WEB ORDER ENTRY USER MANUAL

Table of Contents

Logging In

1. From www.hvacdist.com, click the **WEB ORDER LOGIN** button on the main page to go to the Web Order Entry login screen.

2. On the login screen, complete the fields as noted below:
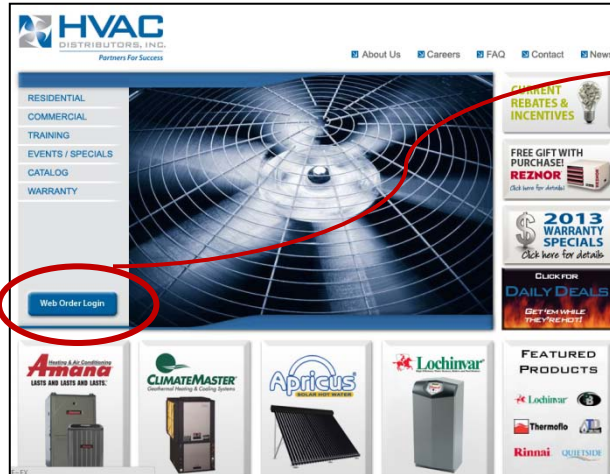
Key	Description	Action
A	Log In ID Text Field	Enter your Web Order Entry ID. This is provided to you by HVAC Distributors when you enroll in WOE.
B	Password Text Field	Enter your Password. This is provided to you by HVAC Distributors when you enroll in WOE.
C	Remember Me	**Not required.** Click the check box to bypass entering login ID and password every time you enter WOE.
D	Forgot Your ID or Password	Use if you need to reset your Password or Log In Credentials

3. Once you have entered the required information, click the **SEND** button (E, above) to log in to the site.

Creating an Order

Orders can be created a variety of ways through Web Order Entry. The following section details common ways to create orders. Orders can be created using each of these methods, independently or together (ie you can start your order by selecting products from a product group, then add additional items using Search).

The following order methods are detailed in this section:
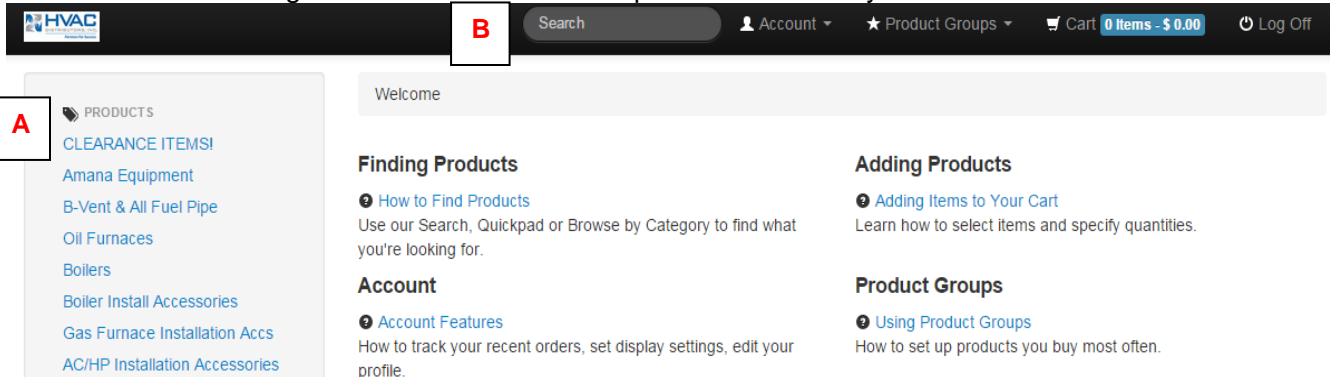Creating a New Order Using Search
Creating a New Order Using an Existing Product Group
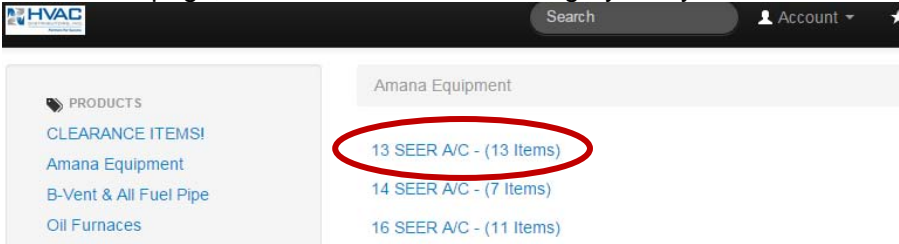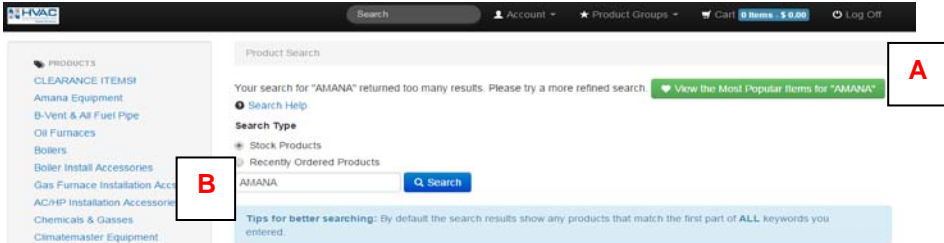Creating a New Order from a Prior Order – Last 365 Calendar Days
Create a New Order from a Prior Order – Previous Sales Order or Bid

Creating a New Order Using Search

1. Use one of the following methods to search for the products to add to your order:

Key	Description	Action
A	Product Category Links	1. Click the category name link (ie "Amana Equipment"). 2. On the next page, click the link of the subcategory that you wish to search. 3. Continue to Step 2.

B	Search	1. Type the name of the item that you are looking for in the text box (ie "GSX16"). You may also use general search terms ("16 SEER" or "Goodman").
		 2. Click the **GO** button.
		 3. If your search is broad (ie "Amana"), you will be redirected to an additional search screen to refine your search:
		
		    a. Select your category (A) for additional search:
		       i. Choose "Products" to search full product catalog; OR
		       ii. Choose "Reorder Pad" to search prior orders placed by your company.
		
		         THEN
		
		    b. Use the Keyword(s) text box (B) to type additional search terms (ie "Amana 13 SEER")
		    c. Click the **GO** button.
		 2. Continue to Step 2.

C	Quick Order	1. Use the 3 text boxes to search for up to 3 specific products at a time.
		
		⊙ QUICK ORDER
		
		Manual
		
		Copy & Paste
		
		File Upload
		
		2. Click the **GO** button.
		3. IF:
		    a. **Your search term was too broad,** you will be prompted to search again. Use the Search Box to search broad terms.
		    b. **Your search term returned multiple results,** you will be prompted to click a link to see a list of your search results. Click the link, then continue to Step 2.
		    c. **Your search term returned exact results,** continue to Step 2.

