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PREPARED FOR
Internal & External Use

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# TABLE OF CONTENTS

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>TABLE OF CONTENTS</td>
<td>2</td>
</tr>
<tr>
<td>INTRODUCTION</td>
<td>4</td>
</tr>
<tr>
<td>Integrate &amp; Punch-out</td>
<td>4</td>
</tr>
<tr>
<td>eCatalogues &amp; eProcurement Marketplaces</td>
<td>4</td>
</tr>
<tr>
<td>Microsoft Cloud Services</td>
<td>4</td>
</tr>
<tr>
<td>Managed Print Services</td>
<td>4</td>
</tr>
<tr>
<td>Cyber Assessment Services</td>
<td>4</td>
</tr>
<tr>
<td>Review Supported Inventory</td>
<td>4</td>
</tr>
<tr>
<td>NEW USER? HOW TO REGISTER &amp; LOGIN</td>
<td>5</td>
</tr>
<tr>
<td>How To Log In</td>
<td>5</td>
</tr>
<tr>
<td>How Request A New Password / Password Reset</td>
<td>5</td>
</tr>
<tr>
<td>Two Factor Authentication</td>
<td>5</td>
</tr>
<tr>
<td>Single Sign On (SSO)</td>
<td>5</td>
</tr>
<tr>
<td>HOMEPAGE</td>
<td>6</td>
</tr>
<tr>
<td>Your Account Manager</td>
<td>6</td>
</tr>
<tr>
<td>View Your Recent Orders, Shipping Dates, Parcel Tracking, Invoice Status</td>
<td>6</td>
</tr>
<tr>
<td>Quicklinks</td>
<td>6</td>
</tr>
<tr>
<td>Navigation Menu</td>
<td>6</td>
</tr>
<tr>
<td>Requisitions / Order Approvals (Where Activated)</td>
<td>6</td>
</tr>
<tr>
<td>PRODUCTS</td>
<td>7</td>
</tr>
<tr>
<td>Search For Products</td>
<td>7</td>
</tr>
<tr>
<td>Text Search</td>
<td>7</td>
</tr>
<tr>
<td>Auto Refinement</td>
<td>7</td>
</tr>
<tr>
<td>Refine Search</td>
<td>7</td>
</tr>
<tr>
<td>Browse The Product Hierarchy</td>
<td>8</td>
</tr>
<tr>
<td>PRODUCT OVERVIEWS</td>
<td>9</td>
</tr>
<tr>
<td>Accessories</td>
<td>9</td>
</tr>
<tr>
<td>Similar Products</td>
<td>9</td>
</tr>
<tr>
<td>Reviews</td>
<td>9</td>
</tr>
<tr>
<td>Compare Products</td>
<td>10</td>
</tr>
<tr>
<td>HOW TO ORDER</td>
<td>11</td>
</tr>
<tr>
<td>CHECKOUT</td>
<td>12</td>
</tr>
<tr>
<td>Additional Notes</td>
<td>12</td>
</tr>
<tr>
<td>Confirmations</td>
<td>12</td>
</tr>
<tr>
<td>Upload A PO / Document At Checkout</td>
<td>12</td>
</tr>
<tr>
<td>MY ACCOUNT</td>
<td>13</td>
</tr>
<tr>
<td>ORDER HISTORY</td>
<td>14</td>
</tr>
<tr>
<td>- View Order / View as PDF</td>
<td>14</td>
</tr>
<tr>
<td>- Re-Order</td>
<td>14</td>
</tr>
<tr>
<td>- Convert to Bundle</td>
<td>14</td>
</tr>
<tr>
<td>- Request Return</td>
<td>14</td>
</tr>
<tr>
<td>PARCEL TRACKING</td>
<td>15</td>
</tr>
<tr>
<td>REQUEST RETURN</td>
<td>15</td>
</tr>
<tr>
<td>INVOICES/CREDIT NOTES</td>
<td>16</td>
</tr>
<tr>
<td>OUTSTANDING INVOICES</td>
<td>17</td>
</tr>
<tr>
<td>MESSAGES (ACCESSIBLE FROM POP-UPS)</td>
<td>17</td>
</tr>
<tr>
<td>REQUISITIONS – APPROVAL PROCESS</td>
<td>18</td>
</tr>
<tr>
<td>SWITCH ACCOUNT (MULTIPLE ACCOUNTS)</td>
<td>19</td>
</tr>
<tr>
<td>INTERNATIONAL ACCOUNTS</td>
<td>19</td>
</tr>
<tr>
<td>RENEWALS</td>
<td>20</td>
</tr>
<tr>
<td>- Renewals Reminders (Email Alert)</td>
<td>20</td>
</tr>
<tr>
<td>MANAGE MICROSOFT CLOUD SERVICES (AVAILABLE UPON REQUEST)</td>
<td>21</td>
</tr>
<tr>
<td>SUPPORTED INVENTORY (AVAILABLE UPON REQUEST)</td>
<td>22</td>
</tr>
<tr>
<td>MANAGED PRINT (WHERE APPLICABLE)</td>
<td>23</td>
</tr>
<tr>
<td>FAVOURITE SEARCHES</td>
<td>24</td>
</tr>
<tr>
<td>FAVOURITE PRODUCTS</td>
<td>25</td>
</tr>
<tr>
<td>BUNDLES</td>
<td>26</td>
</tr>
<tr>
<td>QUOTES</td>
<td>27</td>
</tr>
<tr>
<td>- Bespoke Quotes Prepared by Your Account Manager</td>
<td>27</td>
</tr>
<tr>
<td>- Request quotes from Your Account Manager</td>
<td>27</td>
</tr>
<tr>
<td>MANAGE PASSWORD / ALERTS</td>
<td>28</td>
</tr>
<tr>
<td>- Change Password</td>
<td>28</td>
</tr>
<tr>
<td>- Two Factor Authentication</td>
<td>28</td>
</tr>
<tr>
<td>- Alerts</td>
<td>28</td>
</tr>
<tr>
<td>CALL OFF / DROP SHIP ORDERS</td>
<td>29</td>
</tr>
<tr>
<td>(AVAILABLE UPON REQUEST)</td>
<td>29</td>
</tr>
<tr>
<td>REPORTS (ANALYTICS)</td>
<td>30</td>
</tr>
<tr>
<td>RESTRICTED USAGE</td>
<td>31</td>
</tr>
</tbody>
</table>
INTRODUCTION

