

## Climb Web Portal for Resellers

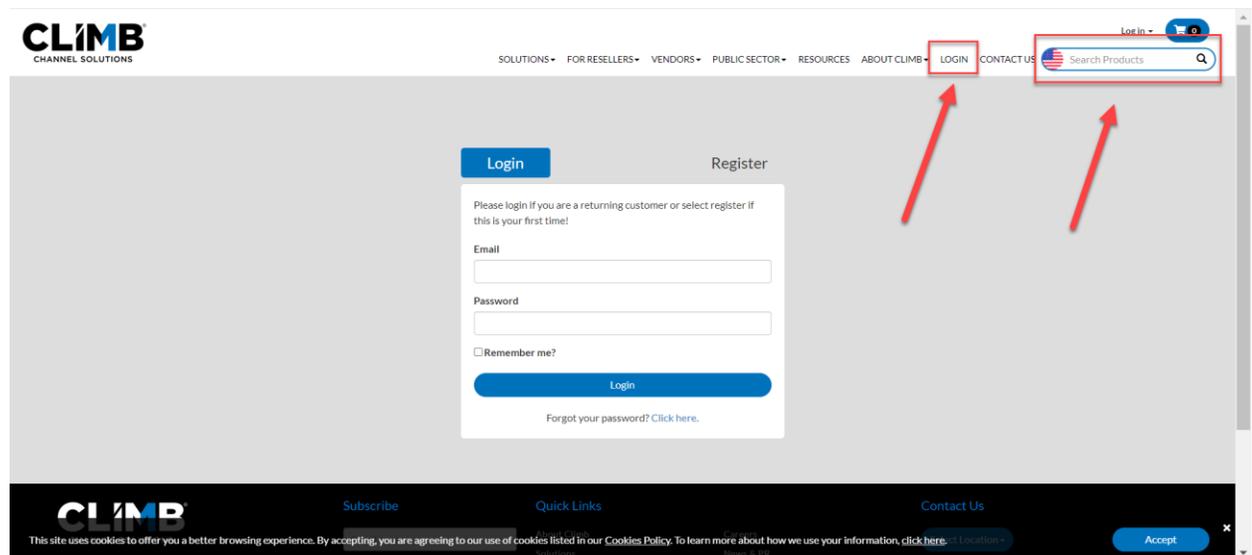
### What does it do?

- Links resellers to a sales team contact.
- Allows resellers on terms to pay for an order through Apple Pay, credit card, or check.
- Checks the status of orders.
- Exports order information.
- Requests license keys.
- Views order details.
- Requests invoices.
- Requests RMAs (returns).
- Requests help from the sales teams.

### Logging Into Your Account

The web portal can be accessed from Climb's website. Click the **"Login"** button on the top ribbon.

This is also where you can search for products we sell and see if their pricing allows for them to be ordered online.



See next page for full reseller landing page.

**Account Details**

Company: Insight Account #: 0001361740  
 Account Name: User Name: Kristen Anastos  
 Address: 6820 S. Harl Avenue, Tempe, AZ 85283, USA

**My Sales Team**



Team: Southwest Team

Name: Isaac Henry  
 Phone: 732-389-0932 x7294  
 Email: Isaac.Henry@waysidetechology.com

**Online Payments**

**Pay Your Bill**

Pay your Climb Channel Solutions bill with your credit card, debit card, or bank account

**\$ Pay Bill**

Log in to your account ▾



Part of the doxo network

**Order History**

[Billing Statement](#)

[Order History](#)

Click Order History to display your order history for the past 30 days or use the field to search for an order.

Order Number

[Search](#)

**Need Help?**

Our support team is standing by and ready to help. Feel free to submit a help request.

Your Name:

Kristen Anastos

Your Email Address:

KristenA@Climbcs.com

Topic:

Choose...

Order Number / PO Number:

Product Name / SKU / Manufacturer's Part #:

Question:

[Submit Request](#)

**Recent Login Activity**

Below is a list of recent login activity for your corporate account.

User	Login Date	IP Address
Climb Support (kmassa)	6/21/2024 4:30:17 PM	10.1.30.248
Climb Support (kmassa)	6/21/2024 4:30:17 PM	10.1.30.248
Climb Support (lhenry)	5/3/2024 3:10:18 PM	10.1.30.26

**Support Services and Quick Links**

Your business is very important to us—we are here to make your experience as straight forward and enjoyable as possible! If you can't find what you're looking for here click Support Center above for more support options and quick links.

