

# 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 Online account page for user Darcy Lewis. The page is titled "Welcome, DARCY" and displays 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 (dlewis@thermalsupply.com), and customer code (53722). There is a "Change Account" dropdown menu and an "Edit Profile" link.
- 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 states "There are no open orders for your account".
- Recent Company Orders:** A section showing orders for the past 30 days. It states "No orders for the past 30 days".
- Shopping Tools:** A section highlighted with a red box, containing links for:
  - 1 Favorites List
  - 2 Order Templates
  - 3 Search History
  - 4 Wish Lists
  - 5 Frequently Ordered Items
  - 6 Saved Carts
  - 7 Set Checkout Defaults
- Account Tools:** A section containing links for:
  - 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

# 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

- 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)

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 circle and a red arrow pointing to the 'Favorites' page. The 'Favorites' page has a search and filter section with three dropdown menus labeled 'a', 'b', and 'c'. Below this is a list of favorite items, with the first item, 'HEAT PUMP INDOOR 12K BTU LV SERIES', highlighted. The price is \$513.88, and it is in stock at Seattle. The quantity is set to 1, and there is an 'Add to Cart' button labeled 'd'. The second item, '\*2T 13 SEER A/C R410A', is also shown with a price of \$1,426.80 and is in stock at other locations.

# 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, with a circled '1' next to it. 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), manufacturer part number (FTXS12LVJU), SKU (FTXS12LVJU), and links to the installation manual and submission data sheet. The price is \$513.88, and it is in stock at Seattle. 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>b</b> View/Remove/Manage	<b>c</b> 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

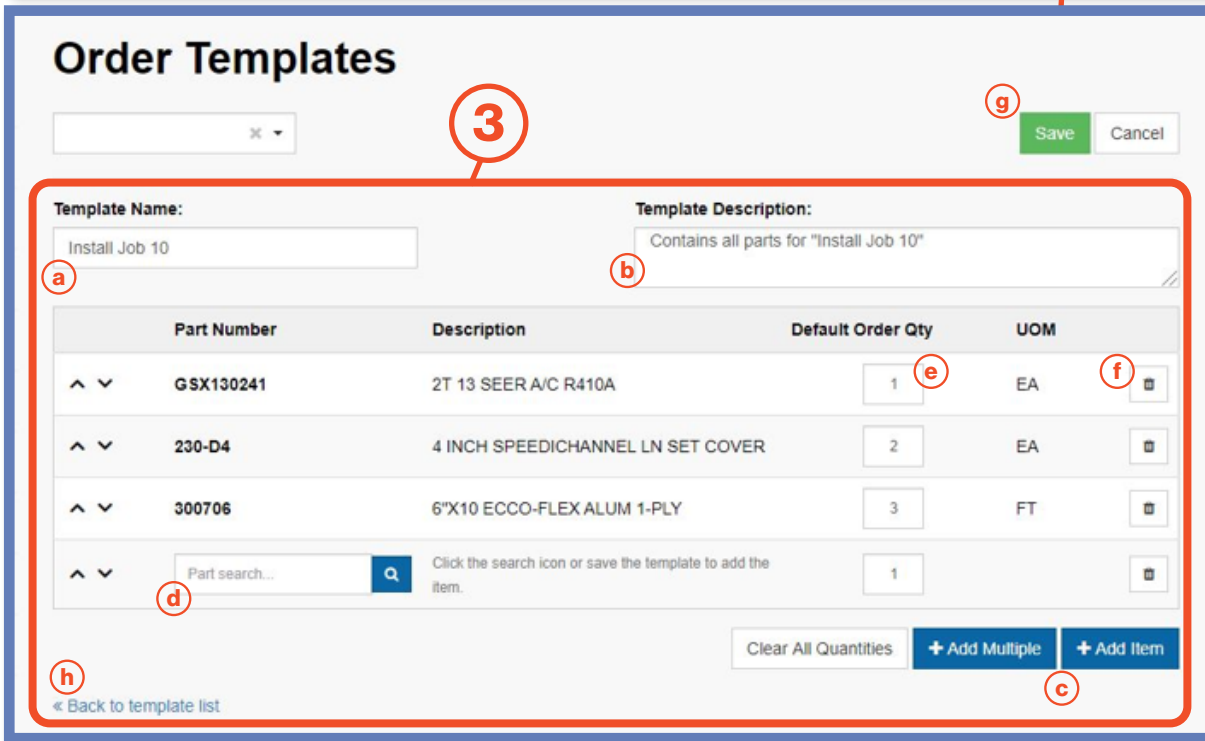
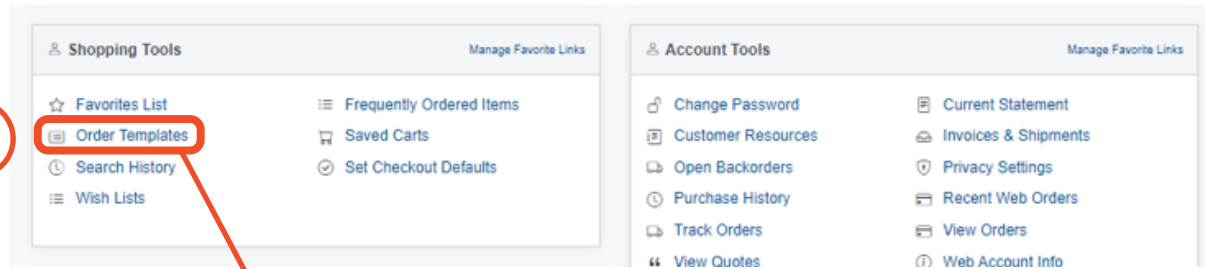
## Order Templates

