

Customer Portal Instructions

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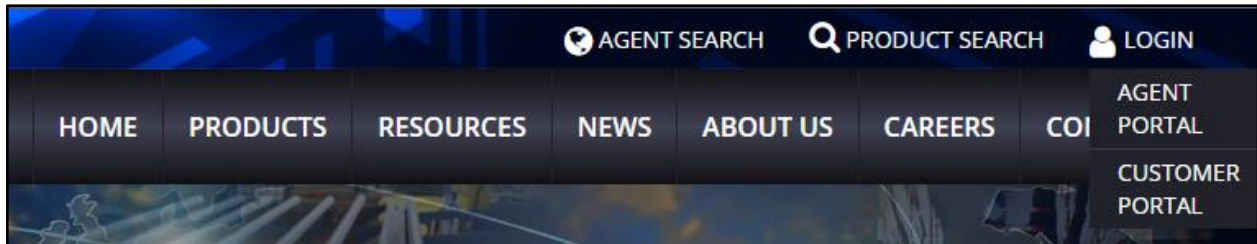
Introduction to the Customer Portal

Login

Click on this link to access the application web page:

<https://www.cantexinc.com/>

In the top right corner there is a “Login” icon with a dropdown. Select the “Customer Portal” option to be forwarded to the login screen for the Customer Portal.



You will now see the below login screen:

A screenshot of the Cantex Account Login screen. The page has a dark blue header with the CANTEX logo on the left and a LOGIN icon on the right. The main content area is white and contains the following elements: a lock icon followed by the text "Account Login", a text input field labeled "User Id", another text input field labeled "Password", a blue button labeled "Login", and two links at the bottom: "Register New Account" and "Forgot Password?".

Your login information will be acquired by using the “Register New Account Link” to open and fill out the registration form. An admin will then review and either approve or deny your registration request. If your request is approved, you will receive an email that will grant you access to the application and allow you to set a password.

Registration Form

Any authorized distributors can register by filling out the registration form using the “Register New Account” link on the “Login” page. On the registration form, you will fill out some basic details about who you are and what business or account you are with. This will help the admins set you up with the correct access type.

PROVIDE YOUR REGISTRATION INFORMATION

Business Name*
XYZ SUPPLY COMPANY INC

Account Number
1234567

First Name* Paul **Last Name*** Johnson

City* Aurora **State*** Illinois

Email*
test@email.com


Type of Access*
Sales and Purchasing

Job Title
Sales manager

Message
Please sign me up as a sales admin

By submitting this form I agree that I have read and understood the CANTEX Inc. Privacy Policy and that CANTEX Inc. may process my data in accordance with the CANTEX Inc. Privacy Policy.

Yes, I Agree

I'm not a robot  [Privacy - Terms](#)

[Clear](#) | [Submit](#)

Registration Form

User Types

There are two categories of users: “Sales and Purchasing” and “Finance” users. The display and structure of the customer portal will differ slightly for these two user types.

Sales and Purchasing Users

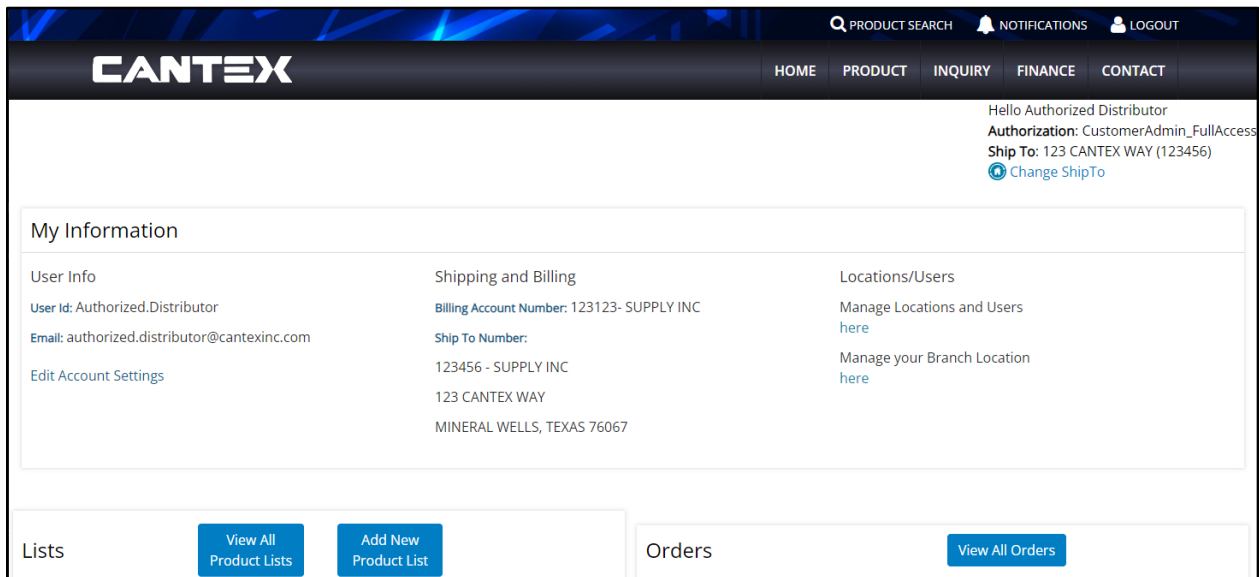
The Customer Portal is navigated using the menu of categorized pages at the top of the page. The pages available to sales and purchasing users are divided into the categories: “Home”, “Product”, “Inquiry” and “Contact”.



