My Account Dashboard

Thermal SUPPLY INC.

My Account

1 | View and Pay Bill

Click this link to visit **Billtrust** - You'll need to create a separate login for billing

2 | Current Profile

View the current login account details. Toggle between accounts by clicking **"Change Account"** drop down menu and selecting the profile you would like to use (this can be a great feature if you require multiple accounts for different team members/roles or locations within the company)

Notes:
The **"Change Account"** drop-down will not initially show unless you have multiple accounts set up. To add additional account profiles to this page please contact our web support team at **dlewis@thermalsupplycom**.

Screenshot content

f in   ▲ DARCY (53722)   🔒 Logout   🛒 YOUR CART   Website Feedback

Thermal ONLINE

Products   Brands   Training   Current Promotions   Featured Shopping   Contact Us   My Account   Search our store... 🔍

Welcome, DARCY
dlewis@thermalsupply.com (53722)

[View and Pay Bill]

Current Profile   [Change Account ∨]

DARCY LEWIS
dlewis@thermalsupply.com
Cust Code: 53722 | DARCY LEWIS
☑ Edit Profile

🔍 Track My Order

Note: Searches according to PO Number will return results only if the associated order is "complete".

[Search by Order, Invoice or PO #...] [Track Order]

✉ Your Recent Web Orders [+ More]

Show orders for the past [30 ∨] days. (100 orders max)

There are no open orders for your account

📋 Recent Company Orders [+ More]

No orders for the past 30 days

⚙ Shopping Tools   Manage Favorite Links

☆ Favorites List   ☰ Frequently Ordered Items
▤ Order Templates   🛒 Saved Carts
🕓 Search History   ✓ Set Checkout Defaults
☰ Wish Lists

⚙ Account Tools   Manage Favorite Links

🔑 Change Password   📄 Current Statement
▤ Customer Resources   ✉ Invoices & Shipments
🔄 Open Backorders   ⓘ Privacy Settings
🕓 Purchase History   🖶 Recent Web Orders
🔄 Track Orders   🖶 View Orders
❝ View Quotes   ⓘ Web Account Info
⏻ Logout

My Account

3 | Track My Order
Search for an order using the order, invoice, or PO number to obtain the tracking details

4 | Recent Web Orders
View the recent orders placed through the webstore via only your account

5 | Recent Company Orders
View ALL the orders placed through your company recently. Includes orders placed by anyone via:
- Online Webstore
- In-Person
- Phone
- Email

Notes:
You can view your orders up to 30 days for both web and company orders. To view older orders up to 1 year click **"+ More"** and select a time range.

Shopping Tools

Shopping Tools

Overview

1 | Favorites List
A list of items that have been "Favorited"

2 | Order Templates
Templated order lists for faster checkout

3 | Search History
Review previous searches

4 | Wish Lists
Items organized in wish lists

5 | Frequently Ordered Items
The top 25 items ordered on your profile

6 | Saved Carts
Any carts that are saved can be revisited here and added back to the current cart

7 | Set Checkout Defaults
Customize your checkout default preferences to use **"Express Checkout"** which allows for a easier and quicker checkout process

Favorites List

Utilizing the **"Favorites List"** feature can be helpful when you want to revisit items quickly and sort them into categories.

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Favorites List

1 | Favorite a Product

When on a product page or browsing in the search results click **"+ Add To Favorites"**

2 | A pop-up will appear to assign the product to a category:

a. Select a category from your list of **"Favorites Categories"**

b. Manage your categories

c. Create a new category if needed

d. Click **"Save"** to assign the item to the category

Search Results

Searching for: **AR-10000**　　　　　　　　　　　Viewing Page 1 of 1 (2 results)

View: 42

☐ Compare

*PRIMARY FILTER ASSEMBLY
Manufacturer: MANITOWOC FSG SERVICES LLC
Manufacturer Part #: AR-10000
SKU: AR-10000

＋ More Info

$226.23
Call For Availability
UOM : EA

QTY:

Add to Cart

①

⊕ Add To Favorites ⇕

☐ Compare

PRIMA
Manuf
SKU: A

$232.99
In Stock at Seattle
UOM : EA

②

Part #: AR-10000　　　　　　　　　　　✕

a
*PRIMARY FILTER ASSEMBLY
Favorites Categories　　　　　　　**b** Manage Categories
☐ Air Conditioners

c

Don't see the category you need? Enter a new one below.

