

My Account Dashboard

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@thermalsupply.com.

The screenshot displays the 'My Account' page for a user named Darcy Lewis. At the top, there are navigation links for 'Products', 'Brands', 'Training', 'Current Promotions', 'Featured Shopping', 'Contact Us', and 'My Account'. A search bar is located on the right. The main content area is divided into several sections:

- Welcome, DARCY**: A red circle '1' highlights the 'View and Pay Bill' link.
- Current Profile**: A red box highlights this section, which includes the user's name (Darcy Lewis), email (dlewis@thermalsupply.com), and a 'Change Account' dropdown menu. A red circle '2' is positioned to the left of this section.
- Track My Order**: A search bar for tracking orders by PO number, invoice, or PO number.
- Your Recent Web Orders**: A section showing no open orders for the account.
- Recent Company Orders**: A section showing no orders for the past 30 days.
- Shopping Tools**: A list of tools including Favorites List, Order Templates, Search History, Wish Lists, Frequently Ordered Items, Saved Carts, and Set Checkout Defaults.
- Account Tools**: A list of tools including Change Password, Customer Resources, Open Backorders, Purchase History, Track Orders, View Quotes, Logout, Current Statement, Invoices & Shipments, Privacy Settings, Recent Web Orders, View Orders, and Web Account Info.

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.

The screenshot shows the 'My Account' page for Darcy Lewis. At the top, there are navigation links for 'Products', 'Brands', 'Training', 'Current Promotions', 'Featured Shopping', 'Contact Us', and 'My Account'. A search bar is located in the top right corner. The main content area is divided into several sections:

- 3**: A 'Track My Order' section with a search input field and a 'Track Order' button. A note above the search field states: 'Note: Searches according to PO Number will return results only if the associated order is "complete".'
- 4**: A 'Your Recent Web Orders' section with a dropdown menu set to '30 days (100 orders max)' and a message: 'There are no open orders for your account'.
- 5**: A 'Recent Company Orders' section with a message: 'No orders for the past 30 days'.

Below these sections are two columns of links:

- Shopping Tools**: Favorites List, Order Templates, Search History, Wish Lists, Frequently Ordered Items, Saved Carts, Set Checkout Defaults.
- Account Tools**: Change Password, Customer Resources, Open Backorders, Purchase History, Track Orders, View Quotes, Logout, Current Statement, Invoices & Shipments, Privacy Settings, Recent Web Orders, View Orders, Web Account Info.

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

The screenshot shows the Thermal Supply Inc. account page for user Darcy Lewis. The page is titled "Welcome, DARCY" and includes a navigation bar with links for Products, Brands, Training, Current Promotions, Featured Shopping, Contact Us, and My Account. The main content area is divided into several sections:

- Current Profile:** Shows the user's name (Darcy Lewis), email (dlewis@thermalsupply.com), and customer code (53722). A "Change Account" dropdown menu is visible.
- Track My Order:** A search box for tracking orders by PO number, invoice, or PO number, with a "Track Order" button.
- Your Recent Web Orders:** A section showing orders for the past 30 days (100 orders max). It currently displays "There are no open orders for your account".
- Recent Company Orders:** A section showing orders for the past 30 days. It currently displays "No orders for the past 30 days".
- Shopping Tools:** A section containing a list of tools: Favorites List (1), Order Templates (2), Search History (3), Wish Lists (4), Frequently Ordered Items (5), Saved Carts (6), and Set Checkout Defaults (7). This section is highlighted with a red box.
- Account Tools:** A section containing various account management options: Change Password, Customer Resources, Open Backorders, Purchase History, Track Orders, View Quotes, Logout, Current Statement, Invoices & Shipments, Privacy Settings, Recent Web Orders, View Orders, and Web Account Info.

