

BBI Self-Service Customer Portal Quick Reference Guide



General Functionality and Order related instructions

1. Navigate to: <https://bbindustries.scsuser.com/BBIPortal> and enter your login credentials

Select a tenant

BB Industries

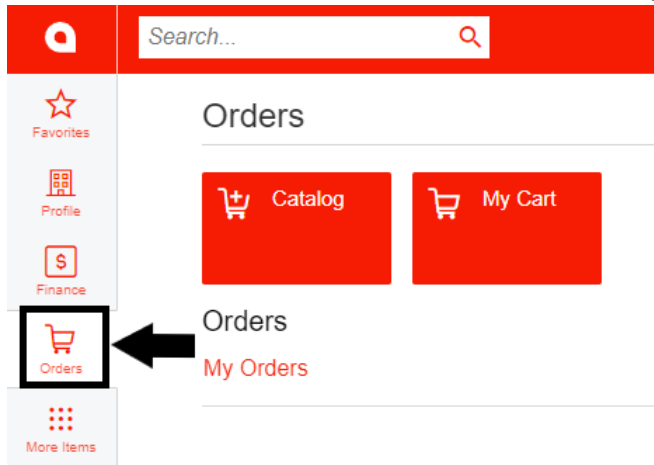
Enter credentials

c.mckenzie@bbindustriesllc.com

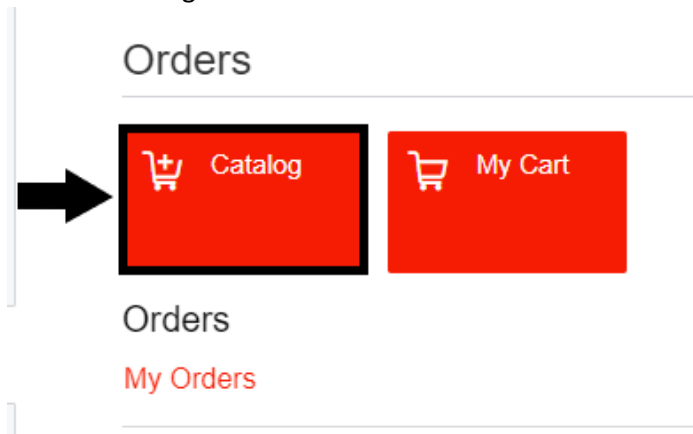
.....

Sign In Forgot your credentials?

2. Click on Orders from the menu on the left side on the page



3. Click on Catalog



4. You can search for a product two ways:

- A. You can click in the “Find Item” field and start typing (Each keystroke will narrow down your options)

Your cart contains 33 items for 779.15 USD

Find Item: Selection T

Category:

ADD TO CART

	Add To Cart	Qty	Inventory ID	Description
>	<input type="checkbox"/>	0.00	11170	Viper Strike Surface Pad 4", 600 Grit, S1
	<input type="checkbox"/>	0.00	11171	Viper Strike Surface Pad 4", 1000 Grit, S2
	<input type="checkbox"/>	0.00	11172	Viper Strike Surface Pad 4", 2000 Grit, S3
	<input type="checkbox"/>	0.00	11173	Viper Strike Surface Pad 4", 3000 Grit, S4
	<input type="checkbox"/>	0.00	11174	Viper Strike Surface Pad 4", 6000 Grit, S5

- B. Click on the magnifying glass and then drill down to the product category your item is listed in (double click on your final selection to list all items in that category)

OPEN CART

Your cart contains 33 items for 779.15 USD

Find Item:

Category:

