Order Inquiry Portal

User Guide

Rev a – 7/24/20

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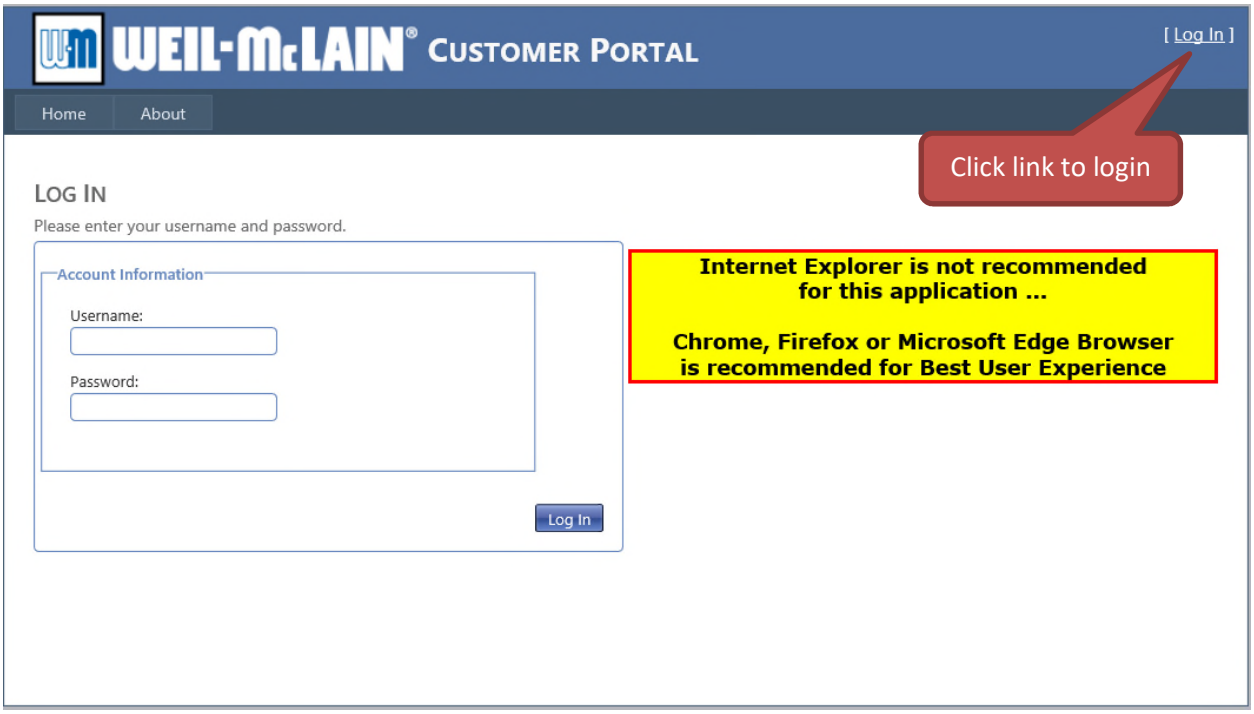
Accessing the Portal

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

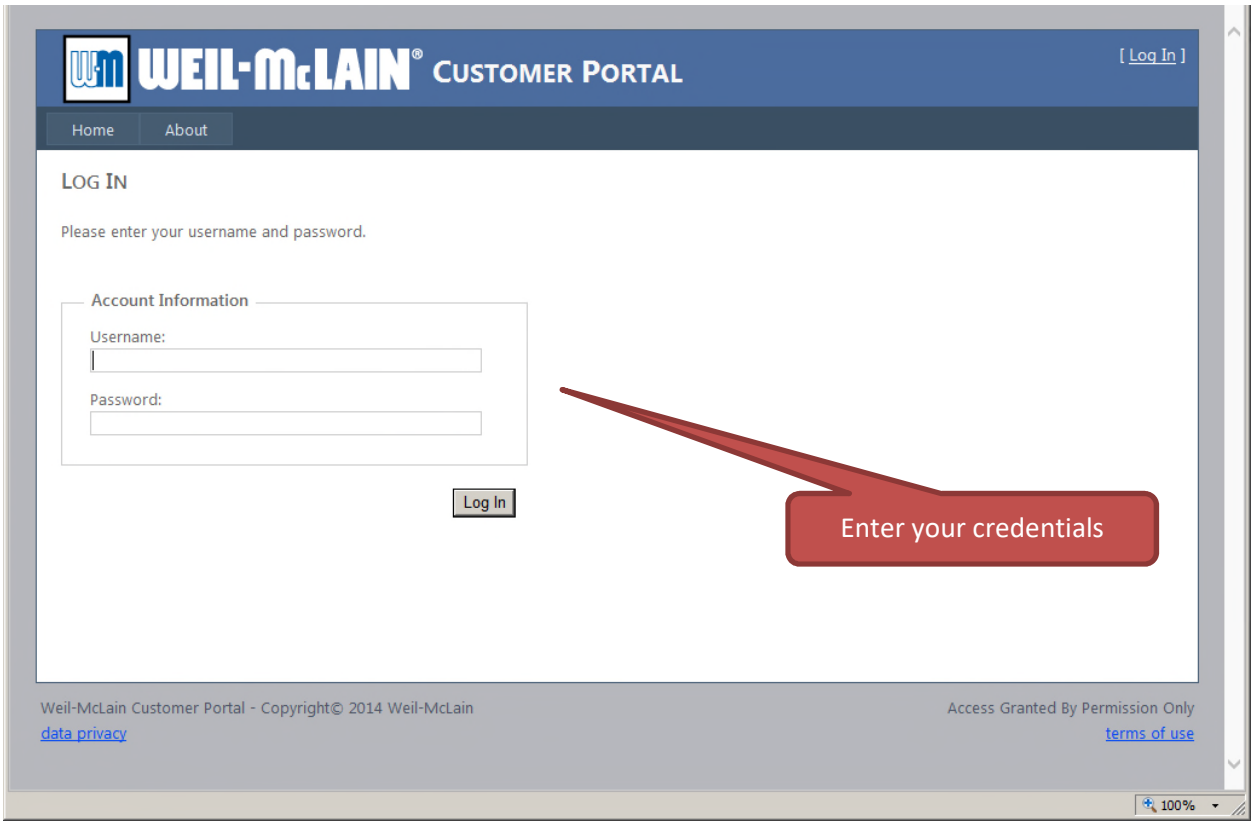
https://orders.weil-mclain.com/

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

Logging In



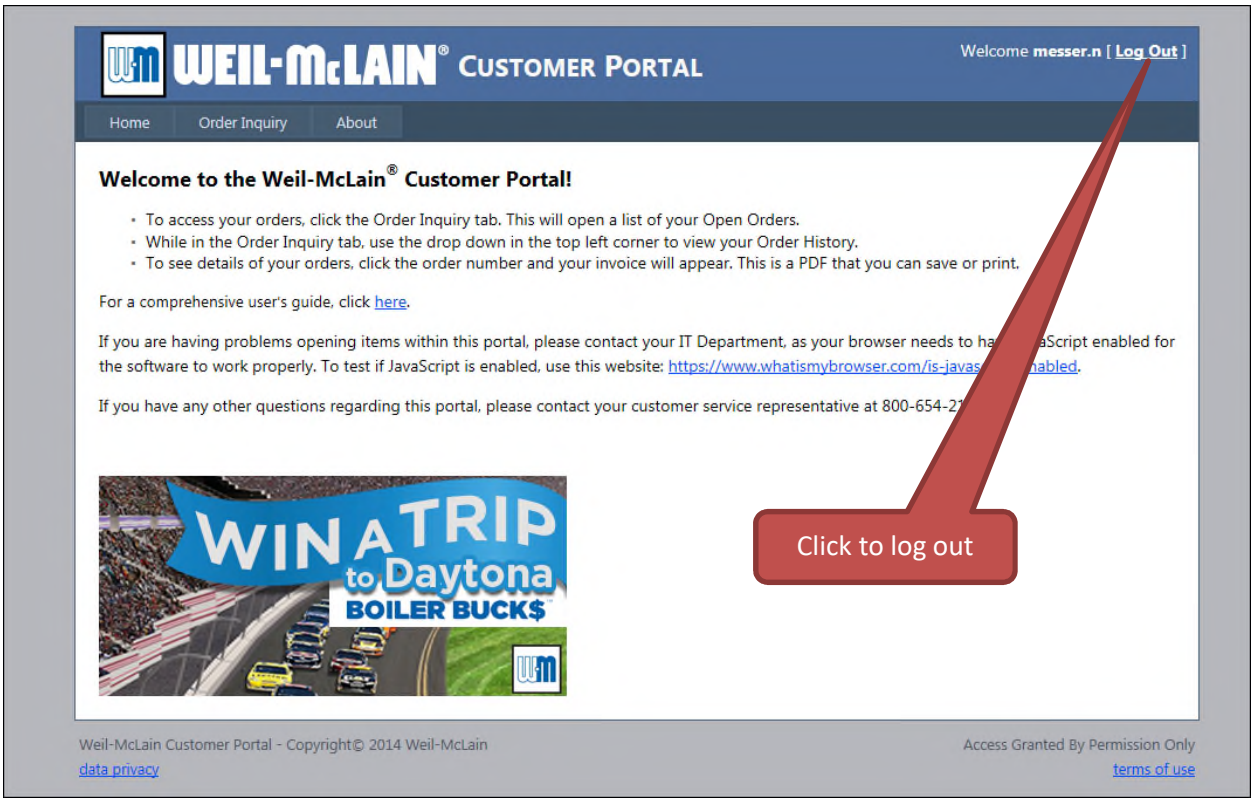
Internet Explorer is not recommended for this application. Use a Google Chrome, Firefox or Microsoft Edge Browser for best user experience.



