

Paycor Marketing Portal

User Documentation

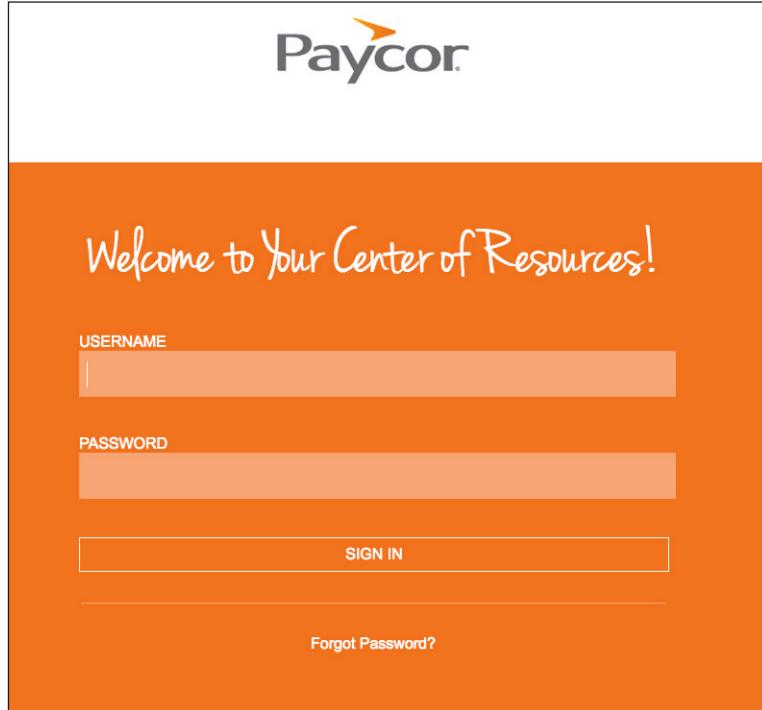
Version 4.0 – November 2020

Open a new browser window and type in the following url to begin:

www.paycormktg.com

Credentials are as follows:

username: your Paycor email
temporary password: change123



QUICK GUIDE

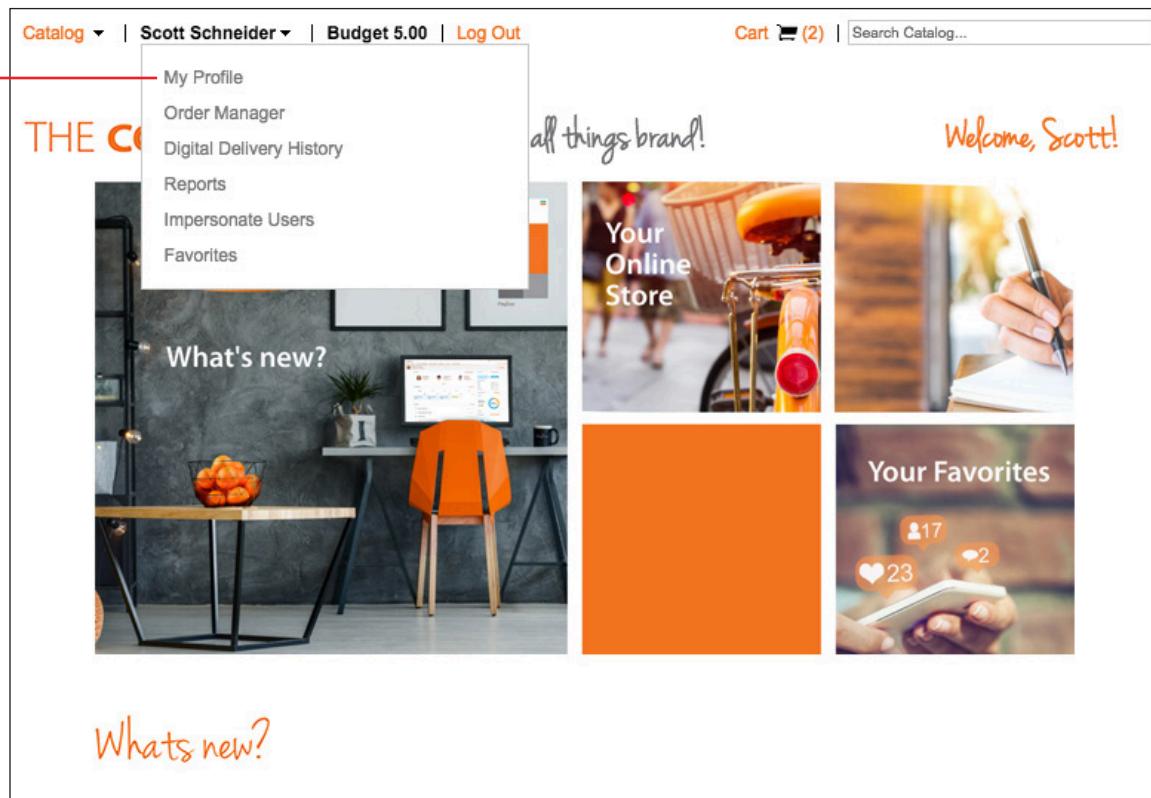
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ADMIN ONLY

