

Order Inquiry Portal User Guide

Rev a - 7/24/20

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Accessing the Portal

You can access the WM Customer Portal directly at this URL:

https://orders.weil-mclain.com/

... Or by logging into the WM Public website, clicking on the "Distributors" tab and choosing the "Order Inquiry Portal" box.

Logging In

	RTAL
Home About	
LOG IN Please enter your username and password.	Click link to login
Account Information Username: Password: Log In	Internet Explorer is not recommended for this application Chrome, Firefox or Microsoft Edge Browser is recommended for Best User Experience

Internet Explorer is not recommended for this application. Use a Google Chrome, Firefox or Microsoft Edge Browser for best user experience.

WEIL-MCLAIN [®] CUSTOMER PORTAL	[<u>Log In</u>]
Home About	
LOG IN	
Please enter your username and password.	
Account Information Username: Password: Log In	Enter your credentials
ill-McLain Customer Portal - Copyright© 2014 Weil-McLain	Access Granted By Permission Only
ta privacy	terms of use

Enter your login credentials. Credentials are case sensitive. Make sure your CAPS lock is off.

If you require assistance with your login information, please email <u>login.help@weil-mclain.com</u>.

Portal Home Screen



The portal home screen may be used by WM Sales and Marketing to communicate important information to distributors.

To log out from the system click the log out link in the upper right hand corner of the screen.

Order Inquiry

Home Order Inquiry Abou	t				
pen Orders 🔹	OPEN ORD	ERS			
rag a courmn header and drop here to g	group by that column				S Refresh
Uumber Sold To Nu	Customer Name	PO Number	Order Type	Entry Date	Open Amount
			GT	06/05/2014	
Order Status			GT	06/05/2014	-
Order Status			GT	06/05/2014	-
811398			GT	06/24/2014	-
811551			GT	06/25/2014	-
811979			GT	07/02/2014	-
▶ 812139	Order Inquiry		GT	07/07/2014	
812308	Order inquiry		GT	07/09/2014	-
812340			GT	07/09/2014	-
812508			GT	07/14/2014	
▶ <u>812722</u>			GT	07/16/2014	
▶ 812770			GT	07/17/2014	
▶ 812853			G1	07/17/2014	
▶ 812864			G1	07/18/2014	
▶ 812917			GT	07/21/2014	
					items in 4 pages

To access your order inquiry screen click the tab "Order Inquiry".

Please be advised the Portal will automatically open to the "Open Orders" status. Viewing invoiced orders can be accessed by choosing "Order History" and will be reviewed later in this guide.

Viewing Details of Order

Orders										
orders	-				OPEN ORD	DERS				
column he	ader and dr	op it here te	Clio	ck arrow t	o expand ord	ler				
							_			🐼 R
der Numb	er Sol	d T-	Cu	stomer Name		PO Number	0	rder Type	Entry Date	2
017677					T					
17677							G	т	07/02/202	20
	em Details	Shipp	ed Item De	tails Sold	To Ship To	Tracking				
Line Number	Line Type	Ship Mode	Open Qty	Ite. Numb	n - Desc	Trade Price	Net Amount	Actual Plan Date	ned Load	Estimated Load Date
					7	and the second sec			nned Load	and a local de la constant
Number 5	Туре	Mode TL	Qty	Numb	I - Desc Re Co Bir	and the second sec		Date ++++		Date 07/24/2020
Number 5	Type s Click to	Mode TL	Qty 6	Numb 381359004		and the second sec		Date ++++	umber	Date 07/24/2020 of items
Number 5	Type S	Mode TL	Qty 6 1 11 2	Numb 381359004 381359070 381359074 381359076	Ca Bir CGa-tar CGa Click	and the second sec		Date ++++		Date 07/24/2020 of items
Number 5	Type s Click to	Mode TL	Qty 6 1 11	Numb 381359004 381359070 381359074	C Bir CGa-ter CGa Click f	Price		Date ++++ ++ ++ N	umber	Date 07/24/2020 of items
Number 5	Type s Click to	Mode TL	Qty 6 1 11 2	Numb 381359004 381359070 381359074 381359076	Carlor Click	tabs to see		Date ++++ ++ ++ N	umber	Date 07/24/2020 of items

To view the details of an order click the arrow at the extreme left of the order summary line.