2. Review the description field on the product selection screen to find the product that you want to order.
    a. NOTE 1: If there is an image icon in the **Image** column (circled, below), you can click the icon to view an image of the product.
   b. NOTE 2: You can obtain further detail about a product by clicking its description.

3. Type the quantity of the product that you want to order in the **Quantity** text box.
    a. NOTE 1: The order quantity (each, box, case, skid etc) for a particular product is noted below its **Quantity** text box.
    b. NOTE 2: Available inventory is shown for our Central Distribution Center (Mt Joy) and your local branch. Available Mt Joy inventory ordered by 5 PM EST will ship next day. Branch inventory is available for next-day pick-up.
    c. NOTE 3: Minimum order quantities and available quantities are listed to the right of the product description.
4. Click the ★ Add To Group button (circled below) to add the selected items to your order.
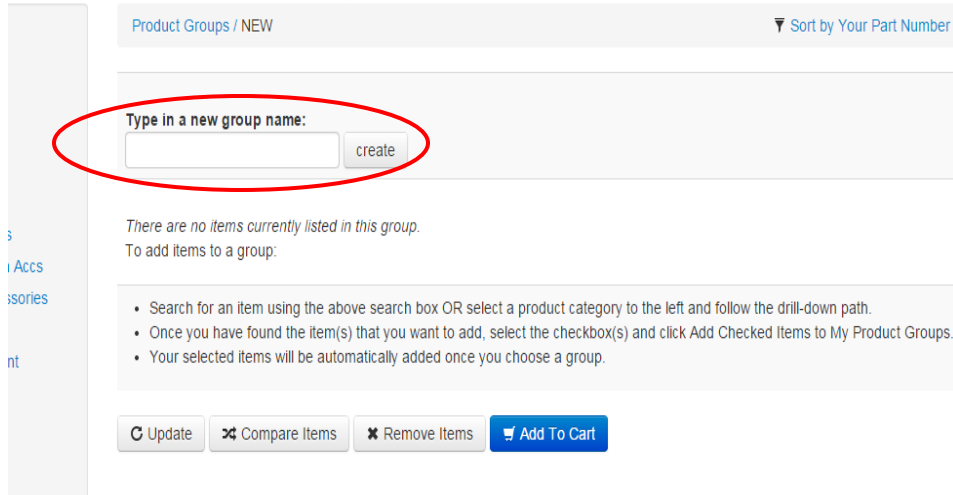
5. Repeat Steps 1 – 4 for each additional product that you want to add to your order using Search, or use one of the other Creating an Order procedures (if applicable) to add additional products to your order.
6. Follow the procedure for **Placing An Order**.
    a. NOTE 1: If you are not ready to order, you can choose to Save an Order. **This will not place the order,** but will save the cart so the order can be placed at a later time.

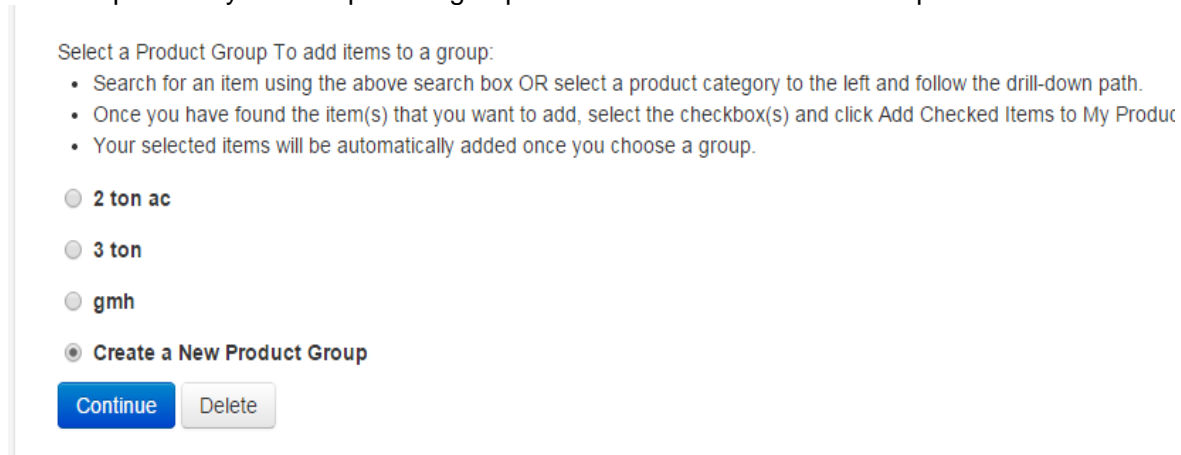## Creating a New Order from an Existing Product Group

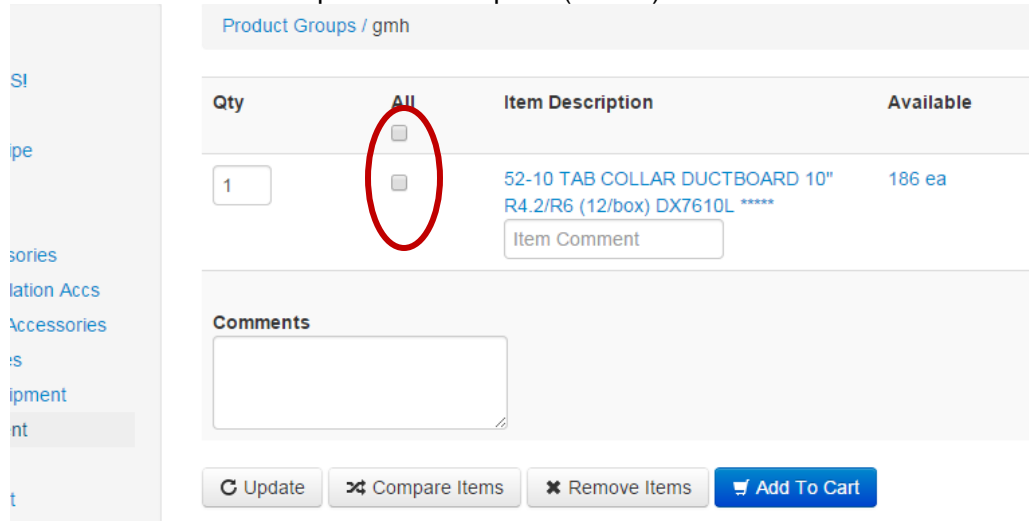1. Click the **PRODUCT GROUP** link at the top of the home page and select "Create Product Group"
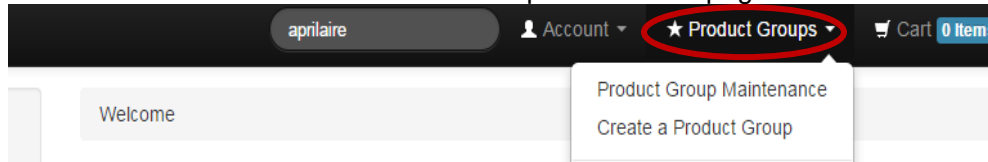
2. On the Product Group page, type a name for a product group you would like to create. You can also click in the box to dislay lists already created.

