

Web-Select™ Ordering, Basic Instructions

(If the unit is already part of a Quote, see “Ordering From an Existing Quote” below)

WEB-SELECT™ AT A GLANCE

1. **Select.** Select products and save to Schedule.
 2. **Price.** Price products and save to Schedule.
 3. **Order.** Create an Order consisting of certain line items from the Quote.
 4. **Release.** Release items in the Order as necessary.
 5. **Order Status.** Follow your job using online Schedule Dates and Shipping Info tools.
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NOTE: All line items must be Selected and Priced prior to Ordering or Quoting. Any items displaying “Not Selected” or “Not Priced” in the Schedule view must be corrected prior to proceeding.

Ordering From the Schedule View

1. In Web-Select, click **View Schedule** for your Project. Choose a Product Type (i.e. Fan Coil Units).
2. **Select the required line items** by checking the box in the Select column. All items may be select at one time by checking the box in the Select column heading.
3. At the bottom of the page, **click the Order button** to add the selected units to a New Order. You may also choose to add the units to an existing Web-Select Order (i.e. as a second release) by choosing the Order Name from the drop-down menu. This will take you to the Order Worksheet, to add Ship To information, PO number, Carrier instructions, multiplier, SFA's, etc.
4. Complete the Order Worksheet and **click Save/Hold for Release**.
5. **Click on any Release Number** to release all line items. This will display the Release Worksheet. Confirm information and click the **Submit Release** button. You may wish to Preview Consolidated Order prior to submitting.
 - *An automatically generated email will immediately follow, saying that your order has been received. The factory verifies and enters the order, after which you will receive email notification of an Order Status Change. At this point, you may access and print line item information from the Project Orders screen by clicking on “Track Orders”.*

Ordering From an Existing Quote

1. In Web-Select, click **View Schedule** for your Project. Choose a Product Type (i.e. Fan Coil Units).
2. Items belonging to a Quote will display the Quote Name in the Schedule. **Click the Quote Name.**
3. For the items on this Quote, **enter a new Order Name and click Create.**
4. On the Project Orders screen, **click on the Order Name** in the green “Add Line Items” column.
5. Select items to be added to the Order and click **“Add Selected to Order”**.
6. Proceed with Step 4 above.

Creating a New Quote (optional)

Quotes may contain multiple Product Types (i.e. fan coils with belt drive blower coils).

1. In Web-Select, click **View Schedule** for your Project.
2. **Select the required line items** by checking the box in the Select column.
3. At the bottom of the page, **click the Quote button** to add the selected units to a New Quote. You may also choose to add the units to an existing Quote by choosing the Quote Name from the drop-down menu. This will take you to the Quote Worksheet.
4. Complete the information on the Quote Worksheet and **click “View Summary/Create Order.”** This takes you the **Quote Item Summary** screen, the starting point for creating an Order (if desired). Proceed with Step 3 above.