# **WM** WEIL-McLAIN<sup>®</sup>

# Weil-McLain Marketing Bulletin MB1707 - May 31, 2017

# **Order Inquiry Customer Portal Updates**

Dear Weil-McLain Distributors:

As a reminder our Distributor Support representatives are available Monday through Friday 7am – 4pm CST. Distributor Support may be reached by calling 1-800-654-2109, Option 4. They can assist with placing or revising an order, or with other inquiries such as order tracking, general pricing, availability, or even invoicing.

As an added option, available 24/7, our self-service portal is available to view order status, order detail and even retrieve invoices. It also shows shipment details such as PRO numbers and carrier names for LTL/TL shipments and UPS tracking #'s with hyperlinks to the UPS website. The portal is located on the Distributor section of the Weil-McLain website, <u>Order Inquiry Customer Portal</u>. We've also prepared a <u>comprehensive user's guide</u> for a complete step by step of the system. For help establishing your log-in credentials or recovering your username and password, e-mail login.help@weil-mclain.com.



## Navigation

The interface will aid in overall navigation within the portal.

- 1. Click on Order Inquiry
- 2. Use the dropdown arrow to choose Open Orders and/or Order History
- 3. Use the Arrow to expand the order to provide order details
- 4. View the **Order Details** screen

5. Click on the **Order Number** (underlined) to view a copy of the Order Status to print or save

0	pen Orders Igen Orders Inder History	Indees					OPEN ORDERS						Variant Land		anne anne genera manne anne anne
0	Drag a column header and drop it here to group by that column														18 18 1
	811.620	Self In Number Cadavare Name PC Number								(7 <u>6</u> 4 ) (raj 54	Si Refeat. Oper Mexant			FLAND STATES BO	
	• 811873 <b>4</b>			-	-		dam tree	-		Adul Terrel Link	Parent land Drive	1.1.1		CONTRACTOR OF THE	
	81,2757	4	5	1	3	3811500001	10851-2A-8 Res	+	1.14	06/07/2814	06/07/3054		101 1000	And the state of the	100 100
		4191	5			182309001	16851-2.4-4		s	****	04/20/2014			And the second second	
		6.015	5	14	1	HINNES	806 1(0.5)-2.4-A Res	1	12.0	08/07/2014	08/07/2024				
		6.002	5		1	381500005	10251-2.A-A Rev	\$***25		****	06/06/2054		850 BESF - (100)		
		7.001	s	n.	3	385369059	10812-2.4-8	5-145		05/07/2014	08/07/2254	Disaster 3 of	41.		
		1.002	5			101100032	108 51-2 A-8	-	p		05/28/2054				
		9.005	5	1.		383389020	10850-2A/0	L	-11-19	05/07/0814	08/07/0254				

#### Invoice Retrieval

This Order Inquiry Portal also has an added enhancement of invoice retrieval. To view an invoice, you must be in the Order History Screen.

- 1. Choose Order History
- 2. Click the arrow to expand the Shipped Item Details
- 3. Click on the **Invoice Number**

If you get a note: **Invoice Image Not in System**, this is an older invoice that didn't carry over with the new system. In this instance, please contact your customer service representative for a copy of an invoice if you need it.

Ho	me Ord	ler Inquiry	Abo									
		er unden)										
		12	0			ORDE	R HISTORY					
Ord	er History		6									
Drac	a column hea	der and dro	p it here to	group by that	column							
											🐼 Refr	
	Order Number	Sold	To Number	Customer Name			PO Number	Order Ty	npe Entry	Date	Open Amo	
-	792483	40033		And the second second			076806 G1		12/23/2013		57	
		tem Details		To Ship	То							
	Line Number	Line Type	Ship Mode	Shipped Qty	Carrier	Item Number	Item Desc	Trade Price	Nét Amount	Shipped Date	Invoice Number	
	1	s	GRD	2		592800011	Seal-SC 2.31x0.208x0.203	\$2.53	52.84	12/26/2013	1587588	
	2	s	EMT	1	TBD	312900006	Sc-R 2918 FI	\$120.00	\$72.43	01/08/2014	1618107	
	4	т	GRD	1	11 1	Tracking	1ZE955A40357905039	\$0.00	\$0.00	12/26/2013	1587588	

#### **Tracking Numbers**

You will also notice tracking numbers on UPS shipments. You can click the hyperlink and it will open the UPS website automatically. When LTL/TL carrier information is entered, you can also access PRO numbers and carrier names to track down your shipments.

### Search, Sort, and Grouping Capability

Another feature is the ability to search by an Order Number (9) or PO Number (10). By entering your WM Order Number (if known) or PO Number (no dots, dashes or spaces) and clicking ENTER, the search will retrieve Order or PO Numbers with that search criteria. To remove the sort, back space/remove the Order or PO Number and click the Refresh button on the top right hand side.

To sort the order lines, just click on the column header titles to sort ascending and click again to sort descending.

For our customers who manage different branches or need to track orders via UPS or LTL/TL separately, use the *grouping* feature (11). Just grab the available field (Sold to Number or Order Type in this example) and drag it to the header that reads "Drag a column header and drop it here to group by that column".