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 login.help@weil-mclain.com.

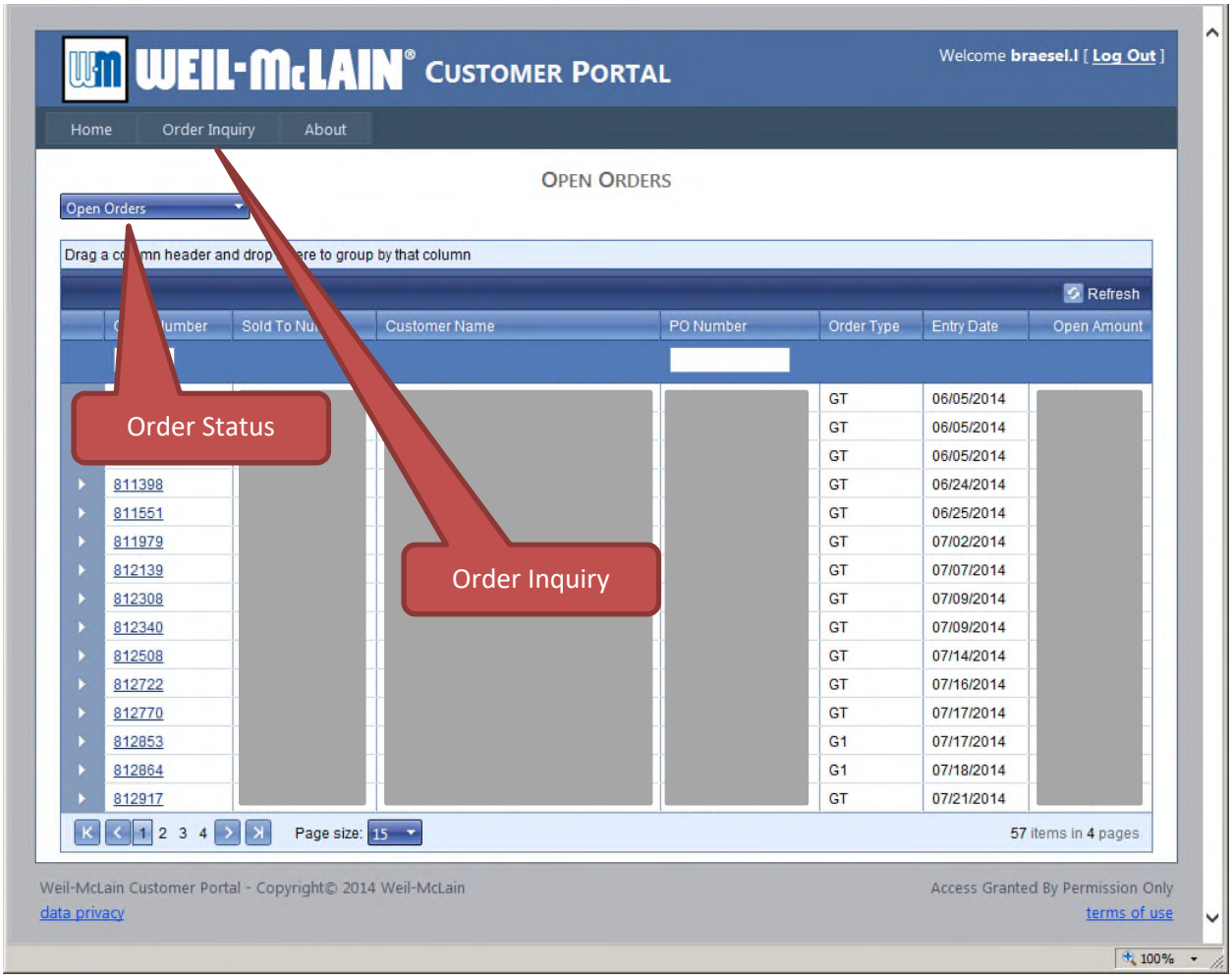
Portal Home Screen



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.