Open line items will be displayed first when you expand the order. To see other sections of the order details, click the appropriate tab, "Shipped Items Details", "Sold-To" address, "Ship-To" address and "Tracking" information.

In the lower right hand there is a display showing how many items the order has and how many pages this information can be found on. If there is more than one page of information, you can toggle between pages by choosing the arrows on the lower left.

Open Item Details - View

en Orders										
en orders		-			OPEN ORD	ERS				
g a column hei	ader and o	drop it here to	o group by	that column						
		_						_	-	🙆 Ref
Order Numbe	er So	old To Numbe	er Cu	stomer Name		PO Number	0	rder Type	Entry Dat	e
1017677					1					
1017677			1				G	т	07/02/20	20
0	m Details	C1.1	ed Item De	tails Sold	fo Ship To	Tracking				
Line	Line	Ship	Open	ltem	io snip io	Trade	Net	Actual Plan	und I and	Estimated Load
Number	Туре	Mode	Qty	Number	Item Desc	Price	Amount	Date	neu toau	Date
5	S	TL	6	259004	CGi-4 PIN T007e S4 B	lr 🛛		++++		07/24/2020
8	s	TL	1		52-25 PIDN T007e S	3				07/24/2020
9	s	TL	11	Item	s not yet ship	ped				07/24/2020
10	s	TL	2	381359076	CGast PIDN 1007est	Bir		+++		07/24/2020
	S	TL	1	381359080	CGa-7 PIDN T007 S3			++++		07/24/2020
11		TL	1	381359107	CGa-6 PID S3 Bir					07/24/2020
11	s	11			35 DII T.	entative Loa				

To view the details of the order that have not yet shipped click on the "Open Item Details" tab. This tab can be found right under the order number.

The Open Qty field will only display what has not shipped yet.

The Actual Planned Load Date field provides a tentative load date. It is important to note that this date may change depending on product availability, carrier commitments, or distributor request dates.

Shipped Items Details - View

ome O	der Inquiry	Abou	t								
en Orders g a column he	• ader and drop i	t here to c	roup by the	at column	0	PEN ORD	ERS	The		vice num	
5											
Order Numb	er Sold To	Number	Custo	mer Name			PO Number	Order Type	Ent	ry Date	
1017677											
<u>1017677</u>								GT	07/	02/2020	
Open It	em Details	Shipped	Item Detail	s Sold	To	Ship To	Tracking				
Shipment Number	Line Number	Līne Type	Ship Mode	Shipped Qty	Carrier	ltem Number	Item Desc	Trade Price	Net Amount	Shipped Date	Invoïce Number
196598	1	s	LTL	1	TBD	510312060	CtI-L HP Stm 2-15PSI 25PSI Max			07/15/2020	1929795
196598	2	S	LTL		TBD	511100005	LWCO 45-1105			07/15/2020	1929795
196598	3	s	LT		TBD	383500380	Kit-S Wtr Supp Pip Repl Ult310			07/15/2020	<u>1929795</u>
196598					TBD	383500600	Kit			07/15/2020	1929795
196598		er Info f avail	ormatio Jable	on	TBD	382200612	GV Date iter			07/15/2020	<u>1929795</u>
196819			abic		TBD	511114526	LW 17	ped		07/17/2020	1929981

Order items that have been shipped can be viewed under the "Shipped Items Details" tab.

If Carrier information is available it will be found in this screen. Should you need carrier information and none is listed or if the description in this field is TBD, contact your Weil-Mclain Customer Service representative for details.

Clicking on the number in the Invoice Number field allows you to generate a copy of this invoice. The invoice will be generated in a PDF file that you can save or print.

Sold To – View

)pen Orders	~		Open Ord	ERS			
rag a columi	n header and drop it here t	o group by that column					S Refres
Order Nu	mber Sold To Numb	er Customer Name		PO Number	Order Type	Entry Date	M Kerres
1017677			T				
1017677					GT	07/02/2020	
	n Item Details Shipp	ed Item Details Sold To	Ship To	Tracking			

The "Sold To" tab allows you to view which branch the product was sold to.