Developed specifically to support customers wanting to trade or administer their account online with Softcat, eCAT is a rich data source to help better manage supplier relations and access bespoke catalogue and price information.

eCAT allows our customers to find products, check prices and availability, create equotes and order online. Order processing is immediate and with eCAT linked directly to our back-office system pricing and stock availability are continually updated.

Integrate & Punch-out
For organisations with an existing eProcurement platform we can dovetail into this system seamlessly as we are able to receive orders electronically, invoice electronically and importantly provide bespoke XML data exports.

eCatalogues & eProcurement Marketplaces
If you are already using an established industry specific marketplace we are happy to supply our services in this way. Please contact your Account Manager or the Softcat eBusiness Team to tell us more.

Microsoft Cloud Services
Customers can manage key elements of their Microsoft Cloud Services via eCAT. Both O365 and Azure subscriptions can be monitored and maintained.

Managed Print Services
Where customers have chosen Softcat to support their managed printer network eCAT provides both reporting and transactional services.

Cyber Assessment Services
Softcat’s customised cyber security review allowing customers to understand the maturity of their security processes, any vulnerabilities and susceptibility to a cyber breach.

Review Supported Inventory
Softcat provides IT hardware, maintenance and warranty support services, all of which can be monitored and managed using eCAT.
NEW USER? HOW TO REGISTER & LOGIN

Simply contact your Softcat Account Manager or ask to speak with your contact in our Sales Team. If required we will create a new account for you. If you already have an account with Softcat we will provide you with the necessary logins for eCAT access.

HOW TO LOG IN

Please visit https://www.softcat.com/ecat/customer-login. Enter your username (your email address) and your password to begin using eCAT.

HOW REQUEST A NEW PASSWORD / PASSWORD RESET

Please visit https://www.softcat.com/ecat/customer-login. Please enter your email address in the New User / Forgotten Password? Field and click ‘Retrieve’ to receive a twenty minute time-bound, secure link requesting your entry of a new password. Password strength requirements exist.

TWO FACTOR AUTHENTICATION

For additional security, two factor authentication can be applied upon request.

SINGLE SIGN ON (SSO)

For customers requiring a single sign on process aligned to your own system, please contact your Softcat Account Manager or ecatteam@softcat.com
HOMEPAGE

YOUR ACCOUNT MANAGER

Upon login your Account Manager and their colleague’s contact details are displayed showing links to their telephone number, email, Jabber and social media. Clicking their image displays notes about their duties and responsibilities that they may wish to add.