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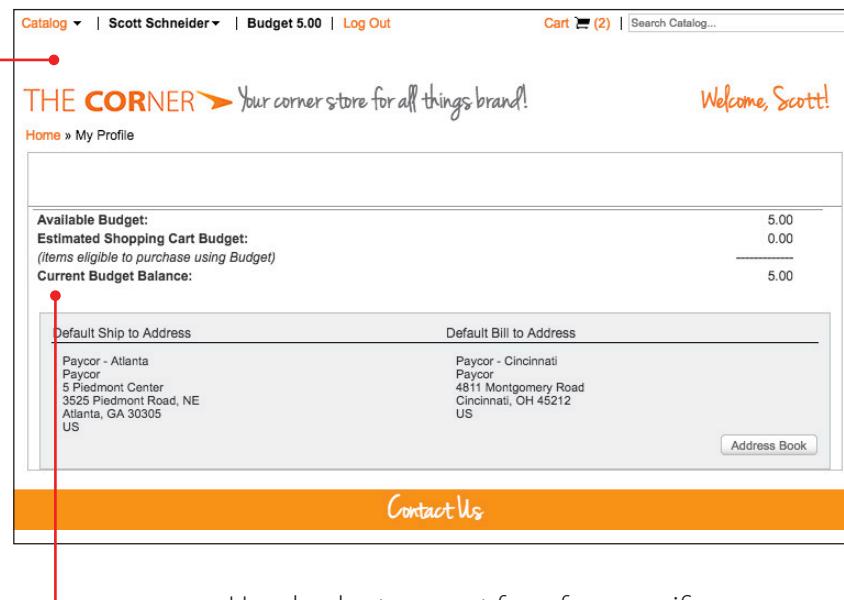
MY PROFILE

2



The screenshot shows the 'My Profile' page. At the top, there is a navigation bar with 'Catalog', 'Scott Schneider', 'Budget 5.00', and 'Log Out'. To the right is a 'Cart' icon with '(2)' and a 'Search Catalog...' input field. A red box highlights the 'My Profile' link in the sidebar. The sidebar also includes 'Order Manager', 'Digital Delivery History', 'Reports', 'Impersonate Users', and 'Favorites'. The main content area features a large image of a modern interior with a desk, a bowl of oranges, and a computer monitor. Overlaid on this are the text 'THE CORNER' and 'What's new?'. To the right are three images: 'all things brand!', 'Your Online Store' (showing a person at a counter), and 'Welcome, Scott!' (showing a hand writing in a notebook). Below these are two more images: 'Your Favorites' (showing a smartphone with social media icons) and 'What's new?' (repeated). A red box highlights the 'What's new?' text.

Click on MY PROFILE to review details and modify if necessary.



