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Customer Portal Help Video

Watch a short training video about the Customer Portal by clicking <u>HERE</u>.

Who to Contact

- Customer Service (<u>Customerservicebiz@simonandschuster.com</u>) for order status, tracking, or general shipping questions.
- Customer Portal Team (customer Portal, login assistance, notification setup (see page 6).

Accessing the Customer Portal

First Time Users

- o Go to: <u>customerportal.simonandschuster.com.</u>
- Click Register Now.
- Complete the Registration Form Be sure to drop the leading zero when entering your account number.

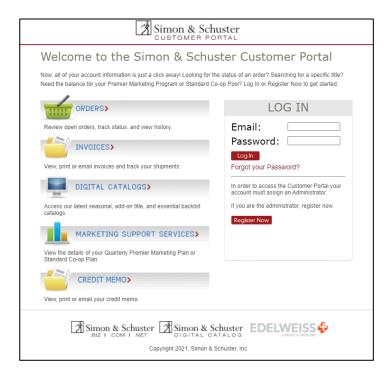
Resetting a Password

- o If you have forgotten your password, click Forgot Your Password? on the login screen.
- Submit your email and follow the instructions that are sent to you.
- o If you need help contact customerportal@simoandschuster.com.

Account Administrators

- o There can only be one Account Administrator for each account number.
- o If the administrator needs be reset, contact customerportal@simonandschuster.com.
- The Customer Portal team will remove the old administrator and set up the new one. All
 users who were previously registered will have to sign up again.





Customer Portal Home Page

- Use the Icons on the Home Page to navigate to the Order Search, Invoice, or Credit Memo search screens.
- If you are an Account Administrator, use the User Administration icon to make changes to the users that have access to the account.
 - o NOTE: An email can only be associated with one account number.

• Contact Options

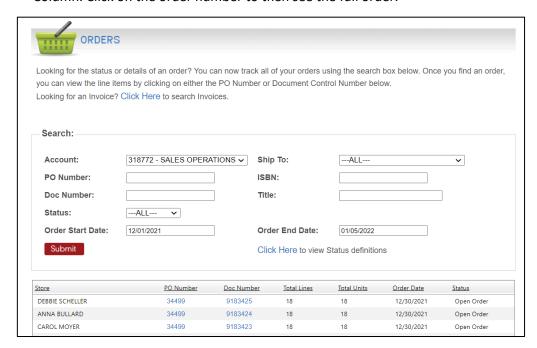
- Contact Customer Service Provides the toll-free Customer Service phone numbers, the Customer Service email address, and a list of our Independent Sales Representatives broken down by territory. Contact Customer Service if you have questions about an order that can't be answered by the Customer Portal.
- Contact Customer Portal Support Opens an email addressed to the Customer Portal inbox. Send an email if you are experiencing any technical difficulties while using the Customer Portal.
- Contact My Sales Representative Viewable only to the Account Administrator. Opens an email with the Sales Representative's name to write any questions or concerns.
- Contact Financial Services Viewable only to the Account Administrator. Opens an email addressed directly to your account's Financial Service Representative.





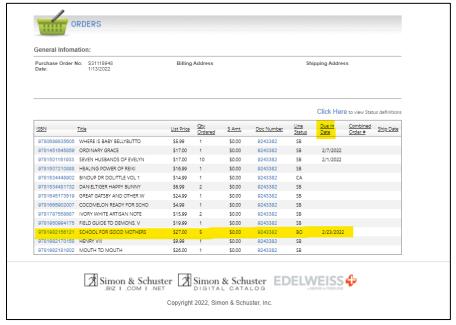
Tracking Orders

- Select Orders from the Home Screen.
- Search for an order by entering the date range an order was placed, the PO number for the order, or the Doc number.
 - The PO number is the number provided by the account at the time the order is placed.
 The Doc number is the S&S generated order confirmation number.
- Click submit to see search results.
- There is a link to order and title status definitions if you are unsure of what the status means.
 - Cancelled/Combined Orders Some titles may be shipping with other orders. If that is the case, the order number that it combined with will appear in the Combined Order # Column. Click on the order number to then see the full order.