VIEW YOUR RECENT ORDERS, SHIPPING DATES, PARCEL TRACKING, INVOICE STATUS

Orders placed on your account recently dispatched or still awaiting completion along with invoices pending payment can be quickly reviewed by clicking the order line on the homepage. Orders placed on your account, both online via eCAT and conventionally, i.e. email, can be seen with any estimated shipping dates. Where available parcel tracking details and options to request a return or reorder goods are available. A link for each order shows greater detail or as .PDF, while a link for each invoice displays a copy ready for printing should you require.

By default the page will display your last month’s orders placed on your account. More historic order information can be seen on the My Account>Order History page.

QUICKLINKS

Key pages can be viewed by using the quick links shown top middle on the homepage or drag left / right to access these.

NAVIGATION MENU

All aspects of your account are accessed from the top, left hand menu. The My Account page is the main page for navigation across eCAT for Scottish public sector users.

REQUISITIONS / ORDER APPROVALS (WHERE ACTIVATED)

For users with a requisition / approval process in place, these too can be accessed from the homepage. Please see the Requisitions – Workflow Approval Process section in this guide for more information.
SEARCH FOR PRODUCTS

There are various ways to find products that you need. These include a hierarchical search and text search both coupled with refine and sort options.

Text Search

Use the Search field in the top middle of every page.

The text search field lets you enter a Softcat product code, manufacturer’s part number, or free text. Your results are displayed under their respective categories, indicating the number of products that are contained within each. You can ‘view all results’ and browse through a full list of results or clicking a category displays a relevant product listing. Should you have chosen the wrong section the remaining categories can be quickly accessed from the list on the right.

Depending upon your search term eCAT may place you into a product category it believes is most relevant, i.e. ‘USB Pen’ will result in users seeing the ‘Flash Drives’ section.

Auto Refinement

An auto refinement may be applied automatically to your search results. This may be to highlight only items that are in stock. Please look out for -

Refine Search

Once a chosen category of products is displayed ‘Refine Search’ options are displayed on the left, to narrow down your findings. Selecting one locks that criteria and allows further refinement. I.e. Price – Less than £1000 followed by your next choice.

A ‘Keywords’ field also lets you enter free text rather than selecting from the criteria list displayed. I.e. ‘Windows’ or ‘Epson’.
BROWSE THE PRODUCT HIERARCHY

Clicking the Products link from the left hand menu displays a range of categories. You can search through the entire catalogue using these two / three level links. Clicking into the hierarchy on any link in that list displays all of the products we feature within that category.

Once a chosen category of products is displayed, the ‘Refine Search’ options on the left of the page are shown to narrow down the results even further. These are relevant criteria associated to the type of products viewed.

Clicking on a product description from a search results list or by searching for a specific product code, you can view a product image or images, overview, detailed technical specifications and in many cases, accessories and similar products.

The product page shows your preferred pricing set up by your Account Manager alongside stock availability. Any results list can be sorted by alpha/numeric, pricing (high to low / low to high) and stock availability.

While viewing a product the option to add to ‘Bundle’ or add to ‘Personal’ / ‘Account Favourites’ lets you save the item for easy ordering in future.
PRODUCT OVERVIEWS

By clicking a product description from a list of products, eCAT begins by displaying an overview, outlining the key details, pictures, documents and journal reviews (where available) and basic specifications. Links allowing users to add to ‘Bundle’ or add to ‘Personal’ / ‘Account Favourites’ lets you save the item for easy ordering in future. Please see more about this in the ‘My Account’ section below.

<table>
<thead>
<tr>
<th>Overview</th>
<th>Specification</th>
<th>Accessories</th>
<th>Similar Products</th>
</tr>
</thead>
</table>

**Specification**

When viewing a product overview, the next tab provides a more detailed technical specification. A more comprehensive list of details are shown, for some products this is extensive and eliminates the need to browse manufacturer’s sites.

On this page you will also see your pricing and stock availability along with on many products, compatible options.

**Accessories**

Where available and appropriate, ‘Accessories’ displays a list of products you may wish to consider in addition to the product viewed. Ideal for quickly locating printer supplies or cables and peripherals.

**Similar Products**

The ‘Similar Products’ link displays exactly that; alternative items you may wish to consider.

