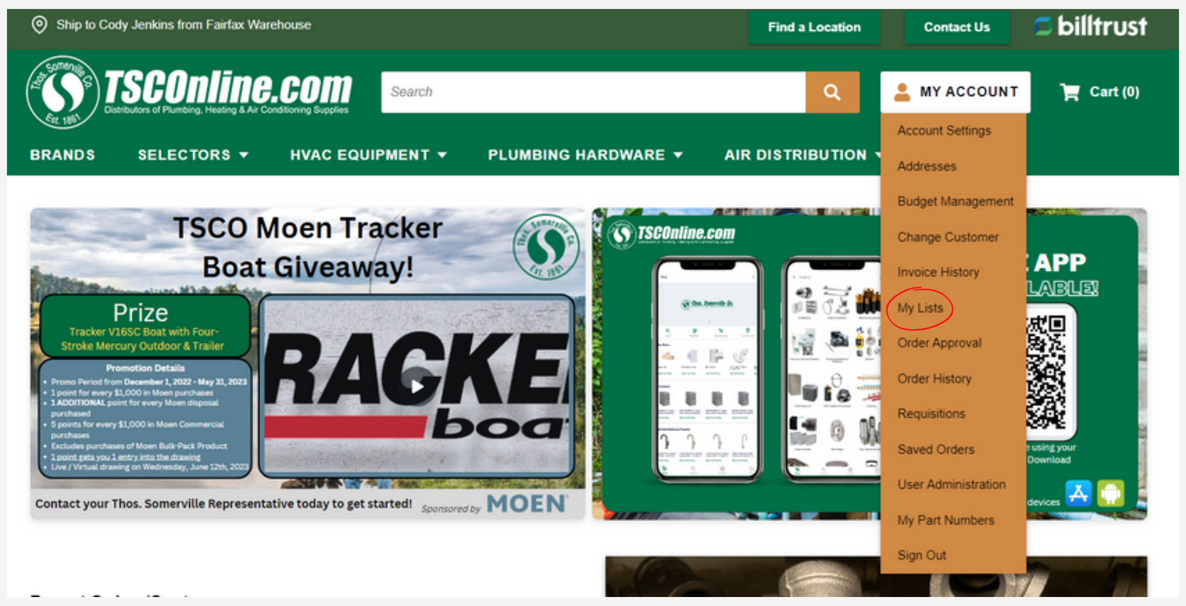
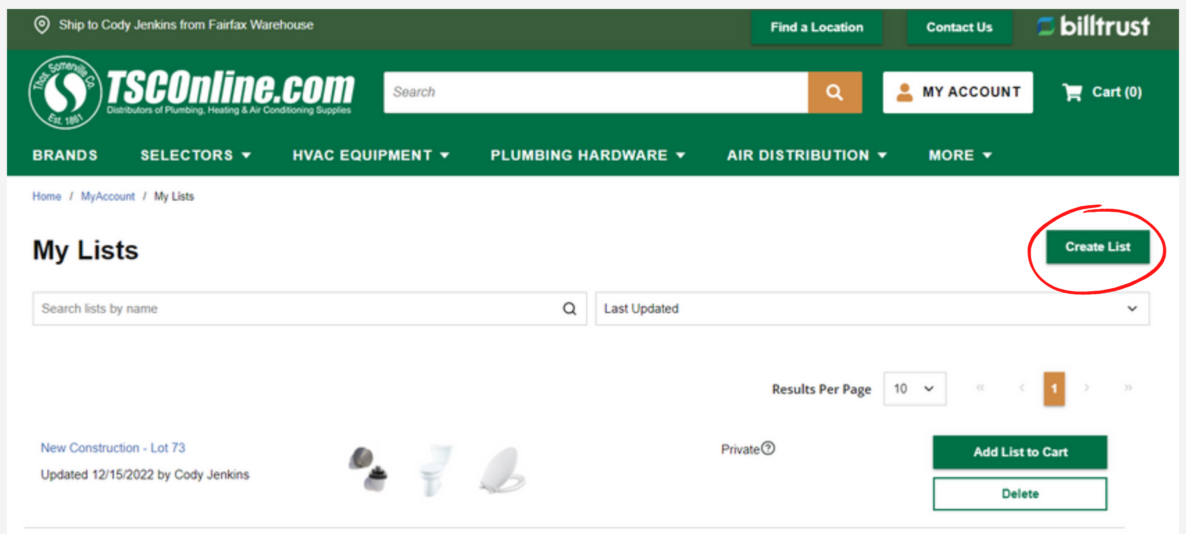
Creating & Managing Lists

