



HOW TO USE THE

# Thermal Webstore

*Learn to Register and Navigate Your Account, Shop and Checkout*

[shop.thermalsupplyinc.com](http://shop.thermalsupplyinc.com)

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# Create an Online Shopping Account

# Register

To register a new online account get started by clicking the “**Login | Register**” link located on the right-hand side of the top bar (next to “Your Cart”).



The screenshot shows the Thermal Supply Inc. website. At the top right, the 'Login | Register' link is highlighted with a red box and a red arrow. The main banner features a DAIKIN Daikin ATMOSPHERA air conditioning unit with the text 'The First R-32 Single Zone Ductless Unit In North America' and a 'Shop Atmosphere' button. Below the banner are three product categories: 'Your OEM Parts Source' (with a 'Shop OEM Brands' button), 'Condensate Pumps' (with a 'SHOP BECKETT' button), and 'Clean Air is Life' (with a 'Shop REME HALO' button).



# Register Options

Under Register Options, click  
“Existing Customers”.

The screenshot shows the Thermal Supply Inc. website interface. At the top, there are social media icons for Facebook and LinkedIn, and navigation links for 'Login | Register' and 'YOUR CART'. The main navigation bar includes 'Products', 'Brands', 'Training', 'Current Promotions', 'Contact Us', and 'My Account', along with a search bar. The page is divided into several sections: 'Shop by Category' with a list of categories like 'Food Service Equipment and Parts', 'HVAC', 'Hydronics', etc.; 'Log In' with a 'Sign In' form for 'Username or Email Address' and 'Password (case sensitive)'; and 'Register Options' which is highlighted with a red box. The 'Register Options' section contains a user icon and a link: 'Existing Customers I have my Thermal Supply, Inc. account information, and I want to access account information and/or shop online.' A large red arrow points from the bottom right towards the 'Existing Customers' link. Below the 'Log In' section is a 'Recently Viewed' section with three product listings, each with an 'Add to Cart' button.

# Account Verification

Complete the information to verify your account and click **“Submit.”**

*This information can be found on any Thermal Supply Invoice.*

## Notes:

If you do not have a recent invoice or have not made any purchases yet, please use the “Contact Us” link found above the form to get set-up.

**Verify Your Account**

To receive access to our website, you must first have an established account with us. If you do not have an account, contact us to set up an account.

**To verify your account, please complete the information below**

- Recent Invoice Number (from the last 30 days)
- Customer Code from the Invoice
- 5-digit Zip from the Invoice

Once verified, you will be able to complete the registration process.

**Name (First Last)**  
Name

**Email**  
Email

**Invoice Number**  
Invoice Number

**Customer Code**      **Zip Code**  
Customer Code      Zip Code

I'm not a robot      reCAPTCHA

**Submit**

**INVOICE**

Invoice #      Customer Code      5-Digit Zip Code

# Create a Web Account

Upon verifying your account, you will receive an email from us with a link that will take you to the page shown here.

Complete the information on the form and click **“Create Web Account”**.

## Notes:

If you have not received an email after verifying your account please check your SPAM folder.

The screenshot shows the 'Web Account Details' form on the Thermal Supply Inc. website. The form is highlighted with a red border and a red arrow pointing to it. The form includes the following fields and options:

- Name:** James Lewis
- Email:** dazcamrshaw14@gmail.com
- \* Required Fields:**
- \* Company Name:** [Text input field]
- \* Requested Username:** [Text input field]
- \* Phone:** [Text input field]
- Extension:** [Text input field]
- \* Password (6 char min):** [Text input field]
- \* Confirm Password:** [Text input field]
- \* Physical Address 1:** [Text input field]
- City:** [Text input field]
- Physical Address 2 (optional):** [Text input field]
- \* State/Province:** Washington (dropdown menu)
- \* Postal Code:** [Text input field]
- \* Country:** United States (dropdown menu)
- \* How did you hear about us?:** Advertisement (dropdown menu)
- \* What is your primary business:** Retail (dropdown menu)
- \* Default Store:** Seattle (dropdown menu)
- Sales Rep (if known):** [Text input field]
- Agree & Subscribe
- Accept terms and conditions
- Create Web Account** button

Below the form, there is a **Terms & Conditions** section with a warning icon and the text: "If you already have an account with us, your product pricing, terms and delivery options will be available after your account information has been verified."



## Account Approval



Your Thermal Supply Web Account will need to be approved by a website admin before you're able to login. This process usually can take up to 4 hours.

Once the account has been approved, you will receive a second email notifying you that the account is active and you are now able to log in.

To sign into your account and begin shopping click the **"Login | Register"** link in the top-right corner.



# 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](mailto: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**: Shows the user's email (dlewis@thermalsupply.com) and a 'View and Pay Bill' link, which is highlighted with a red box and a red circle containing the number 1.
- Current Profile**: Displays the user's name (Darcy Lewis), email, and customer code (53722). A 'Change Account' dropdown menu is highlighted with a red box and a red circle containing the number 2.
- 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. The page includes a navigation bar with 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:

- Welcome, DARCY**: Displays the user's name and email address (dlewis@thermalsupply.com) along with a 'Cust Code: 53722 | DARCY LEWIS'. A 'View and Pay Bill' link is also present.
- Current Profile**: A section with a 'Change Account' dropdown menu and a profile card for Darcy Lewis with an 'Edit Profile' link.
- Track My Order**: A search box for tracking orders by Order, Invoice, or PO number, with a 'Track Order' button. A note states: 'Note: Searches according to PO Number will return results only if the associated order is "complete".'
- Your Recent Web Orders**: A section with a dropdown menu set to '30 days (100 orders max)' and a message: 'There are no open orders for your account'. A '+ More' button is visible.
- Recent Company Orders**: A section with a message: 'No orders for the past 30 days' and a '+ More' button.
- 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, 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.

Annotations 3, 4, and 5 are placed on the 'Track My Order' section, the 'Your Recent Web Orders' section, and the 'Account Tools' section, respectively.

# Shopping Tools



# Shopping Tools

## Overview

### 1 | Favorites List

A list of items that have been “Favorited”  
- Learn more on [page 14](#)

### 2 | Order Templates

Templated order lists for faster checkout  
- Learn more on [page 18](#)

### 3 | Search History

Review previous searches

### 4 | Wish Lists

Items organized in wish lists  
- Learn more on [page 22](#)

### 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. website 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, and customer code. There is a "Change Account" dropdown menu and an "Edit Profile" link.
- Track My Order:** A search bar for tracking orders by PO number, invoice, or PO number, with a "Track Order" button.
- Your Recent Web Orders:** A section showing orders from the past 30 days (100 orders max). It states "There are no open orders for your account".
- Recent Company Orders:** A section showing orders from 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 various account management links such as "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  
- Learn more on [page 17](#)
- 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