Favorites List

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

Shopping Tools

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:

- Select a category from your list of “**Favorites Categories**”
- Manage your categories
- Create a new category if needed
- 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:

Compare

Part #: AR-10000

Favorites Categories

Air Conditioners

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

Category Name

[? What is a category?](#)

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

- View your favorites by category
- Sort your favorites by category, part # and more
- Quickly search by product keyword
- 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)

The screenshot shows the account dashboard with two main sections: Shopping Tools and Account Tools. In the Shopping Tools section, the 'Favorites List' link is highlighted with a red box and a circled '1'. A red arrow points from this link to the 'Favorites' page. The 'Favorites' page has a search and filter section with three dropdown menus labeled 'a', 'b', and 'c', and a search button. Below this is a list of items under the heading 'Equipment (shared)'. The first item is a 'HEAT PUMP INDOOR 12K BTU LV SERIES' with a price of \$513.88. The second item is a '*2T 13 SEER A/C R410A' with a price of \$1,426.80. Both items have an 'Add to Cart' button and a 'Favorite Item' toggle. A circled '2' is placed near the search filters, and a circled 'd' is placed near the 'Add to Cart' button of the first item.

Shopping Tools

Favorites List

1 | Category Management

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

2 | Manage Categories

- Add a new category
- “View/Remove/Manage”** the current products in that category
- Edit the name of your category or delete the entire category
- 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.

The screenshot shows the 'Favorites' page with a search bar and a dropdown menu for 'Jump to Category'. A red box highlights the '(add/edit categories and items)' link, which is also circled with a red '1'. Below the search bar, there are filters for 'Sort By' and 'Search Favorites'. The main content area shows a category named 'Equipment (shared)' with a product listing for a 'HEAT PUMP INDOOR 12K BTU LV SERIES'. The product details include the manufacturer (DAIKIN DUCTLESS), part number (FTXS12LVJU), and a price of \$513.88. There is an 'Add to Cart' button and a 'Favorite Item' checkbox.

2

Category Management

MANAGE CATEGORIES

Shared	Category Name	# Items		
<input type="checkbox"/>	Van Stock	4	b View/Remove/Manage	c Edit
<input checked="" type="checkbox"/>	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

a Category Name: **d** Share category?

Order Templates

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

Shopping Tools

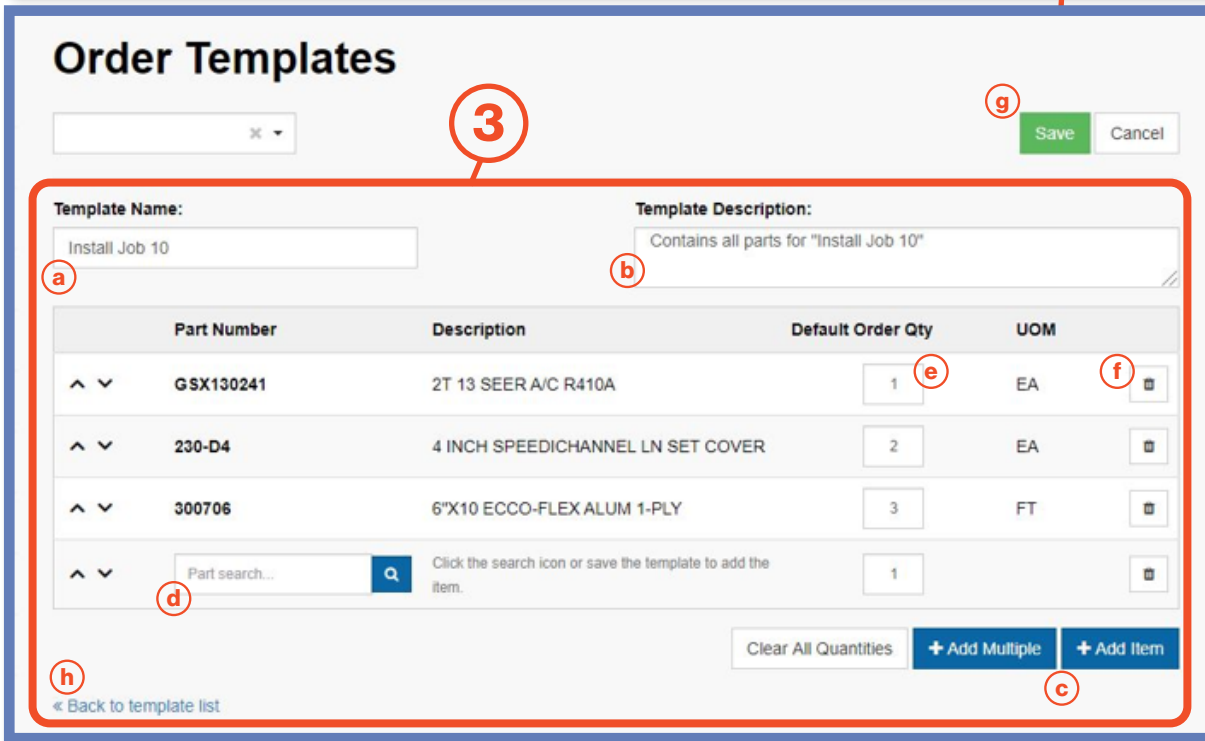
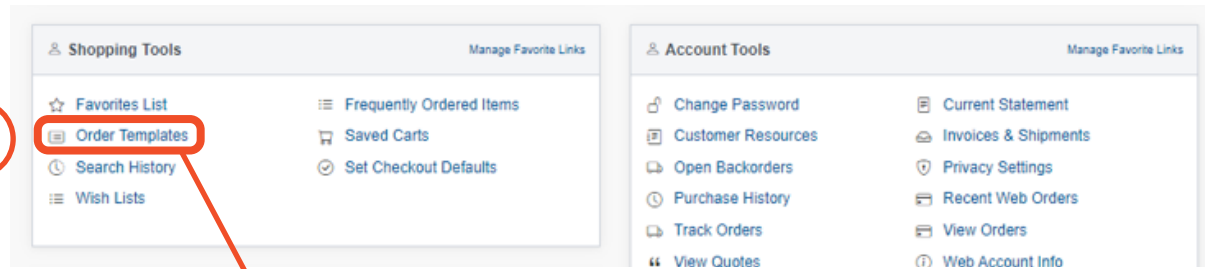
Order Templates