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 search bar containing 'Install Job 10' with a close button and a dropdown arrow, circled with a red '3'. To the right of the search bar are 'Edit', 'Delete', and 'Add To Cart' buttons, with the 'Add To Cart' button circled with a red '4'. Below the search bar is a yellow warning message: 'Quick Checkout is disabled for this template.' Underneath is a sub-header 'Install Job 10 - Contains all parts needed for "Install Job 10"' with a '90 Days' dropdown menu. A table lists items with columns for Part #, Description, Price, Order Qty, Purchased Qty, and Invoice Count. The 'Order Qty' column is circled with a red '2'. At the bottom right of the table are 'Clear All Quantities' and 'Add To Cart' buttons, with the 'Add To Cart' button circled with a red '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', 'Delete', 'Save', and 'Cancel'. A red circle with the number '1' points to the 'Permissions' button. Below this is a table with columns for 'User Name' and 'Permissions'. The 'Permissions' column has radio buttons for 'View', 'Edit', and 'Delete', and an 'Add Permission' button. A red circle with the number '2' points to the 'Allow Quick Checkout' section, which includes fields for 'Ship To', 'Name', 'Shipping Method', 'Address 1', 'Address 2', 'City', 'State', 'Zip', 'Payment Method', and a 'Validate Shipping Methods' button. At the bottom right of this section is a red circle with the number '3' pointing to the 'Save' 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 parts 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