The screenshot shows the 'My Profile' page. At the top, there is a navigation bar with 'Catalog', 'Scott Schneider', 'Budget 5.00', and 'Log Out'. To the right is a 'Cart' icon with '(2)' and a 'Search Catalog...' input field. A red box highlights the 'Available Budget' section. The page displays budget details: Available Budget (5.00), Estimated Shopping Cart Budget (0.00), and Current Budget Balance (5.00). Below this are sections for 'Default Ship to Address' and 'Default Bill to Address'. The 'Default Ship to Address' section lists 'Paycor - Atlanta' with the address 'Paycor
5 Piedmont Center
3525 Piedmont Road, NE
Atlanta, GA 30305
US'. The 'Default Bill to Address' section lists 'Paycor - Cincinnati' with the address 'Paycor
4811 Montgomery Road
Cincinnati, OH 45212
US'. A red box highlights the 'Address Book' button. At the bottom is a large orange 'Contact Us' button.

User budgets are set for a few specific users.
Contact Chris Herter if you need more funds allocated.

MY PROFILE

3

Users can set a default ship to address or add additonal addresses for future use.

Address Book							
		All	Search	Displaying 1-25 of 27 Page 1 /2			
Description	Company	Addr1	City	State	Zip	Country	
*Paycor - Atlanta	Paycor	5 Piedmont Center	Atlanta	GA	30305	US	
*Paycor - Cincinnati	Paycor	4811 Montgomery Road	Cincinnati	OH	45212	US	
Paycor - Apex	Paycor	4437 Fairview Ridge Lane	Apex	NC	27539	US	
Paycor - Charlotte	Paycor	2550 West Tyvola Road	Charlotte	NC	28217	US	
Paycor - Chicago	Paycor	125 S. Wacker	Chicago	IL	60606	US	
Paycor - Chicago West	Paycor	1430 Branding Ln.	Downers Grove	IL	60515	US	
Paycor - Cleveland	Paycor	3 Summit Park Drive	Independence	OH	44131	US	
Paycor - Columbus	Paycor	4249 Easton Way	Columbus	OH	43219	US	
Paycor - Dayton	Paycor	3140 Governors Place Blvd.	Kettering	OH	45409	US	
Paycor - Detroit	Paycor	19500 Victor Parkway	Livonia	MI	48152	US	
Paycor - Dyer	Paycor	9469 Torrance Pl	Dyer	IN	46314	US	
Paycor - Fort Myers	Paycor	8597 Colony Trace Drive	Fort Myers	FL	33908	US	
Paycor - Grand Rapids	Paycor	2851 Charlevoix Dr, SE	Grand Rapids	MI	49546	US	
Paycor - Hudsonville	Paycor	2019 Jaclyn Drive	Hudsonville	MI	49426	US	
Paycor - Indianapolis	Paycor	11405 N. Pennsylvania St.	Carmel	IN	46032	US	
Paycor - Jacksonville	Paycor	10550 Deerwood Park Blvd.	Jacksonville	FL	32256	US	
Paycor - Kansas City	Paycor	8050 Marshall Drive	Lenexa	KS	66214	US	
Paycor - Lewisville	Paycor	8851 Kings Tree Road	Lewisville	NC	27023	US	
Paycor - Louisville	Paycor	9300 Shelbyville Road	Louisville	KY	40222	US	
Paycor - Nashville	Paycor	1801 West End Ave.	Nashville	TN	37203	US	
Paycor - Orlando	Paycor	5401 S Kirkman Rd	Orlando	FL	32819	US	
Paycor - Pittsburgh	Paycor	The Gulf Tower	Pittsburgh	PA	15219	US	
Paycor - Pittsburgh	Paycor	2009 Mackenzie Way	Cranberry Twp	PA	16066	US	
Paycor - Raleigh	Paycor	5400 Trinity Road	Raleigh	NC	27607	US	
Paycor - St. Louis	Paycor	7800 Forsyth Blvd	Clayton	MO	63105	US	

ADD NEW address. This will be available to you only.

Add Address

Description	<input type="text"/>	* Required for Shipping and Billing.
Country	<input type="text" value="United States"/>	* Required for Shipping and Billing.
Company	<input type="text"/>	
Attn	<input type="text"/>	* Does not apply to Billing Address
Addr1	<input type="text"/>	* Required for Shipping and Billing.
Addr2	<input type="text"/>	
Addr3	<input type="text"/>	
Addr4	<input type="text"/>	
City	<input type="text"/>	* Required for Shipping and Billing.
State	<input type="text"/>	* Required for Shipping and Billing.
Zip	<input type="text"/>	* Required for Shipping and Billing.
<input type="checkbox"/> Save as Default Ship To Address		
<input type="button" value="Save"/> <input type="button" value="Cancel"/>		

Select CATALOG from the drop down at the top. Choose Add to Cart or click on Product Name to be taken to screen below. Different user groups see different catalogs in the drop down.

