

TBA & Oil Warehouse

2425 E 30th Street—Indianapolis, IN 46218



WebDocs User Guide

Access to your TBA invoices, credits, and statements anytime.

Need help?

Accounts Receivable Contact Phone

Direct 317-921-5455

General Menu 877-923-2222 Option #3

Start by setting up your login for WebDocs. Before you begin please get one of your recent TBA invoices for the set up process.

Open your web browser and go to our website:

<http://tbawd.com>

Click on the TBA WebDocs on the top of our home page and you will be on our landing page. Click on the TBA WebDocs link in the middle of the page to be redirected to our WebDocs site.

Bookmark this if you will be

using it often for your company. The URL is :

<https://webdocs.epicor.com/site/cgi-bin/3pp.pl/cname/tba>

The screenshot shows a web browser window with the address bar displaying tbawd.com/tba-webdocs-system/. The page features a dark header with the TBA logo on the left, contact information (Phone: 877-923-2222, Fax: 317-923-2233) and a 'Like' button on the right. A navigation menu below the header includes links for Home, About, Store Locations, Employment, TBA WebDocs (highlighted in red), and Contact Us (with a green arrow pointing to it). The main content area is divided into two columns. The left column has a red header for 'Nexpart Online Ordering' and a login form with fields for 'Username:' and 'Password:', a red 'Login' button, and links for 'Forgot Password? Click Here' and 'Questions? Call (877)923-2222'. The right column has a white header for 'TBA WebDocs Access' and text explaining that TBA & Oil is offering online access to credit and invoice documents. It includes a search system description and links for 'TBA WebDocs' (with a green arrow pointing to it) and 'How to get started with TBA WebDocs'.

Click on “Need to create a new account? [Click here](#)”



USER ID: x

PASSWORD:

Need to create a new account? [Click here.](#)

Forgot your user name or password? [Click here](#)

This site is compatible with [Internet Explorer](#) 8.0 or higher,
[Google Chrome](#) 30.0 or higher,
and [Adobe Acrobat Reader](#) 9.0 or higher.

Now you just need one of your TBA invoices from any date after October 1st, 2015 to fill out the self-registration information:

Sample Invoice Header Information:



TBA Warehouse
 2425 E 30th Street
 Indianapolis, IN 46218
 317-923-2222 FAX: 317-923-2233

Invoice
No. 01NO6256

Page 1

13:55:32 Nov 04 2015

CUSTOMER NUMBER 9999	Invoice NUMBER 01NO6256	Invoice DATE 11/04/15	PACKING SLIP 01VO0445001	TERMS CASH/CC	WHSE 010
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BILL TO:
 TEST ACCOUNT
 1234 ANY STREET
 INDIANAPOLIS, IN 46218

SHIPPED TO:
 TEST ACCOUNT
 1234 ANY STREET
 INDIANAPOLIS, IN 46218

Dept: 001 TEST ACCOUNT Contact: /317-999-9999 Route: PICK UP Direction:

YOUR P.O. NUMBER	ORDER DATE	CSR	SHIPPED VIA	CARTONS	OPER
	11/04/15, 13:55:28	100003 RYAN WREGE	2 PICK UP A	1	103

Enter the information from your invoice and click "Register" on the bottom right.

Self-registration

Please enter information below. Your answers will be matched against **Invoices** we have on file. If the information checks out, you can create a user account.

Enter your account number here -

Enter one of your invoice numbers here -

Enter date of your invoice numbers here -

[Cancel](#) [Register >](#)

Next click "Proceed >"

Create Account

You will now be asked to create an account. Once you create an account, you can use it to view your documents.

[Proceed >](#)

Fill out the required information and click "Proceed >"

Please fill out the following information for your account. Only name is required. The rest of the fields are optional.

*Name	<input type="text" value="Test Account"/>
Address	<input type="text" value="1234 Any Street"/> <input type="text"/>
City	<input type="text" value="Indianapolis"/>
State	<input type="text" value="IN"/> ▾
ZIP Code	<input type="text" value="46218"/> - <input type="text"/>
Phone:	<input type="text" value="317"/> - <input type="text" value="999"/> - <input type="text" value="9999"/>
Fax:	<input type="text"/> - <input type="text"/> - <input type="text"/>
FEIN:	<input type="text"/> - <input type="text"/>

[< Previous](#) [Cancel](#) [Proceed >](#)

Now fill out your user information. Login ID and password are case sensitive. Please write down your login ID and password for future reference.

Password rules:

Must be at least 8 characters

Must have at least one number

Must have at least one special character— !@#\$%&*)(?/\-_=;:

Click on "Create Account"

Please fill out the information below for your account.

After registering, you can create other users and groups through the **Manage Users And Groups** wizard. You may change this information, except Login ID, throughout the **My Account** screen.

*First name	<input type="text" value="Test"/>
*Last name	<input type="text" value="Account"/>
Phone	<input type="text" value="317"/> - <input type="text" value="999"/> - <input type="text" value="9999"/>
*E-mail	<input type="text" value="test@gmail.com"/>
Password hint	<input type="text"/>
*Login ID	<input type="text" value="test1"/>
*Password	<input type="password" value="••••••••"/>
*Reconfirm Password	<input type="password" value="••••••••"/>

[< Previous](#) [Cancel](#) [Create Account >](#)

Now that your account is setup you can log into WebDocs. The first screen you will see is the delivery preferences screen for statement delivery. You may choose to receive a paper statement in the mail, by email, or both. Fax is not an option. There are check boxes for supporting documents to come with the statement. Check this if you want copies of all invoices and credits on the statement to be delivered with the statement. For email delivery there are options for delivery format. You can choose your email and add any other recipients as well by adding their emails at the bottom of the screen. Click the “Save Document Delivery Options” at the bottom of the screen when you are finished.