# Shopping Tools

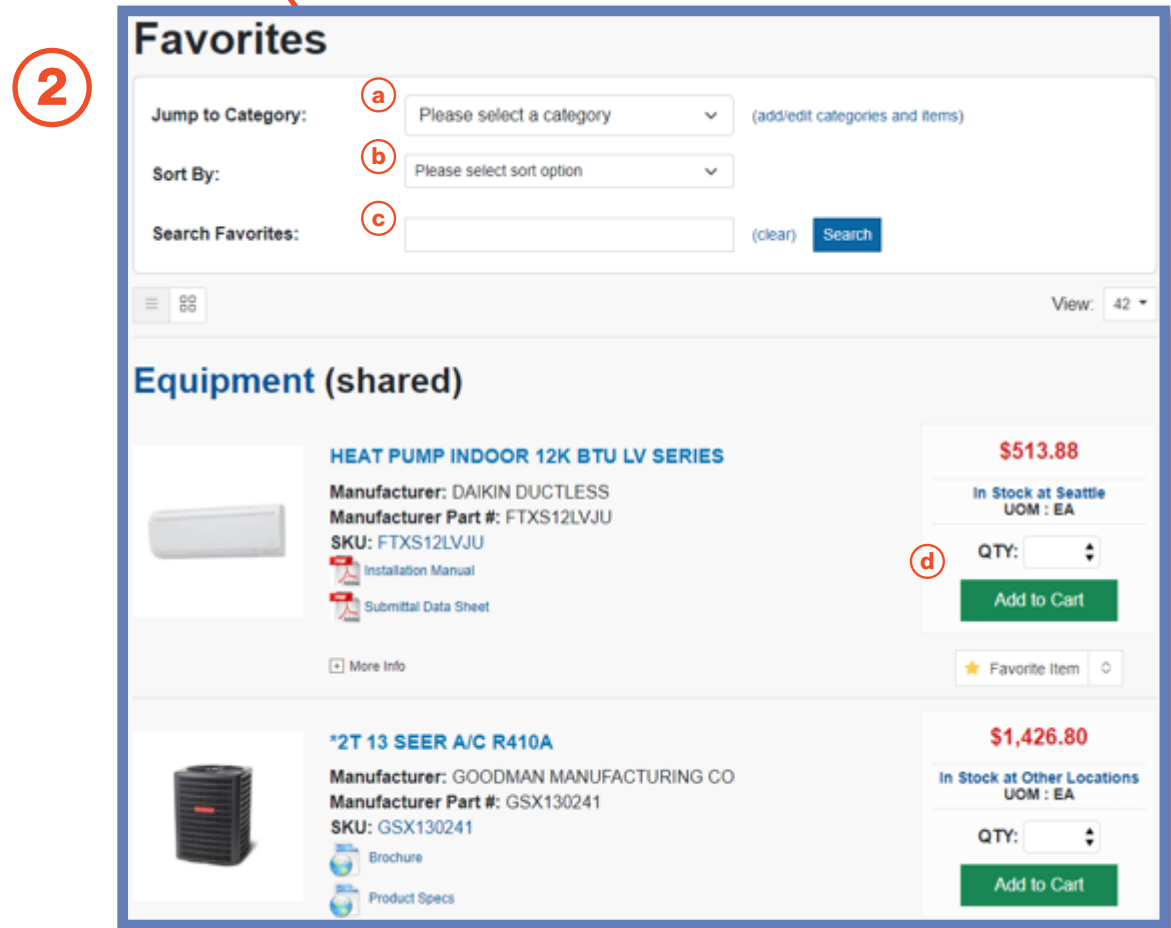
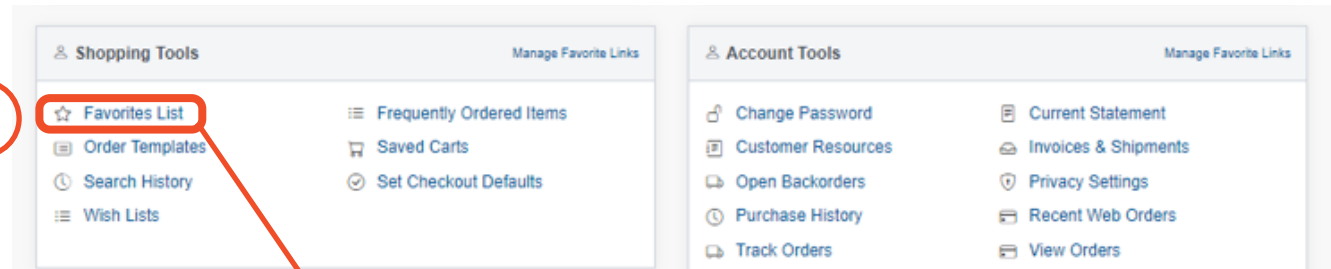
## Favorites List

### 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 - Learn more on [page 17](#)
- 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)





# 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 manufacturer, part number, SKU, and links to 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.

The screenshot shows the 'Category Management' page with a 'MANAGE CATEGORIES' table. The table has columns for 'Shared', 'Category Name', '# Items', and actions. The 'Equipment' category is selected and shared. A red box highlights the 'View/Remove/Manage' link for the 'Equipment' category, which is also circled with a red '2'. Below the table, there is a yellow warning box about shared categories. At the bottom, there is an 'Add Categories' form with a 'Category Name' field (circled with a red 'a') and a 'Share category?' checkbox (circled with a red 'd').

Shared	Category Name	# Items	
<input type="checkbox"/>	Van Stock	4	<a href="#">View/Remove/Manage</a> <span>(c)</span>
<input checked="" type="checkbox"/>	Equipment	2	<a href="#">View/Remove/Manage</a> <span>(b)</span>

# Order Templates

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

# Shopping Tools

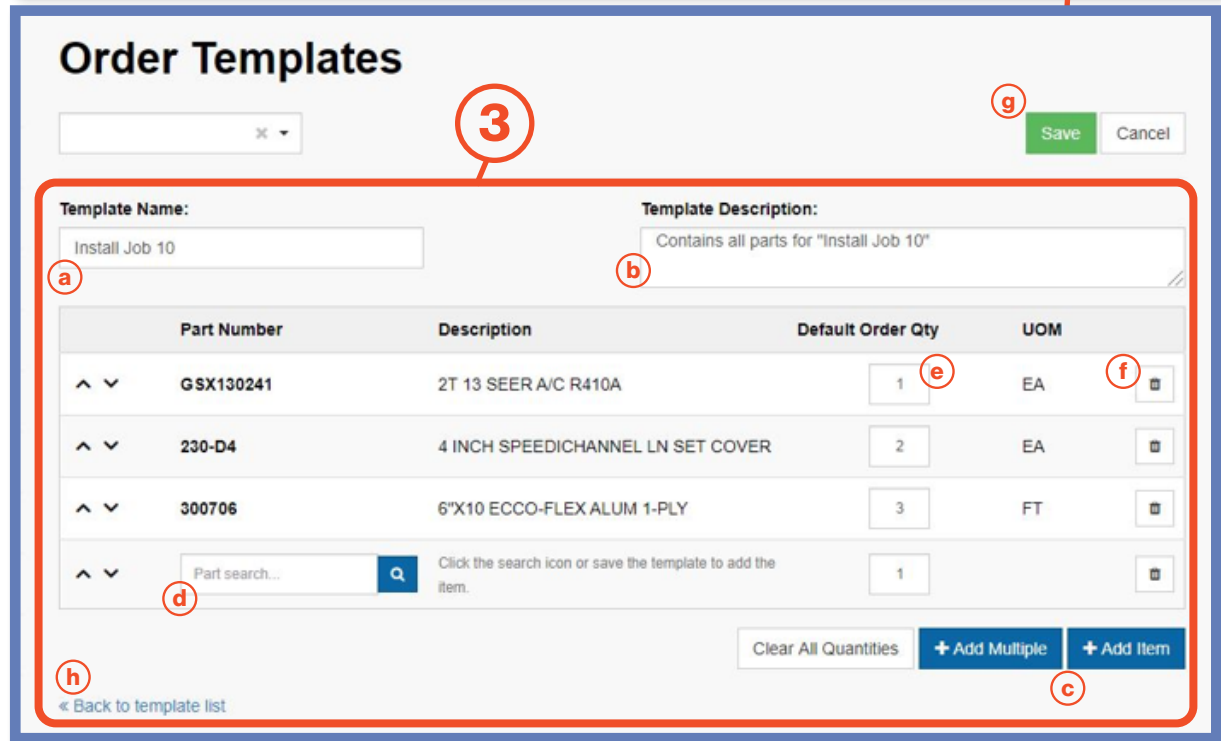
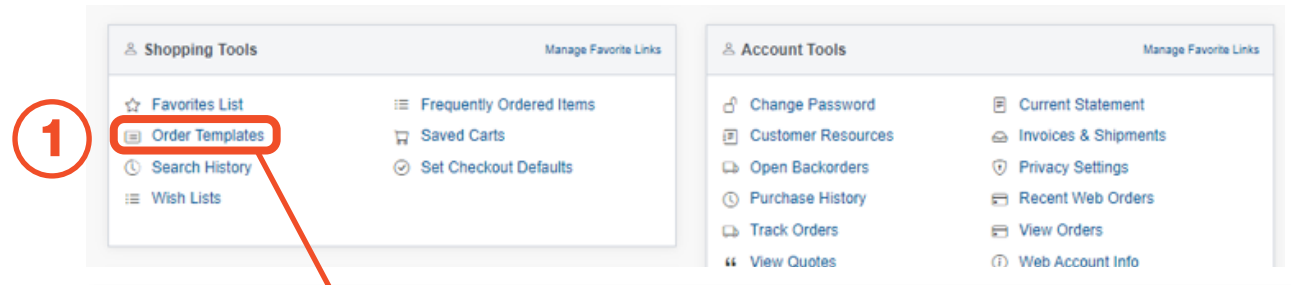
## Order Templates

