WESCODirect.ca User Guide

WESCO Distribution, Inc. is the leading distributor for electrical maintenance, repair and operating (MRO) supplies, and is the nation's largest provider of integrated supply services.



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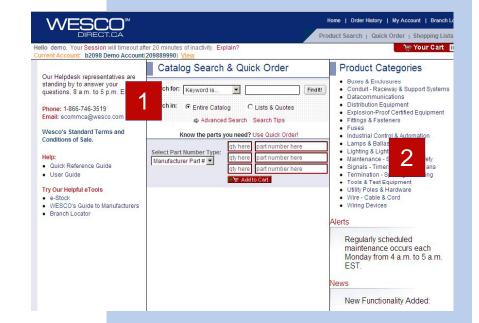
Help



Catalog Search

There are two ways to search for items in the catalog:

- Keyword Search allows you to enter all or part of a part number or description.
- 2. Product Categories allows you to drill down your search by categories.



Catalog Search: Keyword

To use Keyword search:

- 1. Click on arrow of "Search For" field.
- 2. Select search option.
- 3. Click in blank to enter information.
- 4. Click on "Find It."



Catalog Search: Results

The user can:

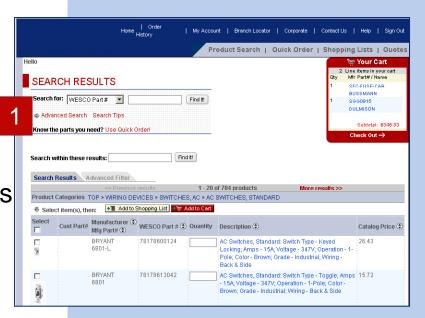
- 1. Select an item.
- 2. Add to the Shopping Cart.
- 3. Add it to a Shopping List.
- Click on the description to see more information about the item.
- Check stock by clicking on the check mark next to the WESCO part number (this check appears next the items that are stocked).
- Refine the search using Advanced Search.
- 7. Refine the search using "Search Within."
- 8. Refine the search using "Advanced Filter."
- Filter items to show only "items stocked at branch" or "items stocked at branch and DC".

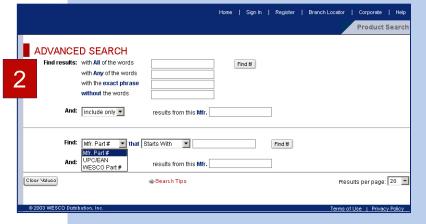


Catalog Search: Advanced Search

Advanced Search

- 1. Click on "Advanced Search."
- Click in blank field to enter information that corresponds with one of the following search options
 - With All of the Words
 - With Any of the Words
 - With the Exact Phrase
 - Without the Words





Catalog Search: Advanced Search (continued)

To use the "And" Search Option

- 1. Click on drop-down arrow of the "And" field.
- 2. Highlight either "Include Only" or "Exclude" to select.



Catalog Search: Advanced Search (Continued)

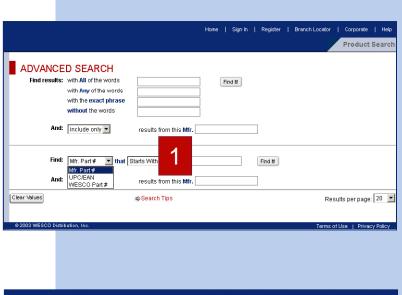
To use the "Results From This Manufacturer" Search Option

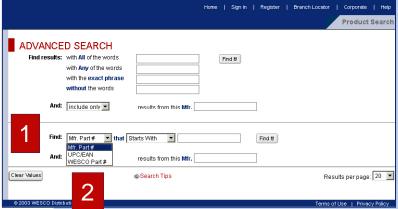
 Click in blank field to enter manufacturer name.

