



## **Klean Wholesale B2B Site**

### **Sales Rep Instructions**

*Updated 12/25*

We are dedicated to all of our Klean retailers to help the business grow and using our Wholesale B2B site to place orders. We are here to support you as Sales Reps, so please provide any feedback and identify any issues so we can continue to improve the site, online experience, and our wholesale ordering process.

If you have any questions or issues, please contact email [wholesale@kleankanteen.com](mailto:wholesale@kleankanteen.com). We can set up individual online trainings as needed or answer any questions.

### **Shopify B2B Benefits and Improvements**

- Easier shopping and browsing of all products, including pre-orders and seasonals
- Add multiple SKUs and colors or variants all at once
- Upload CSV for an order
- Drafts and Quotes for customers
- Quickly re-order from past orders (adding same items to a new cart)
- Split orders for ATS and pre-order products
- Shop as your customer/retailer - and send them email to pre-pay orders
- Reporting on your customer sales and past orders
- Options for online payments - including net terms on account and pre-paid (credit card)
- Shipping calculated and paid on orders - including shipping promos
- More flexibility with pricing, customer category groups, new product launches and more!
- Tighter integration with our Sage ERP for inventory and fulfillment
- Additional functionality and improvements in future

**Below are some instructions to access and use the Shopify B2B site.**

### **Topics**

- [FAQs](#)

### **Basics**

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- [Adding New Accounts](#)

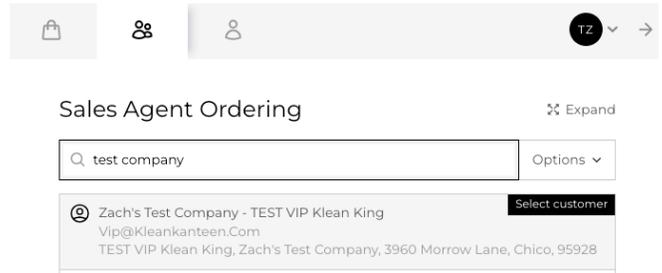
# FAQS

## How can I update email addresses for my customers?

Because each online account is tied to a unique email address, which is connected to the customer as well as our accounting and Sage ERP systems, we must make these email updates for you. Please email [wholesale@kleankanteen.com](mailto:wholesale@kleankanteen.com) with the old email, new email to update, and customer account # if possible, and we can quickly make this update for you and the customer. If you have multiple accounts to update, please send a CSV file. You can easily edit or change mailing and shipping addresses for any account.

## How can I see a current list of accounts and contact info?

When you login as a Sales Rep, you can search and access all of your assigned accounts in the top right "Sales Agent Ordering" tab. If you need a full exported list of all accounts, with contact info and/or order history, please email [web@kleankanteen.com](mailto:web@kleankanteen.com) and we can export for you or set up automated monthly or quarterly reports.

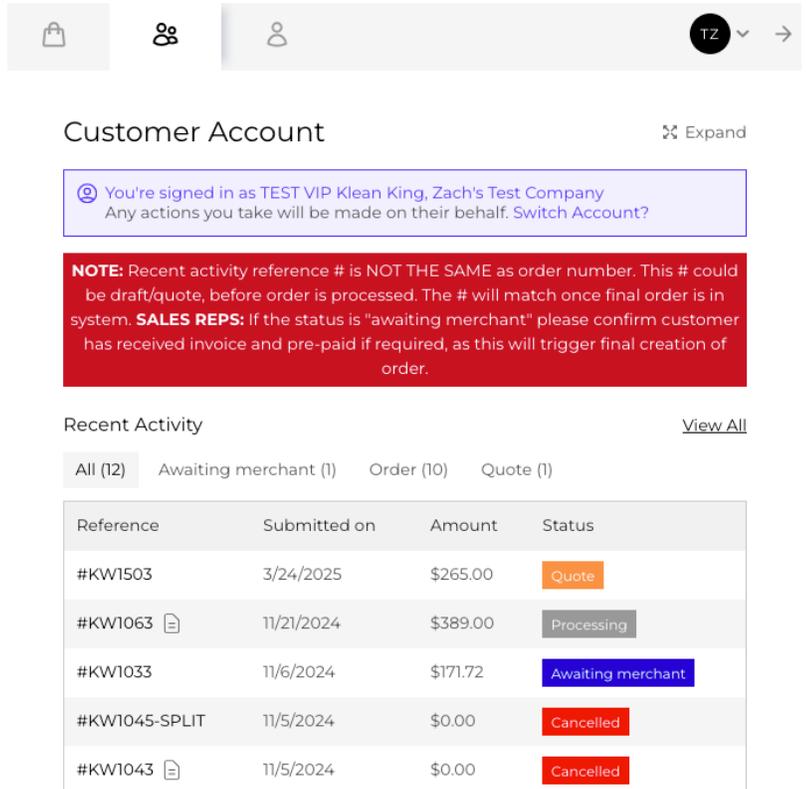


## What is the "Recent Activity" under my account (or my customers account)?

Recent activity is all activities on that account within the site/systems. This could be current past orders, orders still processing, quotes submitted, cancelled orders, or other status items.