Ship to – View

U	I m We	Welcome mes	sser.n [<u>Log Out</u>					
н	ome Order I	nquiry About						
0	pen Orders	•	0	pen Orde	RS			
Dr	ag a column header	and drop it here to grou	p by that column					_
	Order Number	Sold To Number	Customer Name	_	PO Number	Order Type	Entry Date	🧟 Refresh
	1017677	Sold to Number	Customer Name			Order Type	Entry Date	
Ŧ	<u>1017677</u>					GT	07/02/2020	
	Open Item D Ship To:	etails Shipped Iter VATERLOO, IA 50703-962		Ship To Tr	acking			
								\$0.00

In the "Ship To" tab you can see where the product will be shipped.

Tracking - View

	IL-McLAI	CUSTON	IER PORTA	<u>AL</u>		Welcome messe	
ome Orde	r Inquiry About						
pen Orders	*		Open Orde	RS			
ag a column head	er and drop it here to group	by that column					
Order Number	Sold To Number	Customer Name		PO Number	Order Type	Entry Date	🧟 Refre
1017592			7				
<u>1017592</u>					G1	06/30/2020	
Open Item Shipment Number	Details Shipped Item Tracking Number	Details Sold To Carrier	Ship To Tr Ship Date	acking			
196434	1ZE955A40363430	165 UNITED PARCEL SERVICE	7/22/2020				
							\$0.

The "Tracking" tab provides you with information on the tracking number, carrier name and the date the order shipped. UPS tracking numbers have a hyper-link which allows you to check on the status of the order on the UPS website.

Printing Order Status

The **Order Inquiry Portal** system also allows you to print or save a copy of your order status.

Click the "Order Number" in the summary line to access a PDF copy of that order.

	Welcome messer.n [Log Out]								
Home	Order Inquiry	About							
Open Order	Open Orders OPEN ORDERS								
Drag a colun	nn header and drop	p it here to group	by that column						
							🧐 Refresh		
Order N	lumber Sold	To Number	Customer Name	PO Number	Order Type	Entry Date			
101767	Ð		T						
<u>101767</u>					GT	07/02/2020			
si	een Item Details hipment Number Tracking Is Availab	Tracking	Details Sold To Ship To T Carrier Ship Date Click to access a printable copy of your order status	racking			\$0.00		

This printable report is in a PDF format and can be saved directly to your PC and/or printed to a local printer.

Click the "X" in the upper right hand corner to close the window.

UM WEIL-		MER PORTAL			Welcome messer.n [<u>Log Out</u>]
Home Order Inquin	About				<u>-</u>
Open Orders Drag a column header a					
blag a colaminicader a	UM WEIL-McLAIN	[®] Order Status		Date Printed 7/23/2020	🐼 Refresh
Order Number 1017677	Sold To 48979	46979	Ship To		Date
✓ <u>1017677</u>	Order Sold To Customer Name	PO Number Order Type	Date Entered	Open Amount	2020 \$54,682.84
Open Item De	1017677	GT	07/02/2020	Open Amount	
Shipment Nu No Tracking Is	5.00 S TL 6 381359004 CG 8.00 S TL 1 381359070 CG 9.00 S TL 1 381359074 CG 10.00 S TL 1 381359076 CG 11.00 S TL 1 381359076 CG 12.00 S TL 1 381359107 CG 13.00 S TL 1 381359008 CG 13.00 S TL 1 381359008 CG 14.00 S TL 4 381359002 CG 15.00 S TL 1 381359002 CG 15.00 S TL 1 381359002 CG	Trade Trade Price Trade Price Trade Price Trade Price Trade Trade Price Trade Price Trade Price Trade Price Trade Price Trade Price Trade Price Trade Price Price Price Trade Price Pr	Net Act Planner Amount Load Date		\$0.00
Weil-McLain Customer Pol <u>data privacy</u>	Shipped tems Line Ship Carrier Item Line Type Mode Qty Name Number 1.00 S LTL 1 TBD 510312060 2.00 S LTL 3 TBD 510312060 3.00 S LTL 3 TBD 51110005 4.00 S LTL 3 TBD 38250080 6.00 S LTL 1 TBD 38250080 7.00 S GRD 1 TBD 511114526	Desc I 0 CH-L HP Stm 2-15PSI 25PSI Max 25PSI Max 25PSI Max 5 LWCO 45-1105 3 0 KK-S WIT Supp Pip Repl UIR310 0 KK-S T-Snar Flue 2 C GV90 F-S MG 1007 S2 Bir 1 1		2020 1929795 2020 1929795 2020 1929795 2020 1929795	Granted By Permission Only terms of use
In	nage 1 of 1				

Search Tools

The **Order Inquiry Portal** allows flexibility when searching by Order Number or Purchase Order Number.