To use the "Find" Search Option

- 1. Click on drop-down arrow of the "Find" field.
- 2. Highlight the "Find" Search Option to select:

Mfr. Part #
UPC/EAN
WESCO Part #

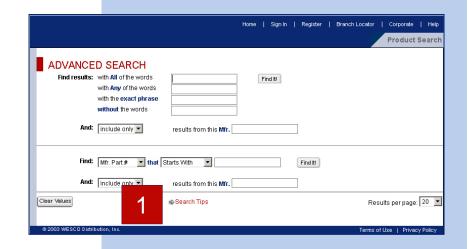


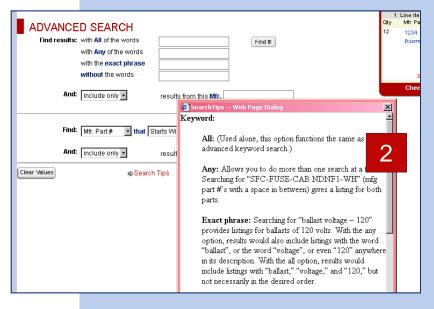


Catalog Search: Advanced Search (Continued)

To use "Search Tips"

- Click on "Search Tips" to obtain search tip information.
- 2. To read "Search Tips" use mouse to scroll up or down.

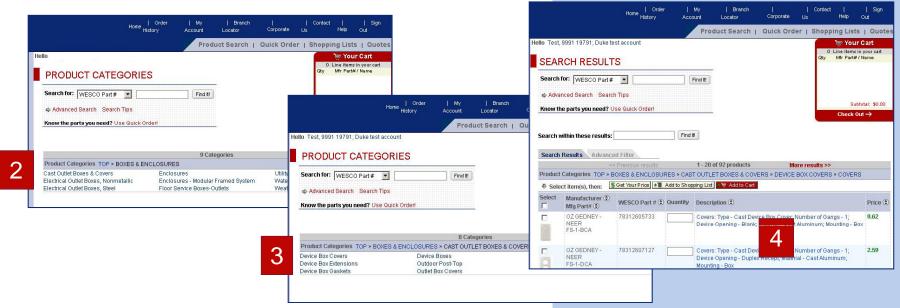


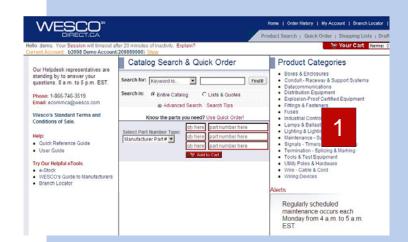


Catalog Search: Category Drill-Down

To use Category Drill-down

- 1. Click on a product category.
- 2. Click on a product subcategory.
- 3. Click on a product type.
- 4. Results will be displayed.

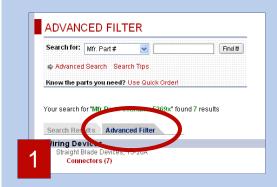


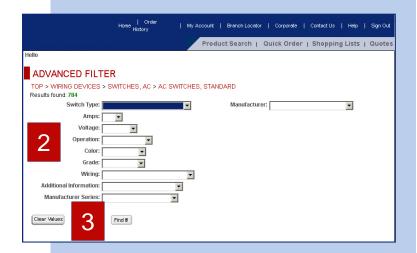


Advanced Filter

Advanced Filter allows you to further refine your search by specific product attributes

- There may be one or more subcategories of items (red text).
 Click on the one that most closely matches the product you are searching for.
- 2. Each of the product attributes has a drop-down menu with specific characteristics. Select as many attributes as appropriate and the list will be further refined.
- 3. Click on "Find it" to obtain results.





Quick Order

If you already know the part numbers of the items that you want to purchase, use the Quick Order Entry.

You can:

 Access a condensed version of Quick Order from the Home Page

-OR-

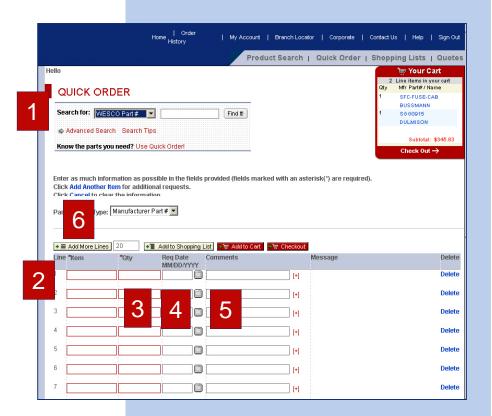
Click on the Quick Order tab for a larger view.