[Change my Password](#)

[Contact Us](#)

[Hours of Business](#)

[How to Order](#)

[Payment/Order Policies](#)

[Return Policy](#)

[Useful Transactions](#)

## Paying A Bill

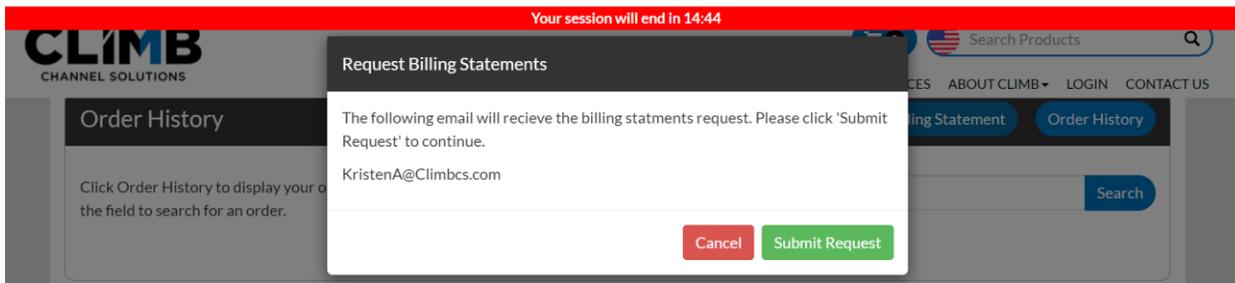
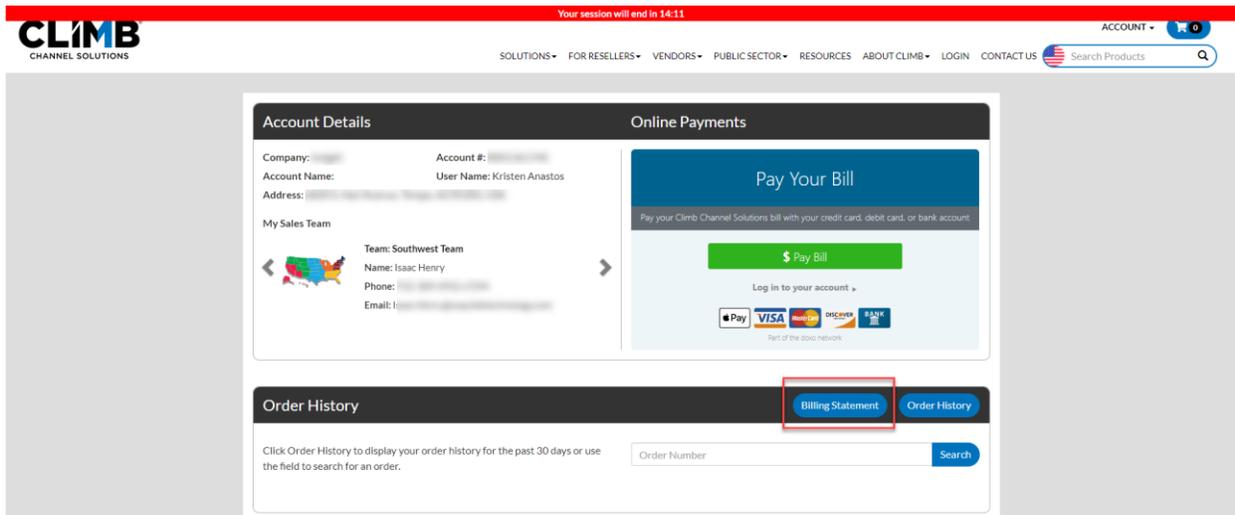
The web portal uses a third-party website, Doxo, to process payments. To pay a bill, click the green **“Pay Bill”** button. This will direct you to a page to fill in your payment account and order information.

The screenshot shows the Doxo payment interface. At the top left is the Doxo logo with 'try PLUS' underneath. At the top right is a 'Log in to doxo' button. Below the header is the title 'CLIMB Pay Your Climb Channel Solutions Bill'. A progress bar at the top of the form has four steps, with the first step (1) highlighted in blue. The main heading of the form is 'Enter Your Payment Amount'. Below this heading is a section titled 'Amount to Pay' which contains a text input field with a dollar sign (\$) on the left. Below the input field is a green button labeled 'Pay Bill'.