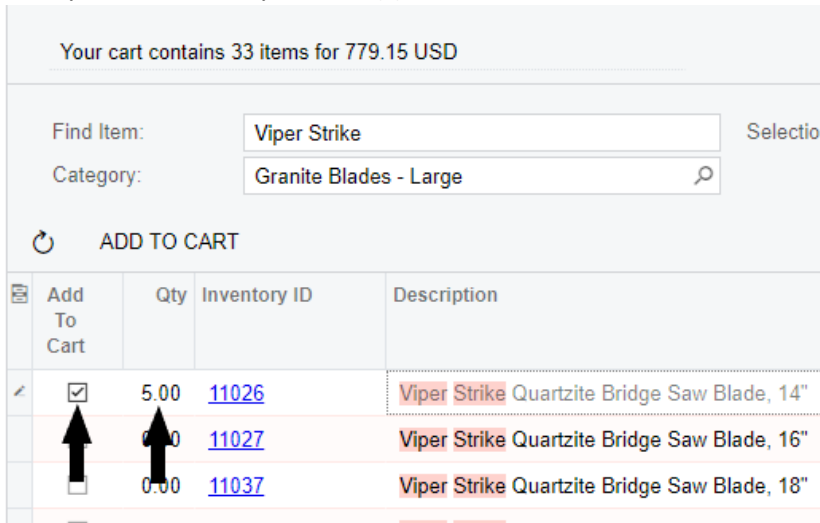
ADD TO CART

SELECT

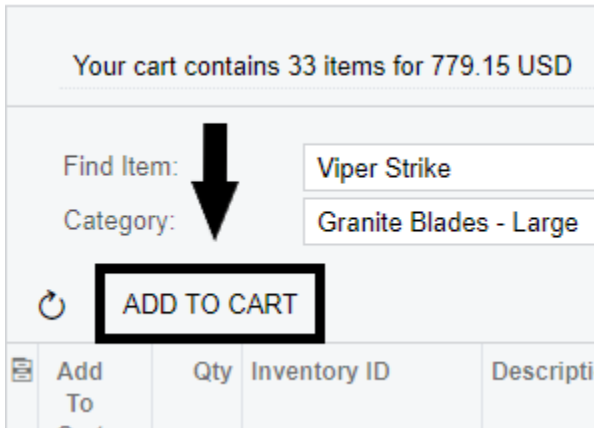
- Tools - Manual Fabrication
 - Blades - Large**
 - Granite Blades - Large
 - Marble Blades - Large
 - Quartzite Blades - Large
 - Specialty Blades - Large
 - UCS Blades - Large
 - Blades - Small
 - Coring & Drilling
 - Grinding

	Add To Cart	Qty	Inven	Description
>	<input type="checkbox"/>	0.00	100	ore Bit 3/4 " 2
	<input type="checkbox"/>	0.00	100	hing Pad 5", I
	<input type="checkbox"/>	0.00	100	hing Pad 5", I
	<input type="checkbox"/>	0.00	100	hing Pad 5", I
	<input type="checkbox"/>	0.00	100	hing Pad 5", I
	<input type="checkbox"/>	0.00	100	hing Pad 5", I

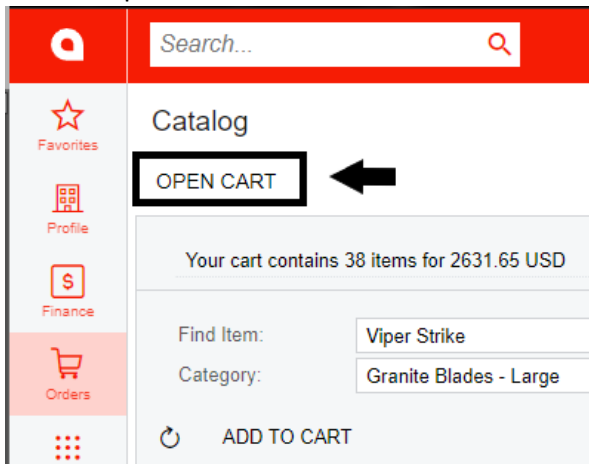
5. Once you have found your item(s) click the “Add to Cart” and enter the quantity you need



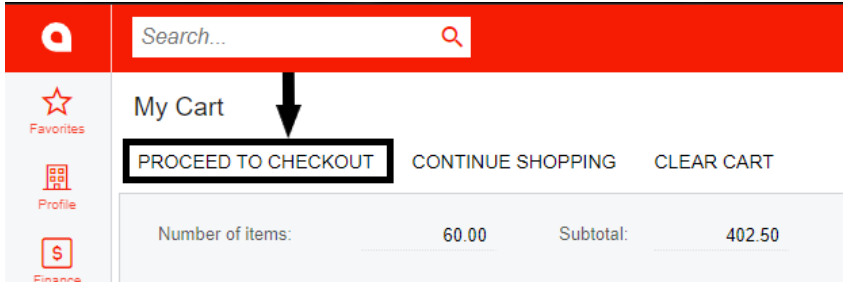
6. Once you have found all your items click the Add To Cart button