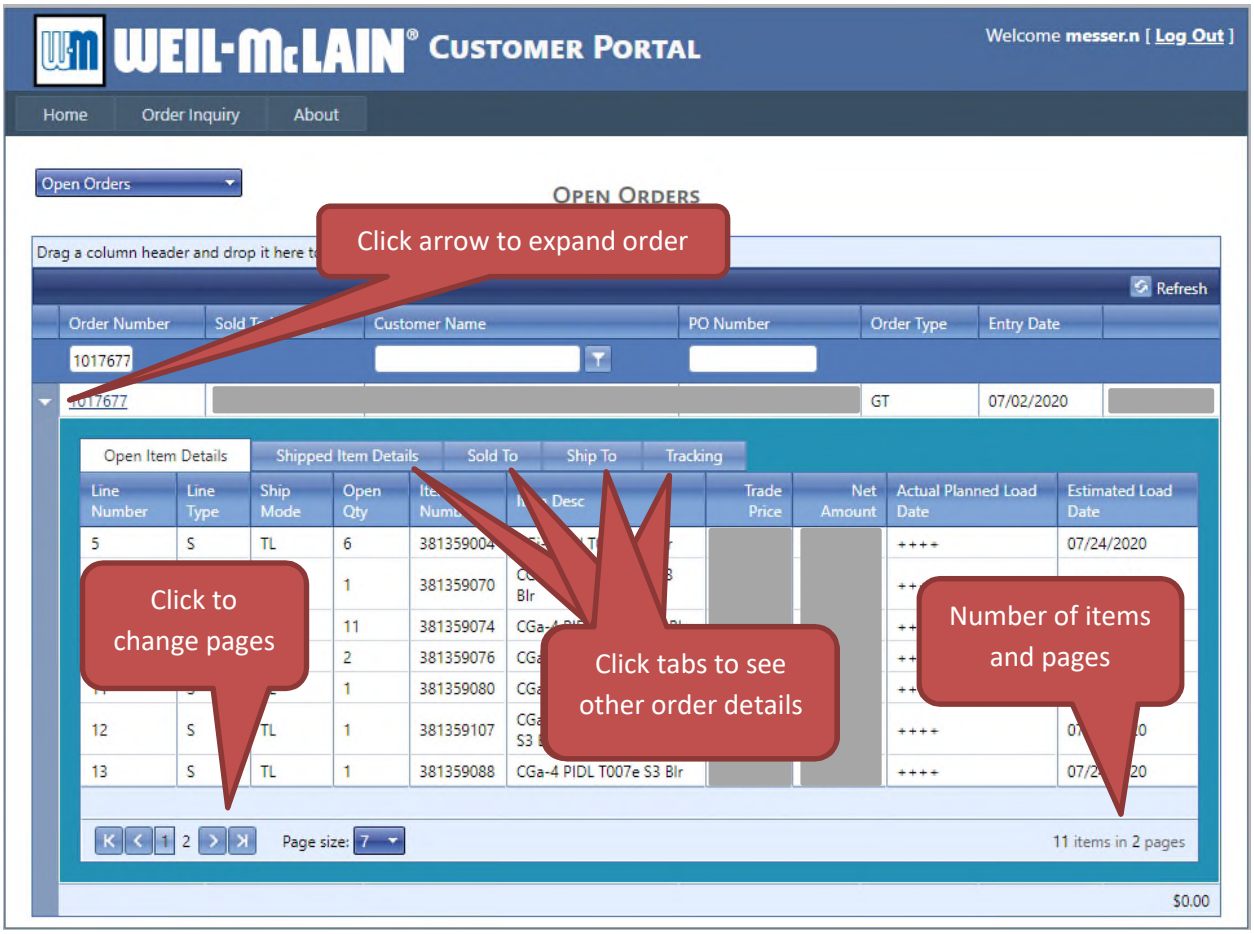
Order Inquiry



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

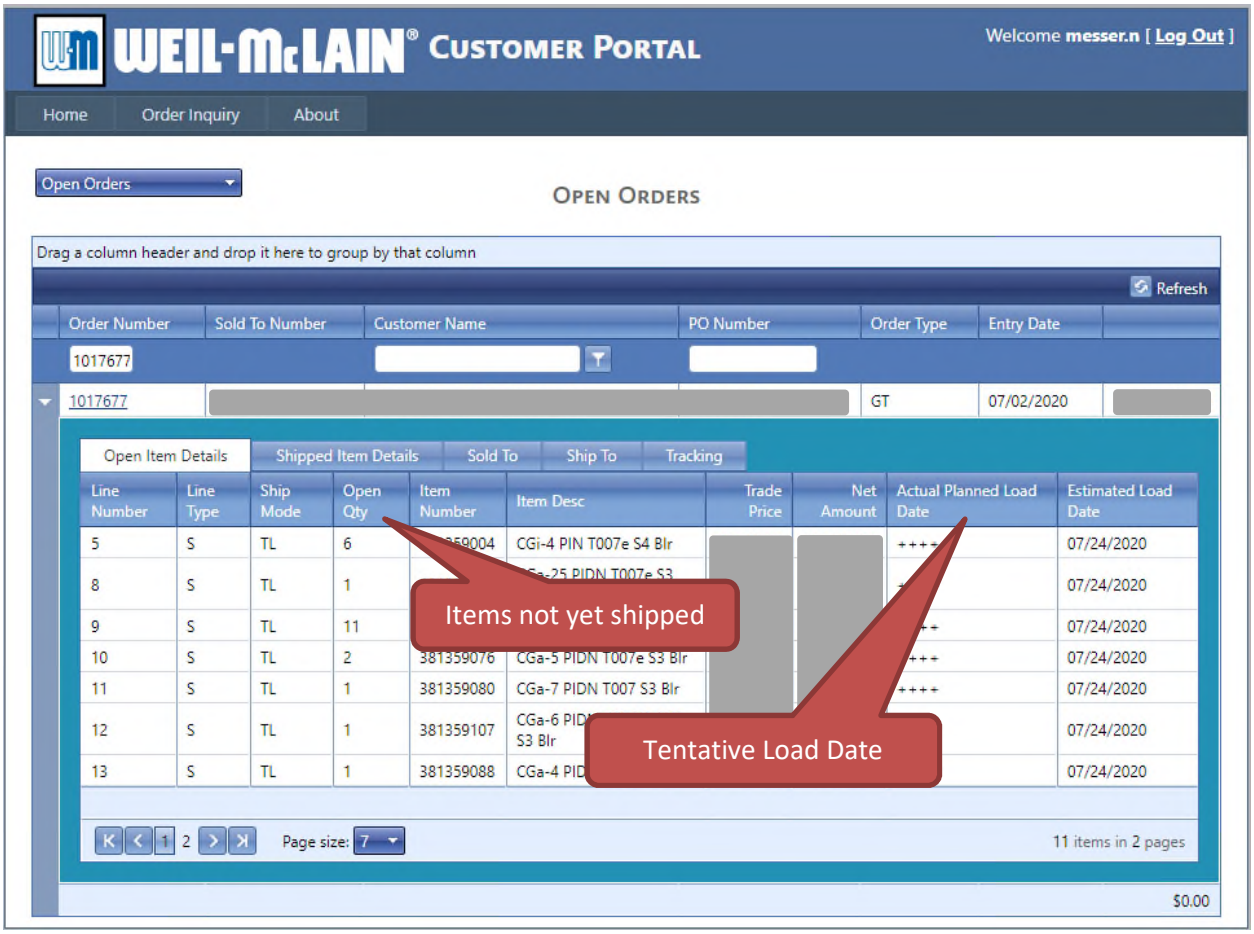


To view the details of an order click the arrow at the extreme left of the order summary line.

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

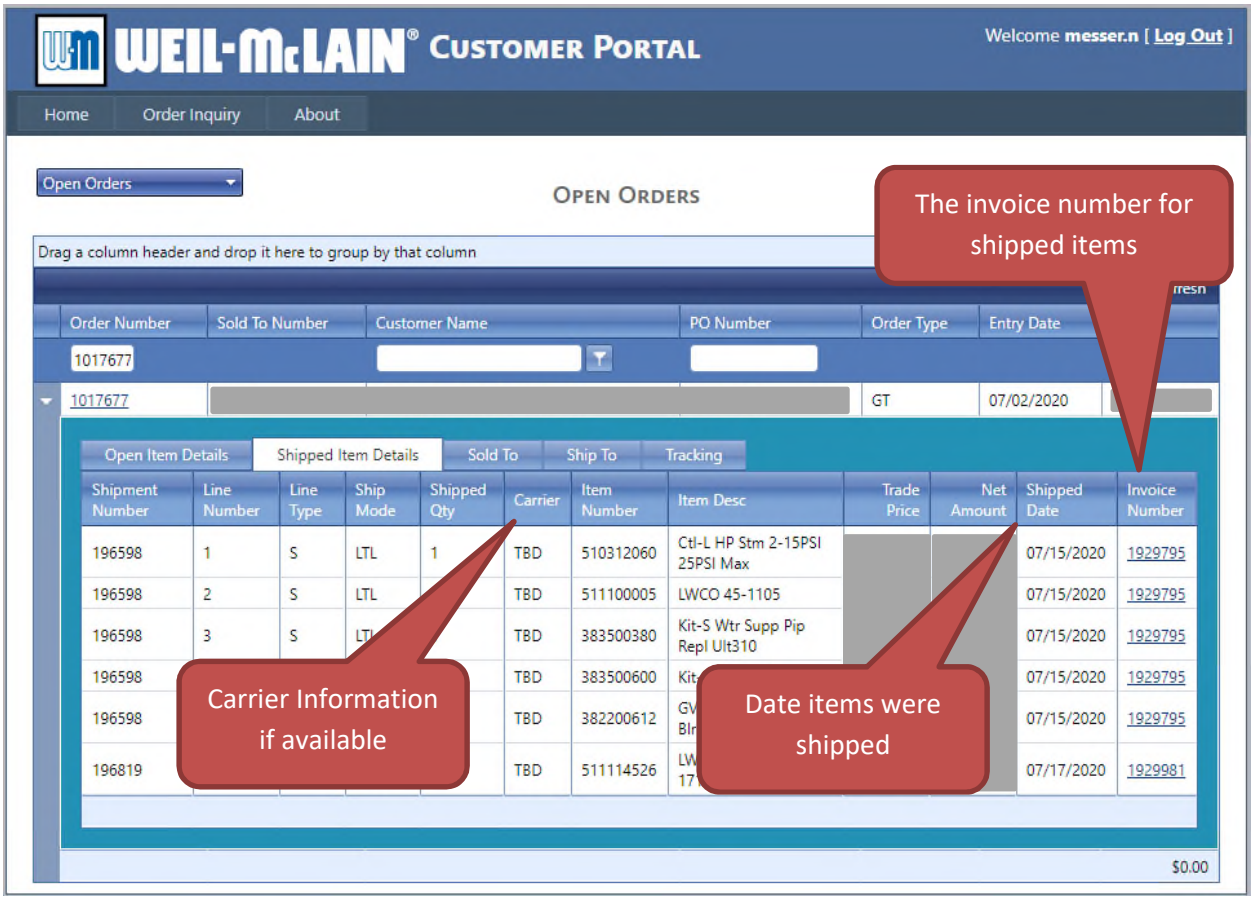


To view the details of the order that have not yet shipped click on the “Open Item Details” tab. This tab can be found right under the order number.

