

# Paycor Marketing Portal

## User Documentation

Version 4.0 – November 2020

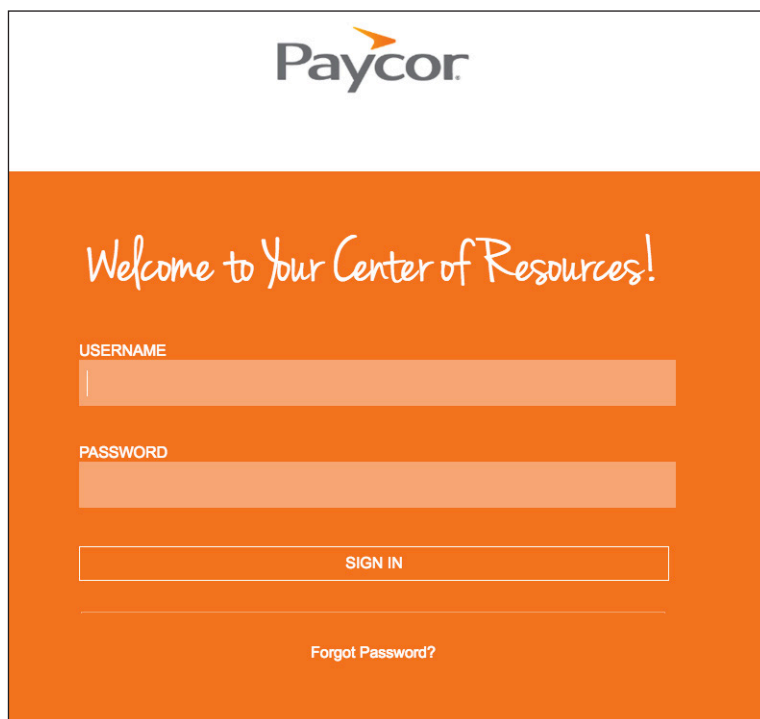
Open a new browser window and type in the following url to begin:

**www.paycormktg.com**

Credentials are as follows:

username: your Paycor email

temporary password: change123



Paycor

Welcome to Your Center of Resources!

USERNAME

PASSWORD

SIGN IN

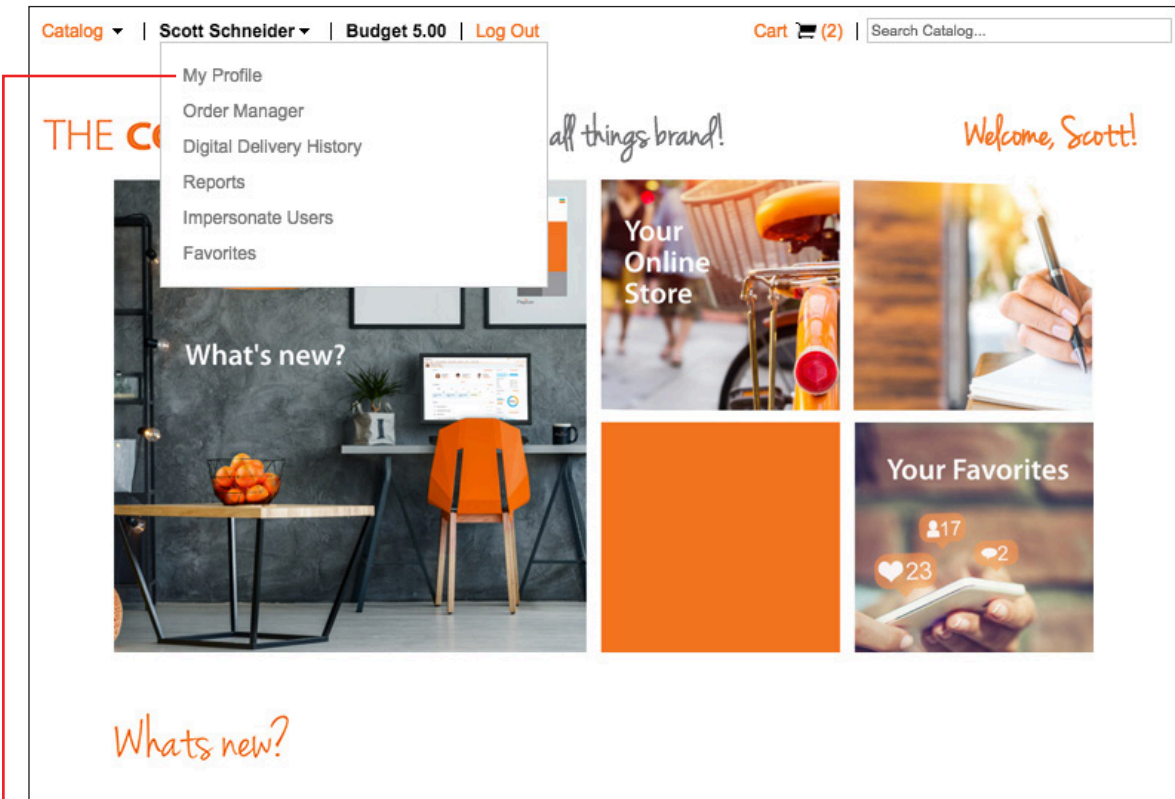
Forgot Password?