3. Select a previously created product group or "Create a New Product Group" and click **CONTINUE**.

4. Within your product group page, select the items that you want to order from the product group by clicking the checkbox next to the product description (circled):


5. For each item being ordered, type the order quantity in the **QUANTITY** text box for the product.
    a. NOTE 1: The order quantity (each, box, case, skid etc) for a particular product is noted within the **Available** column to the right of the product description.
    b. NOTE 2: Available inventory is shown for our Central Distribution Center (Mt Joy) and your local branch. Available Mt Joy inventory ordered by 5 PM EST will ship next day. Branch inventory is available for next-day pick-up.
6. Click the [Add To Cart] button to add the selected items to your order.
7. Repeat Steps 1 – 6 to add products from other existing product groups to your order or use one of the other Creating an Order procedures (if applicable) to add additional products to your order.
8. Follow the procedure for **Placing An Order**.
    a. NOTE 1: If you are not ready to order, you can choose to Save an Order. **This will not place the order,** but will save the cart so the order can be placed at a later time.

Creating a New Order from a Prior Order – Last 365 Calendar Days

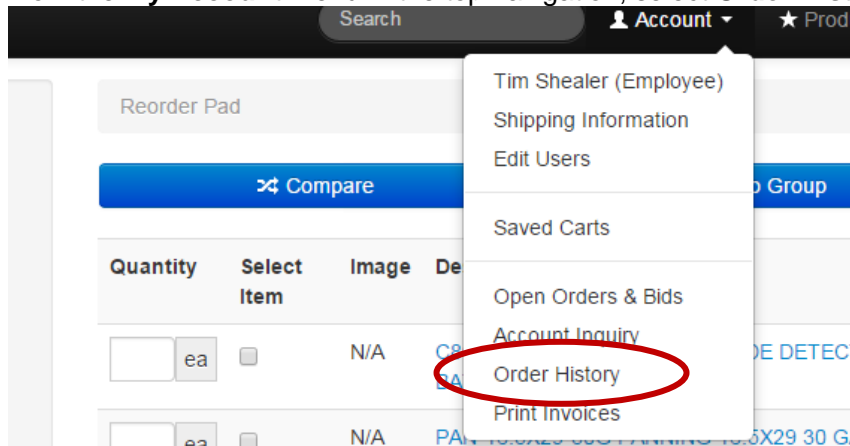1. Click the **Reorder** link from the side navigation (circled):
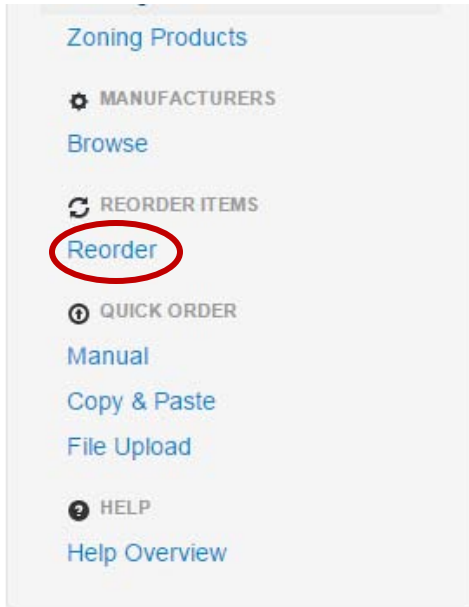
2. All items ordered by your company over the last 365 calendar days are listed.
3. Select the items that you want to order from the list by clicking the checkbox next to the product description (circled):

4. For each item being ordered, type the order quantity in the **QUANTITY** text box for the product.
    a. NOTE 1: The order quantity (each, box, case etc) for a particular product is noted within the **Available** column to the right of the product description.
    b. NOTE 2: Available inventory is shown for our Central Distribution Center (Mt Joy) and your local branch. Available Mt Joy inventory ordered by 5 PM EST will ship next day. Branch inventory is available for next-day pick-up.
    c. NOTE 3: Minimum order quantities and available quantities are listed to the right of the product description.
5. Click the ▦ Add To Cart button to add the selected items to your order.
6. Use one of the other Creating an Order procedures (if applicable) to add additional products to your order.
7. Follow the procedure for **Placing An Order**.
    a. NOTE 1: If you are not ready to order, you can choose to Save an Order. **This will not place the order,** but will save the cart so the order can be placed at a later time.

Creating a New Order from a Prior Order – Previous Sales Order or Bid

1. From the **My Account** menu in the top navigation, select **Order History**.

2. Select the sales order that you want to re-order from using one of the following methods:

Key	Description	Action
A	Reference # List	Click the Reference # link to open the previous sales order.
B	Search by Date Range	1. Type the date range that you wish to search in the date bar to find the sales order that you want to add to your order. 2. Click the **View Orders** button to display the sales orders from that date range in the body of the page (A, above). 3. Click the Reference # link to open the previous sales order.
C	Advanced Search	1. Type a Reference #, PO # or Release # into the search box in the Search section.

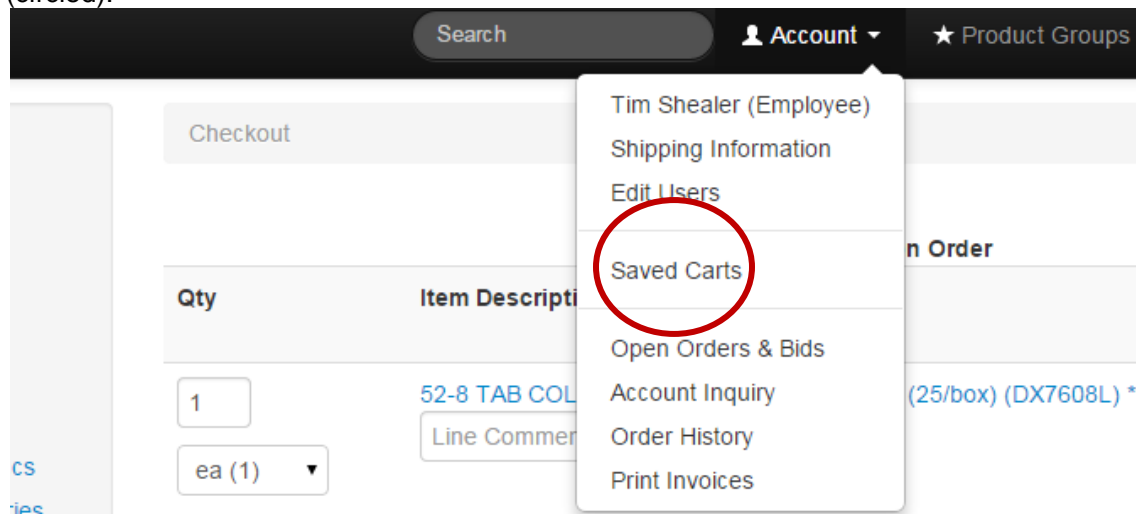|		
		Search Order, PO, or Release **Search**
		2. Click the **Search** button to display the sales order from that search. 3. Click the Reference # link to open the previous sales order.