The navigational menu as seen in the application

Home/Default

After you are logged in, you will be taken to the “Default” page which can also be accessed using the navigational menu under the “Home” dropdown.



This page displays your user information details and provides an “Edit Account Settings” link which opens a window that allows you to edit your “First Name”, “Last Name”, “Email Address”, “Language” selection and “Password”.

The “Edit Account Settings” window

The page then displays your shipping and billing information and links to “Manage Locations and Users” or “Manage your Branch Location”, if you are authorized to do so.

Below your listed information there are two widgets displayed: “Lists” and “Orders”.

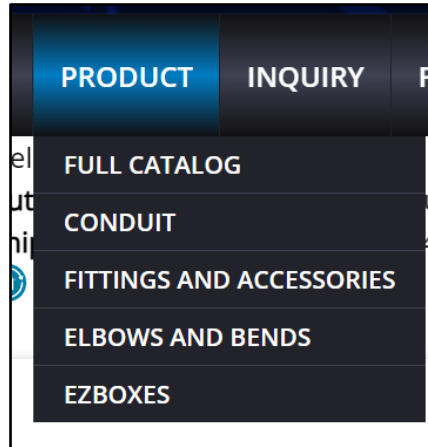
The “Lists” widget displays your product lists and action buttons that allow you to “View” a product list, “Add New Product List”, or “View All Product Lists”, which will forward you to the [“Work With Product Lists”](#) page.

The “Orders” list displays your recent orders and action buttons that allow you to view order details, or “View All Orders” which will forward you to the [“Order History”](#) page.

Lists	View All Product Lists	Add New Product List	Orders	View All Orders
List Name			PO Number	
Test List 7		View	93-026398	View
Test List 6		View	93-026133	View
Testing 5		View	93-026133	View
Test List 4 Copy		View	93-025914	View

The “Lists” and “Orders” widgets as seen on the “Home” page

Product Pages



The “Product” tab in the navigational menu navigates to the Item Catalog, and has a drop down composed of the top categories. This provides a shortcut when you need to directly narrow down a search by a particular item type.

Full Catalog

The “Catalog” page is a catalog of all the items available to you. The Catalog displays item details, including descriptions, prices and availability. The “Catalog” page also allows you to add items to your product lists using the “Add to Product List” action button.

[Back to Full Catalog](#)

Filter Results By

Results Per Page: 15 | 30 | 60

Sort By: Item Number A-Z

*Prices are subject to change without notice.