### NOTES:

Reference # is NOT THE SAME as order number. These numbers could be draft/quotes, before orders are processed. The order # will match once final order is in system. If the activity status is "awaiting merchant" please confirm customer has received invoice and pre-paid if required, as this will trigger final creation of order.



## How can I create a Quote to send to accounts for consideration?

When you add items to cart (as a Sales Rep) there is an alternate blue button “Request Quote” which will start a quote process, rather than a normal order checkout. These quotes can be edited, approved, and sent to the customer for review and approval.

Both you as the Sales Admin and the customer will be notified via email, with links to the Quote — which can viewed/edited on the site, or downloaded as a PDF. See example screen shots and notes below. There are many options, steps and functions within the quote system.

**Several options, steps and status in quote process, including notifying customer and internal notes.**

**Once submitted, Quotes can be viewed or downloaded, change status, order lines and timeline, Edit or Confirm and Complete.**

**Klean Kanteen Wholesale**

TEST Zach Klean King has requested a quote with the Quote ID DO2603-KK.

To review, and approve or amend the details, please click the button below:

[View requested quote](#)

Please do not reply directly to this email. All messages must be sent by logging into your account.

Klean Kanteen Wholesale 3960 Morrow Lane Chico 95928  
Sent via SparkLayer

**Klean Kanteen Wholesale** Quote

3960 Morrow Lane  
Chico  
95928  
wholesale@kleankanteen.com  
kleankanteen-wholesale.com  
800-767-3173

Order number: DO2603-KK

**Downloadable PDF**

**Bill to**  
TEST - Klean Co-Brand  
TEST Zach Klean King  
3960 MORROW LN  
CHICO  
95928-8912

**Ship to**  
TEST - Klean Co-Brand  
TEST Zach Klean King  
3960 MORROW LN  
CHICO  
95928-8912

ITEM	QTY	UNIT PRICE	TOTAL
16oz Rise Tumbler - Color: Autumn Glaze SKU: 1010212	6	16.00	96.00
12oz Kid's Classic Insulated with Flip Seal Sport Cap - Color: Dino Skate Green SKU: 1011215	12	13.50	162.00

Subtotal USD 258.00  
Shipping USD 40.00  
Tax USD 0.00  
Total USD 298.00

**Customer will receive an email with link to quote. You as Sales Rep should also receive email**

### Is there a way to export an order and include images, after the order has been shipped?

No, sorry but this is not possible with the current system. However, as a Sales Rep you should receive an email order confirmation with each order (same as your customers do) which does include the product SKU, price, quantity and images (see below). You could save this order confirmation, forward, or export as a PDF if needed.

### Why do some orders get “stuck” and not processed or completed?

If you are ordering for a customer who is NOT on Terms, and has to be pre-paid, when you submit the order (complete the checkout) the system will notify the customer to submit payment. (see screen shot and email example below). You must make sure the customer (or yourself) pays the order invoice BEFORE order can be finalized, processed and shipped. Until this invoice is paid, the order is set in “draft” status (awaiting merchant). Once paid, this will turn into an order in the system to be processed.

A progress bar at the top shows four steps: 1. My Cart (checked), 2. Shipping (checked), 3. Review & Pay (active), and 4. Complete. Below this are sections for Shipping Method and Payment Method. The Shipping Method section has two options: Local Pickup - Chico for \$0.00 and Economy for \$31.25. The Payment Method section has two options: Pay on Account and Pay Online by Card. A red arrow points from the 'Pay Online by Card' option to a red callout box. Below the payment options is a summary table with columns for item name and price.

Item	Price
Sub-total	\$162.00
Shipping (TEST Zach Klean King, TEST - Klean Co...)	\$31.25
Tax	\$0.00
Total	\$193.25

Please note payment method. “Pay on Account” is for terms customers (net 30, etc) that will be invoiced after order. “Pay Online” is for pre-paid or upfront accounts, and order MUST be paid before order is processed in system!