### QUICK GUIDE

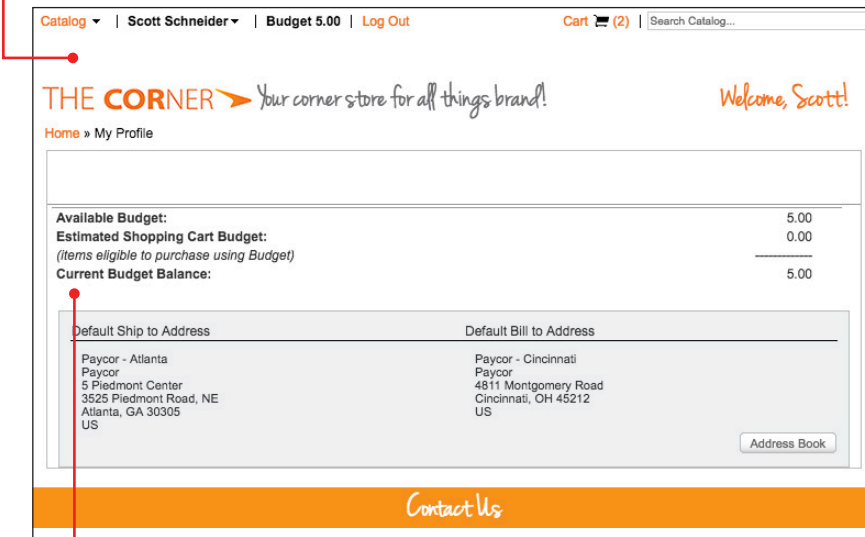
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### ADMIN ONLY

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



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 additional addresses for future use.

Address Book						
<div> <input type="text"/> <span>All</span> <input type="button" value="Search"/> </div>						
View:  Items per page: 25		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.	Ketterling	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

Country

Company

Attn

Addr1

Addr2

Addr3

Addr4

City

State

Zip

☐ Save as Default Ship To Address

\* Required for Shipping and Billing.

\* Required for Shipping and Billing.

\* Does not apply to Billing Address

\* Required for Shipping and Billing.

\* Required for Shipping and Billing.

\* Required for Shipping and Billing.

\* Required for Shipping and Billing.

\* Required for Shipping and Billing.

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.