Category Name

⑦ What is a category?　　　　　　　**d** Save

Shopping Tools

Favorites List

1 | View Favorites

Click **"Favorites List"** from the account dashboard to view all your Favorited items

2 | Categorize & Search Through Your Favorites

a. View your favorites by category

b. Sort your favorites by category, part # and more

c. Quickly search by product keyword

d. Click **"Add to Cart"** to quickly add the item to your cart (this will automatically add a quantity of 1 item to your cart - if you would like to order more update the QTY above before adding)

Shopping Tools

Favorites List

1 | Category Management

To make updates to your favorites categories click **"Add/Edit Categories and Items"**

2 | Manage Categories

a. Add a new category

b. **"View/Remove/Manage"** the current products in that category

c. Edit the name of your category or delete the entire category

d. Select this checkbox to **"Share a Category"** with other users in your company

Notes:
Shared Categories are a great way to collaboratively have others on your team view, add and purchase from categories. When a category is shared it will be in parenthesis next to the category name.

Favorites

Jump to Category: Please select a category ⌄ (add/edit categories and items) ①

Sort By: Please select sort option ⌄

Search Favorites: _____ (clear) Search

View: 42 ▾

Equipment (shared)

HEAT PUMP INDOOR 12K BTU LV SERIES
Manufacturer: DAIKIN DUCTLESS
Manufacturer Part #: FTXS12LVJU
SKU: FTXS12LVJU
📄 Installation Manual
📄 Submittal Data Sheet
⊞ More Info

$513.88
In Stock at Seattle
UOM : EA
QTY: ___ ⬍
Add to Cart
★ Favorite Item ⟳

② **Category Management**

MANAGE CATEGORIES

Shared	Category Name	# Items	ⓑ	ⓒ
☐	Van Stock	4	View/Remove/Manage	Edit 🗑
☑	Equipment	2	View/Remove/Manage	Edit 🗑

⚠ **What is a shared category?**
Categories may be shared with other users in your company.
This will let other users from your company view the favorites you create.