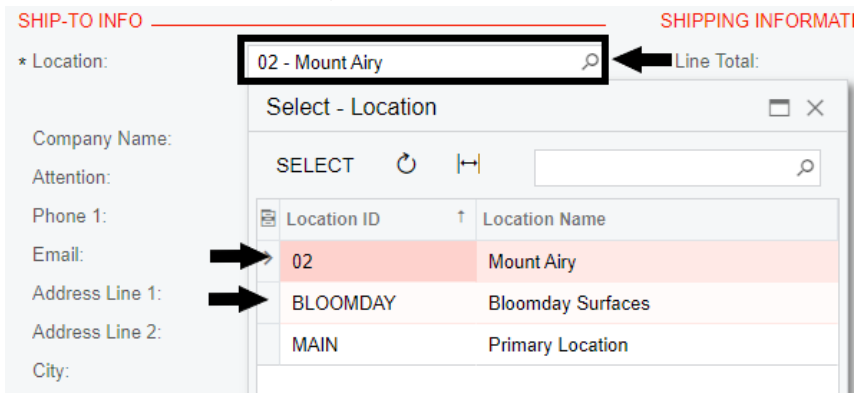
7. Click on Open Cart



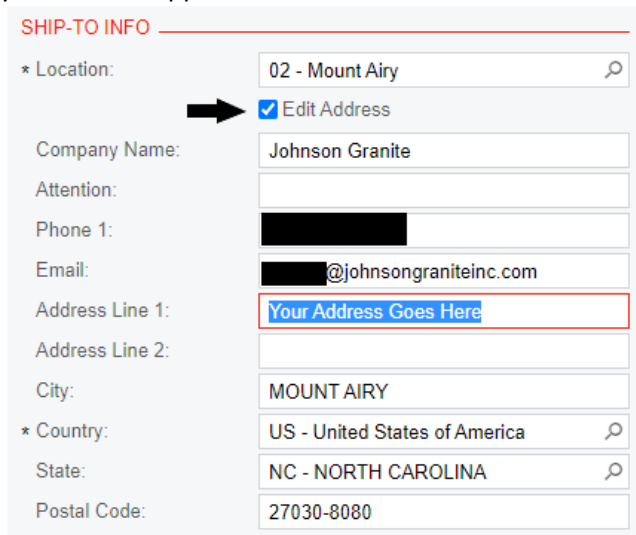
8. Once you have reviewed your cart for accuracy click Proceed To Checkout



- You can choose your shipping address. This can be done by clicking on the magnifying glass in the “Location” field and then choosing the correct location (Locations are entered by a BBI employee and can be changed at any time by calling 1-844-575-4401 and speaking to one of our inside sales team members)

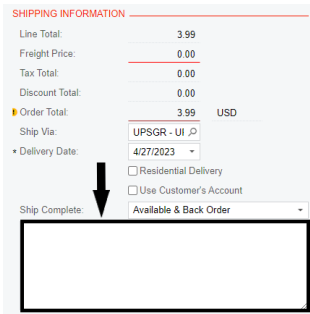


- Alternatively, you can click the “Edit Address” button and then fill in the address you would like your items shipped to



- Additionally you can use the white box to make any notes such as the last four numbers of the credit card you want to use for this transaction or special delivery instructions like Next Day Air

or the PO# you would like to use. *Please keep in mind if you do not state the last four numbers of the card you would like to use, we will use the default card associated with your account.