3. On the following page, click the Copy Items to Current Order button at the bottom of the order to copy all of the items on the sales order to your current order.

4. Use the Procedures for editing an order to adjust quantities or items, if necessary.

Saving an Order

Saving an Order allows you to save a current cart for a later order. This can be done if you are waiting on information to place a complete order or if you require an order review process prior to order placement (ie one employee creates the order and another employee places it). Once a saved cart order is placed, the cart is no longer saved. You can save multiple carts.

1. Following the creation of an order, click the **Saved Cart** link from **Account** menu of the top navigation (circled):

Search   👤 Account ▾   ★ Product Groups

Checkout

Tim Shealer (Employee)

Shipping Information

Edit Users

Saved Carts   n Order

Qty   Item Descripti

Open Orders & Bids

Account Inquiry   (25/box) (DX7608L) **

Order History

1   52-8 TAB COL

Line Commer

cs   Print Invoices

ea (1)   ▼

ies

2. On the Save Current Cart screen, select whether you will save at the User level or the Company level (A, below). Carts saved at the User level are only visible to the user (you). Carts saved at the Company level are visible to all Web Order Entry users within your company.

🏷 **PRODUCTS**

CLEARANCE ITEMS!
Amana Equipment
B-Vent & All Fuel Pipe
Oil Furnaces
Boilers
Boiler Install Accessories
Gas Furnace Installation Accs
AC/HP Installation Accessories
Chemicals & Gasses
Climatemaster Equipment
Goodman Equipment
Duct Products
Ductless Equipment
Electrical Products
Exhaust Fans
Replacement Air Filters
Flexible Duct
Galvanized Duct and Fittings
Geothermal Accessories
Grills, Registers & Diffusers

Saved Carts / Save Current Cart

Saving at the **User** level will allow only you to view and edit the saved cart. Saving at the **Company** level will allow others in your company to view and edit the saved cart.

A   ⦿ User
        ○ Company

Cart Name
B

2 Items in Cart

Qty	Item Description	Unit Price	Ext Price
1 ea	52-8 TAB COLLAR DUCTBOARD 8" R4.2/R6 (25/box) (DX7608L) *****	2.02 ea	2.02
1 ea	53-8 TAB COLLAR W/DMPR DUCTBOARD 8" R4.2/R6 (12/box) (DX3808L) *****	3.84 ea	3.84
Prices are subject to change.		**Subtotal**	5.86

Comments
C

Save and Continue   Save and Logoff

3. In the **Title** text box (B, above), type the name of your cart. The cart name must be unique or it will replace the contents of an existing cart of the same name.
4. *Optional:* In the **Comments** text box (C, previous page), type any comments related to the order.
5. Click one of the Save buttons:
   a. **Save and Continue** if you have additional Web Order Entry tasks to complete.
   b. **Save and Logoff** if you have no additional Web Order Entry tasks to complete.

Viewing a Saved Order

1. Click the **View Saved Carts** link from **Saved Carts** menu of the Account drop down:

Saved Carts

Save Current Cart or View Saved Carts.
You may save your current cart for later viewing and purchasing or view a previously saved cart.

NOTE: A saved cart will not be submitted as an order. If you wish to purchase the items in your cart, Checkout Now.

Save Current Cart
This will save the items in your current cart for future use. There are options to save at the user or company level, and add a title.

View Saved Carts
Here you can view a list of previously saved carts. You may edit or delete each cart, or copy the items from a saved cart to your current cart.

View Current Cart
Here you can view your current cart.

2. The Saved Cart screen shows all Saved Carts that are visible to you.

Saved Carts / View Saved Carts

Please select from the list below:

Title: Automatically Saved Cart   Continue Cart
☐ Select Cart
Date: 01/15/2015   **Time:** 07:33am EST

1 Items in Cart	
Qty	**Item Description**
1 ea	52-8 TAB COLLAR DUCTBOARD 8" R4.2/R6 (25/box) (DX7608L) *****

Prices are subject to change.

Comments

3. To select a cart, click the **Continue Cart** button next to the cart name that you want to select.
4. Within the selected cart, you can edit the order, add additional items to the order or place the order.

Editing an Order
To update quantities:
1. From the cart, adjust the number in the **QTY** text box to the required quantity. Updating a quantity to "0" deletes it from an order.
   a. NOTE 1: If an item can be adjusted to a bulk or individual quantity (each, box, case, skid), a dropdown will be visible within the Unit of Measure column. Use the dropdown to adjust this aspect of quantity.
2. Click the **UPDATE** button at the bottom of the cart.

To remove items:
1. From the cart, adjust the number in the **QTY** text box to "0.".
2. Click the **UPDATE** button at the bottom of the cart**.**

To add items:
1. Follow any of the procedures for Creating an Order to add additional items to your cart.

Placing an Order or Creating a Bid

1. Click the **Standard Checkout** link at the bottom of your cart. (circled)

2. Complete the Shipping Information Screen as follows:

Key	Description	Action
A	Shipping Information (Address, City, State, ZIP, Phone, Email)	Complete all required fields to indicate **SHIP-TO** information. Phone and email are optional, but will be used if there are questions about the ship-to location.
B	Purchase Order # Release #	Type in a Purchase Order # to associate with the order. Leave the field blank for a bid. *Optional.* If your company uses a Release #, type it in the Release # field.
C	Order Status	Choose from "Call When Complete" (to indicate an order) or "Bid" (to indicate a Bid). **NOTE:** Order Status "Bid" with a completed PO number will be treated by HVAC Distributors as an order.
D	Ship Via	Choose shipping method from available shipping options.

3. If necessary, add **ADDITIONAL SHIPPING INSTRUCTIONS** (E, above) to your order. Add shipping instructions if:

a. **You have a job site address where the order needs to be shipped.** Use Shipping Instructions to provide the job site address and identifying landmarks, site contact person, and site contact person's phone number.
b. **You are going to pick up at the branch.** Note in the Shipping Instructions "Will Pick Up."
c. **You are using a PO number or job name for your reference with an Order Status of "Bid" and would like an order to remain a Bid.** Note in the Shipping Instructions "Bid Only."
d. **You have a specific required date (other than next day).** Note in the Shipping Instructions "Need on Req Date" (or specify the date needed). *Please adjust Required Date to the date needed; this additional step confirms that you meant to change the date.*
e. **You have instructions for HVAC Distributors regarding the shipment.**

4. When items A – E have been completed, click the Continue with Checkout button (F, above) to place your order.
5. Once your order is placed, a confirmation screen appears that you can print or save for your records. Use the order number listed at the top of the order as your reference number if you call or email HVAC Distributors about your Web Order Entry order.

