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for Future Generations



Rotork Marketing Ordering System

User guide



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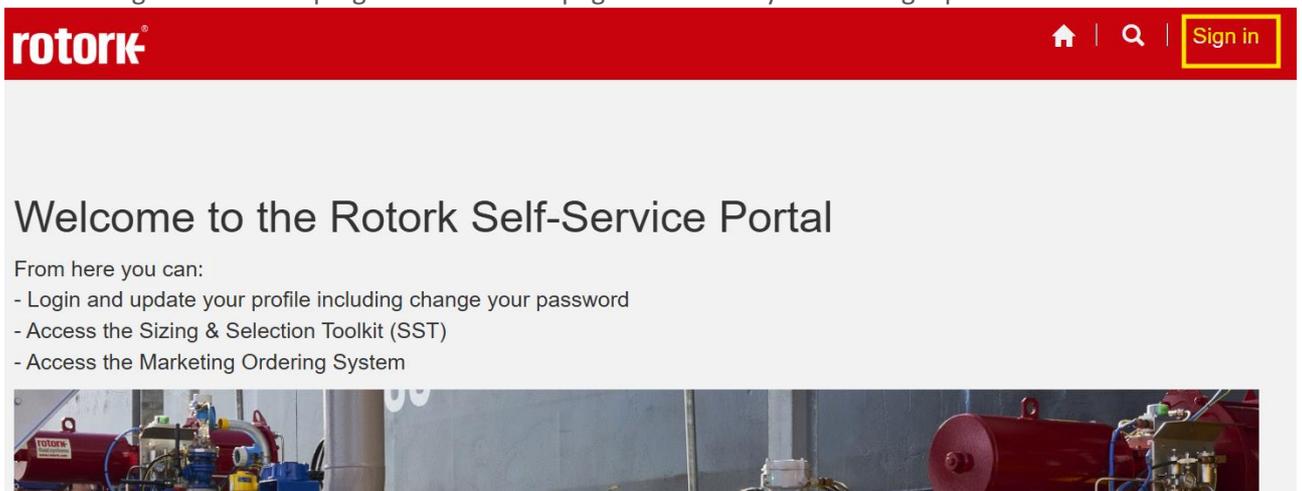


Introduction

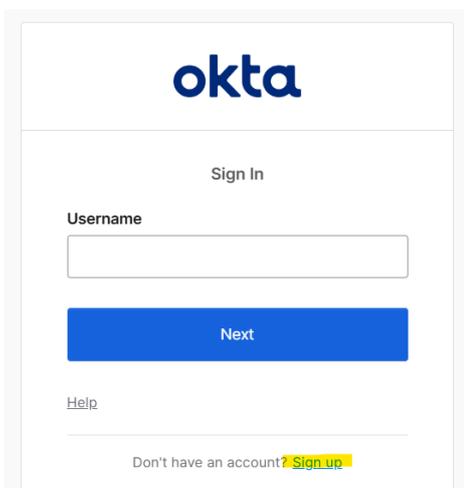
This document serves as the User guide for the Rotork Marketing Ordering System (RMOS) users who can sign up and login to the RMOS portal, View the Marketing Catalogue items and order the items.

How to Sign-up to Rotork Marketing Ordering System

1. If you've previously registered for the POS via the old <https://customers.rotork.com> portal, you'll need to re-register for our new Rotork Marketing Ordering System (RMOS).
2. Click on the link <https://portal.rotork.com>
3. Click on 'Sign in' on the top right corner of the page. It will take you Okta login portal.



4. If you've already registered for an account on our Rotork App or the Sizing and Selection Toolkit (SST), you can use those login details to access the new RMOS.
5. If not, click on 'Sign up' at the bottom of the window.





6. Enter the detail required and click on Sign up.

okta

Sign up

Email

First name

Last name

Job Title Optional

Company

Country
Select an Option

Phone number (with +country code)

Sign Up

[Already have an account?](#)

7. Once sign up is completed, it will ask you to verify your email and set the password.

okta

Set up security methods

automation.admin@rotork.com

Security methods help protect your Rotork account by ensuring only you have access.