The screenshot shows the Klean Kanteen order review page. At the top right is the invoice number #D1818. The main heading is 'Review and confirm to complete your order'. Below this is a draft order notice with the date and time '2025-10-22T17:48:01Z'. A warning message states: 'But customer appears to be on Terms and NOT Pre-Paid. Please check on Draft Order or customer account?'. Another message says: 'This order will not be processed or completed until paid. So please confirm with customer or... PUTNEY CONSU...'. A red callout box is overlaid on this message with the text: 'For pre-paid accounts, customer will receive email to pay online, before order can be processed.' At the bottom of the page is an 'Order summary' table.

Item	Price
12oz Kid's Classic with Flip Seal Sport Cap - Mixed Pack x 1	\$55.50
12oz TKWide with Café Cap - Mixed Pack x 1	\$96.00
12oz Camp Mug x 6 Red	\$90.00

### Can I get copies or email notifications of my customer orders and/or invoices?

Yes! We have set up automated flows for reps and customers, where Reps should receive notices and similar draft or order receipts. If you are NOT receiving these notifications, please email [web@kleankanteen.com](mailto:web@kleankanteen.com) with your request.

# Logging In

- You will be sent an account invite from Shopify to create your login and password on the new site (*will come from wholesale@kleankanteen.com*)
- Each Sales Rep email will have unique login, and can access all their assigned retail stores/customers (no need for shared logins!)
- We have pre-loaded your contact info as well as assigned your retailers. Your retail stores will each also be invited and have their own accounts/logins, so they can order and pay for orders as needed directly.

## Login

An approved Klean Kanteen Wholesale or Custom account is required to access and order from this site. Please enter your email and password to login, or click Sign Up to request access and apply for an account.

E-mail

Password [Forgot your password?](#)

LOGIN

[Don't have an account? Sign up](#)

# Shopping

- You can shop online just like any other ecomm store, browsing top navigation SHOP by category, product line, or features collections.
- Items will display in grid, with quick Add to Cart functionality

The screenshot shows the Klean Kanteen website interface. At the top, there is a navigation bar with links for Shop, Featured, SALE, Product Lines, and About. The Klean Kanteen logo is centered, and there are icons for user profile, search, and cart on the right. Below the navigation bar, a grid of product categories is displayed: Drink (Insulated Water Bottles, Non-Insulated Water Bottles, Tumblers, Cups and Mugs, Thermos), Food (Food Boxes, Food Canisters), Kids (Baby Bottles, Kids' Water Bottles, Kids' Cups, Kids' Lunch Boxes), and Accessories (Bottle Caps, Cup and Mug Lids, Steel Straws). A dropdown menu for 'Product Lines' is open on the right, listing: Insulated TKWide, Insulated Classic, Single-Wall Wide, Single-Wall Classic, Rise Drinkware, Rise Food Boxes, TKCanisters, TKPro, Kid Kanteens, Pints and Cups, and Accessories. Below the categories, a banner for 'Insulated Water Bottles' is shown with 43 products. The product grid includes filters for Size, Color, Price, Cap, and Availability. Three products are visible: a 12oz Classic Kid's Insulated Water Bottle with Sport Cap (Hawaiian Ocean, \$10.50), a 12oz Classic Kid's Insulated Water Bottle with Sport Cap - Mixed 6-Pack (\$83.70), and a 12oz TKWide Insulated Coffee Tumbler with Cafe Cap (Beryl Green, \$10.50).

## Collection Notes

- **Price** will apply any discounts to per item list price and pack \$ total.  
**NOTE: this includes any sale SKUs or customer specific pricing.**

- You will see **qty rules apply**, including case quantities (pack sizes) and minimums. These are indicated under each product.

Qty rules apply

- This product comes in pack sizes of 6
- Each variant has a minimum order quantity of 6

- **Pre-Order and Sale** products will be indicated with **BLUE** or **RED** badges.

- **Filters** on left can be used to show products by size, color, cap or price. These can be combined to filter further within a Collection.



12oz TKWide Insulated Water Bottle with Twist Cap



12oz TKWide Insulated Water Bottle with Twist Cap - Ghosts



\$13.20

2 products

Size

- 12oz (1)
- 16oz (1)
- 20oz (1)
- 25oz (0)
- 32oz (0)
- 64oz (0)

Color

Price

Cap

- Café (2)
- Chug (0)

X 16oz X 20oz X Corsair X Café Clear all

PRE-ORDER

A blue insulated coffee tumbler with a silver base and a white café cap. A blue "PRE-ORDER" badge is in the top left corner.