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

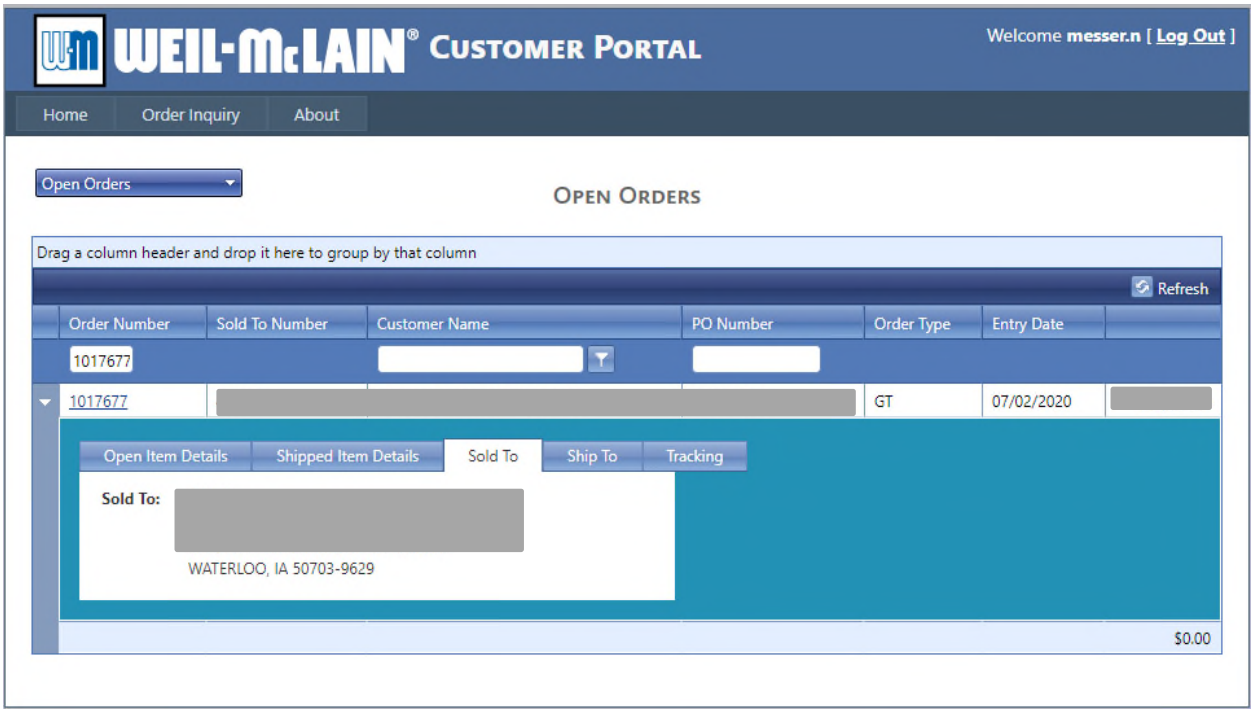


Order items that have been shipped can be viewed under the “Shipped Items Details” tab.

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.

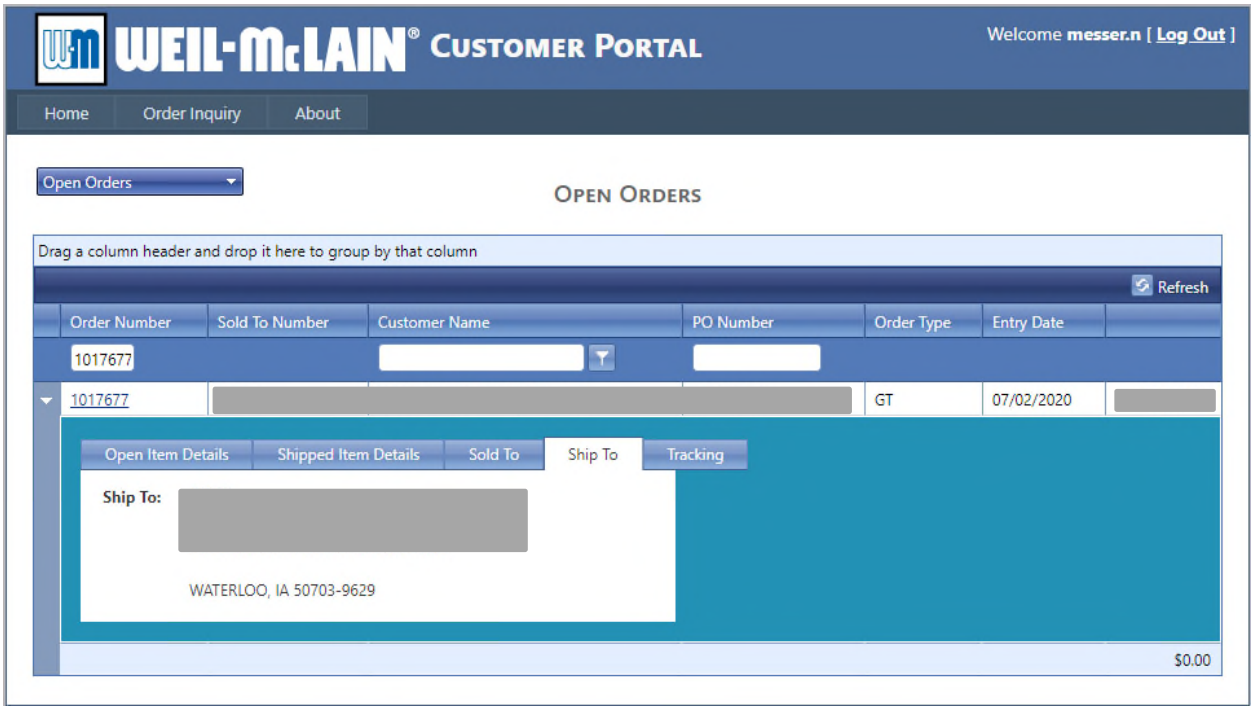
Clicking on the number in the Invoice Number field allows you to generate a copy of this invoice. The invoice will be generated in a PDF file that you can save or print.

Sold To – View



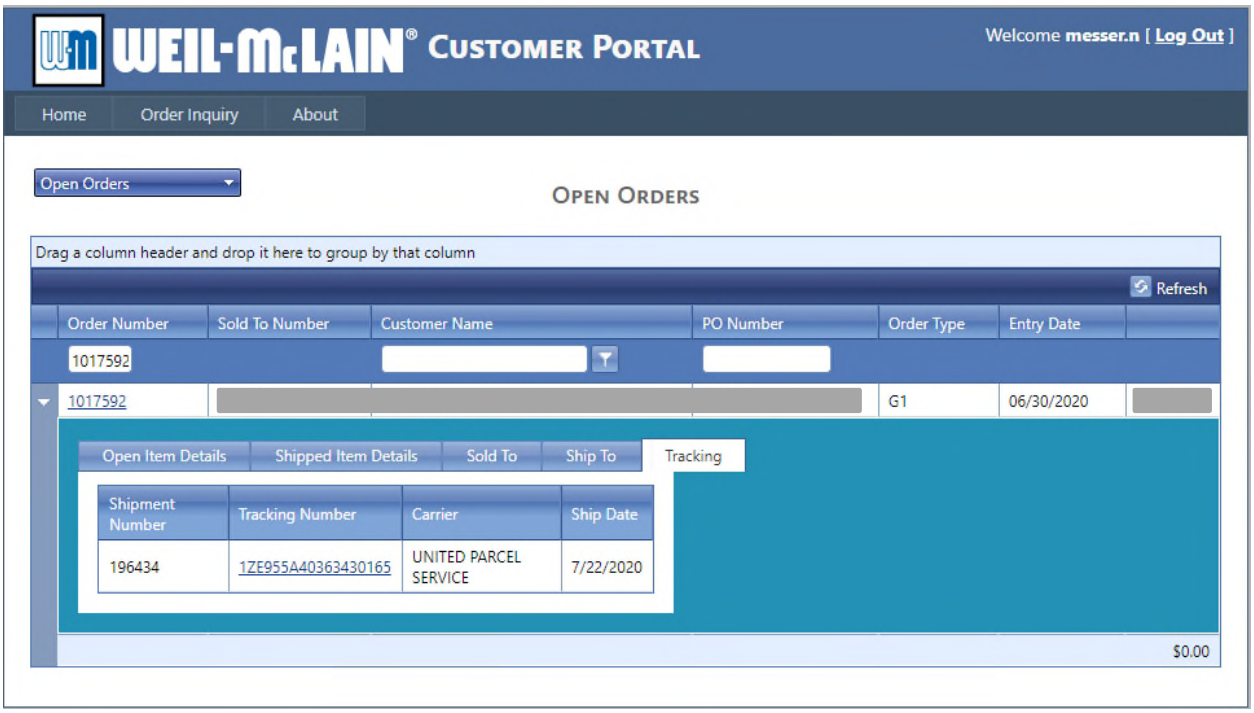
The “Sold To” tab allows you to view which branch the product was sold to.