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:

- Add a Name for your template
- Add a Description
- Either copy/paste multiple products at once **OR** add them one at a time
- If you choose the latter you can search for the item by keyword or product #
- Add the Default Order Quantity (these fields can be easily cleared below)
- Delete an item
- Save your template
- 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.

The screenshot shows the 'Order Templates' page. At the top, there is a dropdown menu for the selected template, 'Install Job 10', with a close button (3). To the right are 'Edit', 'Delete', and 'Add To Cart' buttons (4). Below this is a yellow warning banner: 'Quick Checkout is disabled for this template.' The main section is titled 'Install Job 10 - Contains all parts needed for "Install Job 10"' with a '90 Days' time range selector. A table lists items with columns for Part #, Description, Price, Order Qty, Purchased Qty, and Invoice Count. The 'Order Qty' column is highlighted with a red box (2). At the bottom right are 'Clear All Quantities' and 'Add To Cart' buttons (1). A 'Back to template list' link is at the bottom left.

Part #	Description	Price	Order Qty	Purchased Qty	Invoice Count
GSX130241	2T 13 SEER A/C R410A	\$674.40/EA	1	0	0
AFP04	4"X10" ECCO-FLEX ALUM 1-PLY	\$2.48/FT	2	0	0
230-D4	4 INCH SPEEDICHANNEL LN SET COVER	\$30.19/EA	3	72	9

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

The screenshot shows the 'Order Templates' editing page for 'Install Job 10'. At the top right, there are buttons for 'Permissions' (circled 1), 'Delete', 'Save' (circled 3), and 'Cancel'. Below this is a table for user permissions with columns for 'User Name' and 'Permissions' (View, Edit, Delete), and an '+ Add Permission' button. A large red box (circled 2) highlights the 'Allow Quick Checkout' section, which includes fields for 'Ship To', 'Name', 'Shipping Method', 'Address 1', 'Address 2', 'City', 'State', 'Zip', 'Payment Method' (set to 'On Account'), and a 'Validate Shipping Methods' button. Below the form are fields for 'Template Name' (Install Job 10) and 'Template Description' (Contains all parts needed for "Install Job 10"). A table lists items with columns for Part Number, Description, Default Order Qty, and UOM. At the bottom, there are buttons for 'Clear All Quantities', '+ Add Multiple', and '+ Add Item', and a link to '<< Back to template list'.