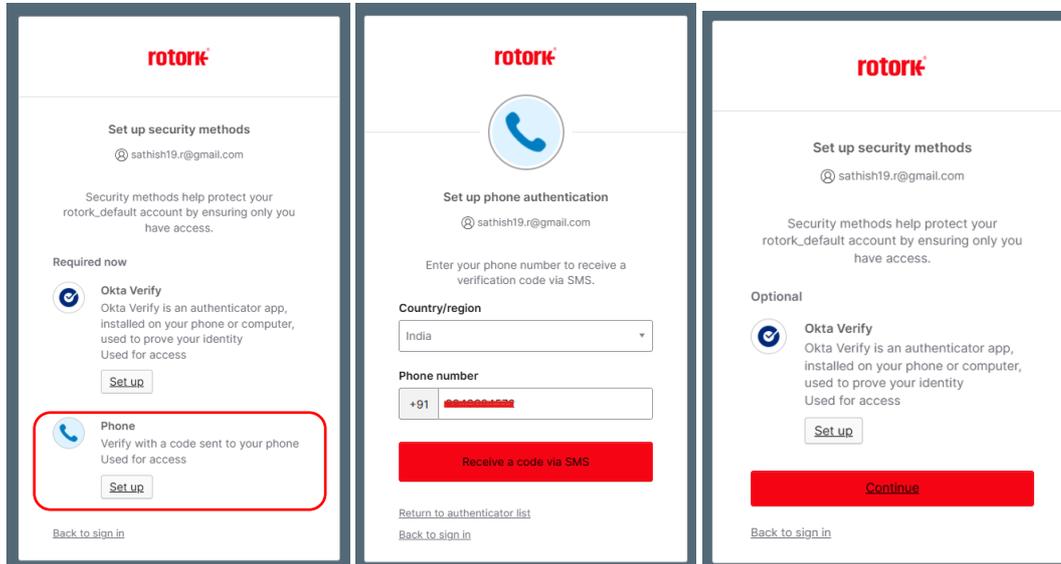
Set up required

- Email**
Verify with a link or code sent to your email
- Password**
Choose a password for your account

[Back to sign in](#)

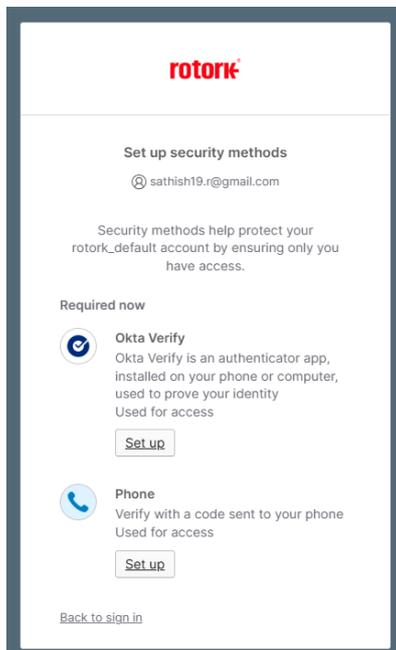


- Once the email is verified and password is set, preferably you can verify your account by registering a mobile number. This mobile number will be used for sending OTP to login to the system.



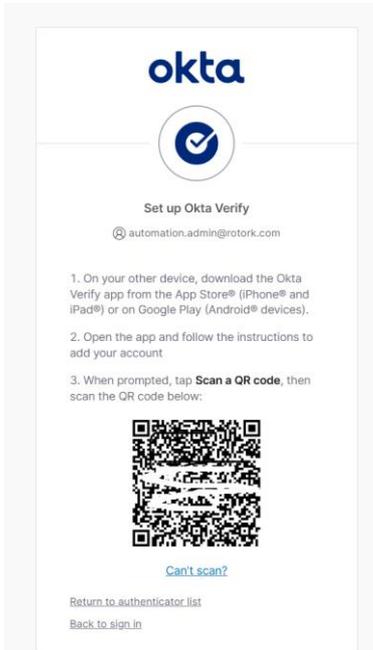
If you don't prefer to use mobile number, you can do the authentication using Okta verify app using below steps 9 & 10.

- (Optional if step8 is not preferred) Or you can Install Okta Verify app on your mobile device to verify your account. Once the app is installed on your mobile device, click on 'Okta Verify'.





10. (Optional if step8 is not preferred) Then scan the QR provided in the screen using your mobile device to add your account to the OKTA Verify app.



11. Once your account is added in your OKTA Verify app, you will be redirected to the profile screen of the Marketing ordering portal. Fill in the required details and click on 'Update'.