Ship to – View



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

Tracking – View

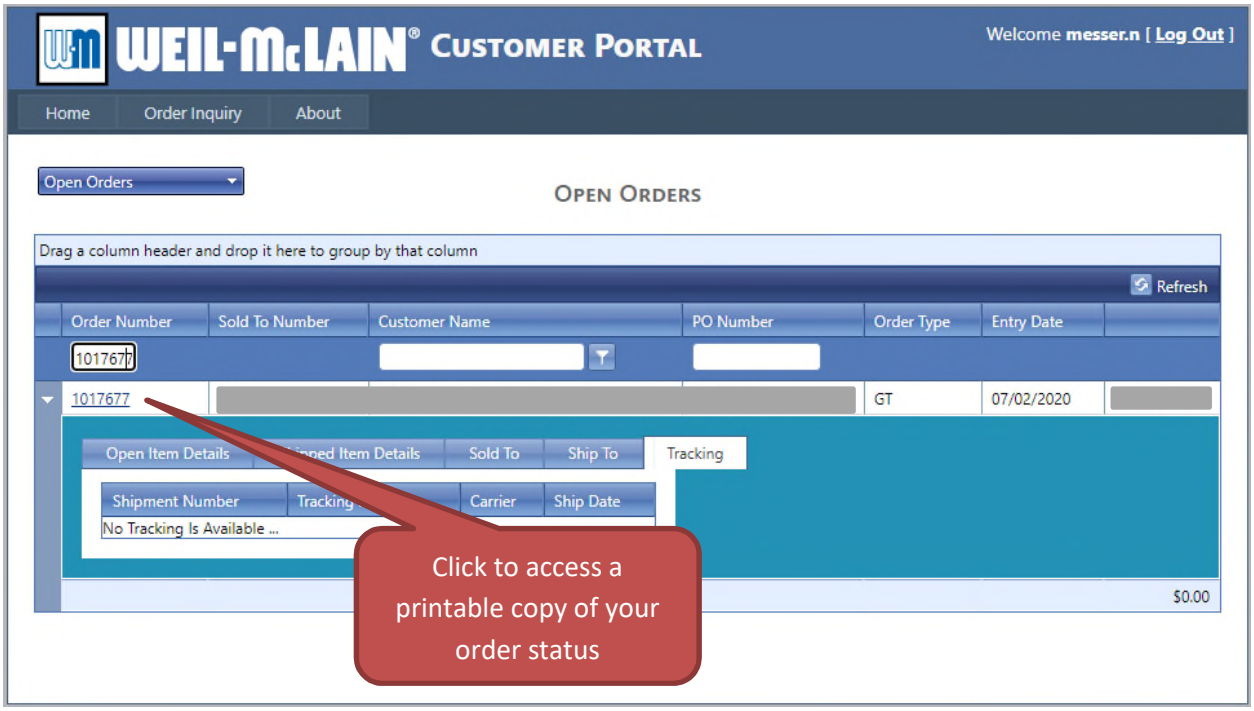


The “Tracking” tab provides you with information on the tracking number, carrier name and the date the order shipped. UPS tracking numbers have a hyper-link which allows you to check on the status of the order on the UPS website.

Printing Order Status

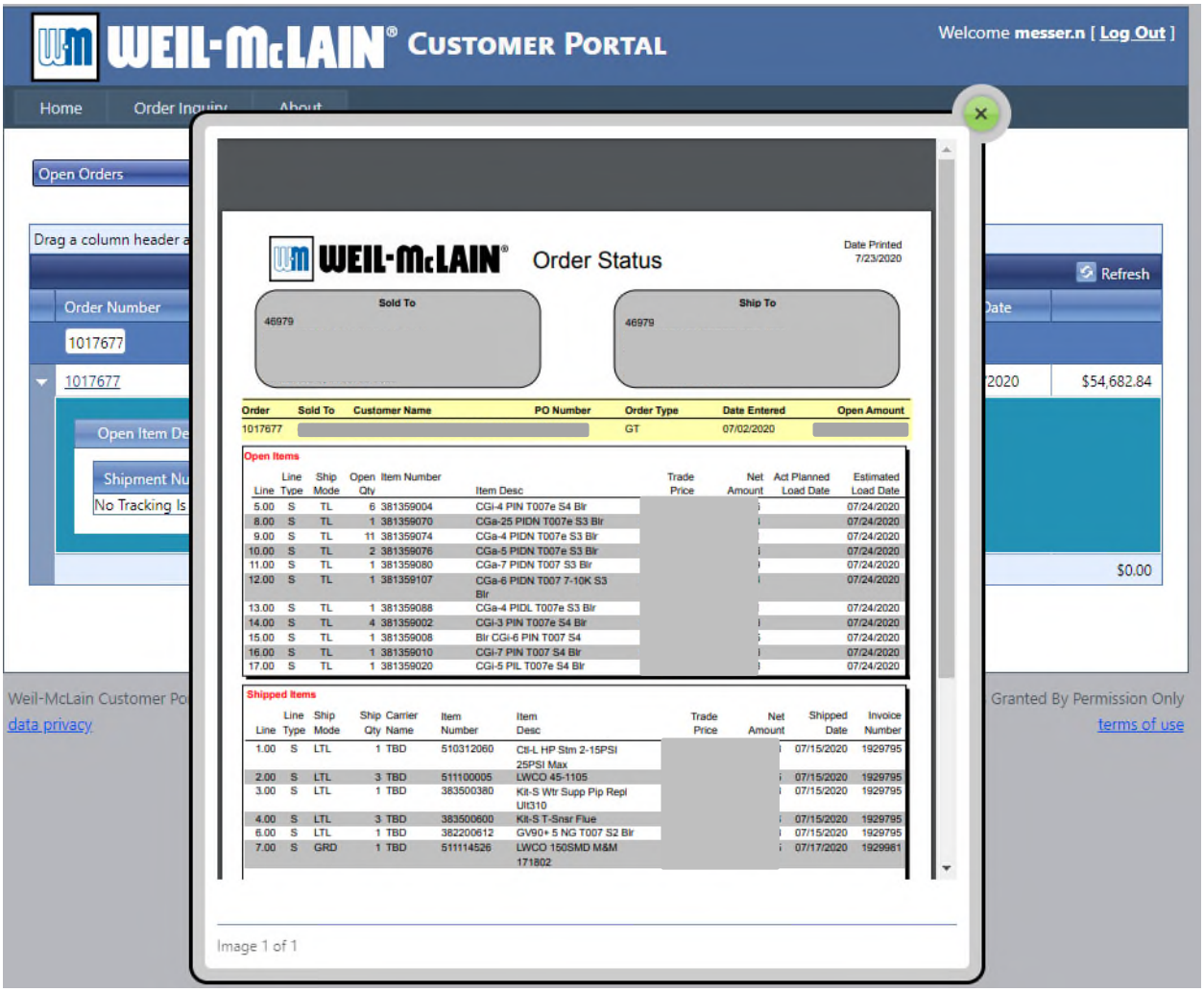
The **Order Inquiry Portal** system also allows you to print or save a copy of your order status.

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



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

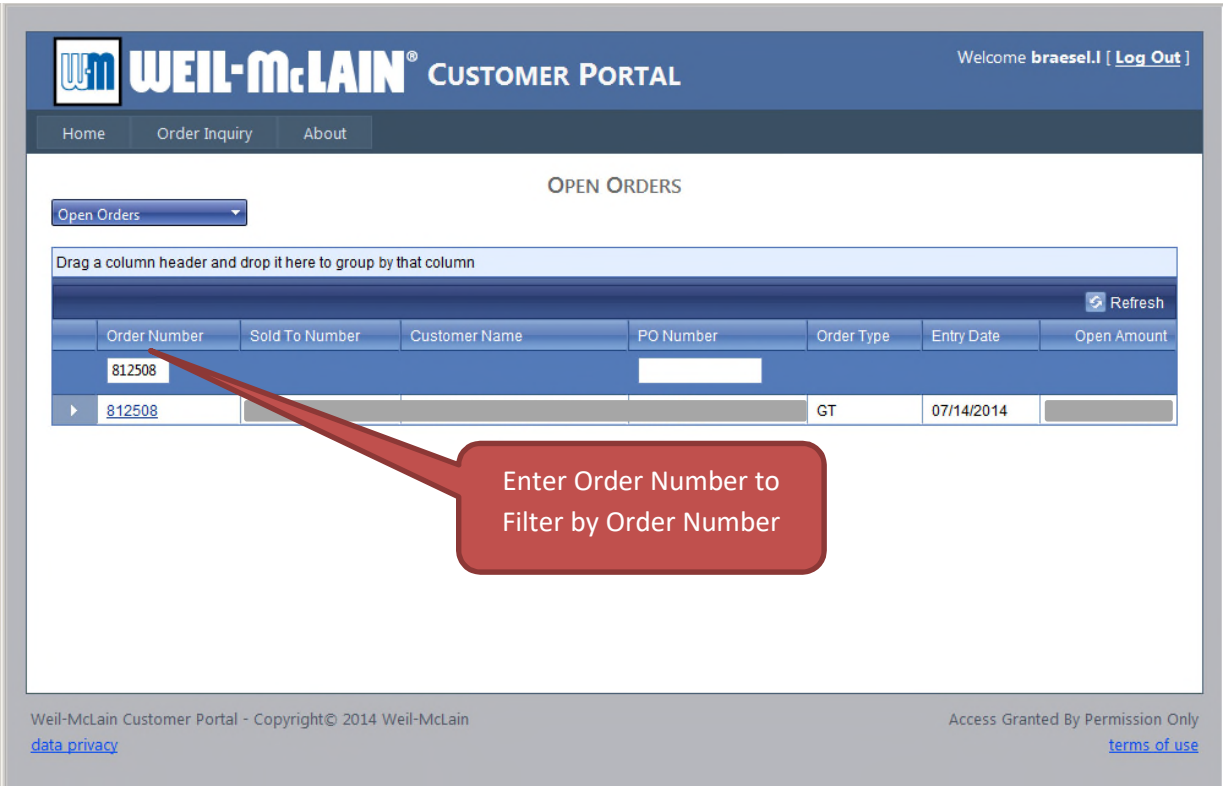
Click the “X” in the upper right hand corner to close the window.