Search Utilities Delivery Logout Cabinets: TB
Company: Test Account (J
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Document Delivery Preferences for TBA Oil AR cabinet

Set preferences on how you would like to receive various types of documents.

Statement

I have no preference. Delivery method will be determined by the sender.

I would like to receive this Document Type by the following method(s). If you don't pick any method, you won't be notified when a new document is available, but you can access the document via this web site.

Paper (mail)
 Email
 Fax

Print

Even if supporting documents are available, I do not want to receive them

Email

Even if supporting documents are available, I do not want to receive them

I would like to receive all e-mails for linked folders as **combined** e-mail(s)

Do not send e-mails to linked folders

How would you like to receive Statement documents via e-mail?

As a PDF attachment to the e-mail
 ZIP (password protected zip)

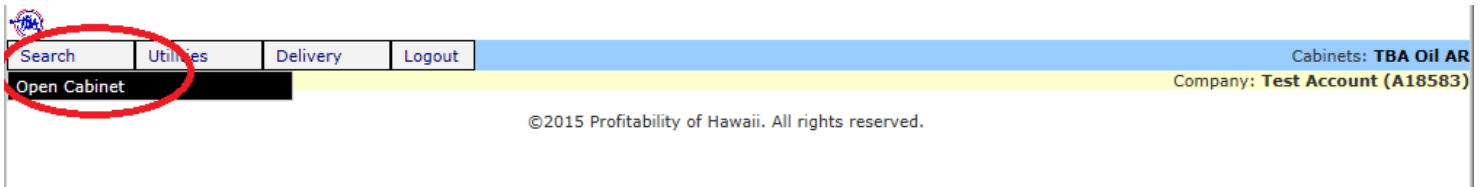
An e-mail that contains a link back to this site

Who would you like to receive the e-mail?

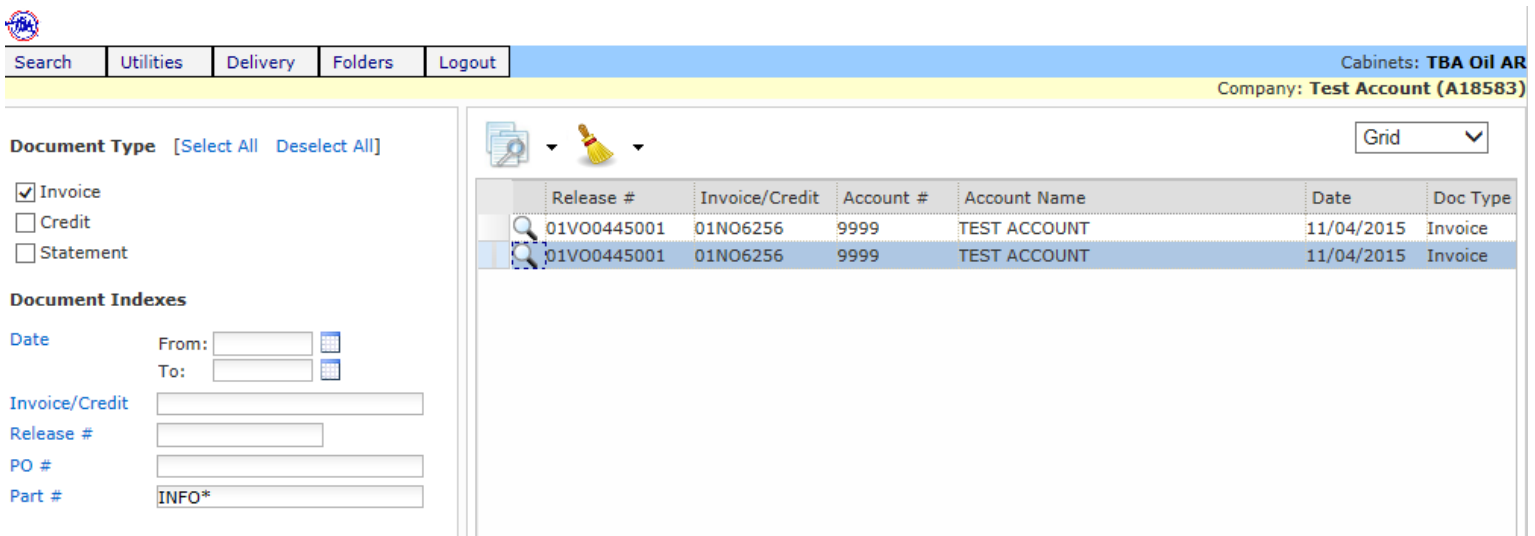
Account, Test [test@gmail.com]

Save Document Delivery Options

You are now ready to search your documents. Click on “Search” and “Open Cabinet”.



Now you can search by Document Type, Date, Invoice/Credit #, Release #, PO #, or Part #. Searches are case sensitive and require an exact match. You can use * as a wildcard search. In my example below I have part # INFOTICKET billed on the test invoice. If I enter INFO* in the Part # field I can recall the invoices that match the search criteria. To view and print the invoice click on the magnifying glass.



You can add other users or change your account information in the “Utilities” menu at the top of the screen. If you have any questions or need help please contact our accounts receivable department at 317-921-5455 or ar@tbawd.com.

Thank you for choosing TBA.