Public Profile Copy

Preferred Language

How may we contact you? Select all that apply.

- Email
- Fax
- Phone
- Mail

[Update](#)

12. Then you will be redirected to the RMOS homepage.

rotork® | [Marketing Catalogue](#) | [Checkout](#) | [Order History](#) | [Address Book](#) | [Sabbish Rawi](#) >

Welcome to the Rotork Self-Service Portal

From here you can:

- Login and update your profile.
- Access the [Sizing & Selection Toolkit \(SST\)](#)
- Access the [Marketing Catalogue](#)

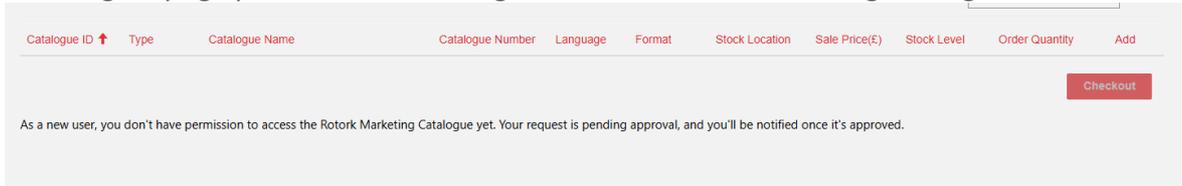


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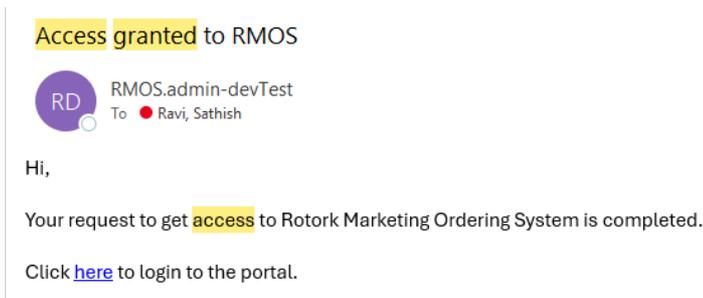


Marketing Catalogue

1. Click on 'Marketing Catalogue' at the top to navigate to the Rotork Marketing Catalogue list.
2. When you navigate to the Marketing Catalogue for the first time, you will be prompted with a message saying, 'you do not have enough access to view the Marketing Catalogue'.



3. Meanwhile, the marketing admins will receive an email to assign a web role, once you have signed up to the portal.
4. Once the marketing admins assign you the appropriate web role, you will get an email confirmation stating your access granted to the portal.



5. Click on the link in the email to view and order the catalogue items.

How to add catalogue items to the basket and submit the order

1. On the Marketing catalogue list, you use the search box at the top right corner of the page to search for a catalogue item. To narrow down the search, you can search on the partial text by using the asterisk (*) wildcard character at the start.



Catalogue ID ↑	Type	Catalogue Name	Catalogue Number	Language	Format	Stock Location	Sale Price(£)	Stock Level	Order Quantity	Add
MCI-02536	Spare	A range spares falsetes leaflet	AE5/4.0-00_1189	English	A4 ROW	United Kingdom	0.60	94	<input type="text" value="0"/>	<input type="button" value="+"/>
MCI-02537	Spare	A Range Complete Workshop Manual	AE5 A Range Complete Workshop Manual-00_1018	English	A4 ROW	United Kingdom	15.00	0	<input type="text" value="0"/>	<input type="button" value="+"/>
MCI-02538	Spare	A range - Sub. Assy. 2 Drive Bush	AE5/4.2-00_1090	English	A4 ROW	United Kingdom	0.10	494	<input type="text" value="0"/>	<input type="button" value="+"/>
MCI-02539	Spare	A range - Sub. Assy. 11 Oil Seals	AE5/4.11-00_1190	English	A4 ROW	United Kingdom	0.15	490	<input type="text" value="0"/>	<input type="button" value="+"/>
MCI-02540	Spare	A range - Sub. Assy. 1 Gearcase	AE5/4.1-00_0590	English	A4 ROW	United Kingdom	0.40	498	<input type="text" value="0"/>	<input type="button" value="+"/>
MCI-02541	Spare	A range - Sub. Assy. Suggested stock holding guide	AE5/4.21-00_1290	English	A4 ROW	United Kingdom	0.28	500	<input type="text" value="0"/>	<input type="button" value="+"/>
MCI-02542	Spare	A range - Sub. Assy. 3 Switchmech	AE5/4.3-00_0390	English	A4 ROW	United Kingdom	0.28	450	<input type="text" value="0"/>	<input type="button" value="+"/>
MCI-02543	Spare	A range - Sub. Assy. 6 Mk 5 PAK Housing	AE5/4.6.2-00_0494	English	A4 ROW	United Kingdom	0.12	50	<input type="text" value="0"/>	<input type="button" value="+"/>
MCI-02544	Spare	A range - Sub. Assy. 4 Handwheel	AE5/4.4-00_0390	English	A4 ROW	United Kingdom	0.10	500	<input type="text" value="0"/>	<input type="button" value="+"/>