Search Tools

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

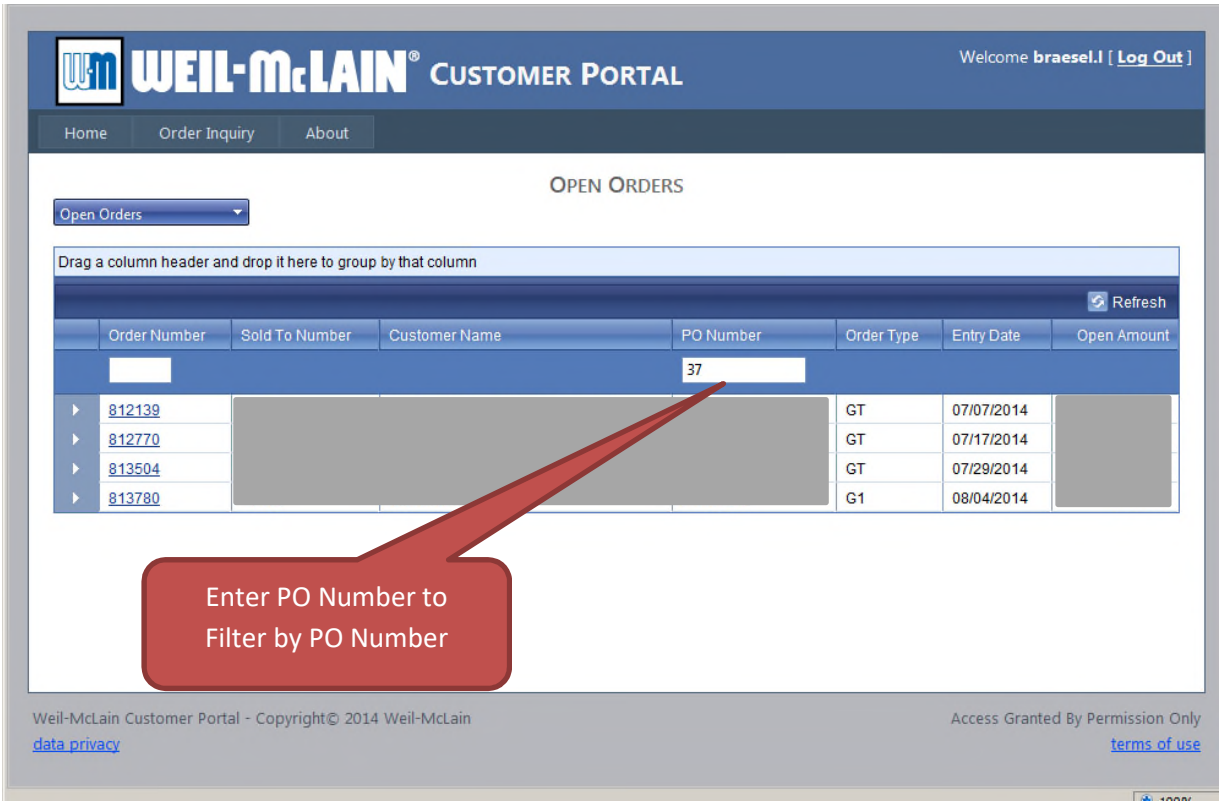
Filter by Order Number



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.

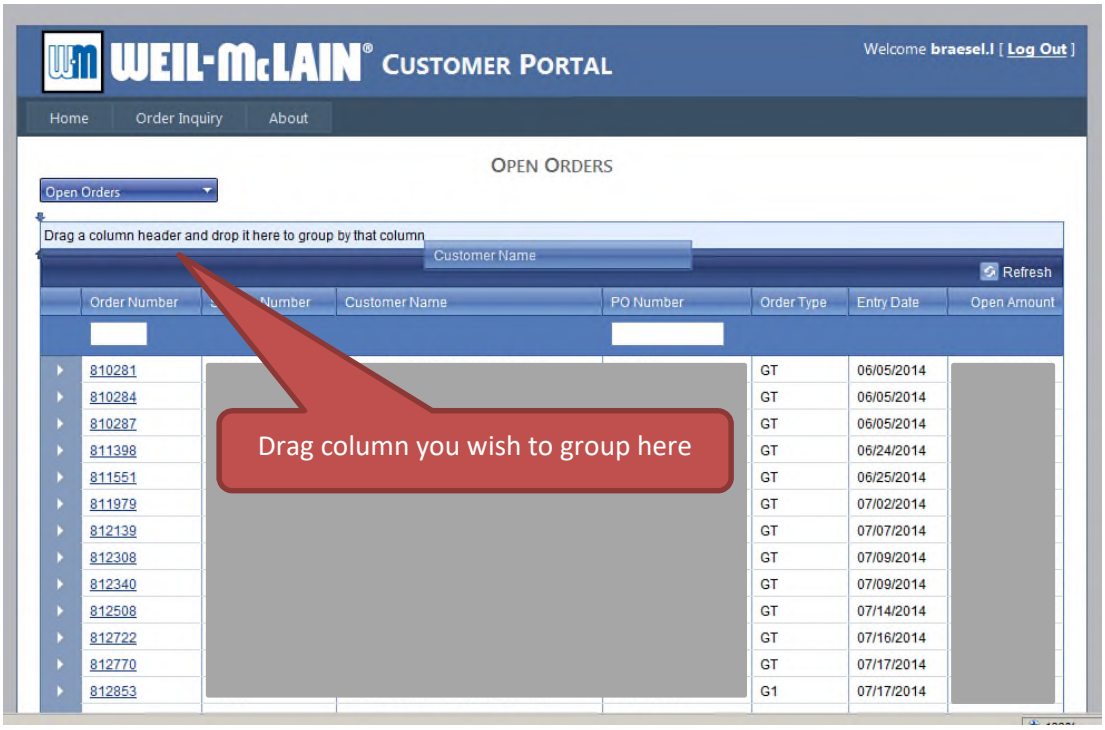
Filter by PO Number



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**.

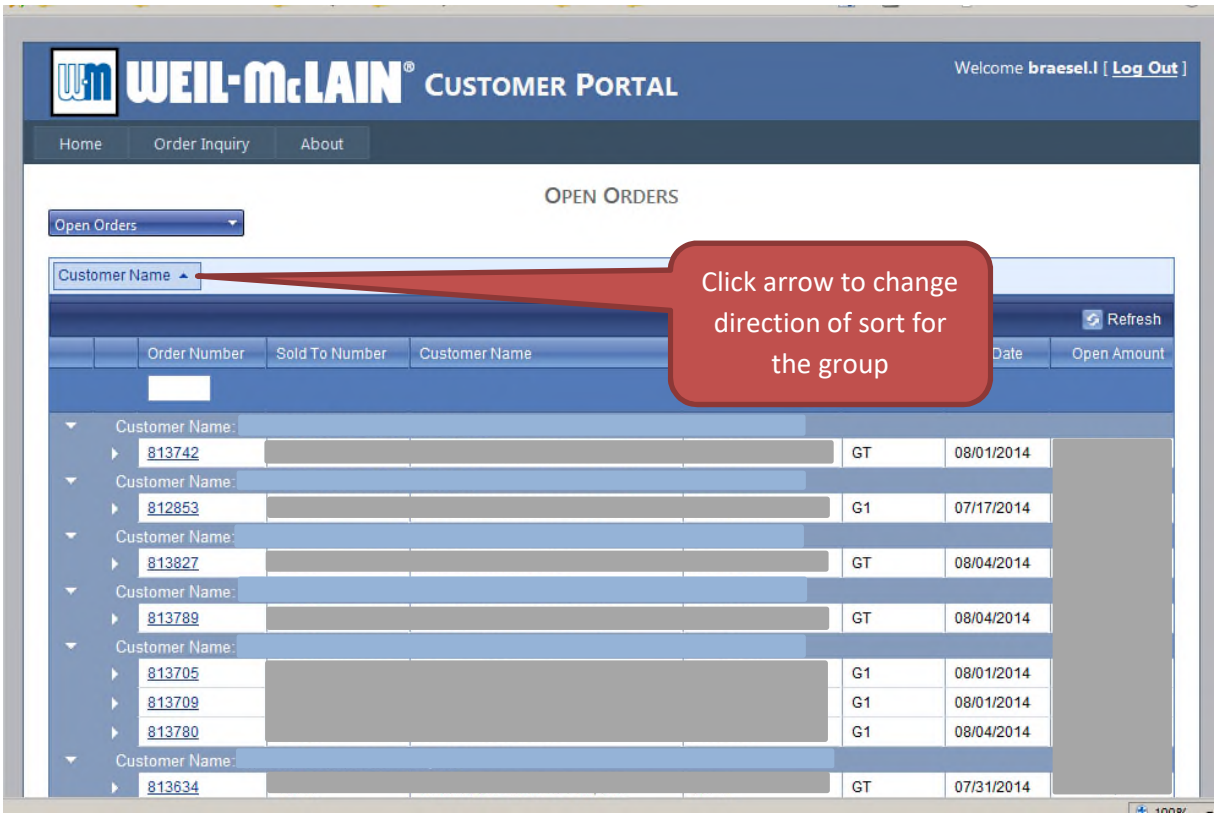
Grouping

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)

