

# WEB ORDER ENTRY

## POINTERS AND TIPS



### TO LOOK UP OPEN BIDS/OPEN ORDERS

Click on **My Account**, then **Open Bids/Open Orders**. This will bring up all open bids and orders within the default date range shown at the top of the page. This date range can be adjusted by the user. From this screen you can also search by job name/number or PO number by using the search box at the bottom of the page. The system will only bring up an exact match, so sometimes less is more. *Example: "Lan" instead of "Lancaster"; or 1386 for PO# 13865-321.*

### TO LOOK UP ORDERS THAT HAVE SHIPPED

Click on "my account"; "order history". This will bring up all shipped orders within the default date range shown at the top of the page. This date range can be adjusted by the user. From this screen you can also search by PO number using the search box at the bottom of the page. The search will look at all shipped orders, not just with the date range set at the top of the page.

### TO FIND AN INDIVIDUAL PRODUCT

At any screen, you can use the main search box at the top of the page to look for products. Type in either a part number or a description and click on the "go" button beside the search box. This will bring up any products that contain those part numbers or descriptions. The system looks for an exact match, so once again, using just part of the description or part number usually works best.

*Example: Key in FPD if you are looking for a Hart & Cooley FPD3-10.*

After bringing up a list of items, you can refine your search by using the additional search box that will be located just above the list of items. This search box will use whatever you put in it, to just search the list of items that has already been brought up.

*Example: Typing "650 grill" in the main search box will give you a list containing approximately 94 items. If you now enter 12x12 in the search box that says "narrow your results", you will get any 650 grills that are 12x12.*

### TO BRING UP A LIST OF ITEMS PURCHASED

From any screen, click on the "reorder pad" button located just to the right of the main search box. This will bring up a list of items that your company has purchased from HVAC Distributors in the last year. You can then use the "narrow your results" search box to just look in this list.

### TO CHANGE YOUR PASSWORD

Click on **My Account**, then **Edit Users**. Scroll down the page to the password box, change your password, and then click **Submit**. Eclipse may require you to fill out other sections of this page. If so, follow the on screen instructions, and then click **Submit**.

### TO BRING UP A SPECIFIC ORDER USING YOUR PO# OR OUR ORDER NUMBER

**IF ORDER HAS SHIPPED:** Go to **My Account**, then **Order History**. Scroll down to the bottom of page and enter your PO# in the search box and click **Go**.

**IF ORDER HAS NOT SHIPPED:** Go to **My Account**, then **Open Orders**. Scroll down to the bottom of page and enter your PO# in the search box and click **Go**.

## TO PLACE AN ORDER USING WOE

Find the item you wish to purchase using either the main search box or the Product links on the left side of the page.

*Example: click the link for **Equipment**, then the PTACs and **Mini-Splits** link, then pick **Sanyo**. This will display a list of Sanyo products.*

You can either look at all of the pages for the product or narrow your search by using the secondary search box. Once you find the item you want, use your mouse to click the **Select Item** box beside the item you want. Then click the **Add Item to Cart** link that is at the top and bottom of the page. You can now either add additional items to your cart or checkout. Additional items can be added using the main search box or the product links.

To checkout click the **Standard Checkout** button at the bottom of the page. On the next screen, enter your PO# in the **Purchase Order #** field. You can put additional information, such as a job name, in the **Release #** field if needed. If you would like the order to ship directly to your jobsite, you can enter the job name and address in the address fields. Please be sure to include the full street address and town.

In the drop down box on this screen labeled **Order Status**, you will have 2 options, **Bid** and **Call When Complete**. If you are just creating a bid, set this to Bid. If you are placing an order, set it to Call when Complete. The Call When Complete status immediately commits the inventory to you, and also allows HVAC staff to look at your order before it prints in the warehouse to ship. Every WOE order is looked at by the HVAC Inside Sales staff for errors and irregularities. You will receive a phone call from us if we see anything out of the ordinary.

After you click the **Continue With Checkout** button you will be directed to a payment screen. If you have an open account, click the **Place Order** button. If you wish to pay by credit card, enter your information, and then click **Place Order**.

Congratulations! You have now placed a web order with HVAC Distributors. Your next screen is a detail of the order, with your order number at the top of the screen. You can then click the **Printer Friendly Version** link and print a copy for your records. You can also automatically receive a fax or e-mail confirmation of your order. To start a new order, either click on the **Start New Order** button or just click the **Main** link in the top right-hand corner of the screen.

## TO CREATE A PRODUCT GROUP USING A BID

Go to **My Account**, the **Open Bids/Open Orders**. Find the appropriate bid and click on the order number of the bid. This will bring up the details of what is on the bid. Scroll to the bottom of the page and click **Copy Items To Product Group**. You can then either create a new product group, or add the items from the bid to an existing product group.

## TO CREATE A PRODUCT GROUP FROM SCRATCH

Search for product using the same methods as above. After finding the item, select it the same way you did when you placed an order, except click on **Add Item to Product Group** instead of adding it to a cart. On the next screen you will be asked which product group to add the item to. If you do not currently have a product group for the item, select **Create a New Product Group** and click **Continue**. Type a name in the **Type in a New Group Name** box, and then click **Update**. The product group should now appear whenever you click the **My Product Groups** link at the top of the page. You can have as many product groups as you want, with as many items in them as you need. By selecting the **View Product Groups for Related Customers** option on the product group screen, you can view product groups created by other users in your company. Select Limit Product Groups to this Customer to return to your list of product groups.

### TO CHANGE AN EXISTING BID TO AN ORDER

Locate the bid in **My Account, Open Bids/Open Orders**. Click on the bid number. Scroll down to the bottom of the page and click on **Modify Bid**. This will put the bid into a cart. If you need to make changes to quantities or remove or add items do so now, and click **Update**. When all items are correct click **Submit**. This will take you to the screen will you will put your PO on the order, and change the order status, as detailed above.

### TO ADD ITEMS TO AN EXISTING BID

Locate the bid in **My Account, Open Bids/Open Orders**. Click on the bid number. Scroll down to the bottom of the page and click on **Modify Bid**. This will put the bid into a cart. From there you can search for items and add them to your cart. Once you have added the new items, click **Update**. This will update the bid, and you can now go to any other screen and the bid will be saved automatically.

### TO SAVE YOUR CURRENT CART

When you are in the cart, go to the top of the screen and click **My Carts**, and the **Save Current Cart** button.

### TO ACCESS A SAVED CART

Go to **My Carts**, click **View Saved Carts**. This will bring up a list of saved carts. Click the box beside the cart you want to access, and click the **Go** button. This cart is now your **Current Cart**. You can add or delete items and then place a bid or an order.

### TO CROSS REFERENCE YOUR PART # TO HVAC'S PART #

If your company uses your own part numbers, you can cross-reference them to HVAC's part numbers. You will then be able to order via WOE using your part numbers. Your part numbers will also show up on all packing slips and invoices from HVAC.

Find your item using **Find an Individual Product**. If your item is on a list with other items, click on the item so that it is the only item on the screen. Click on the **View Custom Part Numbers and Availability** link. Enter your part number in the **Enter a New Custom Part Number** box, and click **Add**. You will now be able to put your part number in the main search box and the system will pull up the item. You can then add to a cart, and create an order. You can use this feature for as many items as you like. However, only 1 custom part number should be tied to our HVAC part number.