The screenshot shows the Doxo payment interface. At the top left is the Doxo logo. At the top right is a 'Log in to doxo' button. Below the header is the title 'CLIMB Pay Your Climb Channel Solutions Bill'. A progress bar at the top of the form has four steps, with the second step (2) highlighted in blue and marked with a green checkmark. The main heading of the form is 'Enter Your Climb Channel Solutions Bill Details'. Below this heading are four input fields: 'Email address', 'Account #' (with a sub-label 'Lifeboat Account Number'), 'Invoice #' (with a sub-label 'Lifeboat Invoice # located on invoice or statement'), and 'Your ZIP Code'. Below these fields is a green button labeled 'Next'.

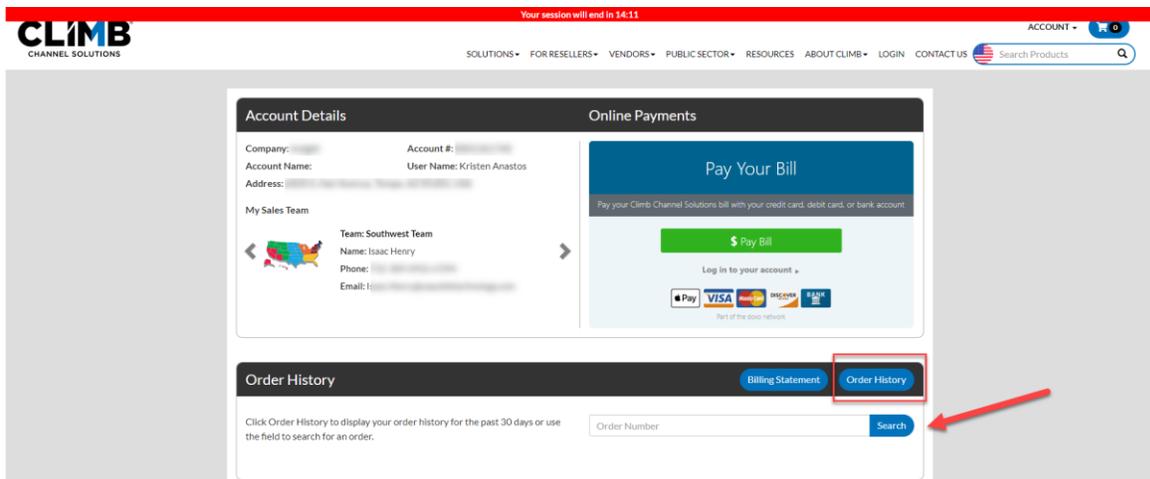
## Billing Statements

If a customer would like to view their billing statement, they can submit a request to have it emailed to them. From the main customer landing page, click the **“Billing Statements”** button. This will pop up a window that asks for the email address you would like to send it to.



## Searching for an Order

To find an order status or access information about that order, you can either view all orders or run a search for a specific order from the main web portal page.



Viewing the order history will show you all orders within a certain date. This date can be updated to widen or narrow your results. You can also filter by order number or PO number. The table easily shows if the orders has been fulfilled or not.

Your session will end in 14:41

ACCOUNT - [User Icon]

SOLUTIONS - FOR RESELLERS - VENDORS - PUBLIC SECTOR - RESOURCES ABOUT CLIMB - LOGIN CONTACT US [US Flag] Search Products [Search Icon]

Search Orders

From Date: 05/22/2024 To Date: 06/21/2024 Order Number: Order Number PO Number: PO Number

Search Export Order Summary Export w/ Details Reset Search

Your search returned over 1000 orders. We can only show the top 1000 orders. Please use the date range fields to refine your search.

« 1 2 3 4 5 6 7 »

Order Number	PO Number	Currency	Order Date	Status	Options
T2485777	504509707	USD	5/21/2024	Shipped Complete	[Menu Icon]
T2485778	68516313	USD	5/21/2024	Shipped Complete	[Menu Icon]
T2485783	504508763	USD	5/21/2024	Shipped Complete	[Menu Icon]
T2485787	68516493	USD	5/21/2024	Shipped Complete	[Menu Icon]
T2485793	504509467	USD	5/21/2024	Shipped Complete	[Menu Icon]

## Accessing Order Details

Clicking on the “Options” icon gives you a few quick things you can find for an order.