Add Categories

ⓐ
Category Name: _____

ⓓ
☐ Share category?   Submit

Order Templates

Order Templates can be used to create a templated list of set products that can easily be ordered again.
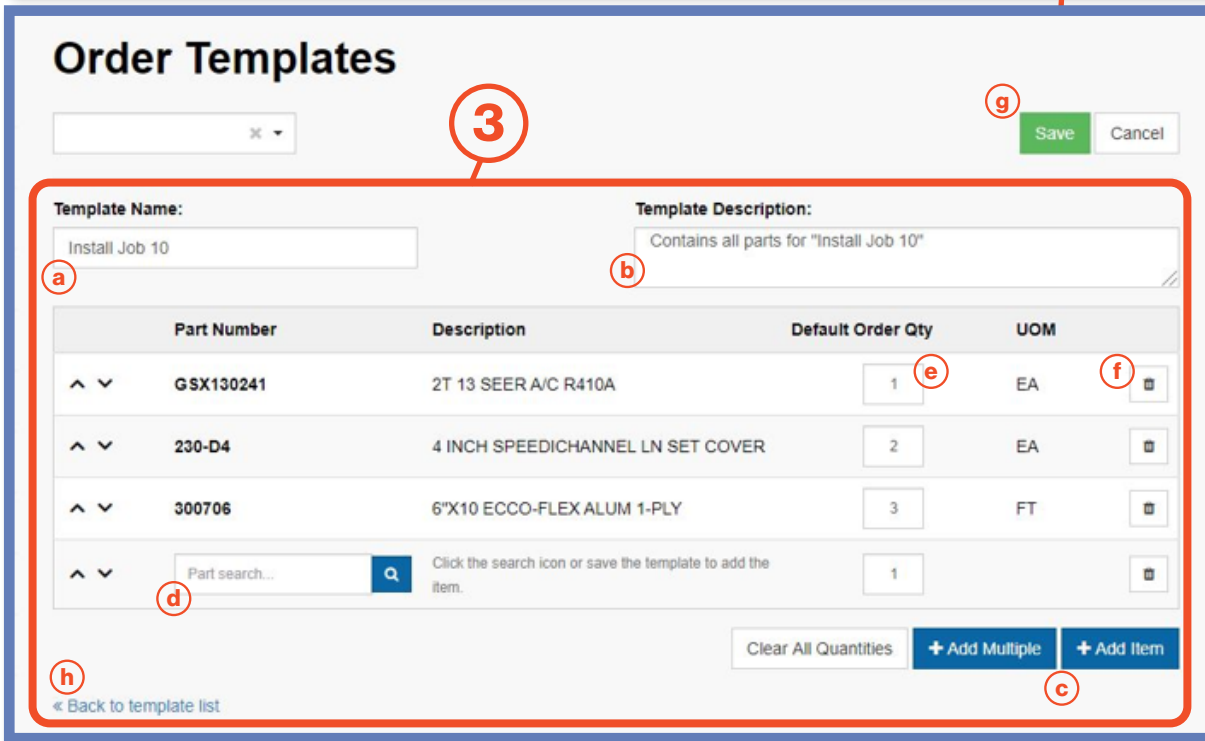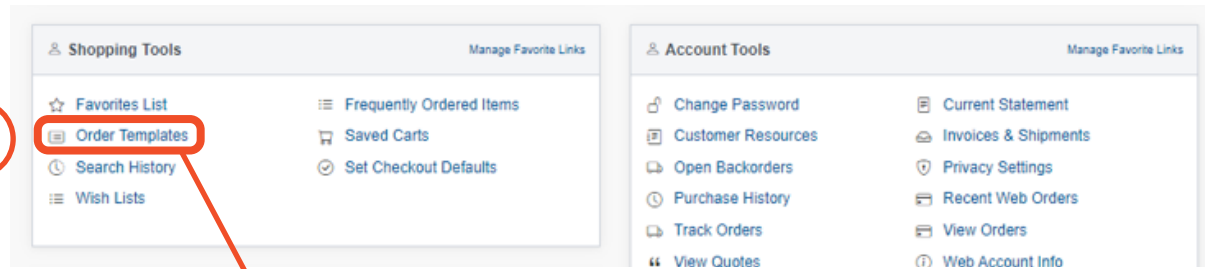
Shopping Tools

Order Templates

1 | Click **"Order Templates"** to start creating a new template or to view current templates

2 | On the next page click **"New Template"**

3 | You can now add in the details of your Order Template:
  a. Add a Name for your template
  b. Add a Description
  c. Either copy/paste multiple products at once **OR** add them one at a time
  d. If you choose the latter you can search for the item by keyword or product #
  e. Add the Default Order Quantity (these fields can be easily cleared below)
  f. Delete an item
  g. Save your template
  h. Go back to the template list on the previous page

Shopping Tools

Order Templates

Once your Order Template has been saved and created you can use it to make the check out process faster.

1 | To quickly add the order to your cart click **"Add to Cart"**

2 | If you would like to change the default order quantities you can update individual item quantities before adding to your cart

3 | Use the drop-down to easily switch order templates

4 | Edit or Delete the template

Notes:
To the right of the Order Qty you can view the total Purchased Qty and Invoice Count within a specific time range. To change the range use the time period drop-down.