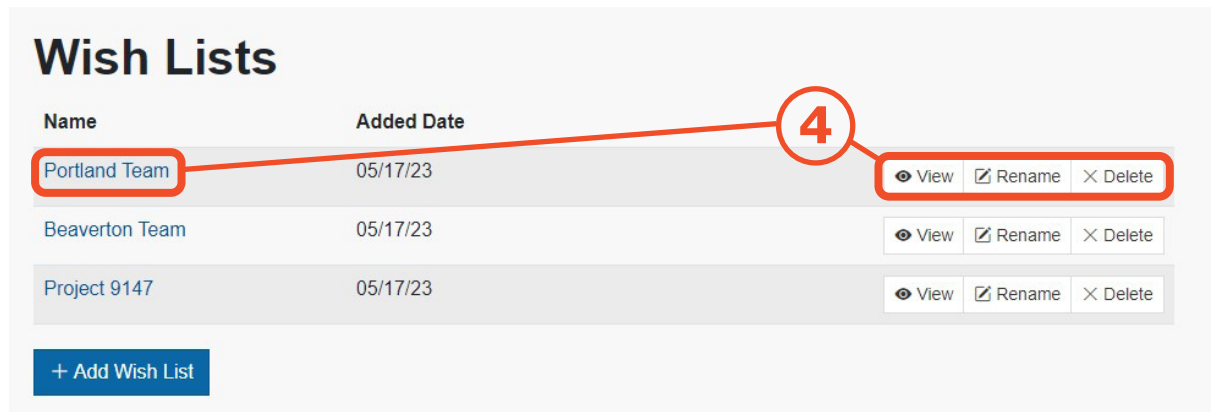
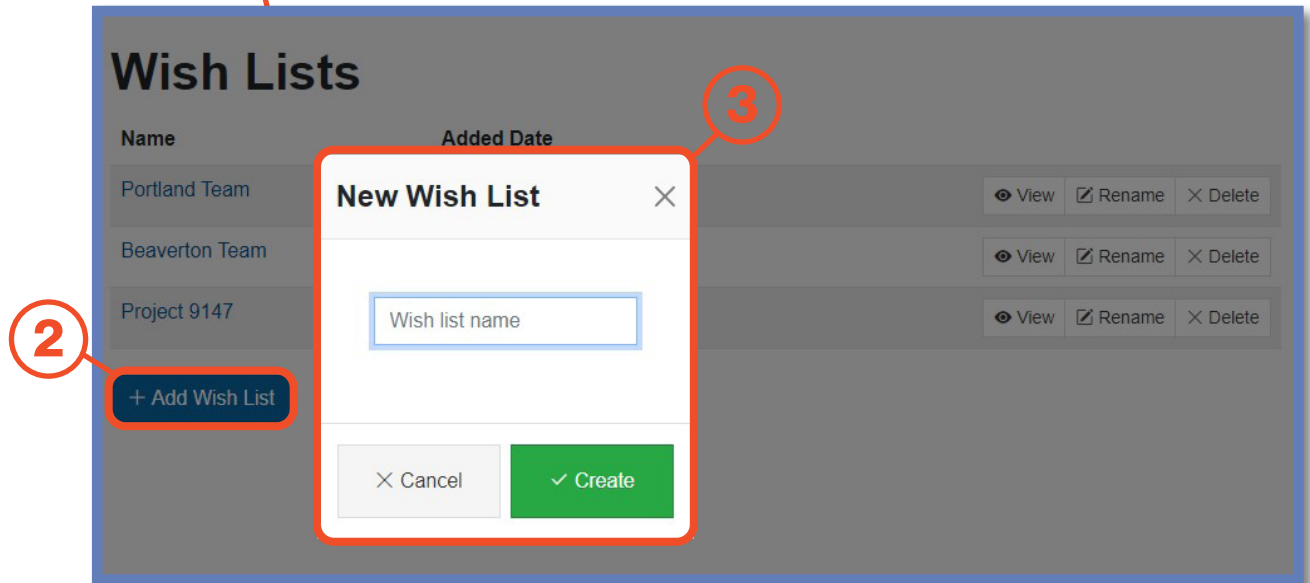
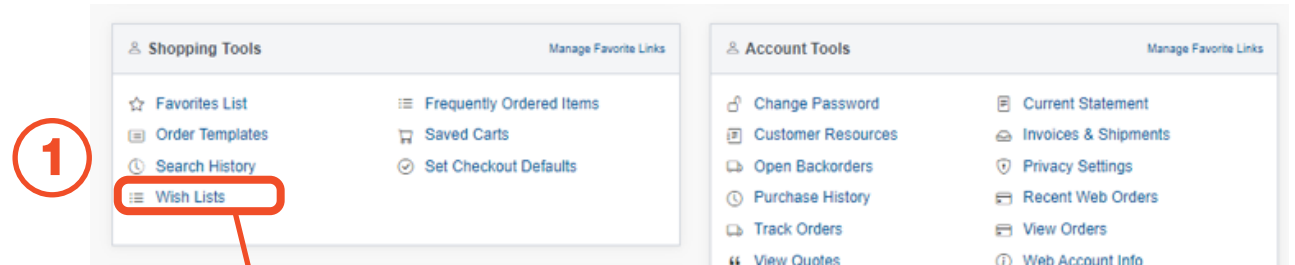
Wish Lists allows you to easily create a list of desired products to be purchased later. It can also be a useful tool when creating a list to be submitted for a custom quote.

# 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)



# Shopping Tools

## Wish Lists

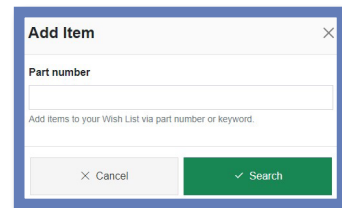
There are two ways that items can be added to a Wish List:

### 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  
\*PRIMARY FILTER ASSEMBLY  
Call For Availability  
+ More Info  
\$226.23 / EA  
Total: \$226.23  
1  
Add Note

FTXS12LVJU  
HEAT PUMP INDOOR 12K BTU LV SERIES  
In Stock at Other Locations  
+ More Info  
\$513.88 / EA  
Total: \$513.88  
1  
Add Note

+ 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  
Manufacturer: MALCO PRODUCTS INC  
Manufacturer Part #: MSHLC  
SKU: MSHLC  
More Info  
\$10.10  
In Stock at Portland  
UOM : EA  
QTY: 1  
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

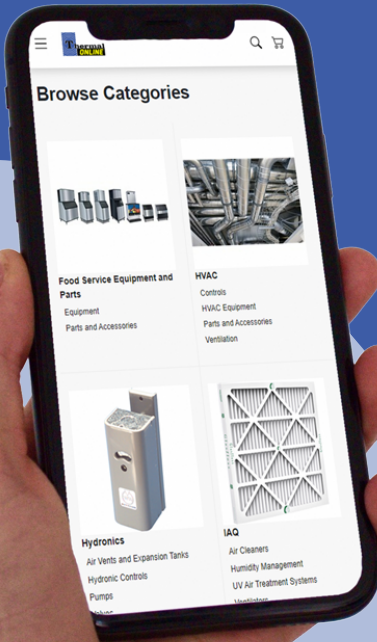
Select All  In Stock Only

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

[Delete Wish List](#)

**Wishlist total:** \$740.11

## 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

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