Part Number	Description	Default Order Qty	UOM
GSX130241	2T 13 SEER A/C R410A	1	EA
AFP04	4"X10" ECCO-FLEX ALUM 1-PLY	2	FT
230-D4	4 INCH SPEEDICHANNEL LN SET COVER	3	EA

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.

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)

The screenshot shows the 'Shopping Tools' and 'Account Tools' sections. The 'Wish Lists' page displays a table with columns for 'Name' and 'Added Date'. A '+ Add Wish List' button is highlighted with a red circle (2). A pop-up form titled 'New Wish List' is shown, with a 'Wish list name' input field and 'Cancel' and 'Create' buttons. The 'View' button for the 'Portland Team' list is highlighted with a red circle (4).

Name	Added Date	View	Rename	Delete
Portland Team	05/17/23	View	Rename	Delete
Beaverton Team	05/17/23	View	Rename	Delete
Project 9147	05/17/23	View	Rename	Delete

Shopping Tools

Wish Lists

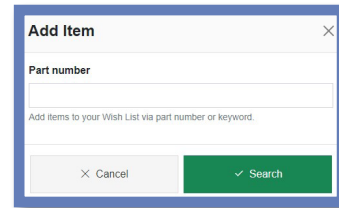
There are two ways that items can be added to a Wish List:

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

- 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
- 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:

- While looking at products you can quickly add them to a wish list by **clicking the drop-down button** next to “Add to Favorites”
- A drop-down menu with your Wish Lists will appear allowing you to select a list
- 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
Total: \$226.23 1

*PRIMARY FILTER ASSEMBLY

Call For Availability Add Note

+ More Info

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

HEAT PUMP INDOOR 12K BTU LV SERIES

In Stock at Other Locations Add Note

+ More Info

+ Add Item + Non-Stock Item Delete Wish List

Wishlist total: \$740.11

Add to Cart


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
Manufacturer Part #: MSHLC
SKU: MSHLC In Stock at Portland UOM : EA

More Info QTY: Add to Cart

Compare  **1/4 + 5/16 x 6" REVERSIBLE HEX DRIVER**

Manufacturer: MALCO PRODUCTS INC
Manufacturer Part #: MSHXLC
SKU: MSHXLC

More Info Add To Favorites Add To Order Template Add To Wish List Project 9147 Portland Team Beaverton Team + Create Wish List Add to Cart

Shopping Tools

Wish Lists

Additional features to note on this page:

- View product price and change item quantities
- Add notes for the item that you would like to communicate to our team when conducting custom quotes
- Delete an item from the Wish List
- Send the wish list by email by clicking **“Email List”**
- Print the list by clicking **“Print”**
- 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.

Created: 5/17/2023, 7:38 AM PDT

Select All In Stock Only

<input type="checkbox"/>		AR-10000 *PRIMARY FILTER ASSEMBLY Call For Availability + More Info	\$226.23 / EA Total: \$226.23	1	<input checked="" type="checkbox"/> Add Note <input type="button" value=""/>
<input type="checkbox"/>		FTXS12LVJU HEAT PUMP INDOOR 12K BTU LV SERIES In Stock at Other Locations + More Info	\$513.88 / EA Total: \$513.88	1	<input checked="" type="checkbox"/> Add Note <input type="button" value=""/>

[Delete Wish List](#)

Wishlist total: \$740.11

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

The screenshot displays the Thermal Supply Inc. account page for user Darcy Lewis. The page is titled "Welcome, DARCY" and shows the user's email (dlewis@thermalsupply.com) and customer code (53722). The page is divided into several sections:

- Current Profile:** Shows the user's name (Darcy Lewis), email, and customer code. A "Change Account" dropdown menu is visible.
- Track My Order:** A search box for tracking orders by Order, Invoice, or PO number, with a "Track Order" button.
- Your Recent Web Orders:** A section showing the user's recent orders, with a "More" button and a filter for "Show orders for the past 30 days (100 orders max)".
- Recent Company Orders:** A section showing the user's recent company orders, with a "More" button and a message "No orders for the past 30 days".
- Shopping Tools:** A section with links for Favorites List, Order Templates, Search History, Wish Lists, Frequently Ordered Items, Saved Carts, and Set Checkout Defaults.
- Account Tools:** A section with links for 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, and Logout. This section is highlighted with a red box and numbered callouts 1 through 7.