Thank you for your order

Your order number is S2193206

Shipping Address
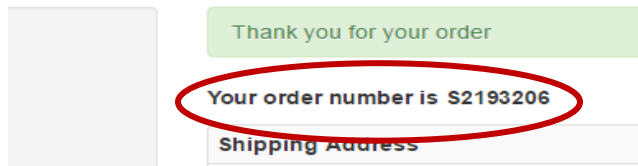
Placing a Re-Order

1. Use one or both of the procedures for creating orders from prior orders to create your cart:
   a. Creating a New Order from a Prior Order – Last 365 Calendar Days
   b. Create a New Order from a Prior Order – Previous PO
2. Follow the procedure for Placing an Order to complete your re-order.

Creating Product Groups

Product Groups are a shortcut within Web Order Entry to create saved lists. You can create product groups of frequently ordered products or product-specific match ups to ensure that all necessary components are added to an order—any saved list that will help your company order products more efficiently for your needs or those of your company.

RECOMMENDED PRODUCT GROUPS
- Preventative Maintenance
- Service Parts
- 80% Gas Furnace Install
- 90% Gas Furnace Install
- Oil Furnace Install
- Hydronics Accessories
- Outdoor Units
- Ductless

The following methods for creating product groups are detailed in this section:
Creating Product Groups Using Search
Creating Product Groups from an Open Order or Bid
Creating Products Groups from a Prior Order – Last 365 Calendar Days
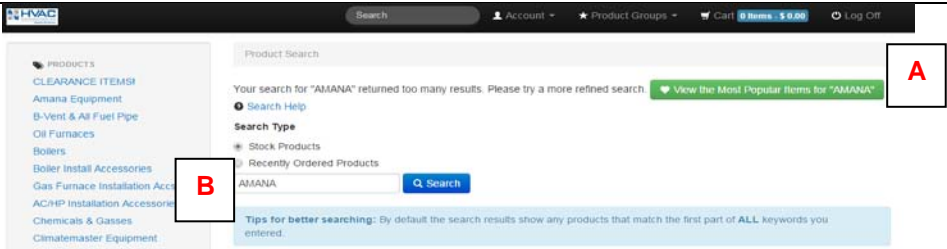
Creating Product Groups Using Search
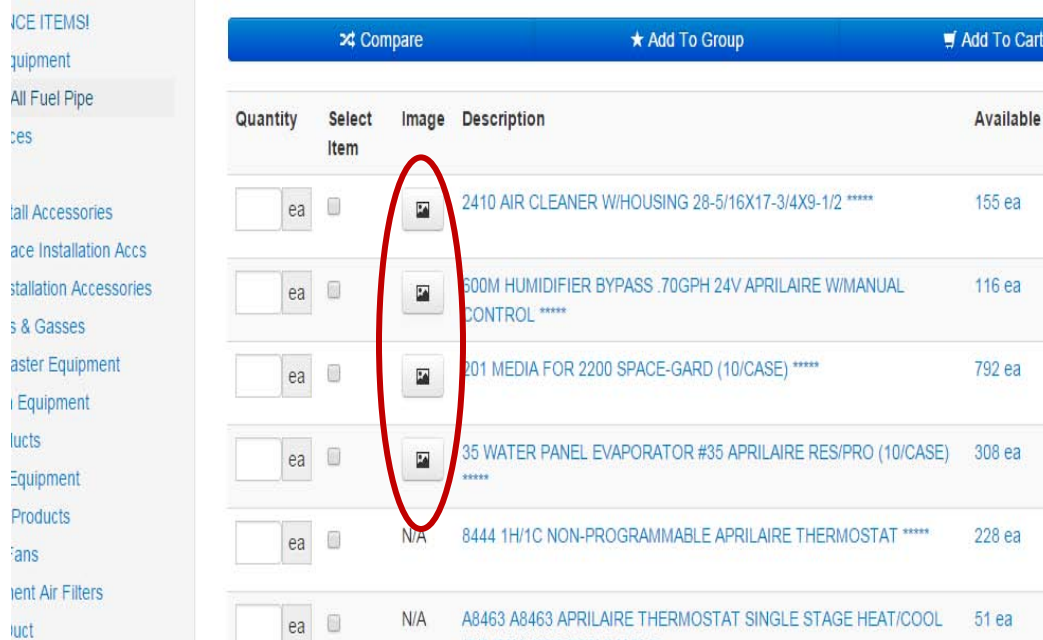
1. Use one of the following methods to search for the products to add to your order:

Key	Description	Action
A	Product Category Links	4. Click the category name link (ie "Amana Equipment"). 5. On the next page, click the link of the subcategory that you wish to search. 6. Continue to Step 2.
B	Search	4. Type the name of the item that you are looking for in the text box (ie "GSX16"). You may also use general search terms ("16 SEER" or "Goodman"). 5. Click the **GO** button. 6. If your search is broad (ie "Amana"), you will be redirected to an additional search screen to refine your search:

16
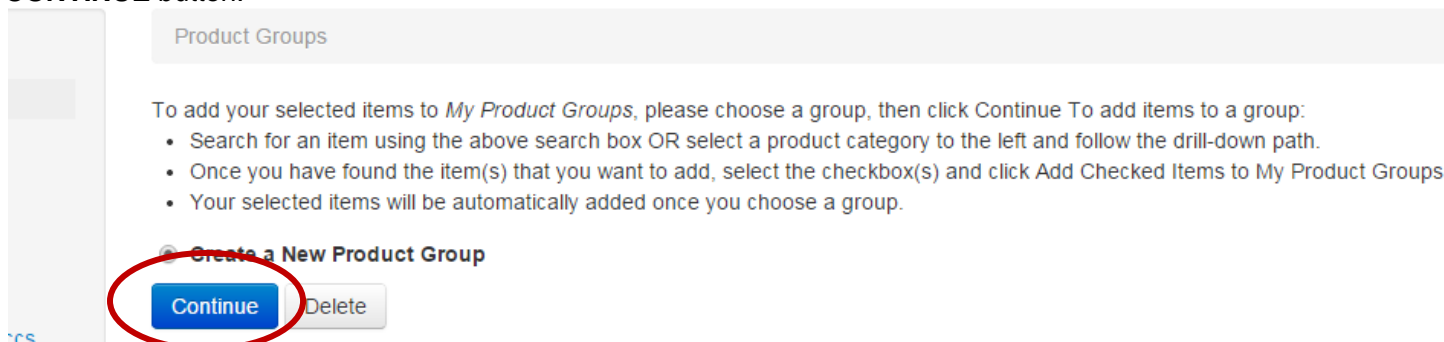
b. Select your category (A) for additional search:
   i. Choose "Products" to search full product catalog; OR
   ii. Choose "Reorder Pad" to search prior orders placed by your company.