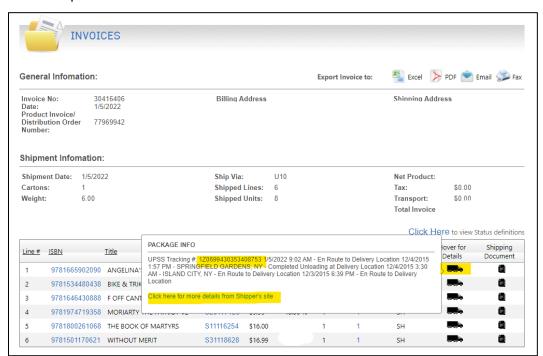




- Click the hyperlinked PO Number or Doc Number beside the order to view order details.
- Titles on backorder will show a Due In Date, this is the date that the title is expected to arrive in S&S warehouses. If a title is on backorder and there is no Due In Date, then there is not a printing planned for the title.



- For tracking information, click on the Doc number for a shipped order.
- Click on the Invoice number.
- Hover over the truck icon next to any title to view the tracking number or link to the shipping website if provided.

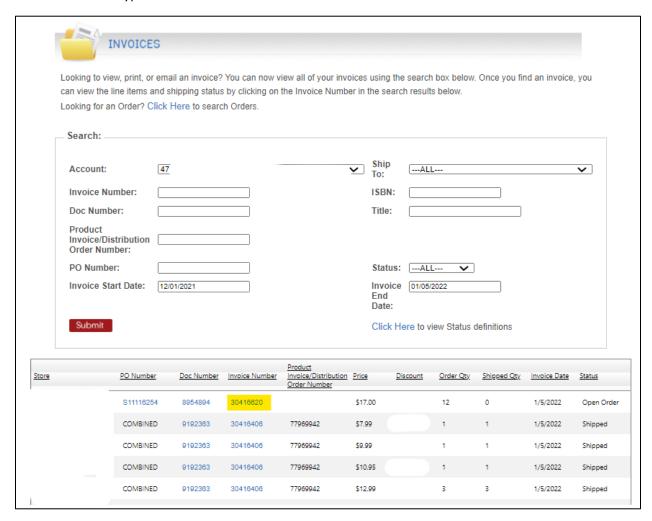




Invoices

The invoice posted in the S&S Customer Portal is the financial invoice and includes the overall total dollar amount. The invoice generated from the warehouse is the product invoice/packing list and does not include the total dollar amount.

- Select the Invoice icon from the Home Screen to search invoices.
- Search by any criteria and click submit to view the search results.
- Click the hyperlinked invoice number to view the titles on each invoice.



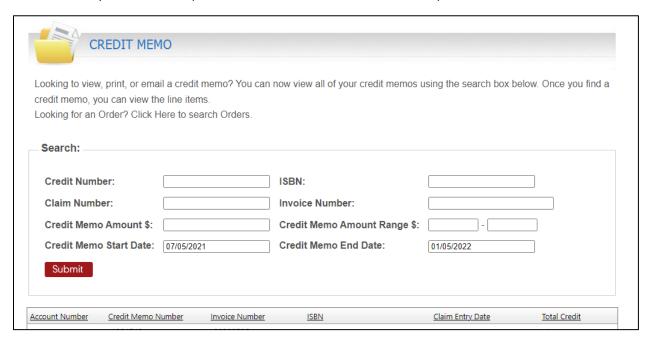
• Export the invoice to PDF, Excel, or an email to share the invoice as needed.





Credit Memos

- Search and view credit memos by clicking Credit Memos on the Home Screen.
- Use any search criteria and click submit to view the search results.
- Click the hyperlinked credit memo number to view the details.
- For any credit memo questions contact the financial services representative.



Register for Notifications

- Email Customerportal@simonandschuster.com to receive electronic notifications for:
 - Orders Received
 - Credit Memos Posted
 - Invoices Shipped
 - o Shipments Delivered