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

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

Account Tools

Manage Favorite Links

Manage Favorite Links

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

- The Favorite Links will appear in the “**Current Profile**” section next to the account details
- To edit click “**Manage Favorite Links**”
- Select (or unselect) the stars next to the tools you'd like to add and click “**Done**” to save

The screenshot displays the account dashboard with several sections. In the 'Current Profile' section, a red box labeled 'a' highlights the 'Favorite Links' menu, which includes 'Favorites List', 'Order Templates', 'Current Statement', and 'Open Backorders'. In the 'Shopping Tools' section, a red box labeled 'b' highlights the 'Manage Favorite Links' button. Below this, a detailed view shows the 'Shopping Tools' and 'Account Tools' sections with red boxes labeled 'c' around the star icons next to various tool names, indicating the selection process. The 'Shopping Tools' list includes Favorites List, Order Templates, Search History, Wish Lists, Frequently Ordered Items, Saved Carts, and Set Checkout Defaults. The 'Account Tools' list includes Change Password, Customer Resources, Open Backorders, Purchase History, Track Orders, View Quotes, Logout, Current Statement, Invoices & Shipments, Privacy Settings, Recent Web Orders, View Orders, and Web Account Info. A 'Done' button is visible at the top right of the detailed view.

Admin Tools

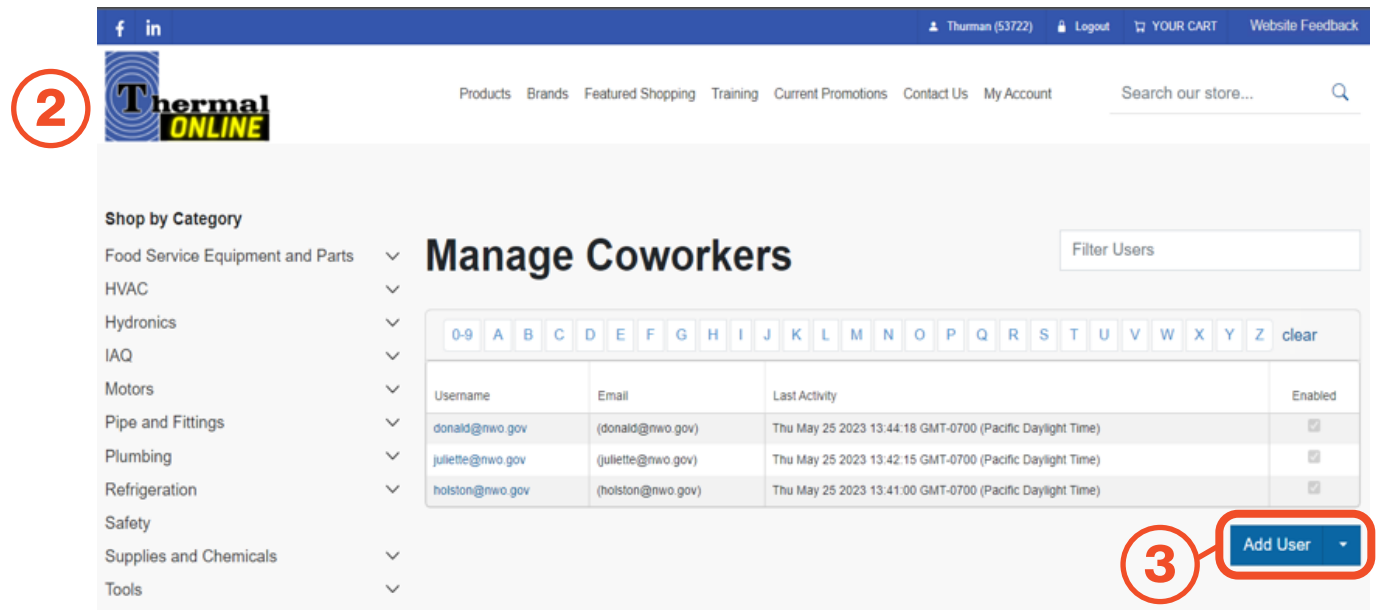
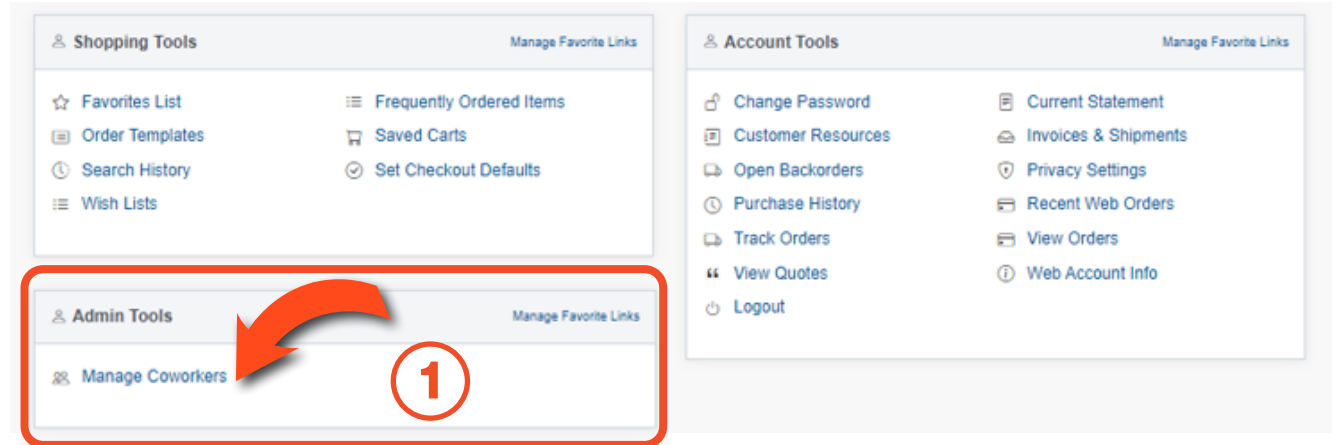
Manage Coworkers