Shopping Tools

Order Templates

When editing an Order Template you can make any changes to the template details or products as outlined in the steps on the previous page.

You will also see some new options:

1 | Permissions
Permissions can be granted to users within your company that allows them to View, Edits or Delete the template

2 | Quick Checkout
Mark the checkbox and complete the fields to enable **"Quick Checkout"**. This feature allows you to assign a specific Ship To, Shipping Method, and Payment Method so that you can skip to those sections of the checkout process

3 | Save your changes

Wish Lists

Wish Lists allows you to easily create a list of desired products to be purchased later. It can also be a useful tool when creating a list to be submitted for a custom quote.

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Shopping Tools

Wish Lists

To add a new Wish List:

1 | Click **"Wish List"** to view, edit, or add new lists

2 | On the next page click **"+ Add Wish List"**

3 | A pop-up will appear that will prompt you to name your Wish List and then click **"Create"**

4 | Click on either the name of the Wish List or **"View"** to edit the list (lists can also be renamed or deleted from these options)

There are two ways that items can be added to a Wish List:

1 | By adding an item from that Wish Lists edit page:

    a. Click the **"+ Add Item"** button and a pop-up will appear where you can search for products by part # or keyword and then add them directly to your Wish List

    b. Click **"+ Non-Stock Item"** to add items that don't exist in the online inventory to request quotes for them (please include the product manufacturer in the description box)

2 | By adding while browsing:

    a. While looking at products you can quickly add them to a wish list by **clicking the drop-down button** next to "Add to Favorites"

    b. A drop-down menu with your Wish Lists will appear allowing you to select a list

    c. You can also create a new wish list
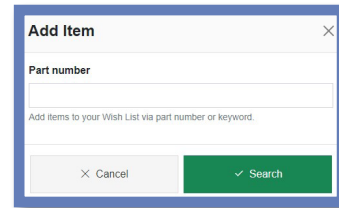
① Wish List

Project 9147 Rename   « Back to lists

Click "Add Item" to search and add an inventory item. Click "Add Non-Stock Item" to add an item that doesn't exist in the online inventory, or shop our site and add Wish List items as you go! Just click the arrow next to "Add to Favorites" and select the Wish List you want to use.

✉ Email List   🖶 Print   Created: 5/17/2023, 7:38 AM PDT

☐ Select All   ☐ In Stock Only   Filter...   Sort By ▼

☐ **AR-10000** $226.23 / EA   1
Total: $226.23

    *PRIMARY FILTER ASSEMBLY

    Call For Availability   ✎ Add Note   🗑

    + More Info

☐ **FTXS12LVJU** $513.88 / EA   1
Total: $513.88

    HEAT PUMP INDOOR 12K BTU LV SERIES

    In Stock at Other Locations   ✎ Add Note   🗑

    + More Info

(a) **+ Add Item**   **(b)** + Non-Stock Item   Delete Wish List

Wishlist total: $740.11

Add to Cart

Add Item   ✕

Part number

[   ]

Add items to your Wish List via part number or keyword.

✕ Cancel   ✓ Search

② Power Tool Accessories

Tools / Power Tool Accessories   Viewing Page 1 of 3 (25 results)

☰ ▦   View: 12 ▼

☐ Compare

1/4 + 5/16 x 2-3/4"REVERSIBLE HEX DRIVER $10.10

Manufacturer: MALCO PRODUCTS INC   In Stock at Portland
Manufacturer Part #: MSHLC   UOM : EA
SKU: MSHLC
                                                QTY: [   ]
+ More Info
                                                Add to Cart