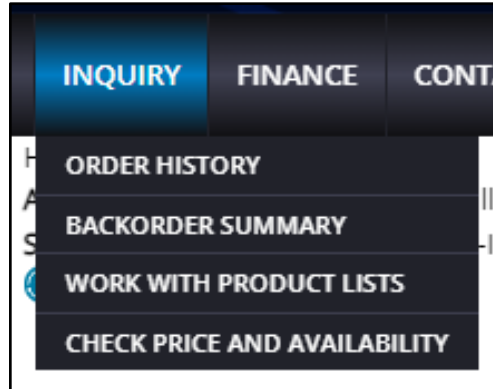
	Item No.	Description	Availability	Package Information	Unit Price
<input type="checkbox"/> EZBOXES (95) <input type="checkbox"/> ELBOWS AND BENDS (805) <input type="checkbox"/> FITTINGS AND ACCESSORIES (488) <input type="checkbox"/> CONDUIT (131)	5119820	5 in. x 45-Degree x 36 in. Radius Plain End Schedule 80 Special Radius Elbow View	8 available at CANTEX, INC (TX)	Pallet Weight: 436 Lbs Pallet Quantity: 30 Quantity UOM: EA Price UOM: EA	Add To Product List
<input type="checkbox"/> EZBOX ACCESSORY (17) <input type="checkbox"/> ADJUSTABLE BOX (3) <input type="checkbox"/> CEILING BOX (14) <input type="checkbox"/> HEAVY WALL BOX (8) <input type="checkbox"/> HANDY BOX (1) <input type="checkbox"/> EZBOX LOW VOLTAGE (8) <input type="checkbox"/> NEW WORK BOX (25) <input type="checkbox"/> OLD WORK BOX (10) <input type="checkbox"/> RED ALARM BOX (5)	5119821	4 in. x 45-Degree x 36 in. Radius Plain End Schedule 80 Special Radius Elbow View	18 available at CANTEX, INC (TX)	Pallet Weight: 477 Lbs Pallet Quantity: 48 Quantity UOM: EA Price UOM: EA	Add To Product List
<p>More...</p> <input type="checkbox"/> 1 GANG ADJ BOX (2) <input type="checkbox"/> 2 GANG ADJ BOX (1) <input type="checkbox"/> COVERS (17)	5119822	1-1/4 in. x 90-Degree x 18 in. Radius Plain End Schedule 80 Special Radius Elbow View	Out of stock at CANTEX, INC (TX)	Pallet Weight: 246 Lbs Pallet Quantity: 150 Quantity UOM: EA Price UOM: EA	Add To Product List

Catalog Page

The item catalog provides customizable viewing options on the top right where you can choose the number of results to display on the page, how they will be sorted and how they will be displayed.

A filters section is also provided on the left side of the screen where you are able to filter by category, item or search text.

Inquiry Pages



The Inquiry tab pages include: “Order History”, “Backorder Summary”, “Work With Product Lists” and “Check Price and Availability”.

Order History

The “Order History” page can be found under the “Inquiry” tab in the navigational menu. The page contains a list of all the orders for your current “ShipTo” location. The page allows you to filter results based on “Order Number”, “PO#”, “Item Number”, or the “Created On Date”. Each “Order #” on the list is a hyperlink to open the corresponding “[Order Details](#)” page.

Order History

Find Orders

Ship To	Customer Name	Order #	PO #	Order Amount	Order Date	Requested Date
123456	SUPPLY INC	1111444	111-444444		10/04/2023	10/09/2023

Order History

Order Details

The “Order Details” page displays the “Billing” and “Shipping” information, “Order Header Info” and a financial “Summary” for the order, followed by a table displaying all items included in the order.

Order Details															
Billing				Shipping				Order Header Info				Inquiry ?		Summary	
P O BOX 111112 123123- SUPPLY INC Houston, TX				123456 - SUPPLY INC 123 CANTEX WAY MINERAL WELLS, TEXAS 76067				Order Number: 111444 Order Type: Sales Order Created Date: 10/04/2023 Ordered By: PO Reference: 12-0001212 Requested Date: 10/09/2023						Subtotal Taxable Subtotal Weight Tax Shipping Cost: Total	
Excel Export															
Line #	Item #	Item Description	Branch Plant	Requested Date	Ship Date	Qty. UOM	Qty. Ord.	Qty. Shippable	Qty. BackOrd.	Qty. Cancld.	Cantex Price	Price UOM	Ext. Price	Weight	Status
1,000	2222222	TEST ITEM 1	100	10/09/2023		EA 5	5	5	0	0		C		20.50 LB	Open
2,000	3333333	TEST ITEM 2	100	10/09/2023		EA 32	32	32	0	0		C		62.20 LB	Backordered

Order Details

Next to the “Order Header Info” header, there is an Inquiry “?” button which opens a “Contact Send Inquiry” window. This allows you to send a message with any questions or concerns regarding the order. This inquiry will be sent to a CANTEX Agent, who will be able to assist you.

The “Contact Send Inquiry” window as seen opened using the “Inquiry?” button

Backorder Summary

The “Backorder Summary” page contains a list of all backordered items. This page can also be filtered on “Order Number”, “Order Date”, “Item Number”, “Item Description” and “PO#”. The

order number displayed in the list also serves as a hyperlink to forward you to the [“Order Details”](#) page.