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 and a circled '3' next to it. To the right of the dropdown are 'Edit', 'Delete', and 'Add To Cart' buttons, with a circled '4' next to the 'Add To Cart' button. Below this is a yellow warning banner: 'Quick Checkout is disabled for this template.' Underneath, there is a title 'Install Job 10 - Contains all parts needed for "Install Job 10"' and a '90 Days' time range dropdown. A table lists the items with columns for Part #, Description, Price, Order Qty, Purchased Qty, and Invoice Count. The 'Order Qty' column has input boxes with values 1, 2, and 3, circled with a '2'. At the bottom right of the table are 'Clear All Quantities' and 'Add To Cart' buttons, with a circled '1' next to the 'Add To Cart' button. 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

### Order Templates

Install Job 10 x

Permissions Delete Save Cancel

User Name Permissions + Add Permission

View Edit Delete

Allow Quick Checkout

Ship To Name Shipping Method

Address 1 Payment Method

On Account Validate Shipping Methods

Address 2

City State Zip

Template Name: Install Job 10

Template Description: Contains all parts needed for "Install Job 10"

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

Clear All Quantities + Add Multiple + Add Item

<< Back to template list

# Wish Lists

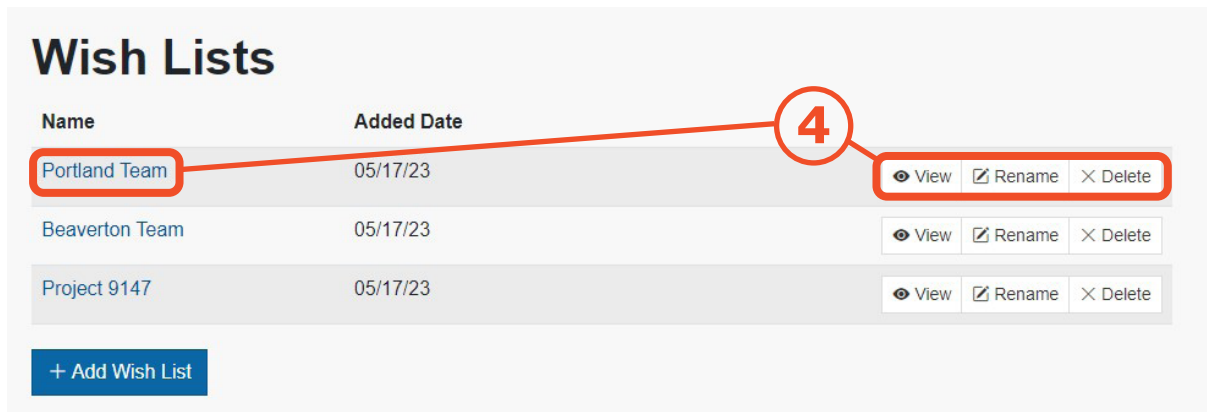
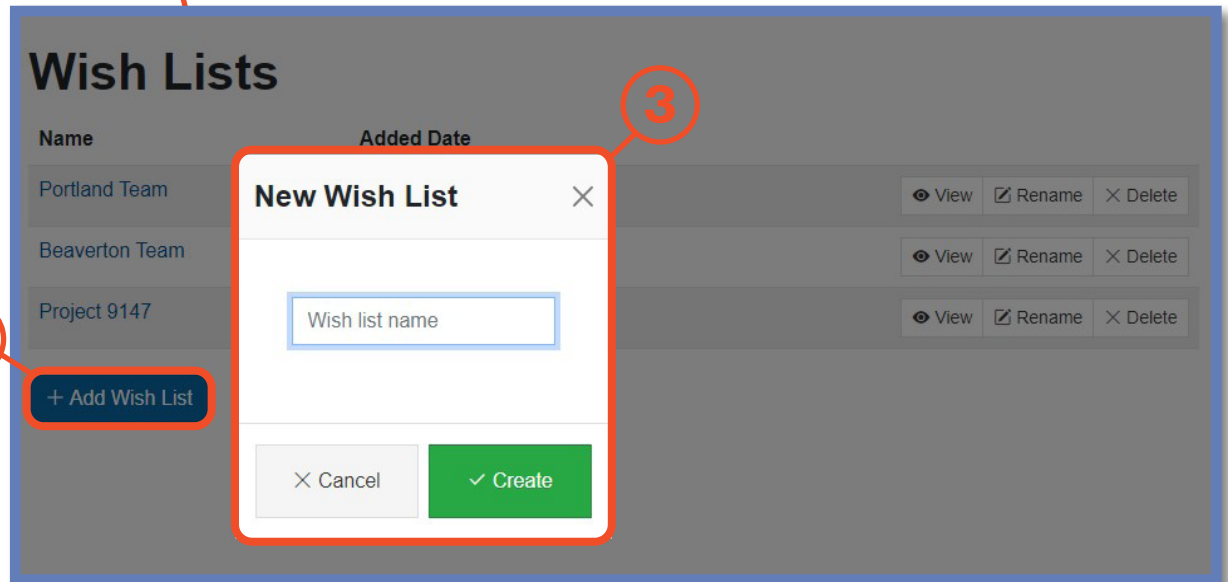
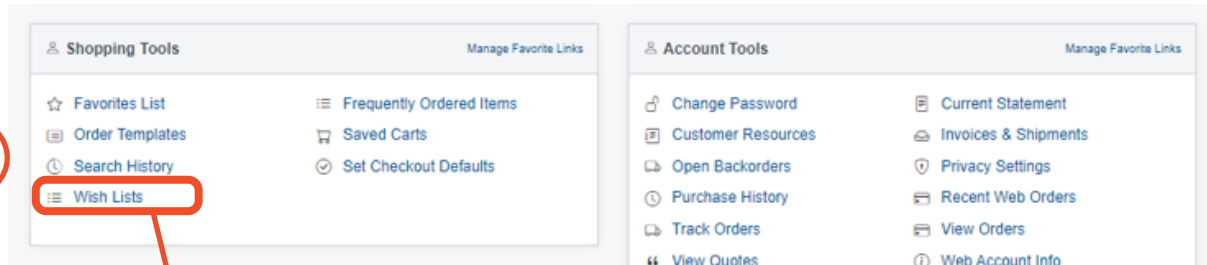
Wish Lists allows you to easily create a list of desired products to be purchased later. It can also be a useful tool when creating a list to be submitted for a custom quote.