   THEN

b. Use the Keyword(s) text box (B) to type additional search terms (ie "Amana 13 SEER")
c. Click the **GO** button.
3. Continue to Step 2.

C	Quick Order	4. Use the 3 text boxes to search for up to 3 specific products at a time.
		5. Click the **GO** button.
		6. IF:
		a. **Your search term was too broad,** you will be prompted to search again. Use the Search Box to search broad terms.
		b. **Your search term returned multiple results,** you will be prompted to click a link to see a list of your search results. Click the link, then continue to Step 2.
		c. **Your search term returned exact results,** continue to Step 2.

2. Review the description field on the product selection screen to find the product that you want to add to your product group.
   a. NOTE 1: If there are multiple pages of matching products, you can page through the available inventory by clicking each page number.
   b. NOTE 2: If there is an image icon in the **Image** column (circled, below), you can click the icon to view an image of the product.

   c. NOTE 3: You can obtain further detail about a product by clicking its description.

3. Type the quantity of the product that you want to add to your product group in the **Quantity** text box.
   a. NOTE 1: The order quantity (each, box, case, skid etc) for a particular product is noted below its **Quantity** text box.
   b. NOTE 2: Available inventory is shown for our Central Distribution Center (Mt Joy) and your local branch. Available Mt Joy inventory ordered by 5 PM EST will ship next day. Branch inventory is available for next-day pick-up.
   c. NOTE 3: Minimum order quantities and available quantities are listed to the right of the product description.

4. Click the ★ Add To Group button to add the selected items to your product group.

5. On the My Product Groups page, select the **Create a New Product Group** option, then click the **CONTINUE** button.

6. Type the name for the Product Group in the text box (circled below), then click the **Create** button.

7. To add additional products to your Product Group, follow the procedure for <u>Adding Products to an Existing Product Group.</u>

Creating Product Groups from an Open Order or Bid

1. From the top navigation, select the **Open Order/Bids** link from the **My Account** menu.
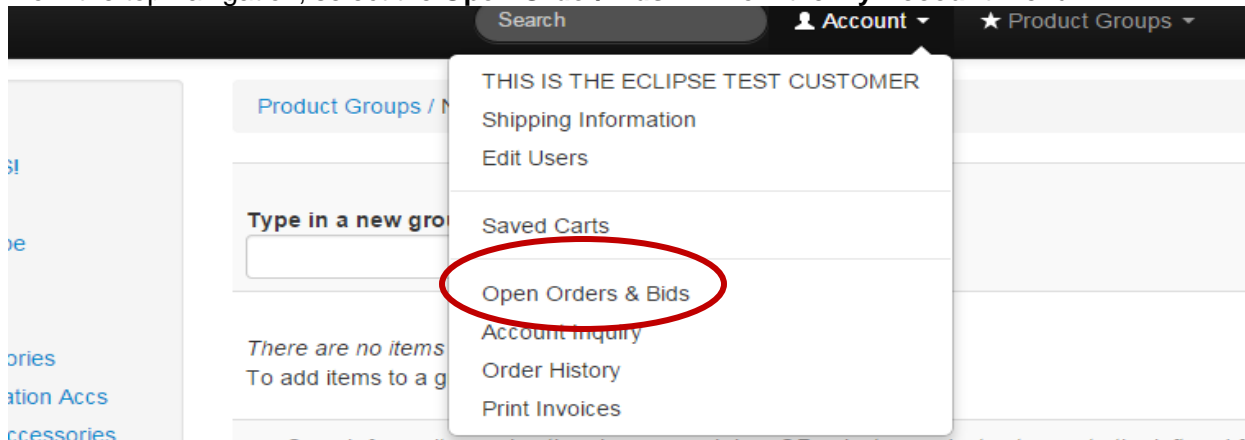
2. Select the open order that you want to use to create a product group for using one of the following methods:

Key	Description	Action
A	Reference # List	Click the Reference # link to open the open sales order.
B	Search by Date Range	4. Type the date range that you wish to search in the date bar to find the open sales order that you want to use to create a product group. 5. Click the **Get More Transactions** button to display the open sales orders from that date range in the body of the page (A, above). 6. Click the Reference # link to open the open sales order.
C	Advanced Search	4. Type a Reference #, PO # or Release # into the search box in the Advanced Search section.

5. Click the **GO** button to display the sales order from that search.
6. Click the Reference # link to open the open sales order.

3. At the bottom of the open order page, click the [Copy Items to Product Group] button.
4. On the My Product Groups page, select the **Create a New Product Group** option, then click the **CONTINUE** button.

5. Type the name for the Product Group in the text box (circled below), then click the Create button.

6. To add additional products to your Product Group, follow the procedure for Adding Products to an Existing Product Group.

Creating Products Groups from a Prior Order – Last 365 Calendar Days

1. Click the **Reorder Pad** link from the top navigation (circled):

2. All items ordered by your company over the last 365 calendar days are listed.

3. Select the items that you want to add to a product group from the list by clicking the checkbox next to the product description (circled):

4. For each item being added to the product group, type the order quantity in the **QUANTITY** text box for the product.
    a. NOTE 1: The order quantity (each, box, case etc) for a particular product is noted within the **Available** column to the right of the product description.
    b. NOTE 2: Available inventory is shown for our Central Distribution Center (Mt Joy) and your local branch. Available Mt Joy inventory ordered by 5 PM EST will ship next day. Branch inventory is available for next-day pick-up.
5. Click the ★ Add To Group button.
6. On the My Product Groups page, select the **Create a New Product Group** option, then click the **CONTINUE** button.

Type the name for the Product Group in the text box (circled below), then click the **Create** button.

7. To add additional products to your Product Group, follow the procedure for Adding Products to an Existing Product Group.

Adding Products to an Existing Product Group

1. Select products to add to a Product Group using the following steps of the Creating a Product Group procedures:
    a. Creating Product Groups Using Search – Steps 1 - 4
    b. Creating Product Groups from an Open Order or Bid – Steps 1 - 3
    c. Creating Products Groups from a Prior Order – Last 365 Calendar Days – Steps 1 - 5

2. Select the radio button next to the name of the Existing Product Group that you want to add products to, then click the **CONTINUE** button.