                                    ⊕ Add To Favorites ◇ **(a)**

                                    Add To Order Template
☐ Compare   Add To Wish List

1/4 + 5/16 x 6" REVERSIBLE HEX DRIVER   Project 9147   **(b)**
                                    Portland Team
Manufacturer: MALCO PRODUCTS INC   Beaverton Team
Manufacturer Part #: MSHXLC
SKU: MSHXLC   + Create Wish List   **(c)**
+ More Info
                                    Add to Cart

Shopping Tools

Wish Lists

Additional features to note on this page:

    a. View product price and change item quantities

    b. Add notes for the item that you would like to communicate to our team when conducting custom quotes

    c. Delete an item from the Wish List

    d. Send the wish list by email by clicking **"Email List"**

    f. Print the list by clicking **"Print"**

    g. Click **"Add to Cart"** to move the Wish List contents to your active cart to checkout

Quotes can be used when ordering an item that is not currently stocked or if you would like recommendations for substitutions.

To request a quote please email your sales rep or local branch by clicking "**Email List" (d.)** and forwarding the Wish List.

Wish List

Project 9147 Rename   « Back to lists

Click "Add Item" to search and add an inventory item. Click "Add Non-Stock Item" to add an item that doesn't exist in the online inventory, or shop our site and add Wish List items as you go! Just click the arrow next to "Add to Favorites" and select the Wish List you want to use.

(d) ✉ Email List   (f) 🖶 Print   Created: 5/17/2023, 7:38 AM PDT

☐ Select All   ☐ In Stock Only   (e) Filter... 🔍   Sort By ▾

☐   **AR-10000** $226.23 / EA   1
       *PRIMARY FILTER ASSEMBLY   Total: $226.23
       Call For Availability   ✎ Add Note 🗑
       + More Info

☐   **FTXS12LVJU**   (a) $513.88 / EA   1
       HEAT PUMP INDOOR 12K BTU LV SERIES   Total: $513.88
       In Stock at Other Locations   (b) ✎ Add Note 🗑 (c)
       + More Info

\+ Add Item   + Non-Stock Item   Delete Wish List   **Wishlist total:** $740.11

(g)   Add to Cart

Account Tools

Account Tools

Overview

1 | Change Password
Create a new password

2 | Current Statement
View, print or export your current open statements

3 | Customer Resources
See additional webstore resources such as video tutorials and guides

4 | Invoices & Shipments
Look up previous and current invoices and shipments (If you are looking for a serial number of a specific product you recently purchased that can be found here)

5 | Open Backorders
View items that are currently on backorder

6 | Privacy Settings
Update privacy settings such as receiving marketing emails and exclusive offers

7 | Purchase History
Review previous purchases

Account Tools

Overview

8 | Recent Web Orders
Search through a list of your previous web orders by Order #, PO # or Order Date

9 | Track Orders
Track current orders

10 | View Orders
View all orders up to a year (to review orders placed over a year ago please

contact your sales rep or local branch)

11 | View Quotes
Search any open quote by Quote #, PO # or Date (to turn a quote into an

order contact your local branch)

12 | Web Account Info
View and make updates to your account information such as your email, phone number, password and more

13 | Logout
Logout of the account

Account Tools

Manage Favorite Links

Manage Favorite Links

This feature is used to create shortcuts to your most-utilized tools.

a. The Favorite Links will appear in the **"Current Profile"** section next to the account details

b. To edit click **"Manage Favorite Links"**

c. Select (or unselect) the stars next to the tools you'd like to add and click **"Done"** to save

Admin Tools

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Manage Coworkers

The "Manage Coworkers" Tool allows an admin to manage all the accounts within a company.