Catalog ▾ | Scott Schneider ▾ | Budget 5.00 | Log Out

Cart (2) | Search Catalog...

Branded Materials

Marketing (Admin Only)

SIG

HR (Admin Only)

Seller Tools

Channel Partners

Events

Business Cards

In Review

er store for all things brand!

Welcome, Scott!

Displaying 1-9 of 9 Page 1 /1

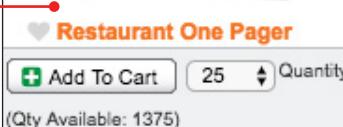
   

Restaurant One Pager **Non Profit One Pager**

Restaurant One Pager

Non-Profit Partners

Add To Cart **Add To Cart** **Add To Cart** **Add To Cart**

Restaurant One Pager  **Non-Profit Partners** 

Restaurant One Pager **Non-Profit Partners**

Add To Cart **25** **Quantity**
(Qty Available: 1375)

Product Information

Restaurant One Pager **

SKU: [P-PC] restaurant_one_pager_09_2018

Description: Restaurant One Pager

Order Information

Qty: 25 

Add to Cart

**Item requires approval by Senior Purchaser

NOTE:

All products will be sent through an order approval process. The orderer will receive email confirmation noting if the order has been approved or denied before the order is processed by Graphic Village. If you have not received your confirmation please contact your Paycor admin.

CATALOG - VERSIONED ITEM

5

Populate specific information to customize the item.

STEP 1. Input information in variable fields. Fields with an asterisk are required.

View larger proof.

STEP 2. Click update proof to view.

***The proof you see is low res but the final print ready proof is created from your input. Please proof carefully for any misspellings/errors.
Once approved then go to Step 3***

STEP 3: Choose Quantity

STEP 4: Add to Cart

STEP 5: Approve proof

Please review proof carefully.

Proof is approved to print.

Cancel I Agree

CURRENT ORDER

6

After adding all items to the current order click on the Cart link.

The screenshot shows a shopping cart page for 'THE CORNER' store. At the top, there are links for Catalog, Scott Schneider, Budget 5.00, and Log Out. The Cart link is highlighted with a red arrow. The page features a welcome message 'Welcome, Scott!' and a navigation bar: Shipping → Billing → Confirm Order. Below this is a breadcrumb trail: Home » Shopping Cart. A search bar is present. The main content is a table of products in the cart:

	Products	Qty
<input type="checkbox"/>	Restaurant One Pager SKU: [P-PC] restaurant_one_pager_09_2018 Description: Restaurant One Pager	25
<input type="checkbox"/>	A2 Envelope – Customize SKU: pt-111- Description: 4.375" x 5.75"-	500

Buttons for 'Remove' and 'Save Cart' are available. A 'Checkout' button is highlighted with a red arrow. A red bracket on the right side of the page indicates the 'Checkout' button. A red bracket at the bottom right points to the text 'Click CHECKOUT when ready and go to next screen'.

THE CORNER ➤ Your corner store for all things brand!

Welcome, Scott!

Shipping → Billing → Confirm Order

Home » Shopping Cart

Search Cart by: Product Name Search Cart... Search

Current (2) Saved

Products

Restaurant One Pager | SKU: [P-PC] restaurant_one_pager_09_2018
Description: Restaurant One Pager

A2 Envelope – Customize | SKU: pt-111-
Description: 4.375" x 5.75"-

Remove

Save Cart **Checkout**

« Back To Catalog

Contact Us

Click CHECKOUT when ready and go to next screen

CURRENT ORDER - SHIPPING

7

STEP 1: Choose a shipping address by choosing the appropriate radio button. Choose CHANGE ADDRESS in the Use an Existing Address section for a list of preset addresses or enter a new address under Use a New Address.

NOTE: Each product in the order can be shipped to a different location by choosing the drop down under SHIP TO next to each item.