16oz TKWide Insulated Coffee Tumbler with Café Cap



20oz TKWide Insulated Coffee Tumbler with Café Cap

\$15.35

Corsair

6

Qty rules apply

ADD (\$92.10)

Pre-order

\$16.28

Corsair

6

Qty rules apply

ADD (\$97.68)

Pre-order

Toggle side filters to show specific products by attributes

### Ordering Multiple Variants/Colors

- For easier ordering, click into detailed product pages to order multiple variants all at once, within a simple widget.
- **Stock** column will show available quantities (with green, yellow, red indicators)
- **Price** will apply any discounts to per item list price and pack \$ total.  
**NOTE: this includes any sale SKUs or customer specific pricing.**

	Color	Price	Stock
	Brushed 1008312	\$15.35 Pack (6): \$92.10	● 500+



## 20oz TKWide Insulated Water Bottle with Twist Cap

From: \$12.25

	Color	Price	Stock	Qty
	Black 1008329	\$16.28 Pack (6): \$97.68	● 500+	- 6 + <small>Qty rules apply</small>
	Blue Tint 1008330	\$16.28 Pack (6): \$97.68	● 500+	- 0 + <small>Qty rules apply</small>
	Heavenly Pink 1010844	\$16.28 Pack (6): \$97.68	● 246	- 12 + <small>Qty rules apply</small>
	Purple Heather 1010845	\$12.25 Pack (6): \$73.50	● 0	! Out of stock <small>Qty rules apply</small>
	Sea Spray 1010110	\$16.28 Pack (6): \$97.68	● 500+	- 0 + <small>Qty rules apply</small>
	Tiger Lily 1009475	\$16.28 Pack (6): \$97.68	● 429	- 6 + <small>Qty rules apply</small>
	Tofu 1010846	\$16.28 Pack (6): \$97.68	● 0	! Out of stock <small>Qty rules apply</small>

**ADD TO CART (\$390.72)**

Stock levels as well as special sale or customer pricing (per SKU) will be displayed.

## Pre-Ordering Products

- Seasonal and upcoming pre-order products (i.e. 2025 colors) will be indicated with blue **PRE-ORDER** badges, both on Collection and Product pages.
- Certain pre-order products will also have **Order Deadline** dates as well as **Available to Ship** dates, shown on product pages.
- Pre-order products can be added to cart as normal, but may be split for orders, shipments, and payments if ordered alongside current available products.

PRE-ORDER



12oz TKWide Insulated Coffee Tumbler with Café Cap

Color selection: Corsair (selected), Sunset, Sea Spray, Peach Parfait

\$13.95

ADD (\$83.70)

Pre-order

PRE-ORDER

### 16oz TKWide Insulated Coffee Tumbler with Café Cap - Mushroom Floral

\$16.28

Product Code: T011288

Pre-order

Quantity: 6

ADD TO CART (\$97.68)

Qty rules apply

**NOTE:** You are pre-ordering this product. Order will be split for later shipping and payment, if ordered with current available products.

**Order Deadline:** 2025-01-17

**Available to Ship:** 2025-02-17

Floral patterns, mushroom motifs, and intricate botanical designs, these springtime patterns welcome a breath of fresh air. Perfect for gifts, these bottles made from 90% certified recycled steel offer a stylish and sustainable way to stay hydrated.

Our 16oz insulated coffee tumbler was designed with versatility in mind, to create the best coffee tumbler and mug, insulated cup, and water bottle — all in one

For pre-order items, make note of order deadline and available to ship dates.

## Checkout Specifics

- Once all items added to cart, proceed to checkout as normal (or use Request Quote)
- Optional fields for Preferred Ship Date, PO Number and Additional Notes
- Choose from existing Shipping Addresses or add a new address.
- **Shipping Method**
  - Local Pickup is available for Chico area customers only.
  - Economy rates are calculated based on weight of products in cart.
  - Shipping promos and discounts will auto-apply based on order total or customer group.
- **Payment Method**
  - Most accounts will have **Pay on Account** option. Invoice will be sent after order, based on net terms (30, 60, etc.)
  - **Pay Online by Card** is for pre-paid accounts, without terms.
- **You must agree to terms and conditions.** This is required to complete checkout.

Select correct payment method and check 'terms and conditions' to complete order.