Backorder Summary

Order Number Order Date From Order Date To

Item Number Item Description PO #

[Find Order](#)

Order Number	Order Type	Item Number	Description	Quantity Ordered	Quantity Shipped	Quantity Backordered	Quantity Canceled	Unit Price	Price UOM	PO #	Order Date	Requested Date
1234567	Sales Order	33344455	TEST ITEM 001	10	0	10	0		EA	12-000123	10/16/2023	10/16/2023
9998881	Sales Order	55566677	TEST ITEM 002	80	0	80	0		EA	34-000044	10/16/2023	10/16/2023

Backorder Summary

Work with Product Lists

This page provides you with the ability to create custom lists for reference. These lists can be created and configured on the “Work with Product Lists” page, which allows you to view, duplicate, edit or delete lists. The page also provides an option to “Upload List From File”.

Work With Product Lists

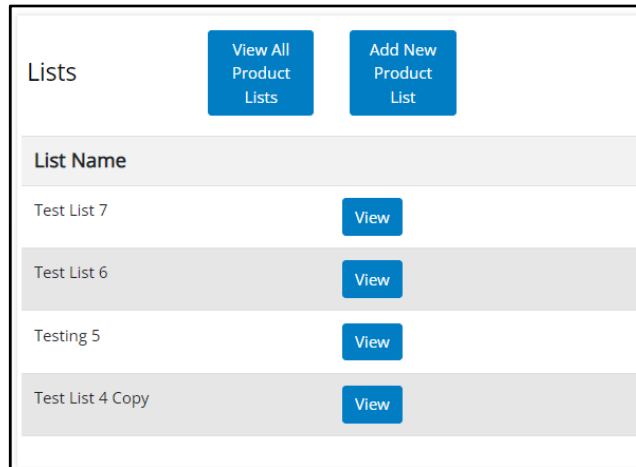
List Name List Description Assigned To [Find](#) [Upload List From File](#) [Add New Product List](#)

List Name	Description	Assigned To			
Test List 7	new new new one	Paul.Johnson	Duplicate	Edit List	Delete
Test List 6	new new one	Paul.Johnson	Duplicate	Edit List	Delete
Testing 5	New test list	Paul.Johnson	Duplicate	Edit List	Delete
Test List 4 Copy	Duplicating List 4	Paul.Johnson	Duplicate	Edit List	Delete

Work With Lists Page

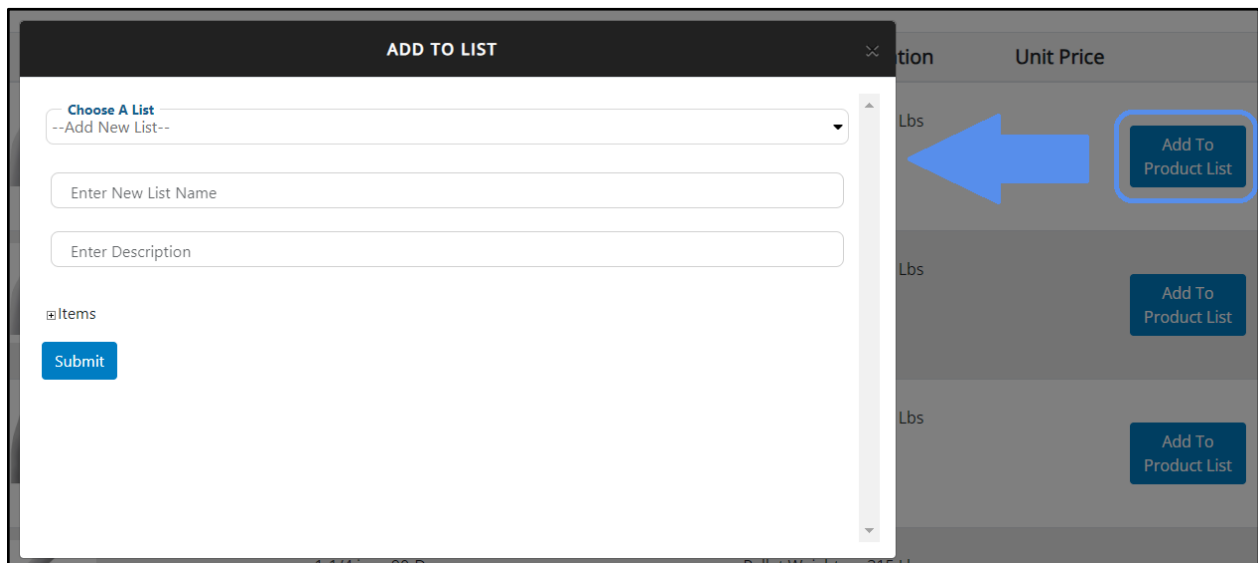
Your product lists can also be found on the [“Default”](#) page, either to view existing lists, or add a new list. The [“Catalog”](#) page also allows you to update product lists by providing an “Add to Product List” button next to each available item.