Catalog | Scott Schneider | Budget 5.00 | Log Out

Cart (2) | Search Catalog...

THE CORNER ➤ Your corner store for all things brand!

Welcome, Scott!

Shipping → Billing → Confirm Order

Choose Shipping Address: (All Products)

Use an Existing Address:

Attn :
Paycor
5 Piedmont Center
3525 Piedmont Road, NE
Suite 520
Atlanta, GA 30305
US

OR

Use a New Address (This order only):

Country: United States *
Company:
Attn:
Addr1: *
Addr2:
Addr3:
Addr4:
City:
State:
Zip:

*Required Field

Save Address

Description:

Save and Apply | Close

Choose Shipping Method: (All Products)

Ground (UPS)

Products	Description	Ship To	Ship Method	Instructions	Qty
<input type="checkbox"/> Restaurant One Pager [P-PC] restaurant_one_pager_09_2018	Restaurant One Pager	Current	Ground (UPS)	<input type="text"/> 25	
<input type="checkbox"/> A2 Envelope - Customize pt-111	4.375" x 5.75"-	Current	Ground (UPS)	<input type="text"/> 500	

Contact Us

Choose SAVE ADDRESS to bring up a pop up window and save the address for future use.
This is a personal address and cannot be seen by other users.

Note special instructions here.

Ship method is set to Ground UPS only.



CURRENT ORDER - BILLING / CONFIRM ORDER

8

All orders are billed to Paycor. Click CONTINUE to proceed.

THE CORNER ➤ Your corner store for all things brand! Report a bug.

Shipping ➔ **Billing** ➔ **Confirm Order**

Choose Billing Address: (All Products)

Use an Existing Address:

Paycor
4811 Montgomery Road
Cincinnati, OH 45212
US

SKU	Description	Ship Method	Qty
[P-PC] restaurant_one_pager_09_2018	Restaurant One Pager	Ground (UPS)	25
pt-111-	4.375" x 5.75"	Ground (UPS)	500

[X Remove](#)

[Back](#) [Continue ➤](#)

One last chance to make any changes to the order. Choose any linked noted in [Orange] to modify. COMPLETE ORDER when ready.

User will receive an email confirming the order once the requisition has been approved or denied. If you don't see this email please contact your Paycor administrator.

Once the order has shipped an email will be sent to the user who placed the order (in this case whoever approved the requisition) with all the appropriate information. This information will also include date shipped and tracking number.

Catalog ▾ | Scott Schneider ▾ | Budget 5.00 | Log Out Cart (2) | Search Catalog...

THE CORNER ➤ Your corner store for all things brand! Welcome, Scott!

Shipping ➔ **Billing** ➔ **Confirm Order**

Current Ship To Address Paycor
5 Piedmont Center
3525 Piedmont Road, NE
Suite 520
Atlanta, GA 30305
US [\[Change\]](#)

Purchase Order Number:
Current Bill To Address Paycor
4811 Montgomery Road
Cincinnati, OH 45212
US

Items	Name	SKU	Ship Method	Qty
1	Restaurant One Pager	[P-PC] restaurant_one_pager_09_2018	Ground (UPS) [Change]	25
2	A2 Envelope – Customize	pt-111-	Ground (UPS) [Change]	500

[Back](#) [Complete Order ➤](#)

[Contact Us](#)



ORDER MANAGER - REQUISITIONS

9

All products ordered by a General User are Requisition only. Once the Admin approves the order that Admin is considered the purchaser of the item. A General User must search Requisitions to view what they ordered.

Graphic Village receives an email once the order is approved. The General User who placed the Requisition will receive an email once the Approver approves or denies the request. If you do not receive this email please contact the Admin who approves your requisitions.

Options	Items	Order Number	Ordered By
	1	012120191313034879	Jeff Jones
	2	012120190746271230	Jeff Jones
	7	012020190527286758	Chris Bradford
	1	011520190529120657	Holly Kerschens
	3	012920190522463156	Drew Pifer
	4	012920191322548063	Melissa Morgan
	5	020120190520539595	Mike Coppola
	5	020420190819282758	John Ortwerth
	2	020420190848353692	Ashley Biggs
	5	020420190927148830	Kevin Bandemer
	3	020420191511551543	Alex Robinson

PAYCOR ADMINS ONLY

Select RED X to DECLINE or GREEN ARROW to APPROVE. Window opens - input reason (optional) then SUBMIT.