Filter by Order Number

łome Order II	nquiry About					
pen Orders		OP	en Orders			
	and drop it here to group t	w that column				
						🙆 Refre
Order Number	Sold To Number	Customer Name	PO Number	Order Type	Entry Date	Open Amo
812508						
812508				GT	07/14/2014	
			Order Number to by Order Numbe			

To search by "Order Number" you must enter the **exact** order number into the filter box.

To remove the filter, remove the text from the filter box.

Filter by PO Number



Searching by PO Number works in a similar fashion to searching by Order Number, however the search **doesn't need to be an exact match**.

Grouping

U	II WEIL-	McLAIN [®] Customer F	PORTAL		welcome bi	aesel.l [<u>Log (</u>
Hom	ne Order Inquiry	y About				
Open	n Orders 🔻	Ope	N ORDERS			
Drag	a column header and d	rop it here to group by that column				
		Customer Nam	le			🙆 Refrest
	Order Number	Number Customer Name	PO Number	Order Type	Entry Date	Open Amour
	810281			GT	06/05/2014	
	810284			GT	06/05/2014	
	810287			GT	06/05/2014	
	811398	Drag column you wish	to group here	GT	06/24/2014	
	<u>811551</u>			GT	06/25/2014	
	<u>811979</u>			GT	07/02/2014	
	812139			GT	07/07/2014	
	812308			GT	07/09/2014	
	812340			GT	07/09/2014	
	812508			GT	07/14/2014	
	812722			GT	07/16/2014	
	812770			GT	07/17/2014	
				G1	07/17/2014	

The Order Inquiry Portal also allows you to group the data according to your needs.

A good example of grouping would be to group by Customer Name.

To group by a summary column, drag that column name to the area designated at the top of the data grid. (See example above)

W	WEIL-	Mc LAIN	Customer P			Welcome bra	aesel.l [<u>Log</u>
Home	e Order Inquiry	About					
)pen C	Orders 🔻		OPEN	ORDERS			
Custo	mer Name	Sold To Number	Customer Name		arrow to chan ction of sort fo the group		S Refres Open Amou
	Customer Name:				GT	08/01/2014	
	Customer Name: <u>812853</u>				G1	07/17/2014	
	Customer Name: <u>813827</u> Customer Name:				GT	08/04/2014	
	813789 Customer Name:				GT	08/04/2014	
	 ▶ 813705 ▶ 813709 				G1 G1	08/01/2014 08/01/2014	
	B13780 Customer Name:				G1	08/04/2014	

The data is now displayed and grouped by Customer Name.

You can change the sort direction of the group by clicking the arrow in the group header.

Sorting

U	II WEI	L- McLA	CUSTOMER POR	TAL		vveicome DI	raesei.i <u>Log C</u>
Hon	ne Order In	quiry About					
		_	OPEN ORI	DERS			
Орег	Orders	*					
Drag	a column header a	nd drop it here to grou	p by that column				
							🧟 Refrest
	Order Number	Sold To Number	Customer Name	PO Number	Order Type	Entry Date 🔺	Open Amour
Þ	810281				GT	06/05/2014	
	810284				GT	06/05/2014	
	810287				GT	06/05/2014	
	811398				GT	06/24/2014	
	811551				GT	06/25/2014	
	811979		Click column		GT	07/02/2014	
	812139		header to sort		GT	07/07/2014	
	812308				GT	07/09/2014	
	812340				GT	07/09/2014	
	812508				GT	07/14/2014	
	<u>812722</u>				GT	07/16/2014	
	812770				GT	07/17/2014	
	812853				G1	07/17/2014	
	812864				G1	07/18/2014	
	812917				GT	07/21/2014	

Data within the table can also be sorted by any column without grouping.

To sort a column, click on the column header. The first click sorts ascending, the second click sorts descending and the third click turns off sorting for that column.