**Reviews**

Product reviews may be included from various IT technical journals. (NB. These are third party reviews and may not be for the exact product viewed.)
**COMPARE PRODUCTS**

While viewing products displayed in a results list, you may add up to 10 items to be shown side by side. This helps you compare relevant specifications for whatever range of products you are browsing. Click the ‘Comparison’ link under each product description. You’ll see the comparison link light up and the product is added to the comparison tiles at the top of the page. Click compare. Information that is of a difference between products is shown in bold near the top, while same specification details are in grey, lower down the page.

From this page you may remove any items from your list, view them individually or ‘Add to Cart’ to buy.

A ‘View as PDF’ option allows users to view, print or save the comparison table as a .PDF document.
HOW TO ORDER

Like many websites, eCAT uses a Cart / Checkout process. Simply click the ‘Add to Cart’ button when viewing a product and this will be added to your cart page as shown below.

If required you may add further products until you have all that you need. To change the quantity of a product when in the basket, enter the quantity required or use the arrow buttons. Click the ‘Update Basket’ button to confirm. Products can also be deleted from the basket by clicking ‘Remove’ or changing the quantity value to zero and again clicking ‘Update Basket’.

If you leave your basket at any point to go to another part of the site, or leave the site altogether, your items remain in the basket for when you return.

To proceed with the purchase choose your preferred delivery option from the ‘Select Your Shipping’ drop-down and click ‘Proceed To Checkout’ / ‘Pay on Account’ or ‘Pay by Card’ where available.

Other currencies or an Inc. VAT. figure can be displayed upon request.
CHECKOUT

The checkout page confirms your invoice / billing address and requires you to select either a delivery address that we already have lodged against your account, or for users with the relevant permission to do so, enter a new address. Add your purchase order (P.O.) number and the name of the intended recipient / for attention of. (FAO) Clicking ‘Place Order’ completes the process.

For customers wishing to add extra information to advise your Account Manager at point of ordering, e.g. ‘Please notify by phone when delivery is due’, additional information can be added here. Ask your Account Manager or the ecatteam@softcat.com to include this feature.

Additional Notes

Additional notes fields can be provided to allow extra information to appear on order documents, confirmations, invoices and reports. These can be added to the header of each order or at product line level and can be mandatory if preferred.

Confirmations

Along with the order originator your Softcat Account Manager receives a confirmation notification the moment an order is placed on eCAT. If required we can ensure that certain additional customers receive a confirmation email for any and every order that gets placed on eCAT too.

Upload A PO / Document At Checkout

Customers may attach a formal PO or other document to their checkout for receipt by their Softcat Account Manager. Please contact ecatteam@softcat.com to apply this.
MY ACCOUNT

This is the place to go to view the administrative features open to you as an account holder. Clicking the ‘My Account’ link in the left hand menu lets you:

View your Order History (A more detailed summary than shown on the homepage).

View Invoices/Credit Notes. (A more detailed summary than shown on the homepage).

View Outstanding Invoices. (Those pending payment)

Review historic eCAT hints & tips messages

Supported Inventory showing hardware warranties and their management. (when active)

Check Requisitions raised or needing approval. (when active on your account)

View software licence and hardware renewal statuses.

Manage Microsoft (O365) Cloud / Azure Services. (if required).

Switch to other invoice / account addresses (if required – when active)

View and obtain renewal agreement information.

Managed Print reports and statistics may be accessed. (when subscribed to)

Cyber Assessment Service. (where requested)

Access Favourite and Bundle lists of products.

View Quotes, save as .PDF and reload them for checkout.

(View quotes created for you by your Softcat Account Manager)

View your Call Off order Status (when active on your account)

Change your password / Receive quote expiry alerts.

Request a return of goods.
ORDER HISTORY

The Orders History page by default shows all your orders with Softcat for the current month. Various search options at the top of the screen can be used to find orders by your order number (PO), Softcat’s order number and where appropriate / available, serial number. Alternatively you can search your open orders by month and year and period. A free text search field enables filtering of all text on page. And all columns can be reordered in an alpha-numeric / date sequence.

Clicking the plus symbol/order number link displays order details including the delivery address, FAO, items, costs, ETA etc.