The screenshot displays the Paycor catalog interface. At the top, a navigation bar includes a 'Catalog' dropdown, user information 'Scott Schneider', a 'Budget 5.00' indicator, a 'Log Out' link, a 'Cart (2)' icon, and a 'Search Catalog...' field. A dropdown menu is open under 'Catalog', listing options: 'Branded Materials', 'Marketing (Admin Only)', 'SIG', 'HR (Admin Only)', 'Seller Tools', 'Channel Partners', 'Events', 'Business Cards', and 'In Review'. Below the menu, several product cards are visible. One card, 'Restaurant One Pager', is highlighted with a red line leading to a detailed product view. This view shows the product name, SKU '[P-PC] restaurant\_one\_pager\_09\_2018', description 'Restaurant One Pager', and an 'Add to Cart' button with a quantity of 25. A note at the bottom states '\*\*Item requires approval by Senior Purchaser\*\*'. The detailed view also includes a thumbnail image of the product.

## 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.

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.

A2 Envelope – Customize

4.375" x 5.75"

Saved Settings

Select >

Save/Update

Address \*

9933 Alliance Road

City \*

Cincinnati

State \*

OH

Zip \*

45242

View Zoom In Zoom Out Refresh

Paycor

9933 Alliance Road  
Cincinnati, OH 45242

PENDING APPROVAL

PDF - Low Resolution

Quantity Add To Cart

***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

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

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

Home » Shopping Cart

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

**Current (2)** Saved

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

Remove

« Back To Catalog Save Cart **Checkout**

Contact Us

Click CHECKOUT when ready and go to next screen

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.**

**Choose Shipping Address: (All Products)**

☒ Use an Existing Address:   
 Attn :    
 Paycor   
 5 Piedmont Center   
 3525 Piedmont Road, NE   
 Suite 520   
 Atlanta, GA 30305   
 US   
 Change Address

OR

☐ Use a New Address (This order only):   
 Country: United States   
 Company:    
 Attn:    
 Addr1:    
 Addr2:    
 Addr3:    
 Addr4:    
 City:    
 State:    
 Zip:    
 \*Required Field   
 Save Address

**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)		25
<input type="checkbox"/> A2 Envelope – Customize pt-111-	4.375" x 5.75"	Current	Ground (UPS)		500

Remove

Back Continue

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.*

**Save Address**

Description    
☐ Save as Default Ship To Address   
 Save and Apply Close

Note special instructions here.

Ship method is set to Ground UPS only.



## CURRENT ORDER - BILLING / CONFIRM ORDER

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

**Shipping** → **Billing** → **Confirm Order**

**Choose Billing Address: (All Products)**

☒ **Use an Existing Address:**

Paycor  
4811 Montgomery Road  
Cincinnati, OH 45212  
US

<input type="checkbox"/> SKU	Description	Ship Method	Qty
<input type="checkbox"/> [P-PC] restaurant_one_pager_09_2018	Restaurant One Pager	Ground (UPS)	25
<input type="checkbox"/> pt-111-	4.375" x 5.75"	Ground (UPS)	500

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!

**Shipping** → **Billing** → **Confirm Order**

Welcome, Scott!

Current Ship To Address	Purchase Order Number:
Paycor 5 Piedmont Center 3525 Piedmont Road, NE Suite 520 Atlanta, GA 30305 US <a href="#">[Change]</a>	Current Bill To Address Paycor 4811 Montgomery Road Cincinnati, OH 45212 US

**Items**

1	Name	SKU	Qty
	Restaurant One Pager	[P-PC] restaurant_one_pager_09_2018	25
	Description	Ship Method	
	Restaurant One Pager	Ground (UPS) <a href="#">[Change]</a>	
	Ship To		
	Paycor 5 Piedmont Center 3525 Piedmont Road, NE Suite 520 Atlanta, GA 30305 US <a href="#">[Change]</a>		
2	Name	SKU	Qty
	A2 Envelope – Customize	pt-111-	500
	Description	Ship Method	
	4.375" x 5.75"	Ground (UPS) <a href="#">[Change]</a>	
	Ship To		
	Paycor 5 Piedmont Center 3525 Piedmont Road, NE Suite 520 Atlanta, GA 30305 US <a href="#">[Change]</a>		

Contact Us



## ORDER MANAGER - REQUISITIONS

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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.