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

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 available 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

1

New User Wizard

Create a new website user based on contact information from the records of Thermal Supply, Inc.
If the contact information isn't found you can create a new user manually.

Begin Wizard

New User Wizard

- Search/New
- User Info
- Account Info
- Review
- Complete

Contact Search/User Email

Email Address

Search

+ New User

2

Manage Coworker

User Info Misc User Fields Security & Access Online Spending Limits

User Name: scott@meo.gov
Password: [input]
Re-enter Password: [input]
User's Name (first/last): Scotty
Phone: 555 [input]
Extension: [input]
User Email: scott@meo.gov
Re-enter Email: [input]

Address 1: [input]
Address 2: [input]
City: [input]
State: [input]
Zip Code: [input]
Country (3 letter code): US
Time Zone: (UTC-08:00) Pacific Time (US & Ca)

Default Location: Seattle
Shipping Address Type: Commercial

Save

b

Manage Coworker

User Info Misc User Fields Security & Access Online Spending Limits

Default Store

Sales Rep (if Known)

Save

Back to Manage Coworkers

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 be 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 c

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

Webalta Access

Not Set (disabled) v

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 d

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

Online Spending Limits

Enable Limit

Limit: per

-1 0 v

Spending limits

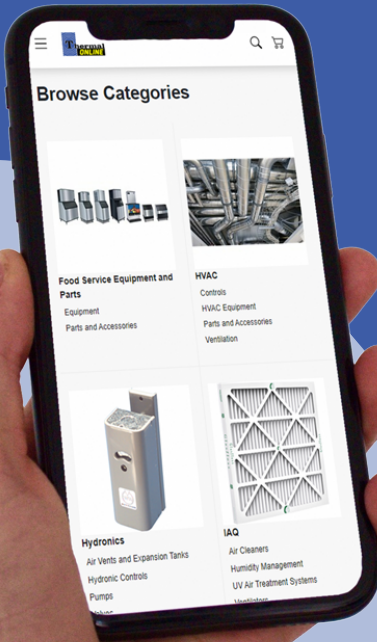
Users with spending limits will also have Order Approvers. When a user spends beyond their allotted dollar amount in their allotted timeframe, the Order Approver will then have to approve the order before it can be completed.

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

Save

< Back to Manage Coworkers

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:

CONTACT

Darcy Lewis

dlewis@thermalsupply.com

801-664-3426