Orders

Search by Date/Status

Show orders from the month of:

April 2020 for 1 months

Search by IDs

Enter your full name (Mandatory):

Order number:

Product serial number:

Search

View Order / View as PDF

Having clicked to expand each order line, it is possible to see each order individually on screen by clicking the ‘View Order’ button. From here an option to request to return items or to re-order the same items is available. A .PDF view option is available too.

Copy invoices and credits relating to your order can also be accessed.

Re-Order

A Re-Order button copies all items and quantities from your order into your basket, ready to be checked or edited before proceeding to checkout.

Convert to Bundle

Convert to bundle is a handy feature enabling you to save a group of items as a bundle for easy lookup and purchase in future.

Request Return

A return request can be raised and issued to your Account Manager while displaying a history of other RMAs (Return Merchandise Authorisation)
PARCEL TRACKING

From orders shown on the homepage or the Order History page, clicking the plus symbol to expand an order line will provide a Parcel Tracking link should this be available to Softcat via the respective courier. Clicking the link will direct the user to the courier’s webpage to display parcel tracking information and signatory details should this information be available. A status of ‘Not Available’ simply means this information has to be recovered manually by your Softcat Account Manager. Please get in touch.

REQUEST RETURN

When viewing an order, clicking ‘Request Return’ displays your Return Merchandise Authorisations (RMA) from where an update via email can be requested. Using the ‘request a new RMA’ link places the order content onto a Request a Return page. The customer is required to select a reason for return, enter the quantity of items to return and any serial numbers if not pre-populated. An ‘Additional Comments’ field is available to add more details to inform your Account Manager at Softcat about your return request.

Finally, clicking ‘Request Return’ will issue a notification to your Account Manager for them to take action and respond.
INVOICES/CREDIT NOTES

The Invoices/Credit Notes page by default shows your invoices for completed orders or credit notes we have issued for the current month. As with Order History, various search options at the top of the screen can be used to find orders by your order number (PO), or Softcat’s invoice number. Alternatively you can search your open orders by month, year and period. A free text search field enables filtering of all text on page. And all columns can be reordered in an alpha-numeric / date sequence.

A search field on the page helps narrow down to specific content if required.

Clicking the invoice (INV…) or credit (CRN…) number link displays further details including the delivery address, FAO, items, costs, ETA. etc. Here you can save, view or print a copy invoice or credit by .PDF.
OUTSTANDING INVOICES

Outstanding Invoices works exactly as Invoices/Credit Notes (explained above). All invoices shown are those pending payment. Invoice data, a link for more details per invoice, the due date and the overdue status can all be seen.

MESSAGES (ACCESSIBLE FROM POP-UPS)

eCAT hints, tips and advice can be viewed here.
REQUISITIONS – APPROVAL PROCESS

eCAT can help customers match their web ordering to their own purchasing process.

We understand that within organisations there are:

- People who specify but cannot buy.
- A hierarchy to approving IT buying.
- Requirements to restrict user access to eCAT.

eCAT’s Workflow Approval Process provides a requisition approval system recognising different users with different purchasing rights and responsibilities. Some users will be purely specifiers and will never be able to buy directly. These users will fill a basket with their required items. This is then forwarded to their manager or purchaser who will approve the basket and complete the order process. A choice of approver can be added too, along with automatic routing to the correct approver dependent upon the type of products required.

Once established an additional tab showing pending requisitions is displayed on the homepage of both approvers and requisitioners alike. All the while email alerts are sent between personnel involved to ensure action is swift, and the ability to search the status and see a timestamp of all requisitions is displayed too.

We can also ensure that certain IT or Purchasing Managers receive a confirmation email for any and every order that gets placed on eCAT.

If you require any further information on this functionality, please contact your Account Manager or ecatteam@softcat.com
SWITCH ACCOUNT (MULTIPLE ACCOUNTS)

For customers needing to buy for more than one account (billing address), it is possible to switch between different business accounts without the need to have numerous passwords. By clicking ‘My Account’ and then ‘Switch Account’ or the ‘Switch’ link in the header, the user is given the option to select the relevant business (where this is set up) and if necessary request to have one organisation as a default account too.

The eCAT Analytics pages can be set to amalgamate multiple accounts allowing users to view group management information. For this and the creations on additional account please contact your Softcat Account Manager.

INTERNATIONAL ACCOUNTS

For customers who require international accounts, eCAT can display pricing for each respective country with in-country currency shown if required. Softcat can bill in GBP, EUR and USD.
RENEWALS

For customers with software / hardware renewal agreements with Softcat the Renewals section shows by default a 3-month summary of upcoming renewals for your account. Customers choose to view renewal information by date range, vendor or agreement number.