Preferred Shipping Date

mm/dd/yyyy

Please select your preferred shipping date.

PO Number

Please enter a PO number if applicable.

Additional Notes

Enter additional order notes

Shipping Address

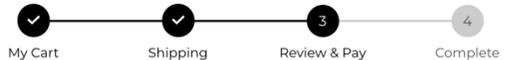
Add a new address

Zach King, Klean Kanteen, 3960 Morrow Lane, Chico, 95928

You can edit existing addresses from your account

CONTINUE

Tax and shipping costs shown on next step



Shipping Method

<input type="radio"/> Local Pickup	\$0.00
<input type="radio"/> Economy	\$11.00

Payment Method

<input checked="" type="radio"/> Pay on Account	
<input type="radio"/> Pay Online by Card	

Sub-total	\$251.10
Shipping (Zach King, Klean Kanteen, 3960 Morrow Lane, C... )	\$0.00
Tax	\$0.00
Total	\$251.10

I agree to the terms and conditions

COMPLETE ORDER: \$251.10

Enter a preferred ship date, PO number and order note, if applicable.

  
Let's begin building your order.  
Browse our website to begin adding products, try our search above, or use a shortcut below.

 Upload a file  
Start by uploading a document (e.g. CSV or PDF)

 Forward an email  
Start by emailing your product details

 Scan a barcode  
Use your mobile device to add products by barcode

 Repeat order  
Use a previous order

NOTE: Within the My Cart screen there are also many other options to start an order – such as Upload a CSV file, scan a barcode, or Repeat Order.

## Ordering as a Sales Rep (for your customers)

- As a Sales Rep, you can order on behalf of your customers.
- Once logged in, on top right you will see a special **Sales Agent Ordering** tab.
  - Here you can search for a specific customer.
  - Once selected you will see you are **“Signed in as XYZ customer”**
  - Shop on their behalf, add to cart and submit orders on their account.
    - If applicable - specific pricing, payment and shipping options will apply to that customer.
  - **NOTE:** make sure to click **SWITCH ACCOUNT** to order for another account!

Search for a customer account and shop as that customer, adding items to cart all the way through checkout.

Remember to “switch account” to order for multiple customers.

The screenshot shows the 'Sales Agent Ordering' page. At the top, there are navigation icons for a shopping bag, a group of people, and a single person. Below these is a search bar containing 'la mont'. A list of customer accounts is displayed below the search bar. The third account, 'Linda's Montana Gifts - LINDA'S MONTANA GIFTS', is highlighted with a 'Select customer' button. Other accounts include 'LA MONTANITA CO-OP' and 'FABULA - FABULA'.

The screenshot shows the 'Customer Account' page. At the top right, there are navigation icons for a shopping bag, a group of people, and a single person. Below these is the text 'Customer Account' and an 'Expand' icon. A blue box highlights the text: 'You're signed in as LA MONTANITA CO-OP, LA MONTANITA CO-OP. Any actions you take will be made on their behalf. Switch Account?'. Below this is a 'Recent Activity' section with a dashed border and a shopping bag icon, containing the text: 'Your order activity will show here when you place your first order.' Below that is a 'Shopping Lists' section with a dashed border and a list icon, containing the text: 'Your shopping lists will appear here once you've added one.' At the bottom is a 'My Details' section with fields for 'Email address' (danielle.roark@lamontanita.coop) and 'Name' (LA MONTANITA CO-OP).

- Payment options include **Pay on Account** (net terms) or **Pay Online by Credit Card** (pre-paid). These will vary based on account. **NOTE:** if you are shopping as a customer, you can still checkout with **Pay Online option**. This will send a link to customer email to pay by card, with the Shopify checkout pre-populated.

The screenshot shows the 'Payment Method' selection interface. There are two radio button options: 'Pay on Account' and 'Pay Online by Card'. The 'Pay Online by Card' option is selected, indicated by a filled radio button.

If you place a pre-paid order for a customer, they will receive invoice email to pay online.

The screenshot shows the checkout page for 'klean kanteen'. At the top left is the 'klean kanteen' logo. At the top right is 'INVOICE #D147'. Below the logo is the text 'Complete your purchase'. A green button labeled 'Complete your purchase' is followed by the text 'or Visit our store'. Below this is the 'Order summary' section. It lists two items: '12oz TKWide Insulated Water Bottle with Twist Cap x 6 Black' for \$63.00 and '16oz TKWide Insulated Café Cap and Twist Cap - Mixed 6-Pack x 1' for \$99.00.