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Admin Tools

Manage Coworkers

1 | If you have the tool enabled on your account click on **"Manage Coworkers"** to access the tool located within the account dashboard

2 | On the next screen you'll be able to view and manage any user that shares your account number - To make edits click on the username

3 | Click on **"Add User"** to generate a new profile for those that need a webstore login within your company
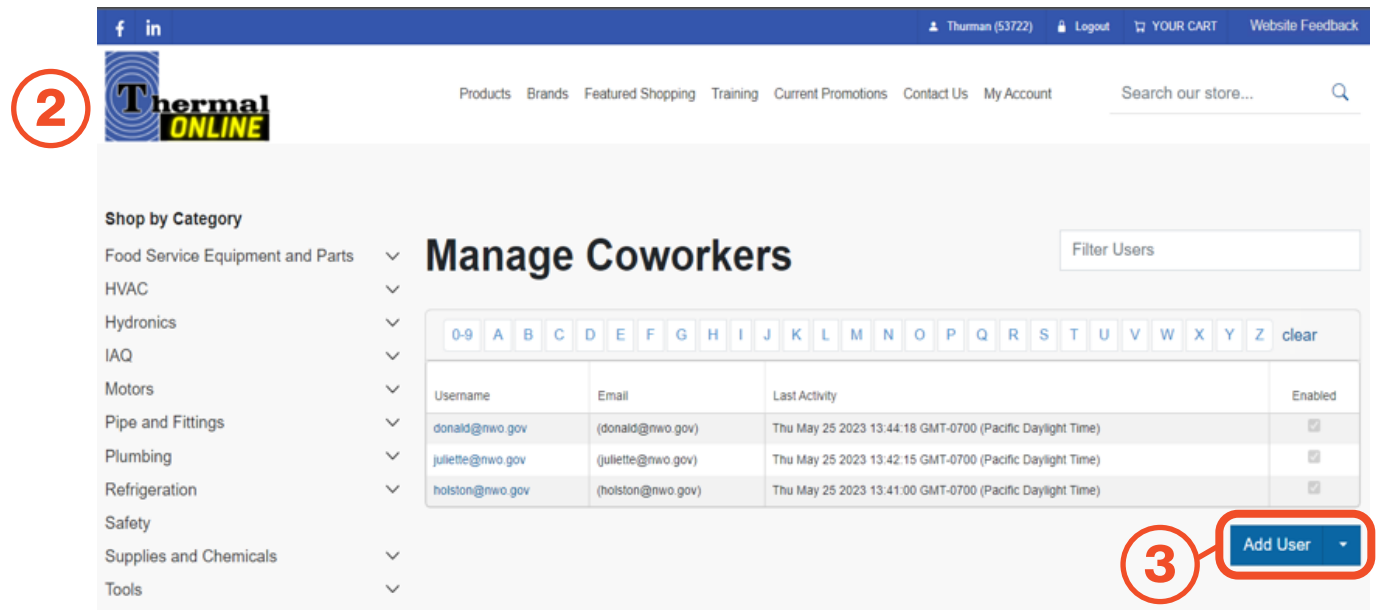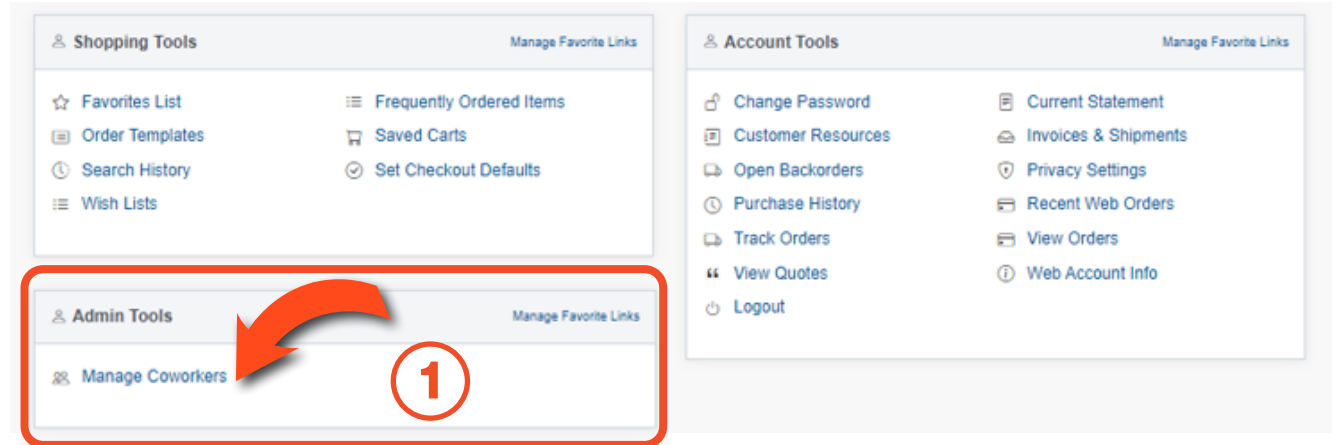
Notes:
This feature will only be availble to admin profiles that have the tool enabled. Based on your company's needs, there can be more than one admin account with the ability to manage coworkers. Please contact dlewis@thermalsupply.com if you need assistance.