- Similarly, you can use the one or more filters together at the left side, to narrow down your search on the catalogue items.

Catalogue ID ↑	Type	Catalogue Name	Catalogue Number	Language	Format	Stock Location	Sale Price(£)	Stock Level	Order Quantity	Add
MCI-02652	Publication	Rotork Company Overview	PUB000-001-10_0121	Chinese - Simplified	A4 ROW	United Kingdom	3.00	500	<input type="text" value="0"/>	<input type="button" value="+"/>
MCI-02922	Publication	AB-PR Datasheet Metric	PUB033-006-10_0817	Chinese - Simplified	A4 ROW	United Kingdom	0.80	500	<input type="text" value="0"/>	<input type="button" value="+"/>
MCI-02939	Publication	RC200 Sales Brochure Metric	PUB014-001-10_1123	Chinese - Simplified	A4 ROW	United Kingdom	1.50	500	<input type="text" value="0"/>	<input type="button" value="+"/>

- Enter the required quantity in the 'Order Quantity' textbox and click on 'Add' button.

Catalogue ID ↑	Type	Catalogue Name	Catalogue Number	Language	Format	Stock Location	Sale Price(£)	Stock Level	Order Quantity	Add
MCI-02652	Publication	Rotork Company Overview	PUB000-001-10_0121	Chinese - Simplified	A4 ROW	United Kingdom	3.00	500	<input type="text" value="120"/>	<input type="button" value="+"/>
MCI-02922	Publication	AB-PR Datasheet Metric	PUB033-006-10_0817	Chinese - Simplified	A4 ROW	United Kingdom	0.80	500	<input type="text" value="80"/>	<input type="button" value="+"/>
MCI-02939	Publication	RC200 Sales Brochure Metric	PUB014-001-10_1123	Chinese - Simplified	A4 ROW	United Kingdom	1.50	500	<input type="text" value="0"/>	<input type="button" value="+"/>



- You will get an on-screen notification saying the 'item updated in cart!'

Location	Sale Price(£)	Stock Level	Order Quantity	Add
n	3.00	500	120	+

- Once the required items are added to the cart, click on 'Checkout' button at the right bottom of the page to navigate to the basket page.
- On the Basket page, you can review the items added to cart by increasing or reducing the quantity. You can remove the items from the basket using the bin icon. Or you can clear the basket by clicking on the 'Clear Basket' button.

Basket

Clear Basket

Catalogue ID	Catalogue Name	Catalogue Number	Stock Location	Stock Level	Sale Price	Quantity Ordered	
MCI-02652	Rotork Company Overview	PUB000-001-10_0121	United Kingdom	500	3.00	120	🗑️
MCI-02536	A range spares falsetes leaflet	AE5/4.0-00_1189	United Kingdom	94	0.60	20	🗑️

Back Next

- Once the items are reviewed in the basket, click on next to navigate to address details page.
- Click on search icon to open the saved address(es).

Address Details

Shipping Address

Shipping Address Details

Is Billing Address different than Shipping?

Next



- When you are ordering for the first time, you won't see any address saved. Click on 'New' button at the left bottom to add new address.

- Fill in all the required details and click on submit.



11. Then select the address and click on 'Select' button to add the address as the chosen shipping address.

Lookup records

Customer Address Lookup View

Search

Choose one record and click Select to continue

<input checked="" type="checkbox"/>	Full Name	Name	Street 1	City	Zip/Postal Code
<input checked="" type="checkbox"/>	Sathish Ravi		Test Street1	Chennai	631501

12. If the billing address is different than the shipping address, then select the checkbox to add a different billing address.