Logging Off

1. Click the **LOGOFF** link in the top navigation menu.

Changing Your Password

1. Click the **Edit Users** link from the **My Account** menu in the top navigation.
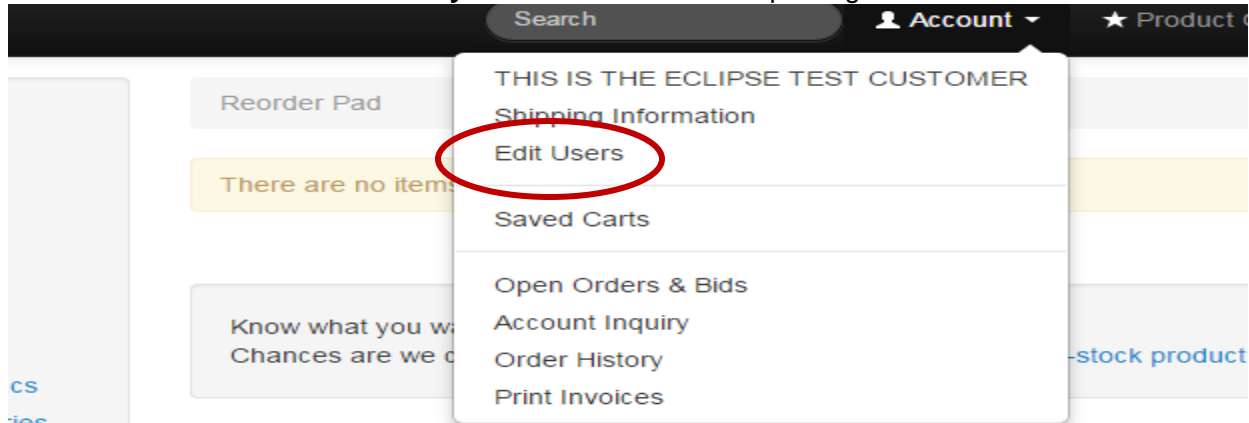
2. On the My Account screen, type a new password in the password box, following the password requirements detailed on the page. *NOTE: Make sure to record your password prior to typing it in the password field so you remember what it is.*

3. Click the **SUBMIT** button at the bottom of the page to change your password.

Special Functions: Adding Company-Specific Part Numbers to Web Order Entry Products

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 Web Order Entry using your part numbers. Your part numbers will also show up on all packing slips and invoices from HVAC.

1. From the product list page (accessible following a product search, reorder pad or through a product group list), click on the description of the product.

2. This will take you to the product detail page. At the bottom of the page is the Custom Part Number box (circled).

3. Type your custom part number in the text box and click the **ADD** button. 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.
   a. *NOTE: 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.*

Special Functions: Viewing/Printing/Saving Previous Invoices

Through Web Order Entry, you are able to view invoices for <u>any</u> order placed with HVAC Distributors (whether it was conducted by Web Order Entry, phone, fax or branch).

1. From the top navigation, select the **Order History** link from the **My Account** menu.

2. Select the sales order that you want to review from using one of the following methods:

Key	Description	Action
A	Reference # List	Click the Reference # link to open the previous sales order.
B	Search by Date Range	1. Type the date range that you wish to search in the date bar to find the sales order that you want to add to your order. From [01/05/1994] To [06/06/2014] [View Orders] 2. Click the **Get More Transactions** button to display the sales orders from that date range in the body of the page (A, above). 3. Click the Reference # link to open the previous sales order.

C	Advanced Search	1. Type a Reference #, PO # or Release # into the search box in the Advanced Search section.
		2. Click the **GO** button to display the sales order from that search.
		3. Click the Reference # link to open the previous sales order.

3. This shows you the selected invoice. To print or save the invoice, click the Click here for a printer friendly version of this page link at the bottom of the page.

On the print friendly page, click the **PRINT ORDER** button to print or save the invoice to .pdf.
   a. To print, select the printer that you want to print to.
   b. To save to .pdf, select ADOBE PDF (or the PDF writer your company uses) as your printer. *This requires Adobe PDF Reader or a PDF writer program to be installed on your computer.*

## Special Functions: Using the Account Inquiry Function

If enabled on your account, the Account Inquiry function allows you to see all of your account activity (whether it was conducted by Web Order Entry, phone, fax or branch). This function allows you to review all invoices, cash receipts, and payment information for your account. To access, select the **Account Inquiry** link from the **My Account** top navigation menu.

Special Functions: SuperUser Functions

If enabled on your account, the SuperUser function allows you to add other users to your corporate account, delete users from your corporate account and adjust the account information of other users.

Adding Other Users as a SuperUser

1. To add other users, click the **Edit User** link from the **Account** drop down menu (A, below).
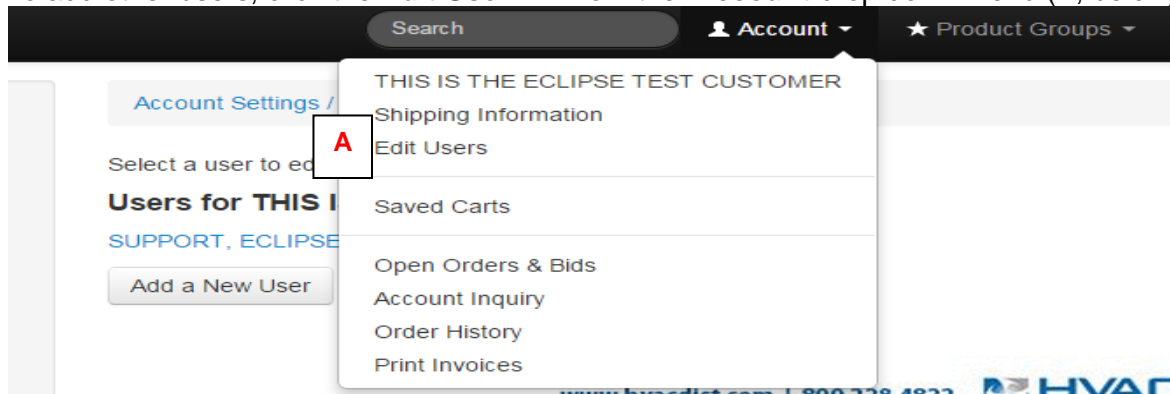
2. From the **Edit Users** screen, select the **Add a New User** link from the choices presented.

Account Settings / Edit Users

Select a user to edit or click *New User*

Users for THIS IS THE ECLIPSE TEST CUSTOMER

SUPPORT, ECLIPSE

Add a New User

3. On a separate sheet of paper, record the new user's login name and password. Login must be between 6 and 40 characters; Password must be between 6 and 14 characters. This information will be needed for Steps 4 and 6.

4. On the following screen, complete the fields as follows:

| KEY	INPUT
A	User Name (first name, last name) – required fields
B	User Title – not required
C	Use Company Address checkbox – not required – uses company address for the fields noted in item D
D	Address, City, State, ZIP for User – required fields. Can be pre-filled by checking the "Use Company Address" checkbox.
E	User Phone/Email fields – not required
F	User Login & Password fields – required. Record exactly as written in Step 3.