An option exists to request a quote for a renewal item via eCAT. Upon doing so your Account Manager will receive an automated email alert with the requirement to action.

Clicking the plus symbol provides more information such as PO number and licence agreement details.

**Renewals Reminders (Email Alert)**

Reminders can be applied to issue a renewal alert email in advance of renewal dates.

Please speak with your Account Manager to nominate when and who should receive such alerts in advance of your licence agreement expiration.
MANAGE MICROSOFT CLOUD SERVICES
(AVAILABLE UPON REQUEST)

Customers may access and manage both O365 and Azure subscriptions via eCAT.

For O365 users may;

- View their current seat numbers for relevant product lines
- Adjust the seat numbers for relevant product lines
- Add new product lines to their cloud services either via converting a quote prepared by their Account Manager or by browsing and selecting products from the catalogue.
- Add a new domain/tenant
- Transfer a domain/tenant from another reseller to Softcat.

Azure users may,
- Set and monitor Azure budgets and historic use
- View and adjust user access.
- Access the Microsoft Azure calculator to estimate product costs.
SUPPORTED INVENTORY (AVAILABLE UPON REQUEST)

Where customers have hardware inventory supported by Softcat you can view our CMDB records for your equipment on eCAT, along with the ability to request additions, deletions or export that data for your own records.

Please speak with your Account Manager for more information about this dedicated service.

Supported Inventory

<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
<th>Serial Number</th>
<th>Contract Number</th>
<th>Contract Start</th>
<th>Contract End</th>
<th>Softcat SLA</th>
</tr>
</thead>
</table>

Export as XLS
MANAGED PRINT  (WHERE APPLICABLE)

For customers subscribing to Softcat’s Managed Print services, eCAT not only highlights all transaction information relating to supplies consumed but also provides detailed reporting for customer’s printer estate. This includes machine location and usage over time, machine operating status and consumable levels and reorder triggers. Data can be extracted by .XLS and help / support tickets raised via the link provided.

To learn more about how Softcat can help manage your networked printer estate please contact MPSsales@softcat.com
FAVOURITE SEARCHES

Users can save their Favourite Searches. This can be useful, if, you have a standard specification for a device and wish to regularly carry out a search based on several specification criteria without having to add those search preference refinements every time.

When viewing a list of product results and having set the required filters as shown in the example to the right, you can now use the ‘Save Search as’ button at the bottom of the filter list to retain those settings as a Favourite Search. A search can be saved either for just you or for all users on the account.

Once saved, favourite searches can quickly and easily re-run by selecting the Favourite Searches option from the My Account page.

Favourite Searches

Personal Searches

Remove

Apple Laptop

Account Searches

Remove

Standard Laser Printer
FAVOURITE PRODUCTS

eCAT lets you create and manage lists of favourite or standard products. When viewing a product micro links under its description allow you to add to ‘Account Favourites’ or ‘Personal Favourites’.

Personal Favourites is a list of products only visible to the user who created it.

Account Favourites is a list of products viewable by all users on an account.

To access either list of favourite products, select ‘Favourite Products’ from the ‘My Account’ menu or from the tabs on the homepage. You can add and remove products in the favourites lists as required.

A ‘Most Purchased’ list is automatically prepared for users highlighting repeatedly bought products from the last 90 days. Ideal for quick repeat ordering.

Type any name or descriptive text in the ‘Filter’ field to instantly narrow down your list.

Permissions to edit the Account Favourite items can be given or removed from individuals, allowing a manager to control their standard product list.

Single or multiple favourite items can be ordered collectively by clicking one or numerous ‘Add to Cart’ boxes followed by the ‘Add Selected to Cart’ button.

Favourites

- Personal (visible only to you)

There are currently no Personal Favourites. To add to your Favourites list simply find the item in the Products area, and click the Add to Favourites link shown below the price.

- Account (visible to all users on your account)

Accessories

Notepac 15-16" Clamshell Case - Black

£18.90

Targus Notepac CN01 Carrying Case for 15.6" Notebook - Black - Aylion, Polyurethane - Shoulder Strap, Handle, Trolley Strap - 250 mm Height x 250 mm Width x 50 mm Depth

K64613WW Desk Mount Cable Anchor

£6.87

Kensington K64613WW Cable Guide - 1 Pack - Cable Anchor
BUNDLES

Like Favourite Products, users can create bundles of items, usually purchased together. i.e. A laptop, carry case, security lock etc. When viewing a product, a ‘Bundle’ link is displayed underneath the product description. To add another item to the bundle simply find the next product and repeat the process. Once the bundle is complete, simply add a product code and description of your choice and click ‘Save Changes’.