SHIPPING INFORMATION

Line Total:	3.99
Freight Price:	0.00
Tax Total:	0.00
Discount Total:	0.00
Order Total:	3.99 USD

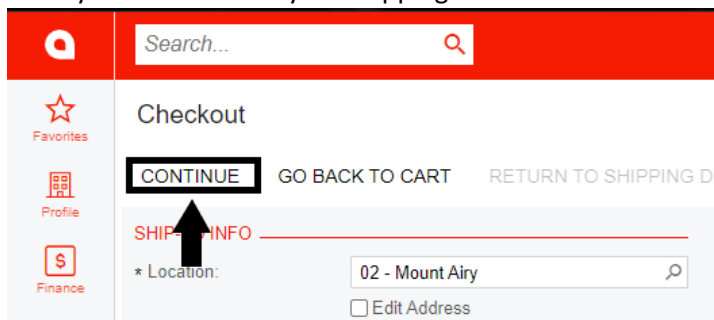
Ship Via: UPSGR - UI

Delivery Date: 4/27/2023

Residential Delivery
 Use Customer's Account

Ship Complete: Available & Back Order

12. Once you have verified your shipping address click “Continue”



Search...

Checkout

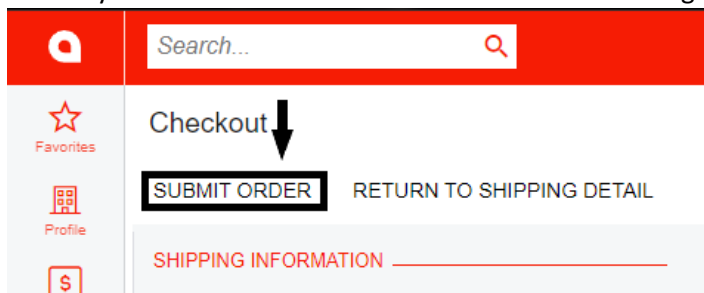
CONTINUE GO BACK TO CART RETURN TO SHIPPING DETAIL

SHIPPING INFO

* Location: 02 - Mount Airy

Edit Address

13. You may now double check all order details before hitting the “Submit Order” button



Search...

Checkout


SUBMIT ORDER RETURN TO SHIPPING DETAIL

SHIPPING INFORMATION

14. Once your order has been submitted, a copy of your order will open and you have the option to close the window or print/email a copy of the order.

How to view invoices and make a payment

1. Navigate to: <https://bbindustries.scsuser.com/BBIPortal> and enter your login credentials



Select a tenant

BB Industries


Enter credentials

c.mckenzie@bbindustriesllc.com

.....

Sign In [Forgot your credentials?](#)

2. Click on Finance from the menu on the left hand side on the page, then select My documents



Search...

Finance

Finance

My Statements

My Documents

Favorites

Profile

Finance

Orders

3. This screen shows you an overview of all invoices and payments made on your account.

Search...

My Documents

PAY NOW PRINT INVOICE/MEMO PRINT ACCOUNT HISTORY AGING REPORT

Outstanding Invoices and Memos: 19,383.06 Credit Limit: 12,000.00
 Unapplied Payments: -65.29 Available Credit: -11,491.99
 Net Balance: 19,317.77

ALL RECORDS OPEN DOCUMENT

Type	*Reference Nbr.	Customer P.O. NO.	*Date	Due Date	Status	Document Total	Open Balance	Description	Customer
Invoice	AR125785	10639	5/15/2023	6/14/2023	Open	129.00	129.00		22798
Payment	PY106400		5/15/2023		Closed	-3,287.47	0.00		22798
Invoice	AR125121	10605	5/11/2023	6/10/2023	Open	672.52	672.52		22798
Invoice	AR125216	10628	5/11/2023	6/10/2023	Open	2,105.05	2,105.05		22798
Invoice	AR124515	10605	5/9/2023	6/8/2023	Open	393.00	393.00		22798
Invoice	AR124519	10611	5/9/2023	6/8/2023	Open	2,580.05	2,580.05		22798
Payment	PY105101		5/9/2023		Closed	-6,671.32	0.00		22798
Invoice	AR124218	10605	5/8/2023	6/7/2023	Open	2,510.61	2,510.61		22798
Invoice	AR124228	10607	5/8/2023	6/7/2023	Open	43.00	43.00		22798
Invoice	AR123814	105088	5/5/2023	6/4/2023	Open	21.50	21.50		22798
Invoice	AR123925	10594	5/5/2023	6/4/2023	Open	2,382.07	2,382.07		22798
Payment	PY104399		5/4/2023		Closed	-6,818.68	0.00		22798
Invoice	AR123050	10577	5/2/2023	6/1/2023	Open	155.74	155.74		22798