Thos. Somerville Co. Est. 1861

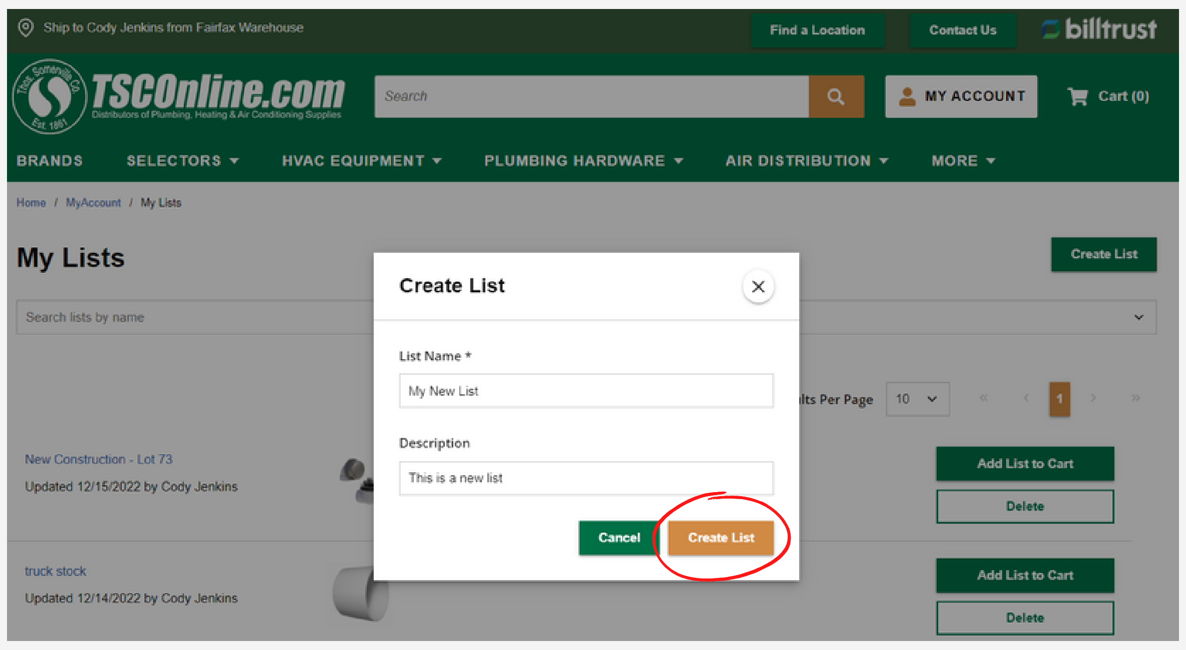
Customer & Sales Rep



- Login and select the appropriate billto address.
- Click the option "My Lists" within the My Account dropdown located in the header.
- From the My Lists page, click the button labeled "Create List" located in the top right corner.

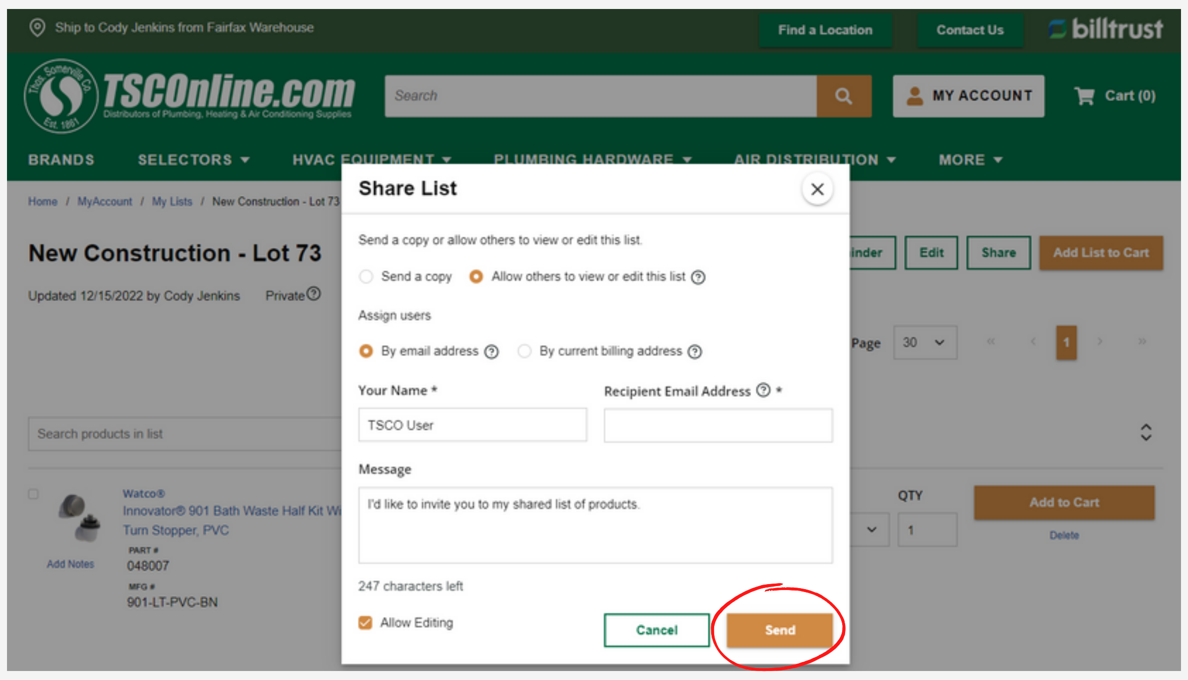


- Give your list a name and description and click "Create List" when finished.



- Once your list is created, there are many options to add items to your list:
  - List page *(via search or excel template)*
  - Product page *(list icon next to availability)*
  - Quick Order *(desktop & mobile scanner)*
  - Order History (add all or individual items)
  - Saved Orders (add all or individual items)
  - Shopping Cart (add all or individual items)

Sharing Lists



- Lists can only be created, stored, or accessed on the individual user level unless explicitly shared.
- This means if you would like to share & collaborate on a list with a customer, you must either create the list and share with your customer (enabling editing) or your customer must share their list with you and enable access for editing.