On the “Default” page the “Lists” widget displays your most recent lists, with an action button, “View”, which will forward you to a page displaying all the list details.



The “Lists” widget as displayed on the Default page

The “View All Product Lists” button will forward you to the “Work with Product Lists” page and the “Add New Product List” button will open an “Add New List” widget.



The “Add To List” widget is opened using the “Add To Product List” button on the “Catalog” page

On the “Catalog” page the “Add To Product List” button will open a window allowing you to choose a list to add the selected item to. In the “Choose A List” dropdown there is an “--Add New List--” option which will allow you to create a new product list directly from the Catalog.

Check Price and Availability

The “Check Price and Availability” page allows you to inquire about the availability and price of specific items by entering an item number and quantity.

The page displays the name and a brief description of the item, followed by the following details:

- **Price:** The price per unit.
- **Availability:** The number of available items followed by the branch location.
- **Extended Price:** The price calculated by multiplying the price per item and quantity.
- **Quantity UOM:** The quantity unit of measure for the item, either per each (EA), per one hundred (C) or per one hundred feet (CF).
- **Price UOM:** The price unit of measure for the item, either per each (EA), per one hundred (C) or per one hundred feet (CF).
- **Carton/Pallet/Pack Quantity:** The number of pieces that are in each package.

4 in. Schedule 40 Standard Center Stop Coupling

CANTEX 6141632 is a 4 in. Schedule 40 Standard Center Stop Coupling used to join lengths of conduit pipe together with two solvent weld socket ends

Availability 18,790 available at CANTEX, INC (TX)	Price TBD/C
Quantity UOM EA	Extended Price TBD
Carton Quantity 20	Price UOM C

“Check Price and Availability” page

Contact Us

The “Contact Us” page allows you to send inquiries to CANTEX support. Any questions or concerns you have can be submitted here. The “Contact Us” form contains a dropdown field where you select whether your question is a “General” question or is related to “Accounting”.

If you submit a general question it will be directed towards the CANTEX Agent assigned to you, or if there is not an agent set up to your account, the email will be sent to a general CANTEX Support email address.

If you submit a question related to accounting the inquiry will be sent to the CANTEX Accounts receivable team to be addressed.

Contact Us

[Send an Email](#)

My inquiry is related to: Accounting

Message Subject

Questions or Comments

Select Some Files

Submit

“Contact Us” form

Finance Users

The Customer Portal is navigated using the menu of categorized pages at the top of the page. The pages available to finance users are divided into the categories: “Home”, “Finance” and “Contact”.



The navigational menu as seen in the application

Home/Default

After you are logged in, you will be taken to the “Default” page which can also be accessed using the navigational menu under the “Home” dropdown.

My Information	
User Info	Shipping and Billing
User Id: Authorized.Distributor	Billing Account Number: 123123- SUPPLY INC
Email: authorized.distributor@cantexinc.com	Ship To Number:
Edit Account Settings	123456 - SUPPLY INC
	123 CANTEX WAY
	MINERAL WELLS, TEXAS 76067

This page displays your user information details and provides an “Edit Account Settings” link which opens a window that allows you to edit your “First Name”, “Last Name”, “Email Address”, “Language” selection and “Password”.

EDIT ACCOUNT SETTINGS

First Name
Authorized

Last Name
User

Email Address
authorized.user@cantexinc.com

Language
English

Password*

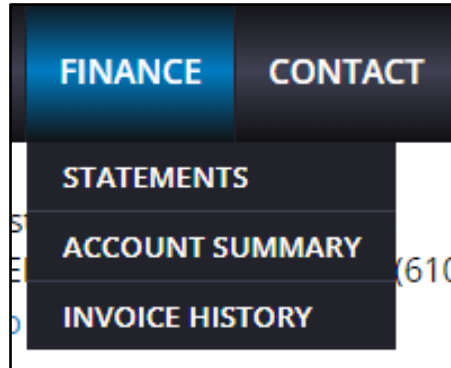
[Change Password](#)

Save

The “Edit Account Settings” window

The page then displays your shipping and billing information.