# 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

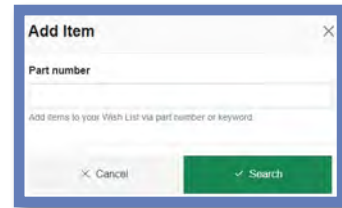
There are two ways that items can be added to a Wish List:

### 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 \$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

+ 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:

Compare

**1/4 + 5/16 x 6\"** REVERSIBLE HEX DRIVER  
Manufacturer: MALCO PRODUCTS INC  
Manufacturer Part #: MSHXLC  
SKU: MSHXLC  More Info

# 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.

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

# 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 shows the Thermal Supply Inc. webstore account page for user Darcy Lewis. The page is titled "Welcome, DARCY" and shows the user's email address and customer code. The page is divided into several sections:

- Current Profile:** Shows the user's name (Darcy Lewis), email address, and customer code. There is a "Change Account" dropdown menu and an "Edit Profile" link.
- Track My Order:** A search box for tracking orders by Order, Invoice, or PO number. A note states that searches by PO number only return results for complete orders.
- Your Recent Web Orders:** A section showing the user's recent orders. It includes a dropdown menu to filter orders by date (30 days) and a message stating "There are no open orders for your account".
- Recent Company Orders:** A section showing the user's recent company orders. It includes a dropdown menu to filter orders by date (30 days) and a message stating "No orders for the past 30 days".
- Shopping Tools:** A section with links to "Favorites List", "Order Templates", "Search History", "Wish Lists", "Frequently Ordered Items", "Saved Carts", and "Set Checkout Defaults".
- Account Tools:** A section with links to "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". This section is highlighted with a red box and numbered 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

The screenshot shows the Thermal Supply Inc. web account dashboard for user Darcy Lewis. The dashboard includes sections for 'Current Profile', 'Track My Order', 'Your Recent Web Orders', 'Recent Company Orders', 'Shopping Tools', and 'Account Tools'. The 'Account Tools' section is highlighted with a red box and contains 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'. Red circles with numbers 8 through 13 are placed next to the links in the 'Account Tools' section, corresponding to the numbered list on the left side of the page.

# 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 the following components:

- Current Profile:** Shows account details for Darcy Lewis (diewis@thermalsupply.com, Cust Code: 53722). A red box labeled 'a' highlights the 'Favorite Links' menu, which includes Favorites List, Order Templates, Current Statement, and Open Backorders.
- Track My Order:** Includes a search bar and a 'Track Order' button.
- Your Recent Web Orders:** Shows a filter for 'Show orders for the past 30 days (100 orders max)' and a message: 'There are no open orders for your account'.
- Recent Company Orders:** Shows a message: 'No orders for the past 30 days'.
- Shopping Tools:** Lists various tools like Favorites List, Order Templates, Search History, Wish Lists, Frequently Ordered Items, Saved Carts, and Set Checkout Defaults. A red box labeled 'b' highlights the 'Manage Favorite Links' link.
- Account Tools:** Lists tools like 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.

The expanded 'Manage Favorite Links' modal (labeled 'c') shows two columns of tools with star icons for selection. A 'Done' button is visible at the top right of the modal.

# Admin Tools

# Manage Coworkers

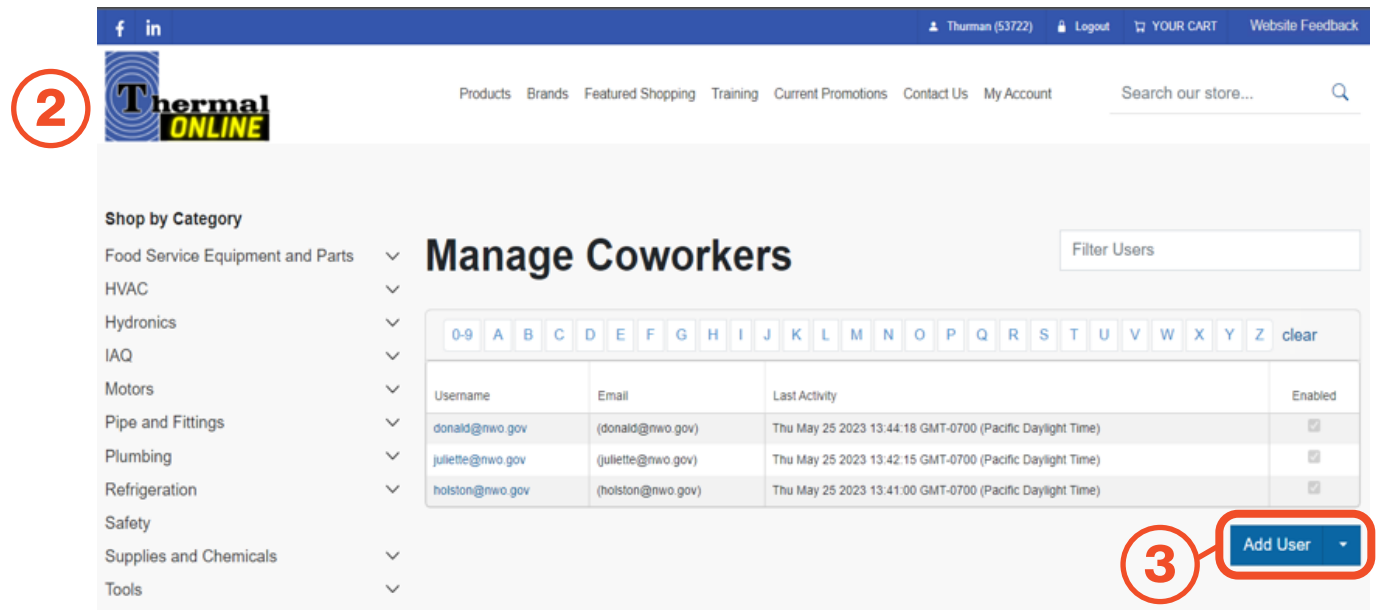
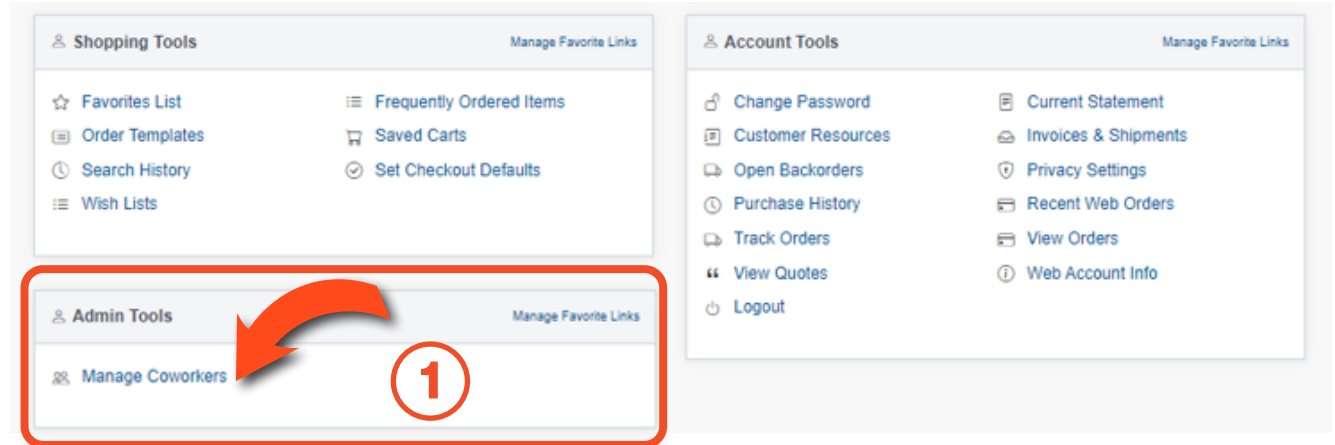
The “Manage Coworkers” Tool allows an admin to manage all the accounts within a company.



