

TO: All Weil-McLain Distributors and Agents
FROM: Dan Neumann, Director of Sales and Marketing Support
SUBJECT: New Order Inquiry Portal

We are happy to announce that our NEW [Order Inquiry Customer Portal](#) is now live. The first thing you will notice with this new portal is a completely updated interface. This screen shot below is the landing page for the new Customer Portal. Please take a moment to read a few of the highlights of this new portal. We've also prepared a [comprehensive user's guide](#) for a complete step by step of the system.

Navigation

This updated 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

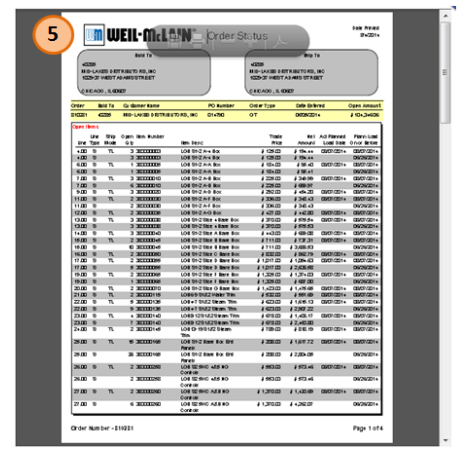
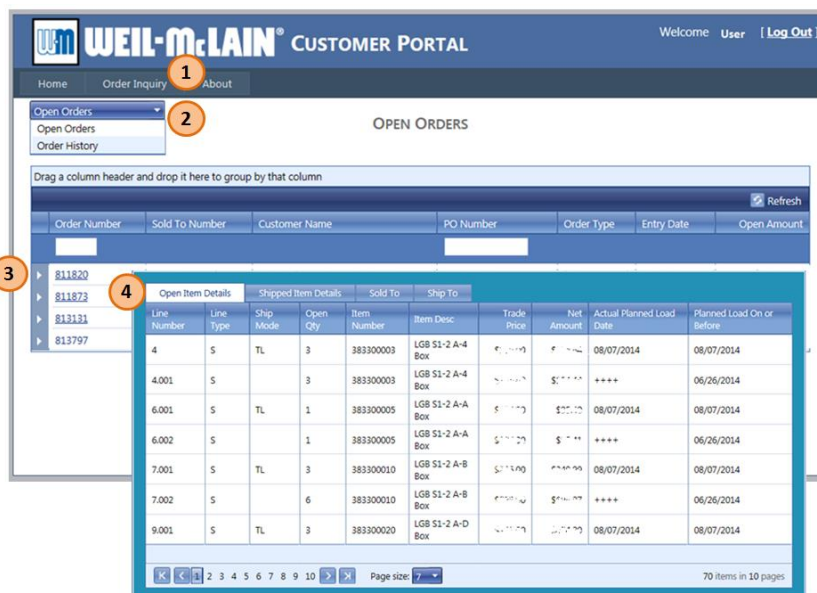


Image 1 of 1

Invoice Retrieval

This new Order Status Customer Portal also has the added enhancement of invoice retrieval. This feature is only available for new orders, not orders that were carried over during the implementation of the new portal. To view an invoice, you must be in the Order History Screen.

6. Choose **Order History**
7. Click the arrow to expand the **Shipped Item Details**
8. 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.

Order Number	Sold To Number	Customer Name	PO Number	Order Type	Entry Date	Open Amount
792483	40033	JACOBY ENTERPRISES	076806	G1	12/23/2013	\$79.43

Line Number	Line Type	Ship Mode	Shipped Qty	Carrier	Item Number	Item Desc	Trade Price	Net Amount	Shipped Date	Invoice Number
1	S	GRD	2		592800011	Seal-SC 2.31x0.208x0.203	22.53	22.53	12/26/2013	1587588
2	S	EMT	1	TBD	312900006	Sc-R 2918 FI	22.00	22.00	01/08/2014	1618107
4	T	GRD	1		Tracking	1Z9955A40357905039	22.00	22.00	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 added 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 bring up all 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 valued 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". Pretty self-explanatory, but this feature is new and exciting.

Drag a column header and drop it here to group by that column						
Order Number	Sold To Number	Customer Name	PO Number	Order Type	Entry Date	Open Amount

We hope you find this new and improved Order Inquiry Customer Portal a valuable tool. If you need to retrieve or set up your credentials to log in, please email your contact information and branches you manage to marketing@weil-mclain.com. If you have any questions regarding your orders, please contact a customer service representative (M-F) between 7:00 a.m. and 4:00 p.m. CST at 800-368-2492.