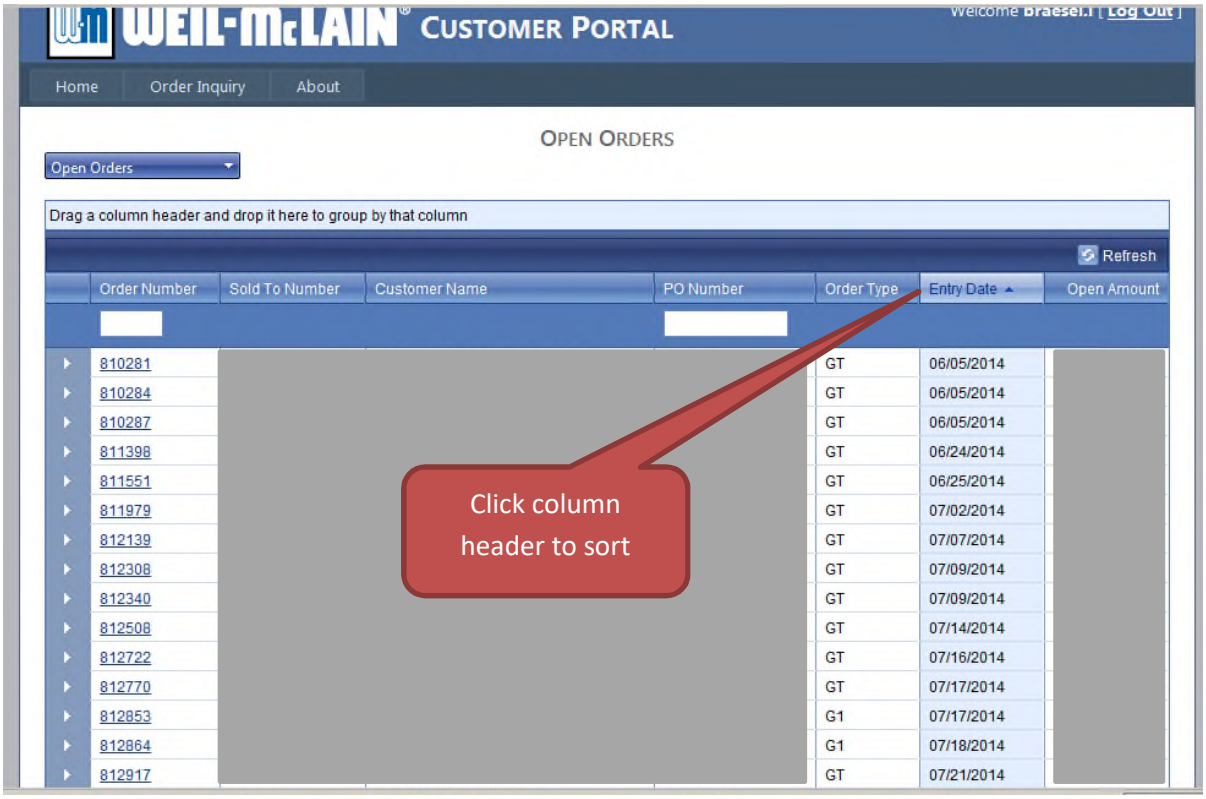


The data is now displayed and grouped by Customer Name.

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

Sorting

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

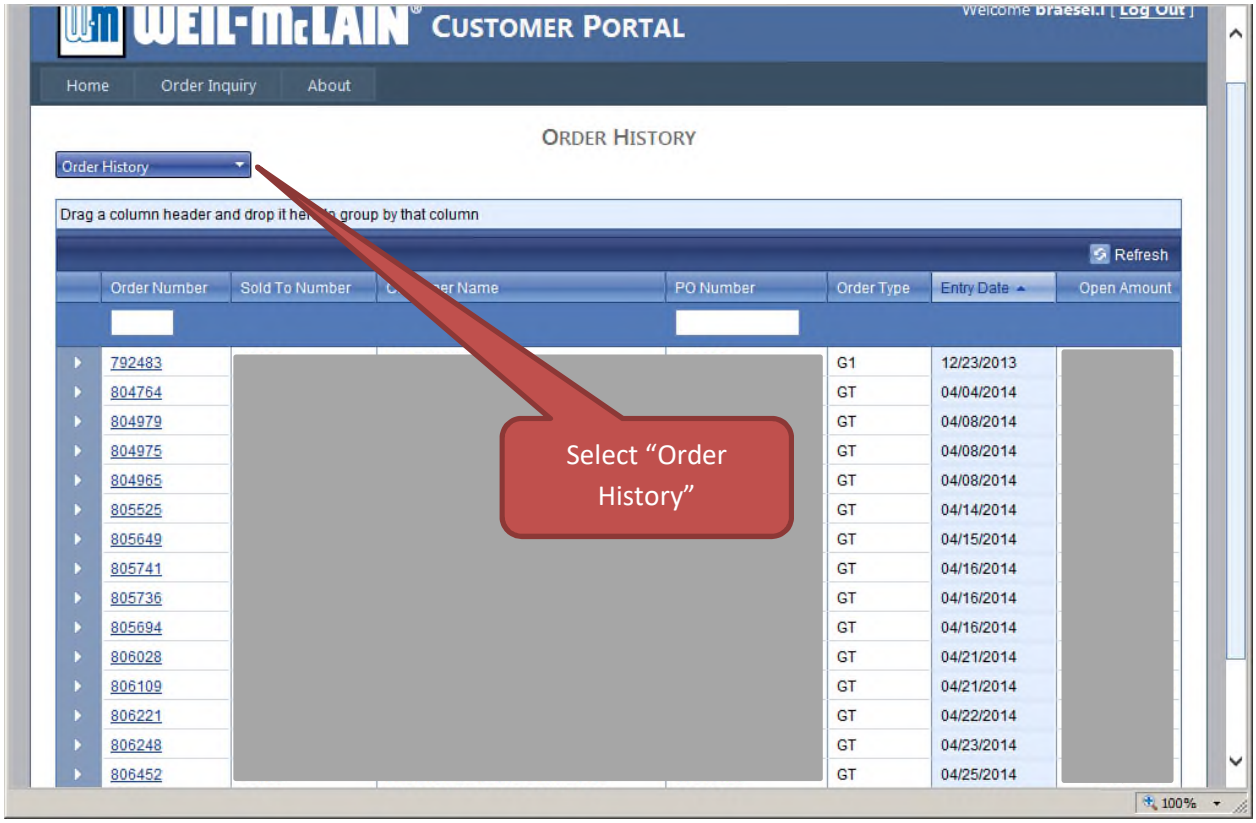


To sort a column, click on the column header. The first click sorts ascending, the second click sorts descending and the third click turns off sorting for that column.

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.