The screenshot shows a web application interface for managing requisitions. On the left is a table with columns: Options, Items, Order Number, and Ordered By. The 'Options' column contains checkboxes and icons (a red 'X' for decline and a green arrow for approve). The 'Items' column lists item numbers (1, 2, 7, 1, 3, 4, 5, 5, 2, 5, 3). The 'Order Number' column lists various alphanumeric codes. The 'Ordered By' column lists names: Jeff Jones, Chris Bradford, Holly Kerschens, Drew Pifer, Melissa Morgan, Mike Coppola, John Ortwerth, Ashley Biggs, Kevin Bandemer, and Alex Robinson. On the right, there is a search filter overlay titled 'ch For' with radio buttons for 'Orders' and 'Requisitions' (selected). It includes fields for 'Order/Req #' and 'Display by Order', and date pickers for 'From' (7/4/2017) and 'To' (7/11/2017), with a 'Search' button. A red line connects the 'Search' button to the date '2/4/2019' in the table's rightmost column.

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

### PAYCOR ADMINS ONLY

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

The screenshot shows a dialog box titled 'Reason for Requisition Action'. It has a subtitle 'Reason for Requisition Approval'. Inside, there is a field for 'Requisition Number' with the value '022120120831491541'. Below it is a larger text area labeled 'Reason'. At the bottom right is a 'Submit' button. A red line connects the 'Submit' button to the 'Reason' text area.

# ORDER MANAGER - REQUISITION STATUS

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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

Search For: ☐ Orders ☒ Requisitions

Order/Req #

Display by

From:

To:

Records 1 to 15 of 15

Select	Options	Order Number	Ordered By	Impersonator	SKU	Order Status	Qty	Price
<input type="checkbox"/>		102020201503222627	Meghan Kunen		[P-VD] VD Broker DM KITS	Invalid Status	1	0.00
<input type="checkbox"/>		102020201503222627	Meghan Kunen		[P-VD-KIT] VD Broker DM KITS	Invalid Status	1	2.00
<input type="checkbox"/>		102020201503222627	Meghan Kunen		VDR-Theresa	Invalid Status	1	0.00
<input type="checkbox"/>		102020201515187139	Meghan Kunen		[P-VD-KIT] VD Stemless Wine	Invalid Status	1	3.00
<input type="checkbox"/>		102020201515187139	Meghan Kunen		VDR-Kellee	Invalid Status	1	0.00
<input type="checkbox"/>		102020201515187139	Meghan Kunen		[P-VD] VD Neo Stemless Wine	Invalid Status	1	0.00
<input type="checkbox"/>		102720200634049817	Meghan Kunen		[P-VD-KIT] VD Stemless Wine	Invalid Status	1	3.00
<input type="checkbox"/>		102720200634049817	Meghan Kunen		VDR-Becky	Invalid Status	1	0.00
<input type="checkbox"/>		102720200634049817	Meghan Kunen		[P-VD] VD Neo Stemless Wine	Invalid Status	1	0.00
<input type="checkbox"/>		102720201020022831	Meghan Kunen		[P-VD-KIT] VD Stemless Wine	Invalid Status	1	3.00
<input type="checkbox"/>		102720201020022831	Meghan Kunen		VDR-Melissa	Invalid Status	1	0.00
<input type="checkbox"/>		102720201020022831	Meghan Kunen		[P-VD] VD Neo Stemless Wine	Invalid Status	1	0.00
<input type="checkbox"/>		103020200745579469	Meghan Kunen		[P-VD-KIT] VD Stemless Wine	Order Accepted	1	3.00
<input type="checkbox"/>		103020200745579469	Meghan Kunen		VDR-Melissa	Work In Progress	1	0.00
<input type="checkbox"/>		103020200745579469	Meghan Kunen		[P-VD] VD Neo Stemless Wine	Work In Progress	1	0.00