You also can sort by multiple columns at the same time. When sorting is active for a column that column is highlighted.

Order History

Additionally the **Order Inquiry Portal** provides you access to a limited view of invoiced orders. The "Order History" tab provides you with information for orders from within the last 180 days.

lom	No. of Concession, Name		CUSTOMER				
rder	History		Ore	DER HISTORY			
raga	a column header a	nd drop it here a group t	y that column				
							S Refresh
	Order Number	Sold To Number	C. Per Name	PO Number	Order Type	Entry Date 🔺	Open Amount
	792483				G1	12/23/2013	
	804764				GT	04/04/2014	
	804979				GT	04/08/2014	
	804975		S	elect "Order	GT	04/08/2014	
	804965				GT	04/08/2014	
	805525			History"	GT	04/14/2014	
	805649				GT	04/15/2014	
>	805741				GT	04/16/2014	
>	805736				GT	04/16/2014	
	805694				GT	04/16/2014	
	806028				GT	04/21/2014	
	806109				GT	04/21/2014	
	806221				GT	04/22/2014	
					GT	04/23/2014	

To switch to "Order History" select it from the drop down menu at the top of the page.

All of the functions work the same in "Order History" as they do in "Open Orders". You can sort, group and filter just the same. You can also print the order by clicking the order number in the summary data.

Printing Invoices

		er Inquiry	Abo	ut								
)rde	er History	•				Order	History		nvoice see inv		er	
ag	a column head	er and drop i	it here to	group by t	that column						$ \leftarrow$	
	Order Number	Sold T	o Numbe	r 0	ustomer Nan	10	POI	Number	Order T		ate	🧟 Refree
-	1018553	3010 10	o Numbe					Vullibei	order i	урс	01-	
P						t and Minim		_	61	0	7/22/2	
P	1018553 1018553					t and Minim s are visible			G1	C	7/22/2	
P		em Details	Sold						G1	c	7/22/2	
P	1018553	em Details Line Number	Sold Line Type					item Desc	G1 Trade Price	Net Amount	7/22/2 Shipped Date	Invoice Number
P	1018553 Shipped Ite Shipment	Line	Line	To Ship	Charge:	s are visible	here	Kit-R SC 86/88	Trade	Net	Shipped	
P	1018553 Shipped Ite Shipment Number	Line Number	Line Type	To Ship Mode	Charge: Shipped Qty	s are visible	here		Trade	Net	Shipped Date	Number

While in "Order History", you have the capability to print or save a PDF copy of your invoices.

Click the invoice number to view invoice.

Freight charges and minimum order charges are also visible from this screen.

	McLAIN [®] Customer Portal	Welcome messer.n [<u>Log Out</u>]
Home Order Incruin Order History Drag a column header a Order Number 1018547 1018547 Shipped Item Shipment Number 197520 197520		Refresh ntry Date 7/22/2020 \$0.00 hipped Invoice Number 7/22/2020 1930377 \$0.00
L	image 1 of 1	

Once the invoice is visible on the screen you can save it or print it to a local printer.

Click the "X" to close the window.

Tracking Shipments

Along with the features previously mentioned the **Order Inquiry Portal** has the ability to provide tracking information for shipped orders.

WEIL-MCLAIN [®] Customer Portal Welcome messer.n								
Home Order Inquiry About								
Order History ORDER HISTO	DRY							
Drag a column header and drop it here to group by that column								
Order Number Sold To Number Click to Track	PO Number	Order Type	Entry Date	Refresh				
▼ <u>1018547</u>	190437200	G7	07/22/2020					
Shipped Item Details Sold Te Ship To Tracking								
Shipment Number Tracking Num er Carrier Ship Date								
197520 1ZE955A40161294043 UNITED PARCEL 7/22/2020								
				\$0.00				

The "Shipped Item Details" tab displays the Carrier and a tracking number if available.

If the product was shipped via UPS a UPS tracking number hyperlink will be provided. Clicking on the hyperlink directs you to the UPS website where the tracking number is automatically tracked.

Support

If you have questions concerning open orders and invoices contact your WM Customer Service representative between 7:00 a.m. and 4:00 p.m. CST at 800-654-2109.

If you have questions concerning your login information contact login.help@weil-mclain.com.