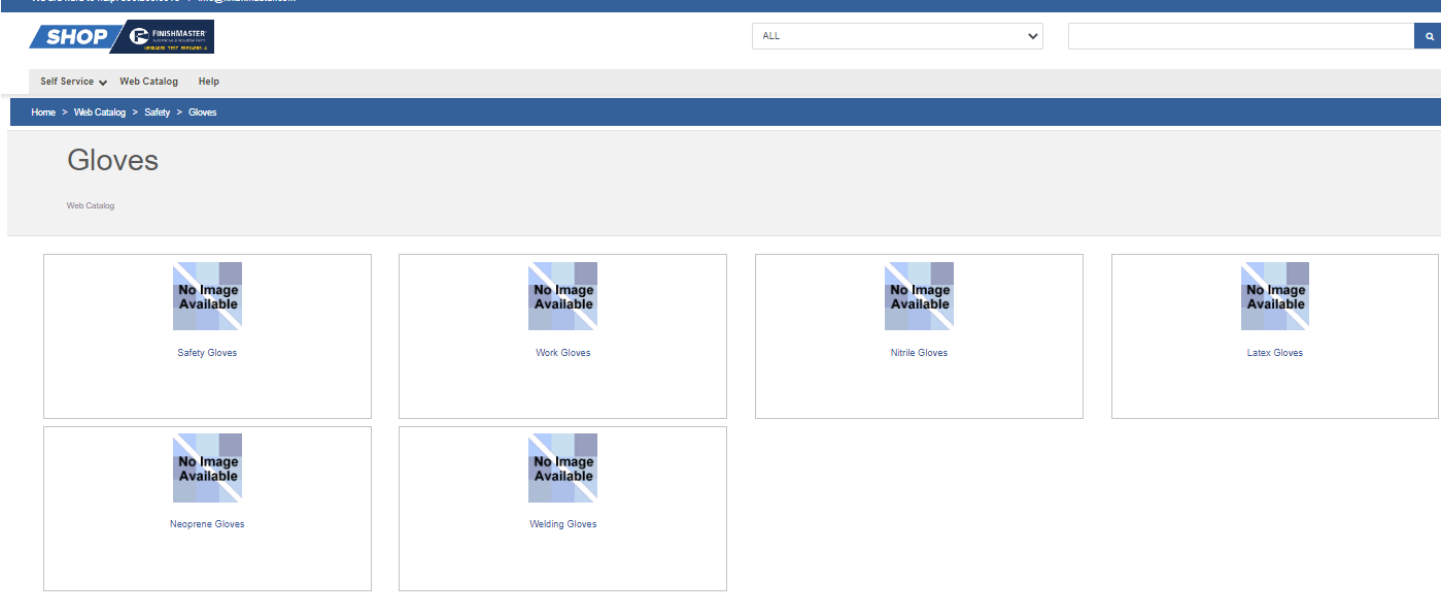
All available glove items will display.

Filtering is available on the left side of the screen. Choose the desired filtering to reduce the number of items displayed. For example, filter by **Manufacturer.**

Once the desired item is located, enter the quantity to order and click **Add to Cart**.

To add the item to an existing **My List,** click **Add to List.** Choose the desired list and click **Add Items.**

Advanced Search

An advanced search is available at the top of the screen. Key in an item number, a partial item number or any part of the item description. The more data entered, the less results will appear. For example, key in **FIB1** to retrieve all item numbers that begin with FIB1.

Key in **Seam Sealer** to retrieve all items where Seam Sealer appears in the item name or description. After finding the desired item, key in a quantity and click **Add to Cart** or **Add to List**.