Reason for Requisition Action

Reason for Requisition Approval

Requisition Number	"022120120331491541"
Reason	<input type="text"/>

Submit

ORDER MANAGER - REQUISITION STATUS

10

Follow these steps to check for ship date and tracking number (if sent via UPS). If sent via USPS there will be no tracking number only a ship date.

1. Go to Order Manager > Requisitions > Display by Item or Display by Order > Choose Dates > Search

NOTE: As of November 2020 there is a bug and the Invalid Status is not correct. If the status is Invalid Status the order has been shipped or denied.

2. Choose Magnifying glass next to order that you want to review to view this screen below.

3. Click on View Detail Summary to see the screen on the left.

4. Click arrow next to Kit Contents to reveal all details including ship date and tracking number.



Because all items are Requisition only once the Admin approves the order that Admin is considered the purchaser of the item. The Admin can now search orders - a General User is not able to see results of Search Order since they are only the Requisitioner.

REORDER PREVIOUSLY ORDERED ITEM

1. Go to ORDER MANAGER

- Choose DESCRIPTION and DISPLAY BY ORDER in drop downs
- Choose DATE RANGE and SEARCH

2. View search results

- SKU will display name associated with versioned item
- Click Magnifying Glass to view entire order or Checkbox next to order and choose REORDER SELECTED to add into Current Order

Options	Items	Order Number	Ordered By	Impersonator	Created
<input type="checkbox"/>	2	PC-7230	Chris Herter		2/14/2019
<input type="checkbox"/>	3	PC-7231	Chris Herter		2/14/2019
<input type="checkbox"/>	7	PC-7232	Gretchen Swann		2/14/2019

VIEW STATUS OF ORDER

1. Go to ORDER MANAGER

- Choose ORDER STATUS and DISPLAY BY ITEM in drop downs
- Choose DATE RANGE
- Choose ORDER STATUS (Work in Progress shown below) Option in drop down and SEARCH