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

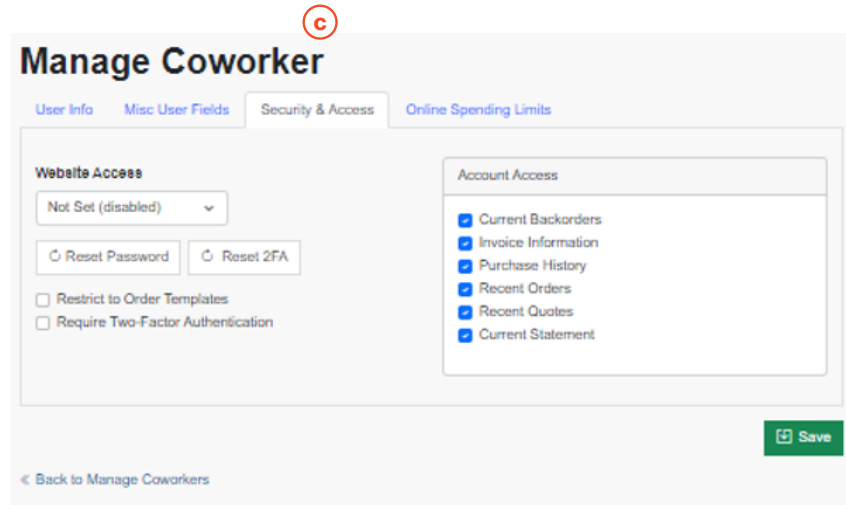
# Admin Tools

## Manage Coworkers

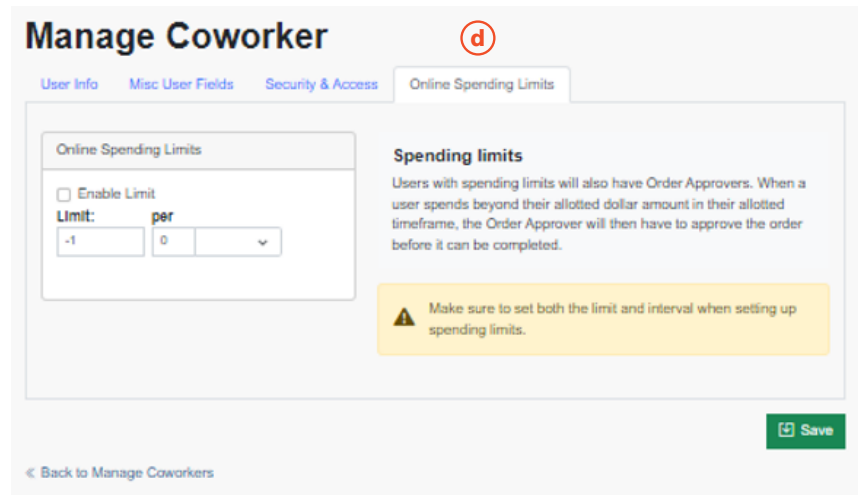
c. The third tab allows you to enable/disable the coworker's account and restrict them to ordering only from Order Templates. You can also determine which areas of the account dashboard are available to them

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



The screenshot shows the 'Manage Coworker' page with the 'Security & Access' tab selected. A red circle 'c' is positioned above the title. The page has four tabs: 'User Info', 'Misc User Fields', 'Security & Access', and 'Online Spending Limits'. The 'Webalta Access' section includes a dropdown menu set to 'Not Set (disabled)', 'Reset Password', and 'Reset 2FA' buttons, and two checkboxes: 'Restrict to Order Templates' and 'Require Two-Factor Authentication'. The 'Account Access' section contains a list of checkboxes for 'Current Backorders', 'Invoice Information', 'Purchase History', 'Recent Orders', 'Recent Quotes', and 'Current Statement'. A green 'Save' button is at the bottom right, and a 'Back to Manage Coworkers' link is at the bottom left.



The screenshot shows the 'Manage Coworker' page with the 'Online Spending Limits' tab selected. A red circle 'd' is positioned above the title. The page has four tabs: 'User Info', 'Misc User Fields', 'Security & Access', and 'Online Spending Limits'. The 'Online Spending Limits' section includes an 'Enable Limit' checkbox, a 'Limit' field with a value of '-1', a 'per' label, and an interval dropdown menu set to '0'. The 'Spending limits' section contains explanatory text: '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.' A yellow warning box below this text says: 'Make sure to set both the limit and interval when setting up spending limits.' A green 'Save' button is at the bottom right, and a 'Back to Manage Coworkers' link is at the bottom left.

# Shop & Search

# Search Bar

Look up products by:

**Item number - SKU/  
Manufacturer Part #**  
(Ex. GSZB402410)

**Keywords**  
(Ex. Heat Pump, SEER2,  
or 2 T 14.3)

**Brand**  
(Ex. Goodman Heat Pump)

**Category**  
(Ex. Residential HVAC)

The screenshot shows the Thermal Supply Inc. website interface. At the top, there is a navigation bar with social media icons (Facebook, LinkedIn), a search bar containing the text "GSZB402410", and links for "Login | Register" and "YOUR CART". Below the navigation bar is the "Thermal ONLINE" logo. The main content area features a large banner for "DAIKIN Daikin ATMOSPHERA" with the text "The First R-32 Single Zone Ductless Unit In North America" and a "Shop Atmosphaera" button. To the right of the banner, it says "IN STOCK NOW!" and "R32 ONLY AVAILABLE IN OREGON AND WASHINGTON". Below the banner are three promotional tiles: "YOUR LEADING SUPPLIER OF OEM PARTS IN THE PACIFIC NORTHWEST" with a "Shop OEM Brands" button; "NEW BK SERIES CONDENSATE PUMPS" with a "SHOP BECKETT" button; and "REME HALO" with a "Shop REME HALO" button. Each tile includes a brief description of the product or service.