4. To make a payment click "Pay Now" button.

My Documents

PAY NOW PRINT INVOICE/MEMO PRINT ACCOUNT HISTORY

Outstanding Invoices and Memos: 21,735.67 Credit Limit: 12,000.00
 Unapplied Payments: -3,291.92 Available Credit: -19,767.44
 Net Balance: 18,443.75 Currency: [dropdown]

ALL RECORDS OPEN DOCUMENT

Type	*Reference Nbr.	Customer P.O. NO.	*Date	Due Date	Status	Curren
Invoice	AR123659	Portal Test 1	5/12/2023	6/11/2023	Open	US
Payment	PY104399		5/4/2023		Closed	US
Invoice	AR123050	10577	5/2/2023	6/1/2023	Open	US

5. Click on magnifying glass to choose payment method.

Pay Now

Reference Nbr.: <NEW> * Location: 02 - Mount Airy Payment Amo... 3.99

Status: Pending Proc... * Payment Meth... []

* Application Date: 5/16/2023 Description: []

* Application Pe... 05-2023

DOCUMENTS TO APPLY

Doc. Type	* Reference Nbr.	* Line Nbr.	Inventory ID	Project	Account	Customer	Amount Paid	Date
Invoice	AR123659	0				22798	3.99	5/12/202

6. Select "CC" as your method of payment.

* Location: 02 - Mount Airy Payment Amo... 3.99

* Payment Meth... []

Card/Account ...

Description:

Select - Payment Method

SELECT []

Payment Method ID	Description	Means of Payment
> CC	Credit Card	Credit Card
CC EXT	External CC Payment	Credit Card

* Reference Nbr. [AR123659](#)

7. You will now see the credit card information displayed in the box.

Pay Now

↶ + PAY NOW

Reference Nbr.: <NEW> * Location: 02 - Mount Airy Payment Amo... 3.99

Status: Pending Proc... * Payment Meth... CC - Credit Card

* Application Date: 5/16/2023 * Card/Account ... CC:****_****_****_****

* Application Pe... 05-2023 Processing St... Description:

DOCUMENTS TO APPLY CARD PROCESSING

↶ + × LOAD DOCUMENTS AUTO APPLY

Doc. Type	* Reference Nbr.	* Line Nbr.	Inventory ID	Project	Account	Customer	Amou
Invoice	AR123659	0				22798	

8. If you have more than one card on your account and would like to use another card for payment, click the magnifying glass in the box and select the card you would like to use.

Pay Now

↶ + PAY NOW

Reference Nbr.: <NEW> * Location: 02 - Mount Airy Payment Amo...

Status: Pending Proc... * Payment Meth... CC - Credit Card

* Application Date: 5/16/2023 * Card/Account ... CC:****_****_****_****

* Application Pe... 05-2023 Processing St... Description:

DOCUMENTS TO APPLY CARD PROCESSING

↶ + × LOAD DOCUMENTS AUTO APPLY

Doc. Type	* Reference Nbr.

Select - Card/Account Nbr.

SELECT ↶ ↷

Payment Method	Card/Account Nbr.
CC	CC:****_****_****_****
CC	CC:****_****_****_****

⏪ ⏩

9. To choose which invoices to pay click "Load Documents"

Pay Now

↶ + PAY NOW

Reference Nbr.:	<NEW>	* Location:	02 - Mount Airy
Status:	Pending Proc...	* Payment Meth...	CC - Credit Card
* Application Date:	5/16/2023	* Card/Account ...	CC:****_****_****-4436
* Application Pe...	05-2023	Processing St...	
Description:			

DOCUMENTS TO APPLY CARD PROCESSING

↶ + × **LOAD DOCUMENTS** AUTO APPLY |↔| ☒

Doc. Type	* Reference Nbr.	* Line Nbr.	Inventory ID	Project
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10. This will bring up a box with Load Options, just hit the "Load" button down to the right.

Load Options

From Date: To Date: 5/16/2023

Max. Number of Rows:

From Ref. Nbr.: To Ref. Nbr.:

Automatically Apply Amount Paid

SORT ORDER _____

Due Date, Reference Nbr.
 Doc. Date, Reference Nbr.
 Reference Nbr.