**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.

Order Date: 10/20/2020

Current Ship To: McGriff  
Theresa Allen  
1020 Highland Colony Parkway, Suite 302  
Ridgeland, MS 39157  
US

Requisition Number: 102020201503222627

Current Bill To: Paycor  
4811 Montgomery Road  
Cincinnati, OH 45212  
US

Payment Method: User Budget

1 Items

Name	SKU	Qty	Price
Broker Partner Direct Mail Kit	[P-VD-KIT] VD Broker DM KITS	1	\$2.00
Description			
Virtual Drop Kit Note			
Ship To: Theresa Allen 1020 Highland Colony Parkway, Suite 302 Ridgeland, MS 39157 US			
Ship Method: Ground (UPS) via UPS 174881510363379901			
Ship Date: 10/22/2020			
Subtotal: \$2.00			
Shipping: \$0.00			
Total: \$2.00			

Order Date: 10/20/2020

Current Ship To: McGriff  
Theresa Allen  
1020 Highland Colony Parkway, Suite 302  
Ridgeland, MS 39157  
US

Requisition Number: 102020201503222627

Current Bill To: Paycor  
4811 Montgomery Road  
Cincinnati, OH 45212  
US

Payment Method: User Budget

Options	SKU	Description	Ship To	Ship Method	Qty	Price
<input type="checkbox"/>	[P-VD-KIT] VD Broker DM KITS	Kit Contents:	Current	Ground (UPS)	1	\$2.00
<input type="checkbox"/>	VDR-Theresa	Virtual Drop Kit Note -			1	
<input type="checkbox"/>	[P-VD] VD Broker DM KITS				1	
Subtotal:						\$2.00
Shipping:						\$0.00
Total:						\$2.00

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

Home » Manage Orders » Search Results

Search For ☒ Orders ☐ Requisitions

Description

Display by Order

From

To

Records 1 to 20 of 27  
Page 1, 2

<input type="checkbox"/>	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

Order Status

Display by Item

From

To

Records 1 to 20 of 29  
Page 1, 2

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

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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.

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

Cart 🛒 (2) | Search Catalog...

THE C

Home » Impersonate Users

My Profile

Order Manager

Digital Delivery History

Reports

Impersonate Users

Favorites

all things brand!

Welcome, Scott!

Last Name	First Name	Login Id	Impersonate
Allen	John	jallen@paycor.com	<input checked="" type="button" value="Select"/>
Arsenault	Neil	NArsenault@paycor.com	<input checked="" type="button" value="Select"/>
Atkins-Parsanko	Rebecca	batkins@paycor.com	<input checked="" type="button" value="Select"/>
Auerbach	Brian	Bauerbach@Paycor.com	<input checked="" type="button" value="Select"/>
Austin	Drew	DAustin@paycor.com	<input checked="" type="button" value="Select"/>
Bandemer	Kevin	kbandemer@paycor.com	<input checked="" type="button" value="Select"/>
Barton	Andy	abarton@paycor.com	<input checked="" type="button" value="Select"/>
Beilfuss	Brett	BBeilfuss@paycor.com	<input checked="" type="button" value="Select"/>
Bellin	Jennifer	Jbellin@paycor.com	<input checked="" type="button" value="Select"/>
Beresid	Steve	SBeresid@paycor.com	<input checked="" type="button" value="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"/>	+
2. Ship Date	<input checked="" type="checkbox"/>	○
3. Attn	<input checked="" type="checkbox"/>	○
4. Address	<input checked="" type="checkbox"/>	○
5. Ship Via	<input checked="" type="checkbox"/>	○
6. Tracking Number	<input checked="" type="checkbox"/>	○
7. SKU	<input checked="" type="checkbox"/>	○
8. SKU Description	<input checked="" type="checkbox"/>	○

**(3) Customize**

**From**

2/14/2019

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 custom-  
ized report that will be added to  
your CHOOSE REPORT options.