Click the bundle line to edit or view it in full. Options exist to change the quantities of products in your bundle or delete it.

Bundles can also be added to the Account Favourites or your Personal Favourites area too, helping users store everything in one place.
QUOTES

Products added to a basket can be saved as a quote to be dealt with later. This may be because users need to gain authorisation to place an order or check with a colleague or your Softcat Account Manager on technical suitability.

From the basket/cart screen clicking ‘Save as Quote’ lets users add a description, and the basket will be saved, fixing the price until the end of the month.

A saved quote can be loaded back into your basket for ordering or editing. The quote can be removed. Or you can download a .PDF view of the quote for internal use, email or saving. An optional ‘Email Quote’ feature can also be added.

To access your saved quotes at any time, click My Account > Quotes or choose the tab on the homepage.

As quotes expire at the end of each calendar month these are still available by ticking the ‘Show expired quotes’ checkbox. Price validity can be arranged by contacting your Softcat Account Manager.

BESPOKE QUOTES PREPARED BY YOUR ACCOUNT MANAGER

Whether for brand new products or if your Softcat Account Manager wishes to simply create a bespoke, one-off quote, these can be added to this page for easy checkout when required. Please speak with your Account Manager for more information.

REQUEST QUOTES FROM YOUR ACCOUNT MANAGER

Customers may request a quote from their account manager via eCAT instead of email or phone. Simply click into ‘Quotes’ then ‘Request a Quote’ and fill in the manufacturer’s part number or a description of what is needed.
MANAGE PASSWORD / ALERTS

1.1 CHANGE PASSWORD

Upon login users can use the ‘Manage Password / Alerts’ link accessed from the ‘My Account’ link in left hand menu. Your current password along with your new password and a re-entry of that to confirm it is required.

To maximise security and in line with PII (Personally Identifiable Information) we do not access your password. Rather giving you the option to reset or recreate a new password whenever required.

Softcat takes online security seriously, one such example is that we ask your password meets our ‘strength’ criteria. A combination of upper / lower / alpha / numeric characters are preferred. Help with this can be obtained by contacting ecatteam@softcat.com

1.2 TWO FACTOR AUTHENTICATION

For additional security, two factor authentication can be applied upon request.

Where other methods of access are required such as single sign on (SSO), please contact your Softcat Account Manager or ecatteam@softcat.com

1.3 ALERTS

A simple tick box option allows you to choose to receive an email alert as your eCAT quotes expire at the end of each calendar month.
CALL OFF / DROP SHIP ORDERS

(AVAILABLE UPON REQUEST)

For Softcat customers who wish to view and call off bonded or pre-ordered stock via eCAT such agreements can be viewed in this section. Products can be ordered from your dedicated stock and available / residual quantities can be monitored at any time.

Please speak with your Account Manager to discuss call off, bonded stock and Softcat’s wide range of product service options.
REPORTS (ANALYTICS)

From the Analytics link in the left-hand menu eCAT provides various reports relevant to your Softcat account and user permissions. Renewal, Print and MS Azure data can be viewed if relevant. Spend Analysis provides access to summary, doughnut graph reports with the option to select specific dates and download extremely detailed .XLSX summary reports for all your account transactions with Softcat.

The data displayed defaults to your last twelve months and this range can be modified at any time by clicking the ‘Change Dates’ button.

Selecting Download XLS will provide a detailed line item report in Excel for the specified date range, including details of your PO number, product level detail, cost and delivery addresses etc.

Upon downloading we ask which version of Excel is being used. Once complete an Enable Content button allows an Excel macro to be run which compiles a further set of graphs reflecting the data.

Customers with multiple accounts can view combined reports giving total figures across all trading sites. Please request this from your Account Manager or ecatteam@softcat.com

Print & View .PDF options are also available.
RESTRICTED USAGE

The Softcat eBusiness Team realise that certain levels of privacy must be adhered to in business and as such elements and functions of eCAT can be hidden or removed, often down to individual user level. Please let us know what customisation you and your organisation may require.