# Search Results

1 | Add to Cart or a Favorites List

2 | Check Inventory (Click to Show Other Locations)

3 | View Attached Documents

4 | Show Item Specifications

5 | Show Compatible Parts and Equipment

The screenshot displays the Thermal Supply Inc. website search results for "heat pump". The page includes a navigation bar with the company logo, user information (DARCY (53722)), and links for Logout, YOUR CART, and Website Feedback. A search bar at the top right shows the query "heat pump" and indicates "Viewing Page 1 of 13 (513 results)".

The main content area is divided into a left sidebar for filtering and a main product list. The sidebar includes "Filter Your Search" with options for "Previously Purchased Only", "Category Group" (listing various HVAC components like Brackets, Defrost, Filter-Driers, etc.), and "Brand" (listing manufacturers like ADEMCO INC, ALLIED AIR ENTERPRISES INC, etc.).

The product list features three items:

- HEAT PUMP INDOOR 12K BTU LV SERIES**: Manufacturer: DAIKIN DUCTLESS, Manufacturer Part #: FTXS12LVJU, SKU: FTXS12LVJU. Price: \$513.88. Inventory: In Stock at Seattle UOM: EA. Options: Add to Cart, Favorite Item.
- 7K INDOOR HEAT PUMP LV SERIES**: Manufacturer: DAIKIN DUCTLESS, Manufacturer Part #: CTXS07LVJU, SKU: CTXS07LVJU. Price: \$443.70. Inventory: In Stock at Seattle UOM: EA. Options: Add to Cart, Add To Favorites.
- \*3 TON DAIKIN FIT HEAT PUMP**: Manufacturer: DAIKIN UNITARY PRODUCTS, Manufacturer Part #: DZ17VSA361BA, SKU: DZ17VSA361BA. Price: \$4,318.50. Inventory: In Stock at Other Locations UOM: EA. Options: Add to Cart, Add To Favorites.

Red annotations highlight key features: 1. "Add to Cart" button, 2. "In Stock at Seattle UOM: EA" text, 3. "Installation Manual" and "Submital Data Sheet" links, 4. "More Info" link, and 5. "View Accessories" link.

# Browsing Category

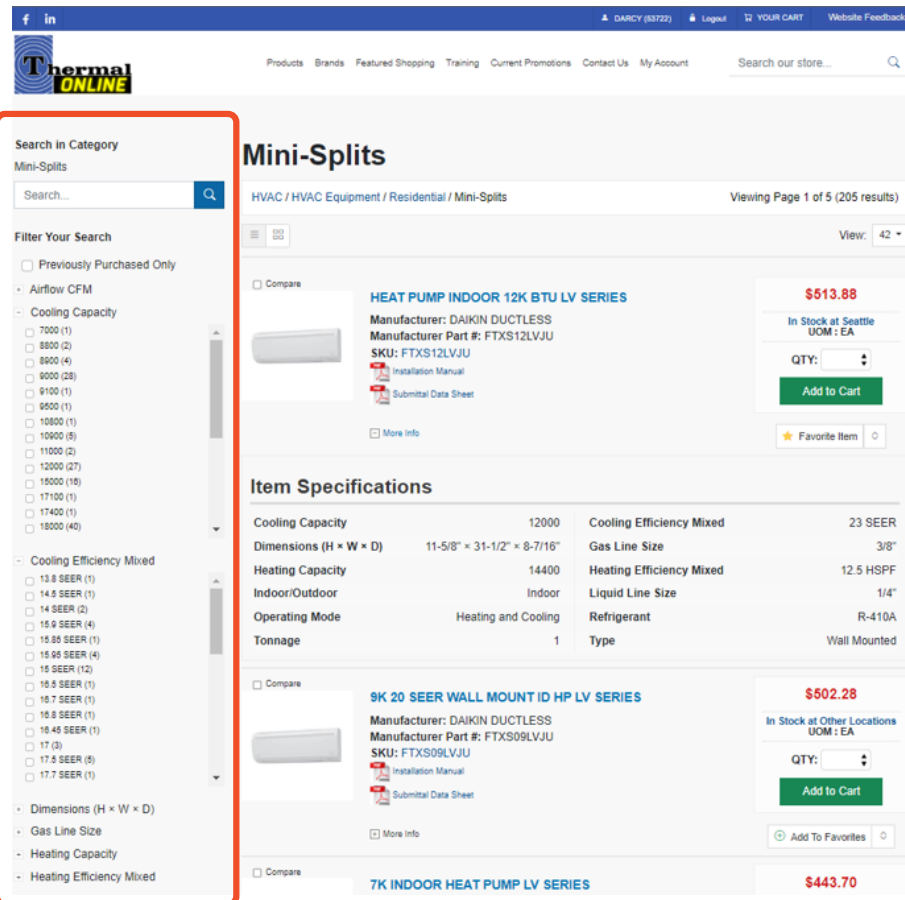
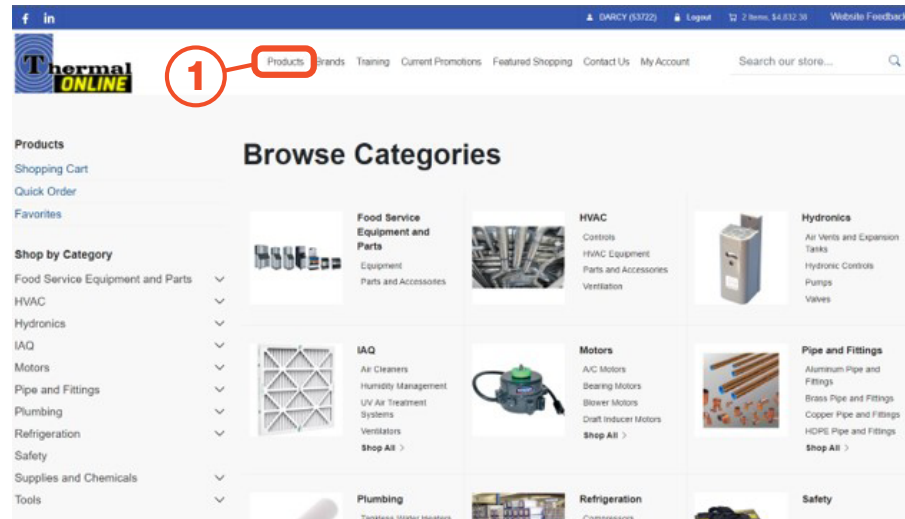
Browse by:

## 1 | Category

Products are categorized by product type and sub-categories

## 2 | Filtering Search Results

While browsing by category, additional filter options appear on the left - Clicking on any of these will only show items with that attribute or specification allowing you to easily narrow your search



# Browsing

## Brands/Suppliers

Browse by:

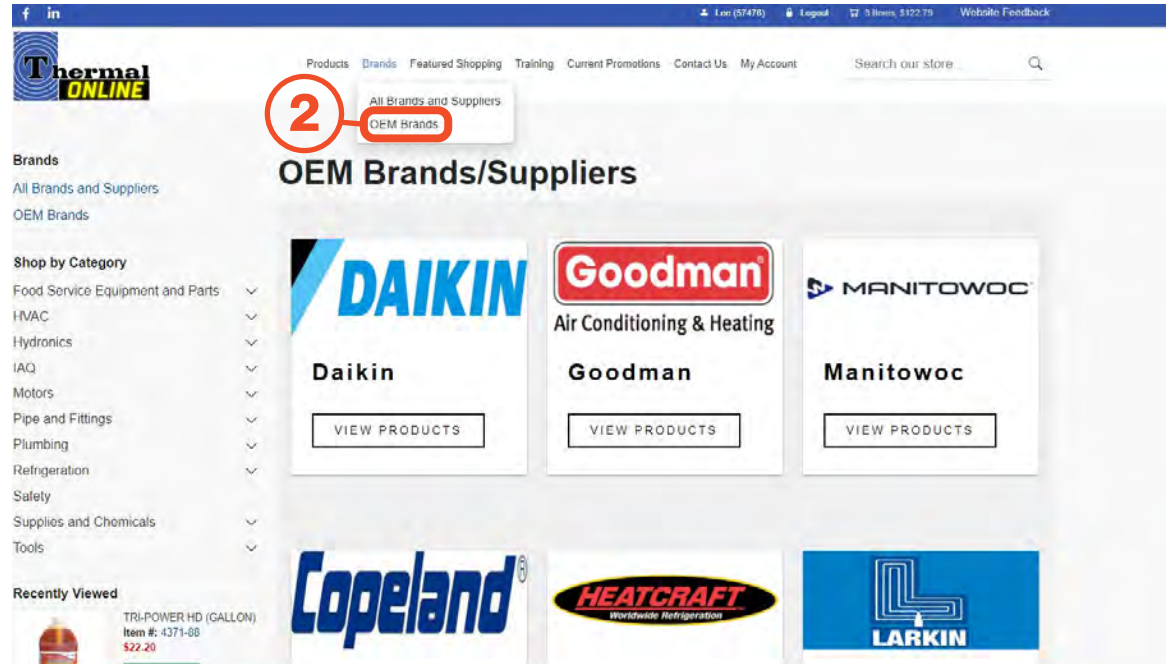
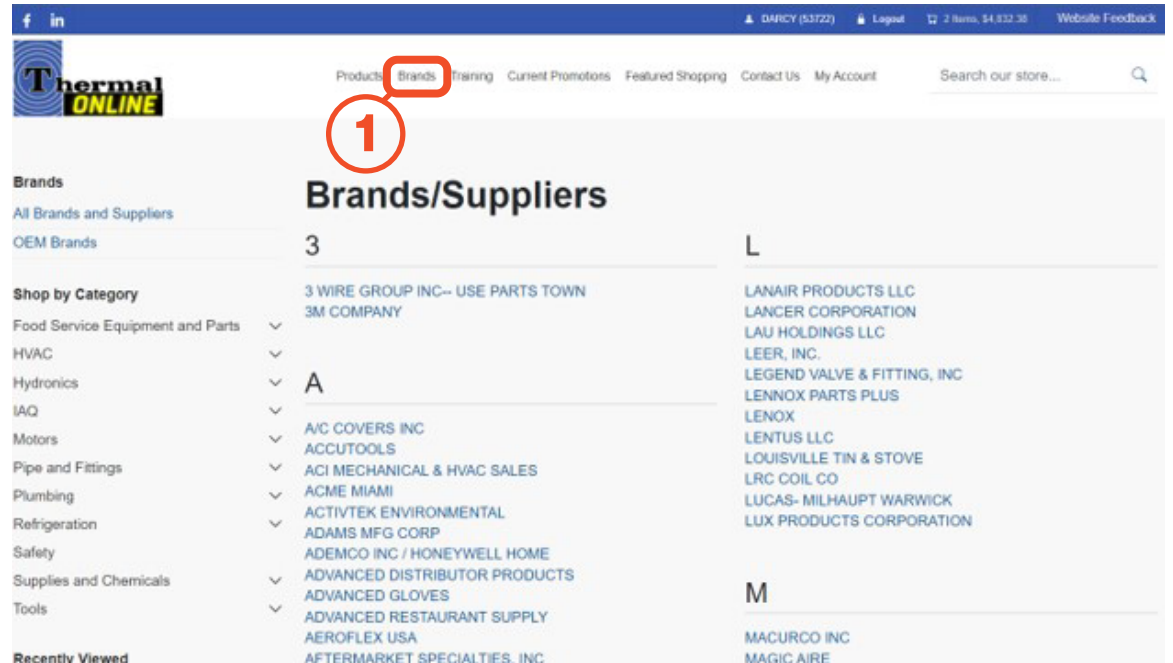
### 1 | All Brands/Suppliers

Brands can be looked up by alphabetical order for All Brands

OR

### 2 | OEM Brands/Suppliers

You can browse by OEM Brands



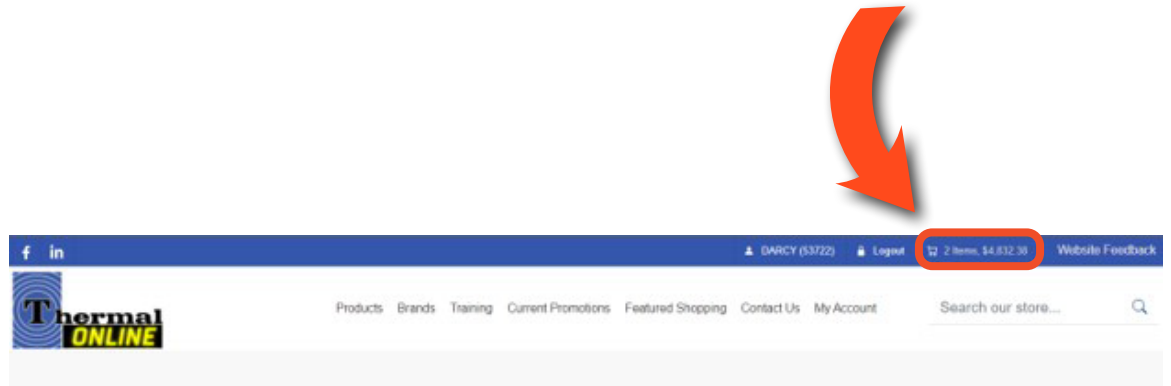
# Checkout

## Ready to Checkout

When ready to checkout and place the order click on the **shopping cart icon** to the right of the top bar.

### Notes:

Next to the cart you'll be able to preview how many items you have and the total cost while you shop.





# Shopping Cart

Review your order in detail:

- 1 | Add Notes to Each Item or Choose a Specific Ship Date
- 2 | Clear the cart or save it for later, and you can also print it or download it as an excel sheet
- 3 | If an item in your cart will need to be backordered or transferred you'll see this alert
- 4 | Add coupon codes if you have any
- 5 | Checkout

The screenshot shows the Thermal Supply Online Shopping Cart page. The page header includes the Thermal Supply Online logo, navigation links (Products, Brands, Training, Current Promotions, Featured Shopping, Contact Us, My Account), and a search bar. The cart items are listed in a table with columns for Part #, Description, Qty, UOM, Avail, Price, and Ext. Price. The items are:

Part #	Description	Qty	UOM	Avail	Price	Ext. Price
FTXS12LVJU	HEAT PUMP INDOOR 12K BTU LV SERIES	1	EA	In Stock at Seattle	\$513.88	\$513.88
DZ17VSA361BA	*3 TON DAIKIN FIT HEAT PUMP	1	EA	Call For Availability	\$4,318.50	\$4,318.50

Below the table, there are checkboxes for "Enable Line Notes" and "Enable Req. Shipdate" (callout 1). To the right, there are buttons for "Clear Cart" and "Save Cart" (callout 2). A "Checkout" button is located at the bottom right (callout 5). On the right side, there is an "Inventory Info" alert for the DZ17VSA361BA item, stating "Part of your order is not available for immediate shipment or pickup." (callout 3). Below the alert is an "Apply Coupons" section with an input field and an "Apply" button (callout 4). The subtotal, estimated tax, and estimated total are displayed at the bottom right.