Your session will end in 14:34

ACCOUNT - [User Icon]

SOLUTIONS - FOR RESELLERS - VENDORS - PUBLIC SECTOR - RESOURCES ABOUT CLIMB - LOGIN CONTACT US [US Flag] Search Products [Search Icon]

Search Orders

From Date: 05/22/2024 To Date: 06/21/2024 Order Number: Order Number PO Number: PO Number

Search Export Order Summary Export w/ Details Reset Search

Your search returned over 1000 orders. We can only show the top 1000 orders. Please use the date range fields to refine your search.

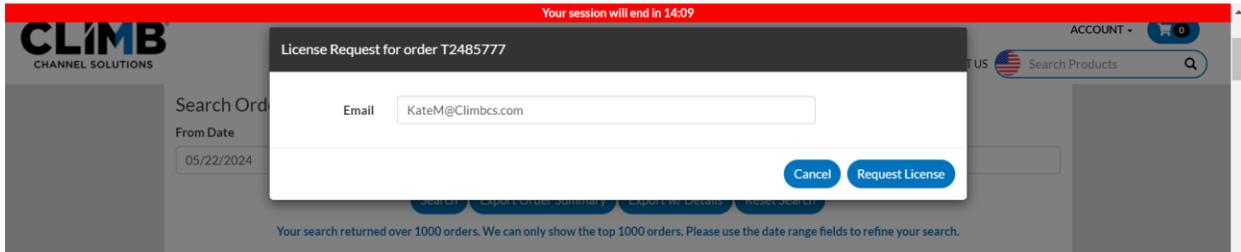
« 1 2 3 4 5 6 7 »

Order Number	PO Number	Currency	Order Date	Status	Options
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T2485778	68516313	USD	5/21/2024	Shipped Complete	[Menu Icon]
T2485783	504508763	USD	5/21/2024	Shipped Complete	[Menu Icon]
T2485787	68516493	USD	5/21/2024	Shipped Complete	[Menu Icon]
T2485793	504509467	USD	5/21/2024	Shipped Complete	[Menu Icon]

License Key(s)  
Order Details  
Request Invoice  
RMA Request

## License Keys

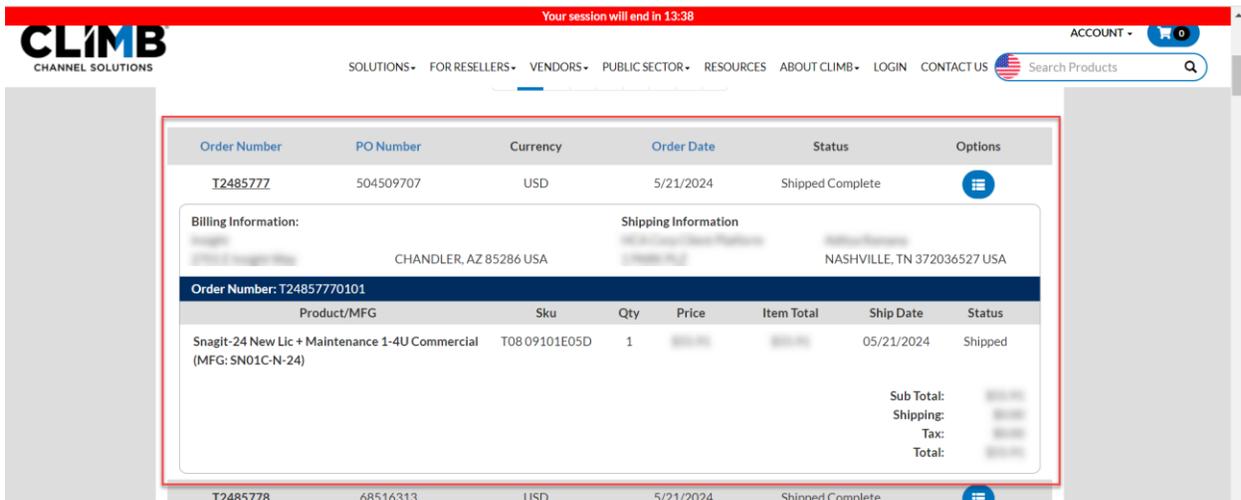
If a reseller would like to request access to the license keys for an order, click **“License Keys”** to pop up a box for your email. These keys will be located for you and sent within a couple of hours.