LOAD RELOAD CANCEL

11. This brings up all the invoices with an outstanding balance.

Pay Now

↶ + PAY NOW

Reference Nbr.: <NEW> * Location: 02 - Mount Airy Payment Amo... 0.00
 Status: Pending Proc... * Payment Meth... CC - Credit Card
 * Application Date: 5/16/2023 * Card/Account ... CC:****-****-****-4...
 * Application Pe... 05-2023 Processing St...
 Description:

DOCUMENTS TO APPLY CARD PROCESSING

LOAD DOCUMENTS AUTO APPLY

Doc. Type	*Reference Nbr.	*Line Nbr.	Customer	Amount Paid	Date	Due Date	Cash Discount Date	Cross Rate	Balance	Cash Discou... Balance	Cu
Invoice	AR081695	0	22798	0.00	10/13/2022	11/12/2022	10/13/2022	1.00000000	49.71	0.00	U
Invoice	AR113909	0	22798	0.00	3/21/2023	4/20/2023	3/21/2023	1.00000000	1,766.64	0.00	U
Invoice	AR114208	0	22798	0.00	3/22/2023	4/21/2023	3/22/2023	1.00000000	1,410.28	0.00	U
Invoice	AR119140	0	22798	0.00	4/14/2023	5/14/2023	4/14/2023	1.00000000	166.19	0.00	U
Invoice	AR119392	0	22798	0.00	4/17/2023	5/17/2023	4/17/2023	1.00000000	1,361.88	0.00	U
Invoice	AR119976	0	22798	0.00	4/19/2023	5/19/2023	4/19/2023	1.00000000	5,121.75	0.00	U
Invoice	AR120000	0	22798	0.00	4/19/2023	5/19/2023	4/19/2023	1.00000000	21.50	0.00	U
Invoice	AR120212	0	22798	0.00	4/19/2023	5/19/2023	4/19/2023	1.00000000	2,160.00	0.00	U
Invoice	AR120553	0	22798	0.00	4/20/2023	5/20/2023	4/20/2023	1.00000000	266.97	0.00	U
Invoice	AR120584	0	22798	0.00	4/20/2023	5/20/2023	4/20/2023	1.00000000	64.50	0.00	U
Invoice	AR120599	0	22798	0.00	4/20/2023	5/20/2023	4/20/2023	1.00000000	796.00	0.00	U
Invoice	AR122010	0	22798	0.00	4/27/2023	5/27/2023	4/27/2023	1.00000000	21.50	0.00	U
Invoice	AR122339	0	22798	0.00	4/28/2023	5/28/2023	4/28/2023	1.00000000	3,215.65	0.00	U

12. To make a payment add in the total amount you want to pay in the box to the left, then Click the invoices you would like this amount applied to.

Pay Now

↶ + PAY NOW

Reference Nbr.: <NEW> * Location: 02 - Mount Airy Payment Amo... 3,226.63
 Status: Pending Proc... * Payment Meth... CC - Credit Card
 * Application Date: 5/16/2023 * Card/Account ... CC:****-****-****-4...
 * Application Pe... 05-2023 Processing St...
 Description:

DOCUMENTS TO APPLY CARD PROCESSING

LOAD DOCUMENTS AUTO APPLY

Doc. Type	*Reference Nbr.	*Line Nbr.	Customer	Amount Paid	Date	Due Date	Cash Discount Date	Cross Rate	Balance	Cash Discou... Balance	Cu
Invoice	AR081695	0	22798	49.71	10/13/2022	11/12/2022	10/13/2022	1.00000000	0.00	0.00	U
Invoice	AR113909	0	22798	1,766.64	3/21/2023	4/20/2023	3/21/2023	1.00000000	0.00	0.00	U
Invoice	AR114208	0	22798	1,410.28	3/22/2023	4/21/2023	3/22/2023	1.00000000	0.00	0.00	U
Invoice	AR119140	0	22798	0.00	4/14/2023	5/14/2023	4/14/2023	1.00000000	166.19	0.00	U
Invoice	AR119392	0	22798	0.00	4/17/2023	5/17/2023	4/17/2023	1.00000000	1,361.88	0.00	U
Invoice	AR119976	0	22798	0.00	4/19/2023	5/19/2023	4/19/2023	1.00000000	5,121.75	0.00	U
Invoice	AR120000	0	22798	0.00	4/19/2023	5/19/2023	4/19/2023	1.00000000	21.50	0.00	U
Invoice	AR120212	0	22798	0.00	4/19/2023	5/19/2023	4/19/2023	1.00000000	2,160.00	0.00	U
Invoice	AR120553	0	22798	0.00	4/20/2023	5/20/2023	4/20/2023	1.00000000	266.97	0.00	U
Invoice	AR120584	0	22798	0.00	4/20/2023	5/20/2023	4/20/2023	1.00000000	64.50	0.00	U
Invoice	AR120599	0	22798	0.00	4/20/2023	5/20/2023	4/20/2023	1.00000000	796.00	0.00	U
Invoice	AR122010	0	22798	0.00	4/27/2023	5/27/2023	4/27/2023	1.00000000	21.50	0.00	U
Invoice	AR122339	0	22798	0.00	4/28/2023	5/28/2023	4/28/2023	1.00000000	3,215.65	0.00	U

13. When you have reviews that all the invoices and amount is correct hit the Pay Now button to complete your transaction.

Pay Now

↶ + **PAY NOW**

Reference Nbr.: <NEW> * Location: 02 - Mount Airy Payment Amo... 3,226.63
 Status: Pending Proc... * Payment Meth... CC - Credit Card
 * Application Date: 5/16/2023 * Card/Account ... CC:****_****_****_
 * Application Pe... 05-2023 Processing St...
 Description:

DOCUMENTS TO APPLY CARD PROCESSING

↶ + × LOAD DOCUMENTS AUTO APPLY |←| |→|

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Doc. Type	*Reference Nbr.	*Line Nbr.	Customer	Amount Paid	Date	Due Date	Cash Discou Date
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Invoice	AR081695	0	22798	49.71	10/13/2022	11/12/2022	10/13/
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Invoice	AR113909	0	22798	1,766.64	3/21/2023	4/20/2023	3/21/2
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Invoice	AR114208	0	22798	1,410.28	3/22/2023	4/21/2023	3/22/2
>	<input type="checkbox"/>	<input type="checkbox"/>	Invoice	AR119140	0	22798	0.00	4/14/2023	5/14/2023	4/14/2

14. When the payment has processed you will see the processing status as Captured, that means the payment was successful.

Pay Now

↶ + PAY NOW

Reference Nbr.: PY104581 Location: 02 - Mount Airy Payment Amo... 3,226.83
 Status: Open Payment Meth... CC - Credit Card
 * Application Date: 5/17/2023 Card/Account ... Visa:****_****_****_
 * Application Pe... 05-2023 **Processing St... Captured**
 Description:

DOCUMENTS TO APPLY CARD PROCESSING

↶ + × LOAD DOCUMENTS AUTO APPLY |←| |→|

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Doc. Type	*Reference Nbr.	*Line Nbr.	Customer	Amount Paid	Date	Due Date	Cash Discount Date
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15. You can also confirm that the payment went through by clicking on the Card Processing tab, you can see in the example below that the payment has been authorized and approved.

Pay Now ✔ The operation has completed.

↶ + PAY NOW

Reference Nbr.: PY104581 Location: 02 - Mount Airy Payment Amo... 3,226.83

Status: Open Payment Meth... CC - Credit Card

* Application Date: 5/17/2023 Card/Account ... Visa:****-****-****-****

* Application Pe... 05-2023 Processing St... Captured

Description:

DOCUMENTS TO APPLY **CARD PROCESSING**

Tran. Nbr.	*Proc. Center	Tran. Type	Tran. Status	Tran. Amount	Expire On (Est.)	Referen- Tran. Nbr.	Proc. Center Tran. Nbr.	Proc. Center Auth. Nbr.	Proc. Center F
> 159619	EBIZCHARGE	Authorize and Cap...	Approved	3,226.8300		3157454932	590314		Approved