Address Details

Shipping Address

Sathish Ravi

Shipping Address Details

Sathish Ravi
Rotork Chennai
Test Street1
street2test
Test Street3
Chennai
631501
India

Is Billing Address different than Shipping?

Billing Address

Sathish Ravi2

Billing Address Details

Sathish Ravi2
Rotork bath
Test Street1
street2test
Test Street3
Bath
BA13JQ
United Kingdom



13. Click next to enter additional details relevant to the order and click 'Next'.

Additional Details

Use this to add any other relevant information

PreviousNext

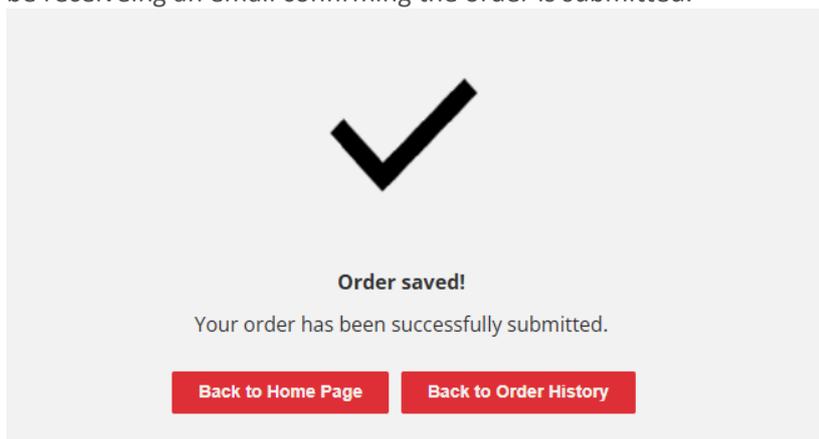
14. Finally, review the order summary and click the button 'Place order now' to submit the order

Order Summary

Catalogue ID	Item Name	Version Name	Stock Location	Stock Level	Sale Price	Quantity Ordered
MCI-02652	Rotork Company Overview	PUB000-001-10_0121	United Kingdom	500	3.00	120
MCI-02536	A range spares falsees leaflet	AE5/4.0-00_1189	United Kingdom	94	0.60	20

Place Order Now

15. Once the order is submitted, you will be redirected to the order confirmation page. And soon will be receiving an email confirming the order is submitted.





Order History

1. Navigate to the 'Order History' page to view the list of submitted orders and their status. Click on the order ID or the drop-down menu at the right side to open and view the details of the order.

rotork® | Home | Marketing Catalogue | Checkout | Order History | Address Book | Sathish Ravi

Search [] [Q]

Order ID	Order Status	Order Type	Created On ↓
MO-01026	Order Received	Publication	3/24/2025 6:10 PM

rotork® | Home | Marketing Catalogue | Checkout | Order History | Address Book | Sathish Ravi

View details

Sathish Ravi
Rotork Chennai
Test Street1
street2test
Test Street3
Chennai
631501
India

Is Billing Address the same as Shipping?
 No Yes

Additional Notes
test

Order Lines

Catalogue Number (Catalogue Item)	Catalogue Name (Catalogue Item)	Quantity
PUB000-001-10_0121 (MCI-02652)	Rotork Company Overview	120
AE5/4.0-00_1189 (MCI-02536)	A range spares falsetes leaflet	20



Address Book

Navigate the Address Book page to view the list of addresses created. You can create a new address by clicking the button 'Create Address'. Also, you can view and edit the existing address details by selecting the drop-down menu at the right side.

The screenshot shows a web interface for an address book. At the top right, there is a red button labeled "Create Address". Below it is a table with the following columns: Full Name, Company Name, Street 1, City, Country/Region, and Zip/Postal Code. The table contains two rows of data. To the right of the table, there is a red dropdown menu with a downward arrow, which is open to show two options: "View Address Details" and "Edit Address".

Full Name	Company Name	Street 1	City	Country/Region	Zip/Postal Code
Sathish Ravi	Rotork Chennai	Test Street1	Chennai	India	631501
Sathish Ravi2	Rotork bath	Test Street1	Bath	United Kingdom	BA13JQ

rotork[®]

Rotork plc
Brassmill Lane, Bath, UK

tel +44 (0)1225 733200
email mail@rotork.com

rotork.com