## Order Details

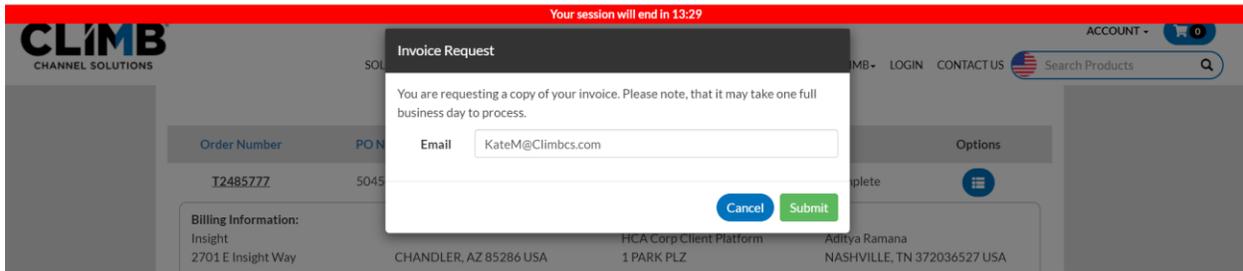
“Order details” pops down the summary of the order, which includes:

- Billing information
- Shipping information
- Product(s) ordered
- Order totals



## Requesting an Invoice

To request a copy of an invoice, click the **“Request Invoice”** button. This will pop up a box to put in your email address. The invoice will be located and sent to you as soon as possible.



## RMA Request

Click **“RMA request”** to submit a request to the sales team to put in an RMA. This does not automatically mean that an RMA will be put in, as each vendor has their own return policies. Once submitting the request, a member of the sales team will reach out to confirm that the RMA is being put in or that it is not possible.

See the form below for full details needed for the request. Note that all SKUs to return must be included and it is important to note if you will be reordering. The more details on this form, the better.

**Return Merchandise Authorization (RMA) Request Form**

This form is to be used to request a return of product(s). All returns are subject to approval and a restocking fee. Once an RMA has been issued, you have 15 days to return the approved merchandise. If merchandise is not received within 15 days, we will not be able to complete the shipment.

<b>Order Number *</b> <input type="text" value="T2485777"/>	<b>PO Number</b> <input type="text" value="Po Number"/>
<b>Contact Name *</b> <input type="text" value="Contact Name"/>	<b>Contact Phone *</b> <input type="text" value="Contact Phone"/>
<b>Contact Email *</b> <input type="text" value="Contact Email"/>	<b>Reason For Return *</b> <input type="text" value="Select Reason"/>

**Method of Contact \***

**Disk Seals Open \***

**ReOrder \***

**Comments**

**Skus: \* At least One**

<input type="text" value="Enter Sku"/>	<input type="text" value="Enter Sku"/>
<input type="text" value="Enter Sku"/>	<input type="text" value="Enter Sku"/>
<input type="text" value="Enter Sku"/>	<input type="text" value="Enter Sku"/>

## Requesting Help with a Quote or Order

From the main portal page, scroll down to the “Need Help” section. This form will be directed to the correct sales team. It can be a request for help with a current order, or a request for a quote for something new.

The screenshot shows a web form titled "Need Help?". At the top, it says "Our support team is standing by and ready to help. Feel free to submit a help request." The form contains several input fields: "Your Name:" with the value "Kristen Anastos"; "Your Email Address:" with the value "KristenA@Climbcs.com"; "Topic:" with a dropdown menu showing "Choose..."; "Order Number / PO Number:" with an empty text box; "Product Name / SKU / Manufacturer's Part #:" with an empty text box; and "Question:" with an empty text area. A blue "Submit Request" button is located at the bottom center of the form.

Other help topics include the following list and will be routed to the correct person if it is not the sales team.

This image is a close-up of the "Topic:" dropdown menu from the form above. The menu is open, showing a list of options. The first option is "Choose..." with a downward arrow. Below it is another "Choose..." option, which is highlighted with a blue background. The remaining options are: "Feedback", "General Assistance", "International Inquiries", "Login Assistance", "Order Tracking Assistance", "International Inquiries", "Product Availability", "Product Sales Assistance", "Technical Product Info", and "Other".