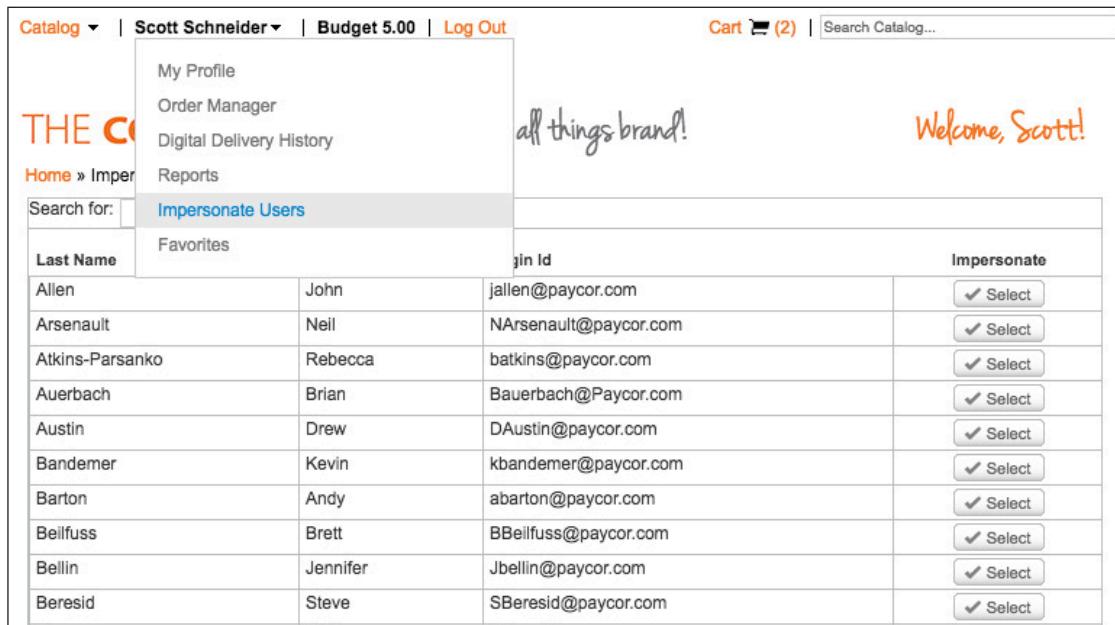
2. View search results

Select	Options	Order Number	Ordered By	Impersonator	SKU	Order Status	Qty	Price
<input type="checkbox"/>		PC-7231	Chris Herter		[P-PC] MMSPF	Work In Progress	75	0.00
<input type="checkbox"/>		PC-7244	Chris Herter		[P-PC] MMSPF	Work In Progress	50	0.00
<input type="checkbox"/>		PC-7249	Brad Sullivan		[P-PC] 2019_Report_Convergy_Guide	Work In Progress	50	0.00
<input type="checkbox"/>		PC-7250	Celia Jones		PC_BC-Juddson_Page_ifpage	Work In	1000	0.00

ADMIN ONLY - IMPERSONATE USERS

12

Click on IMPERSONATE USERS to access list of users. Choose SELECT to impersonate. This allows you to view what others see and order on their behalf. If you impersonate a user and order they will receive all the email confirmations about the order.



Last Name	First Name	Email	Impersonate
Allen	John	jallen@paycor.com	<input checked="" type="checkbox"/> Select
Arsenault	Neil	NArsenault@paycor.com	<input checked="" type="checkbox"/> Select
Atkins-Parsanko	Rebecca	batkins@paycor.com	<input checked="" type="checkbox"/> Select
Auerbach	Brian	Bauerbach@Paycor.com	<input checked="" type="checkbox"/> Select
Austin	Drew	DAustin@paycor.com	<input checked="" type="checkbox"/> Select
Bandemer	Kevin	kbandemer@paycor.com	<input checked="" type="checkbox"/> Select
Barton	Andy	abarton@paycor.com	<input checked="" type="checkbox"/> Select
Beilfuss	Brett	BBeilfuss@paycor.com	<input checked="" type="checkbox"/> Select
Bellin	Jennifer	Jbellin@paycor.com	<input checked="" type="checkbox"/> Select
Beresid	Steve	SBeresid@paycor.com	<input checked="" type="checkbox"/> Select

Catalog ▾ | Scott Schneider ▾ | Budget 5.00 | Log Out Cart (2) | Search Catalog...

THE CORNER ➤ Your corner store for all things brand! Welcome, Scott!

Home » Reports

Charts **Reports**

(1) Choose Report

Standard **Saved**

- Product Catalog
- Inventory Levels
- Sales By Product
- Shipping Info**
- Transactions By Product
- User Budget Audit - Admin
- Total Order Summary
- Digital Deliveries
- User Activity Report
- Track Proofs Viewed
- User Budget Audit - User
- Custom Field Order Report

(2) Modify Columns (Drag to reorder)

Columns (left to right)	Active	Sort By
1. Packing Slip Number	<input checked="" type="checkbox"/>	<input type="radio"/>
2. Ship Date	<input checked="" type="checkbox"/>	<input type="radio"/>
3. Attn	<input checked="" type="checkbox"/>	<input type="radio"/>
4. Address	<input checked="" type="checkbox"/>	<input type="radio"/>
5. Ship Via	<input checked="" type="checkbox"/>	<input type="radio"/>
6. Tracking Number	<input checked="" type="checkbox"/>	<input type="radio"/>
7. SKU	<input checked="" type="checkbox"/>	<input type="radio"/>
8. SKU Description	<input checked="" type="checkbox"/>	<input type="radio"/>

(3) Customize

From
2/14/2019

To
2/21/2019

Format
 Tabular Data
 Summary

Run **Export** **Save As**

STEP 1
Choose report type.

STEP 2
Modify criteria if necessary.

STEP 3
Choose date range and format - TABULAR DATA must be chosen if on screen view is required.

Choose RUN to get on screen view.

Choose EXPORT to save to .csv or Excel.

Choose SAVE AS to save a customized report that will be added to your CHOOSE REPORT options.