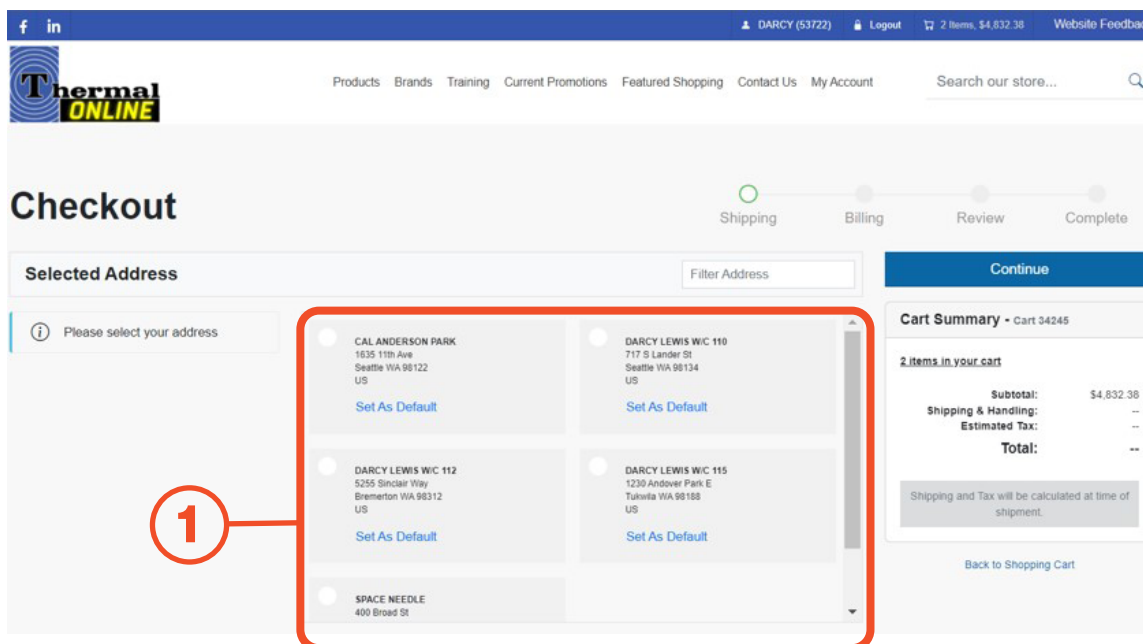
# Shipping Address

## 1 | Select the Shipping Address for the Order

### Notes:

a. Addresses with “W/C” are used when you’re picking up your order at that branch via Will Call. You’ll need to choose Will Call as the shipping method on the next screen, but choosing it here avoids discrepancy.

b. If you need a new shipping address, you’ll need to contact your local branch to add one to your account, which should then be available online after a short time.



# Delivery Method & Billing Information

1 | Select the Address Type and Delivery Method

2 | Complete the Billing Information

## Notes:

a. The Special Instructions box can be used for several reasons:

- Instructions for delivery personnel
- Promotional codes that weren't recognized on the Shopping Cart screen
- Any additional details regarding the order

b. Select "Ship Complete Order Only" to wait until any backordered items have arrived before the order is shipped out

The screenshot shows the Thermal Supply Online checkout page. The page is titled "Checkout" and has a progress bar with four steps: Shipping, Billing, Review, and Complete. The "Billing" step is currently active. The page is divided into several sections:

- Delivery Information:** This section is highlighted with a red box and a circled "1". It contains:
  - Address Type:** Radio buttons for Commercial (selected) and Residential.
  - Delivery Method:** Radio buttons for USPS Priority Air, UPS Ground, UPS Next Day, UPS 2nd Day, Best Way (selected), Will Call, and TSI Delivery.
  - Special Instructions:** A text area with the placeholder "Any special instructions go here..." and a "Ship Complete Order Only" checkbox.
- Billing Information:** This section is highlighted with a red box and a circled "2". It contains:
  - PO:** A text input field with the placeholder "Enter your PO".
  - Payment Type:** A dropdown menu with "On Account" selected.
- Ship-To Address:** A section with the address: CAL ANDERSON PARK, 1635 11th Ave, Seattle WA 98122, US, Ship ID: 68472.
- Cart Summary - Cart 34245:** A section showing 2 items in the cart with a subtotal of \$4,832.38, shipping and handling, estimated tax, and a total.

# Final Review

Review everything you've entered so far; this is your last chance to make any changes.

1 | Click **“Finish Checkout”** to place the order with your local branch

**Checkout**

Shipping  Billing  Review  Complete

**Finish Checkout**

Your checkout isn't complete! Click the "Finish Checkout" button to complete your order.

**Cart Summary - Cart 34245**

2 items in your cart

Subtotal:	\$4,832.38
Shipping & Handling:	--
Estimated Tax:	--
<b>Total:</b>	--

Shipping and Tax will be calculated at time of shipment.

[Back to Shopping Cart](#)

**Ship To**

CAL ANDERSON PARK  
1635 11th Ave  
Seattle WA 98122  
US  
Ship ID: 68472

**Order Information**

Cart #: 34245  
Placed By: DARCY LEWIS  
PO #: TOTALLYREALPO  
Payment Method: On Account

**Ship Method:**  
Best Way

**Special Instructions:**  
please deliver 02/21

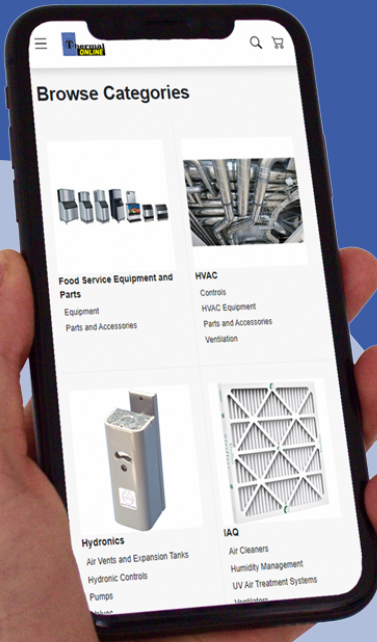
Part #	Description	Qty	UOM	Price	Ext. Price
FTXS12LVJU	HEAT PUMP INDOOR 12K BTU LV SERIES	1	EA	\$513.88	\$513.88
DZ17VSA301BA	*3 TON DAIKIN FIT HEAT PUMP	1	EA	\$4,318.50	\$4,318.50

**Cart Summary - Cart 34245**

2 items in your cart

Subtotal:	\$4,832.38
Shipping & Handling:	--
Estimated Tax:	--
<b>Total:</b>	--

## 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](mailto:dlewis@thermalsupply.com)

801-664-3426