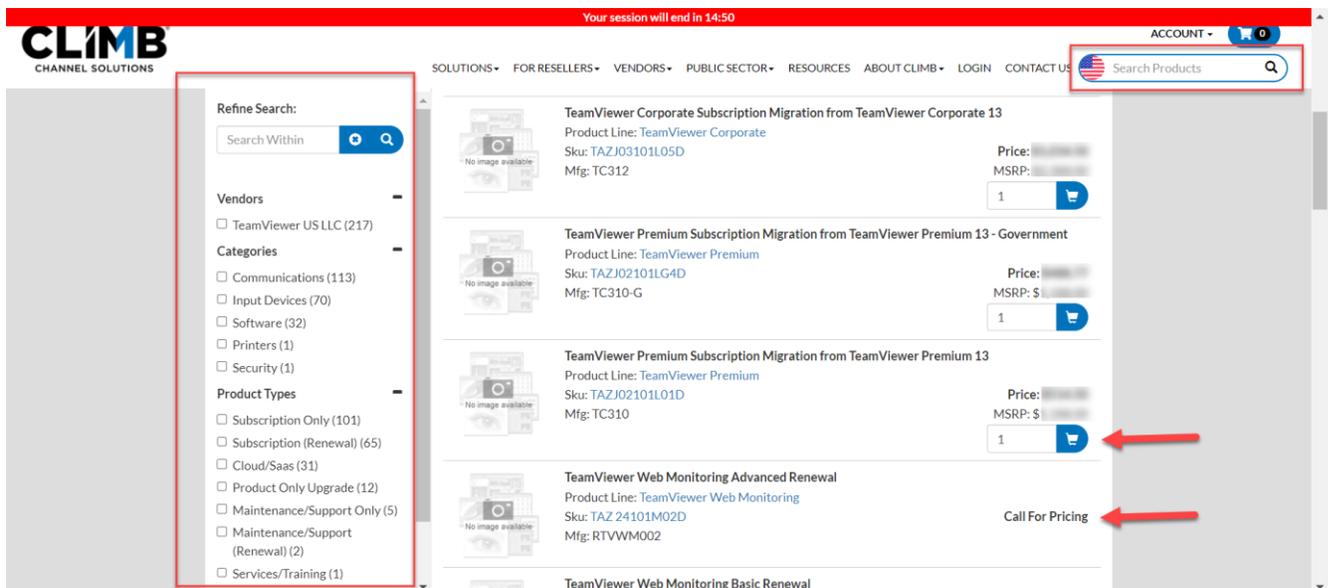
## Searching for Products/Ordering Online

From the main customer landing page, you can search for products. Many of these products can be ordered directly from the page. If the customer account has a particular partner level or academic/government/non-profit pricing, it should pull that pricing information accordingly.

Products can also be filtered on the left-hand side.

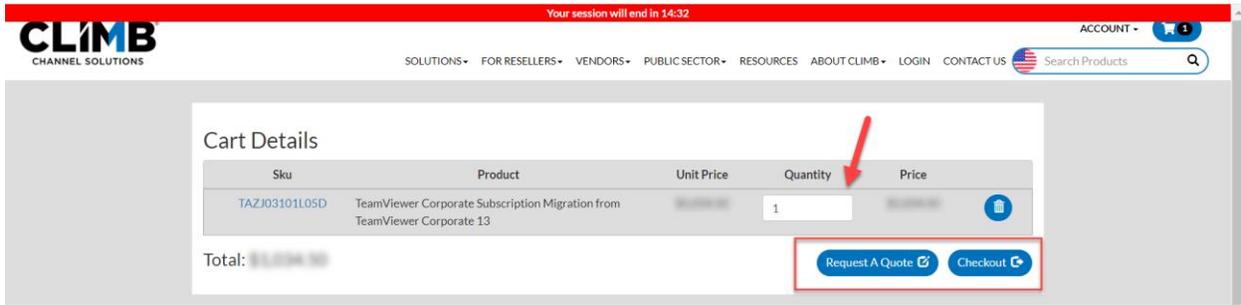
For products that can be ordered online, there will be pricing immediately available. For these products, you can click the cart icon to add the products directly to your cart and check out if you would like.

For special pricing products, there will be a **“Call for Pricing”** note instead. For these products, use the **“Need Help?”** section on the main landing page to request a quote or reach out to your sales team directly.



## Purchasing Products Online

Once products have been added to your cart, click on your cart in the top right corner to view. From here, you can also put in a **Quote Request** to the sales team or **Checkout**.



Once you **Checkout**, you will be prompted to fill out all of the necessary end user and shipping details and assure that all of your information has been entered correctly. Recently used end user information is stored and accessible.