5. Click the **SUBMIT** button at the bottom of the screen (G, on previous page) to add the user and provide the user with Web Order Entry access.
6. Provide the user with his/her login and password information using your corporate best practices (email, phone, memo). This information is **not** automatically sent to the customer through the system.

Adjusting Account Information of Other Users as a SuperUser

1. To edit user information, click the **Edit User** link from the **My Account** drop down menu (A, below).
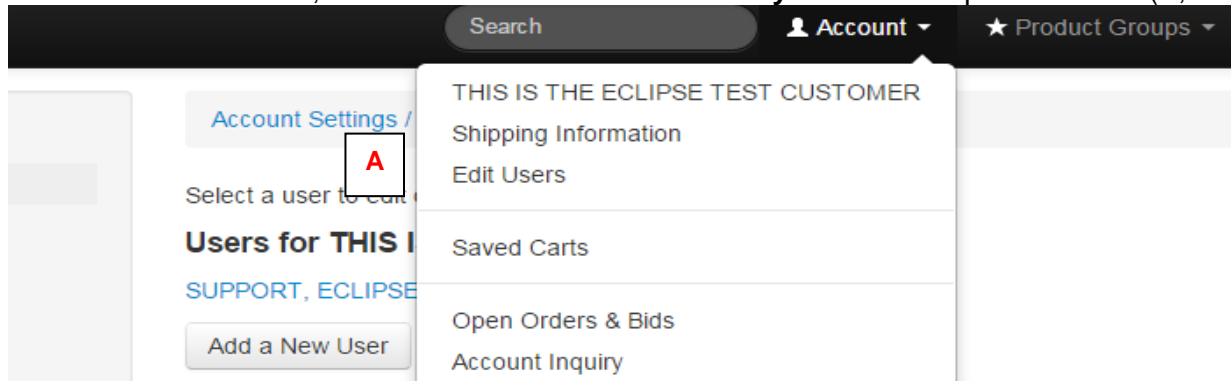
2. From the **Edit Users** screen, select the name of the user whose information you wish to edit from the choices presented.
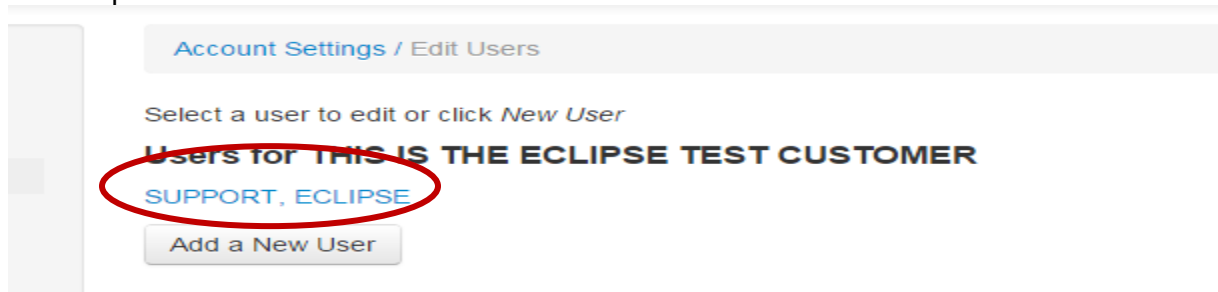
3. On the following screen, adjust the information as required. *Note: If you are changing a login or password, record the information separately to send to the user. It will not be automatically sent to the user through the system.*
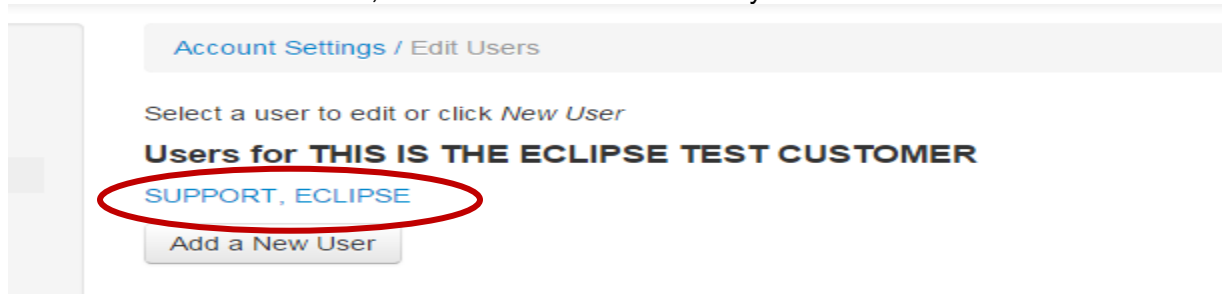
4. Click the **SUBMIT** button at the bottom of the screen to update the user's information.
5. If necessary, provide the user with his/her updated information using your corporate best practices (email, phone, memo). This information is **not** automatically sent to the customer through the system.

Deleting Other Users as a SuperUser

1. To delete users, click the **Edit User** link from the **My Account** drop down menu (A, below).
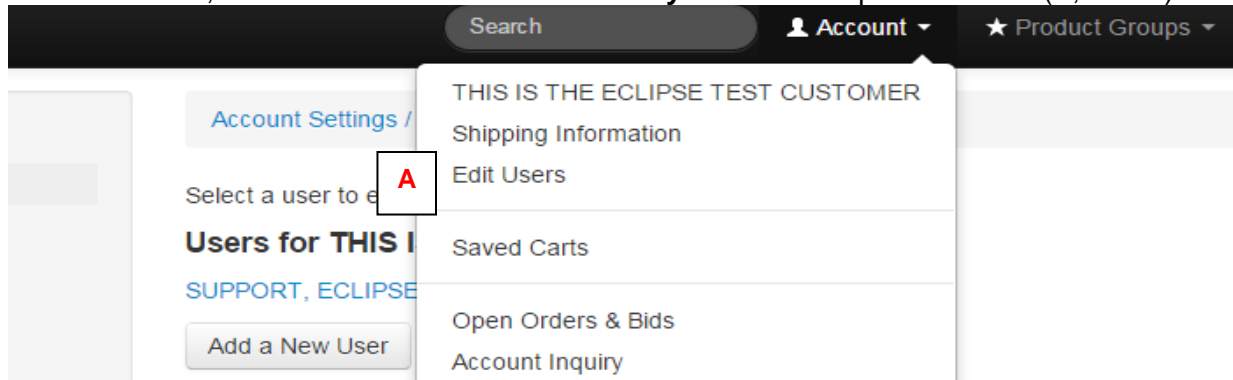
2. From the **Edit Users** screen, select the name of the user you want to delete.

3. On the following screen, click the **DELETE** button at the bottom of the screen.