## Account Reports

- As a Sales Rep, you also can see past order history and reports on what your customers have ordered.
- Once you have selected a customer, scroll down under **Reports**
- Here you can see **Purchase History by Time Period**
- This also gives you the option to “order again” and add same products to start a new cart.

Customer Account Expand

You're signed in as TEST VIP Klean King, Zach's Test Company  
Any actions you take will be made on their behalf. [Switch Account?](#)

Recent Activity View All

Reference	Submitted on	Amount	Status
#KW1045-SPLIT	11/5/2024	\$195.00	Processing
#KW1043	11/5/2024	\$496.00	Processing
#KW1038	10/30/2024	\$258.00	Processing
#KW1037	10/30/2024	\$1,244.20	Processing
#KW1029	9/18/2024	\$1,051.60	Shipped

My Account > Reports

You're signed in as TEST VIP Klean King, Zach's Test Company  
Any actions you take will be made on their behalf. [Switch Account?](#)

Purchase history by time period By quarter

Product	Current	Q3 2024	Q2 2024	Q1 2024
Customization Charge - Engraving SKU: /CUSTOM-ENGRAVE	48	144	0	0
16oz Pint Cup SKU: 1000425   Color: Brushed	30	0	0	0
10oz Cup SKU: 1000426	0	10	0	0
10oz Cup - 4 Pack SKU: 1000429   Color: Brushed	4	0	0	0

Reports

Name

[Purchase history by time period](#)

Click report to show a customer's order history and items.

You can “order again” on any items to start a new order for that account.

## Re-Ordering Same Items

- You can easily re-order the same items from previous orders or order history
- Simple click the “order again” button on any product within a previous order.
- This will add same item to new cart to start checkout.

Customer Account > #KW1037

You're signed in as TEST VIP Klean King, Zach's Test Company  
Any actions you take will be made on their behalf. [Switch Account?](#)

Submitted on 10/30/2024

Status	Payment Method	Shipping Method
Processing	On Account	Economy

Additional Information  
test

Shipping Address  
Zach King, Zach's Test Company, 3960 Morrow Lane, Chico, 95

Processing

 6	<b>12oz TKWide Insulated Water Bottle with Twist Cap</b> SKU: 1008308	\$90.00 6 x \$15.00
<a href="#">Order again</a>		

---

 6	<b>12oz Classic Kid's Sippy Bottle</b> SKU: 1010134	\$54.00 6 x \$9.00
<a href="#">Order again</a>		

6  **12oz TKWide Insulated Water Bottle with Twist Cap**  
SKU: 1008308

[Order again](#)

Click “order again” to add any item to a new cart

My Cart Expand

You're signed in as TEST VIP Klean King, Zach's Test Company  
Any actions you take will be made on their behalf. [Switch Account?](#)

+ Add products by SKU or Barcode Actions

 6	<b>12oz TKWide Insulated Water Bottle with Twist Cap</b> SKU: 1008308   Color: Black In stock 500+	\$63.00 \$10.50 per unit
<a href="#">Order again</a>		

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 1	<b>16oz TKWide Insulated Café Cap and Twist Cap - Mixed 6-Pack</b> SKU: 1008634 In stock 37	\$99.00 \$99.00 per unit
<a href="#">Order again</a>		

## New Accounts

- All retailers interested in applying for a new account, should fill out our online application form here: <https://kleankanteen-wholesale.com/account/register>
- Klean Kanteen will review all applications and required fields and approve retailer account.
- This will trigger creation of a new online account and customer will be notified to login to B2B site.
- Customers will be auto-assigned to correct Sales Rep based on criteria and region, if applicable.

## Apply to Become a Retailer

An approved Klean Kanteen Wholesale or Custom account is required to access and order from this site. Interested in selling our line or ordering custom products? Please complete our application form below, and your info will be reviewed by our sales team.

### **New Wholesale Account Application**

Please complete this online form if you wish to resell all Klean products, including both inline and custom products.

**Amazon/3rd Party Marketplaces & MSRP Policy:**

Klean maintains a strict 3rd party marketplace selling policy, MAP policy and a global promotions strategy. *Please DO NOT apply unless you are a legitimate retailer with store location(s), and not an online only reseller.*

**Order Minimums:**

Minimum opening order is \$350.00.

Minimum Reorder is \$150.00.

All retailer applications will be reviewed and approved before gaining access to order or sell Klean products.

Step 1 of 3

### **Business Information**

Company Name \*

Doing Business As