Admin Tools

Manage Coworkers

Clicking on **"Add User"** will provide you with two options to create a new login:

1 | Existing Contact

If the new coworker has an existing contact in Thermal Supply's system, you can use the **"Add User Wizard"** - Relevant contact information from Thermal Supply's database will be filled out for you

OR

2 | Manually

a. You can select **"Manually Create User"** to enter all the new coworker's information - Choose a username and password for the new login and fill out their contact info

b. On the next tab, **Misc User Fields**, select your closest Thermal Supply branch. If you have a current Thermal Supply sales rep you can enter their name here as well

Admin Tools

Manage Coworkers

c. The third tab allows you to enable/disable the coworker's account and restrict them to ordering only from Order Templates. You can also determine which areas of the account dashboard are available to them

d. The fourth tab allows you to set spending limits for users - Any time an order is placed that is over the given limit, the order will need to approved by you before the order will be sent to Thermal Supply

All pending order approvals can be viewed on the account dashboard

Manage Coworker ⓒ

User Info   Misc User Fields   **Security & Access**   Online Spending Limits

Website Access

Not Set (disabled) ▼

↻ Reset Password   ↻ Reset 2FA

☐ Restrict to Order Templates
☐ Require Two-Factor Authentication

Account Access

☑ Current Backorders
☑ Invoice Information
☑ Purchase History
☑ Recent Orders
☑ Recent Quotes
☑ Current Statement

⊞ Save

« Back to Manage Coworkers

Manage Coworker   ⓓ

User Info   Misc User Fields   Security & Access   **Online Spending Limits**

Online Spending Limits

☐ Enable Limit
Limit: **per**

-1   0   ▼

Spending limits

Users with spending limits will also have Order Approvers. When a user spends beyond their allotted dollar amount in their allotted timeframe, the Order Approver will then have to approve the order before it can be completed.

⚠ Make sure to set both the limit and interval when setting up spending limits.

⊞ Save

« Back to Manage Coworkers

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Still Have Questions?
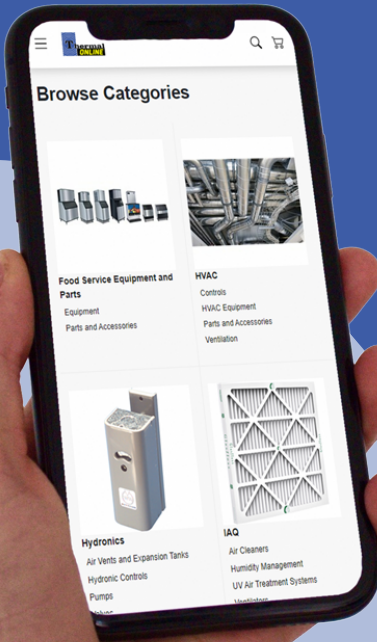
For additional questions, feedback, or to request a virtual tour of the website via Zoom or Microsoft Teams please reach out to our web team:

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801-664-3426