Finance Pages



The Finance tab pages include: “Statements”, “Account Summary”, and “Invoice History”.

Statements

The “Statements” page contains an account summary on top with a list of all statements below. The list of statements displays the basic info including the “Statement Number”, “Date”, “Previous Balance” and “Opening Balance”, as well as a “View Statement” hyperlink to open the “[Statement Details](#)” window.

Statements

Total Outstanding Amount:		Open Order Amount:	
Currency:		Payment Term:	
Date Last Invoiced:			
YTD Invoice:			

Customer Number

SUPPLY INC-IMARK (123456) ▾

[Excel Export](#)

Statement Number	Customer Number	Customer Name	Statement Date	Previous Balance	Opening Balance	Currency	View Statement
120012	123456	SUPPLY INC	09/30/2023			USD	View Statement


Statements Page

Each statement in the grid has a “View Statement” link which opens a modal window to view the statement details.

Statement Details

A “Statement Details” window can be opened using the “View Statement” hyperlink, which displays an itemized list of all the invoices under that statement.

This window also contains an “Excel Export” link which allows you to download a personal copy of the statement details.

STATEMENT DETAIL					
Statement					
Statement Number	Customer Number	Customer Name	Notification Date	Currency	
120012	123456	SUPPLY INC	09/30/2023	USD	
Statement Details					
 Excel Export					
Document Type	Invoice Number	Invoice Date	Due Date	PO Number	Outstanding Balance
Invoice	1234001	09/05/2023	10/11/2023	102-123123	
Invoice	1234002	09/05/2023	10/11/2023	64-123123	
Invoice	1234003	09/05/2023	10/11/2023	01-123123	

Statements Details Window

Account Summary

The “Account Summary” page displays basic information regarding your account, such as the “Total Outstanding Amount”, “Currency”, and “Date Last Invoiced”.

Account Summary	
Total Outstanding Amount:	Open Order Amount:
Currency:	Payment Term:
Date Last Invoiced:	
YTD Invoice:	

Account Summary

If you have access to more than one account, there will be a drop down menu to choose which account summary will be displayed.

Invoice History

The “Invoice History” page displays a list of all of your previous invoices for the last 2 years

Each record on this page can be viewed in more detail by clicking the “Details” link, which will open a window listing the invoice items. Each invoice can be traced to the matching sales order by clicking the link in the “Sales Order Number” column.

Invoice History

Customer Number: SUPPLY INC (123456)

Status: All

Sales Order Number:

Invoice Number From:

Invoice From Date:

Invoice To Date:

Invoice Number:

PO Number Filter:

Invoice Number To:

Invoice Date:

Invoice Due Date:

[Search](#) [Clear Filters](#)

[Excel Export](#)

Invoice Date	Due Date	Invoice Number	Doc Type	Customer Number	Sales Order Number	PO #/Reference	Transaction Currency	Open Amount	Gross Amount	
10/16/2022	11/10/2022	0000000	Invoice	123456	1111444	111-444444	USD	0		Details
10/16/2022	11/10/2022	2222222	Invoice	123456	2222444	222-555555	USD	0		Details
10/16/2022	11/10/2022	3333333	Invoice	123456	3333555	555-666666	USD	0		Details
10/17/2022	11/10/2022	4444444	Invoice	123456	5555666	44-777777	USD	0		Details

“Invoice History” page

Invoice Details

The “Invoice Items” window is opened using the “Details” link on the “Invoice History” page, and displays all items in the order. There is a button that appears at the right end of the Invoice details page: “Send Printed Invoice”, which will send you an email with an attached PDF of the order invoice.

INVOICE ITEMS - CANTEX

Invoice Number	Pay Item	Customer	Total	Open	Doc Type	PO #/Reference	Sales Order	
0000000	001	SUPPLY INC		0	Invoice	111-444444	111444	Send Printed Invoice

“Invoice Items” window

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Contact Us

[Send an Email](#)

My inquiry is related to:

Message Subject

Questions or Comments

Select Some Files

Submit

“Contact Us” form