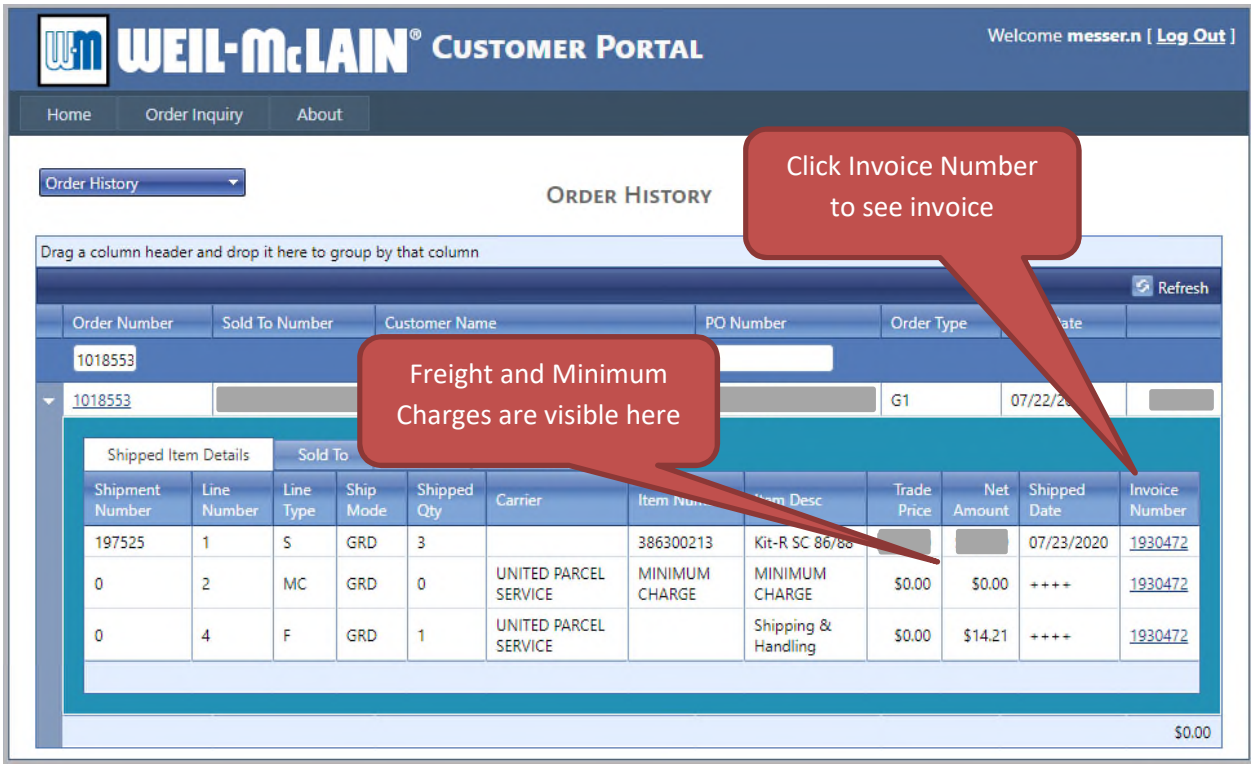


To switch to "Order History" select it from the drop down menu at the top of the page.

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.

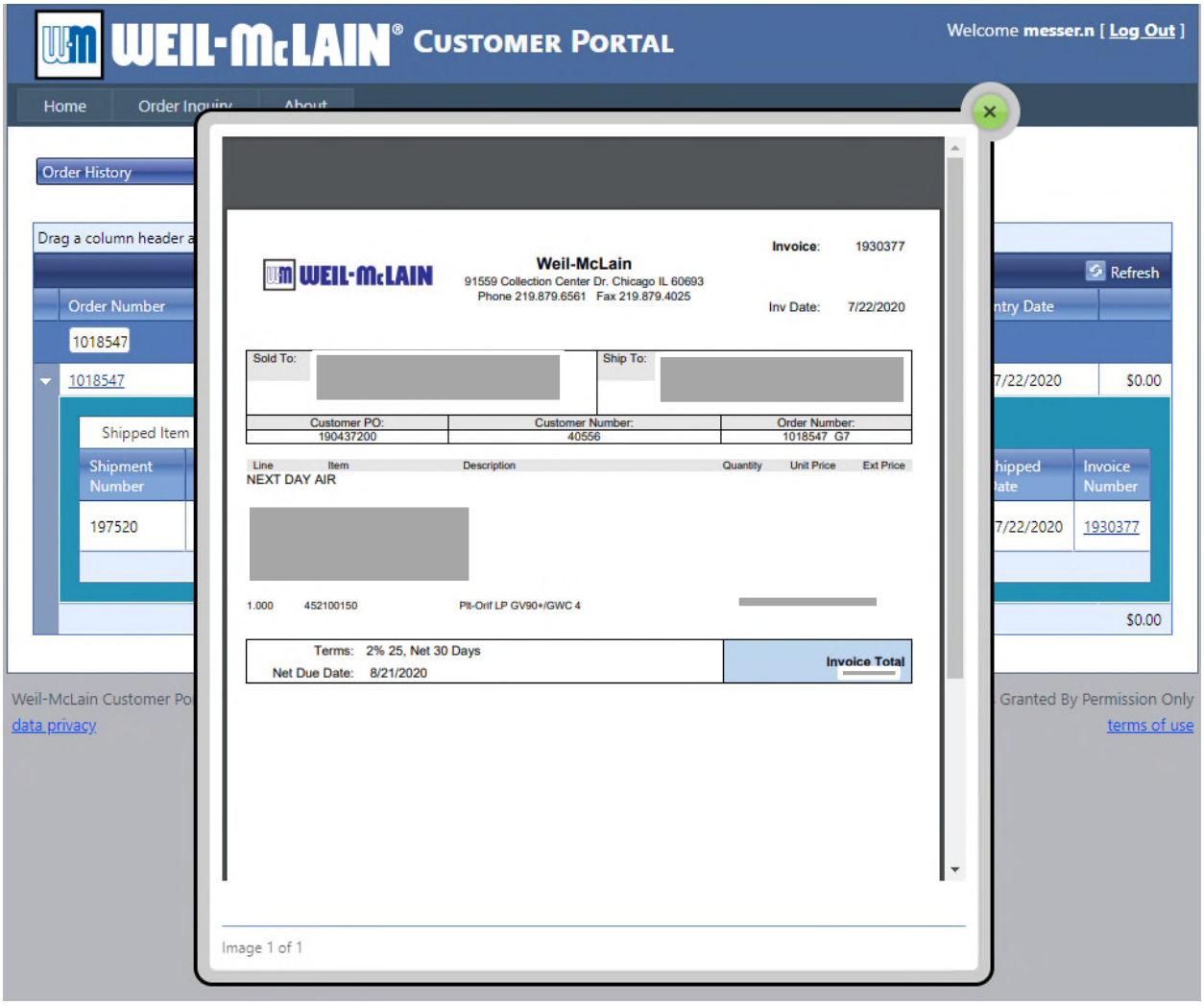
Printing Invoices

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.

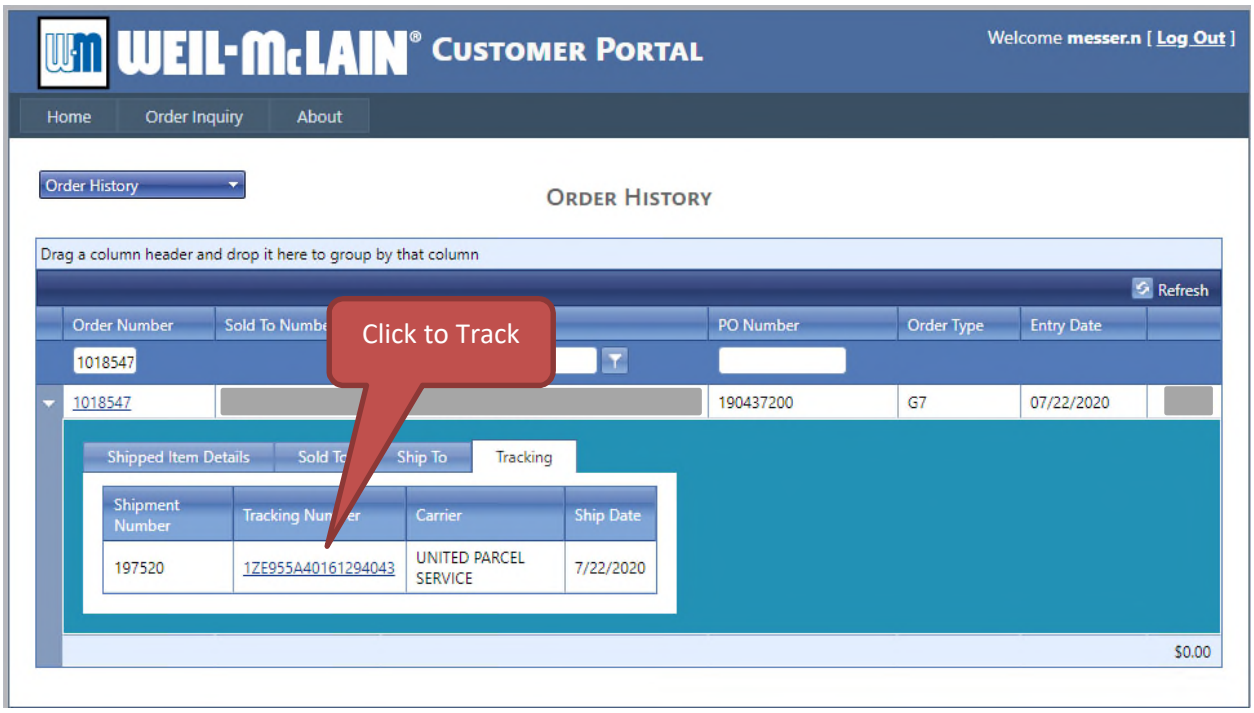


Once the invoice is visible on the screen you can save it or print it to a local printer.

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.



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.