Quick Order

To use Quick Order

- Click on arrow of "Search For" field.
- 2. Click in blank "Item" field to enter item information.
- 3. Click in blank "Qty" field to enter quantity.
- 4. Click in "Req Date" to enter delivery date requirements.
- 5. Click in "Comments" blank to enter comments if appropriate.
- Click on "Add More Lines" to add more lines to the form if necessary.



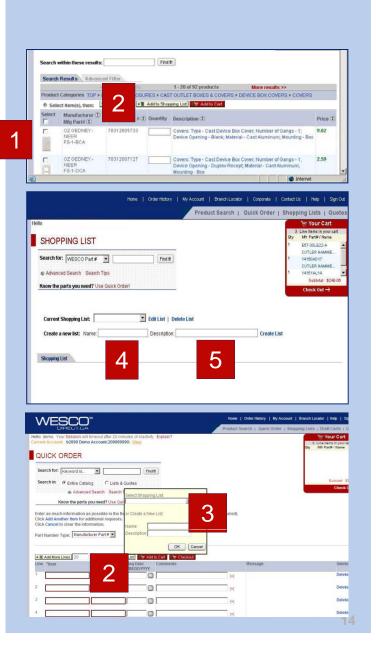
Save your frequently ordered items in a Shopping List to save time

If you are already on the "Product Detail" screen proceed to step 2.

To create a Shopping List

Method I – On the Fly

- 1. Click the box next to the item you wish to buy.
- 2. Click on "Add to Shopping List" button.
- 3. In the "Shopping List Picker" dialog box that appears click on "Add New" to create a new shopping list.
- 4. Click in the blank "Name" field to enter a name for the Shopping List.
- 5. Click in the blank "Description" field to enter description information.
- 6. Click on "Save" to save Shopping List information.

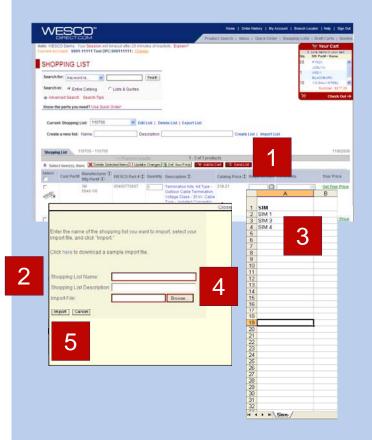


Method II – Using Quick Order

- 1. Enter items on Quick Order screen as described previously.
- 2. Click on "Add to Shopping List" button.
- Create a name and optional description in the shopping list dialog box.

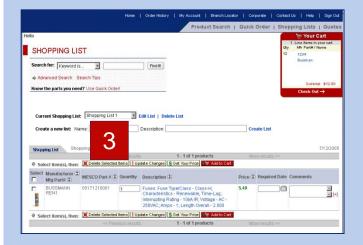
Method III – Using Import Shopping List Function

- From the Shopping List page, click the Import List link.
- 2. Download an inventory template from the Import Shopping List dialog box.
- Enter all SIM's to be imported, and save the spreadsheet.
- 4. Name the Shopping List, provide a description (optional), and use the Browse button to navigate to the location in which you saved the list in step #3.
- 5. Press the "Import" button.



To add an item to an existing Shopping List

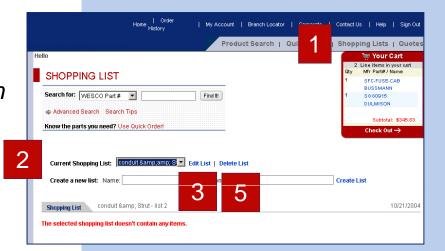
- 1. Click the box next to the item you wish to buy.
- 2. Click on "Add to Shopping List" button.
- 3. Click the drop-down arrow of the "Current Shopping List" field to view all Shopping Lists.
- 4. Highlight the appropriate list name.
- 5. Click "OK" to add the item to the Shopping List.



Use the Shopping List Screen to speed up your next order, edit your lists for future use, or to view what is currently on your list.

To View a Shopping List

- 1. Click on "Shopping List" on gray menu bar.
- 2. Highlight the Shopping List name to select and view that list.
- 3. Click on "Edit" to make changes to the Shopping List.
- 4. Click on "Update Changes" to update the Shopping List.
- Click on "Delete" to delete the Shopping List.
- 6. To "Add to Cart" click on box next to the item to select it.



Shopping Cart

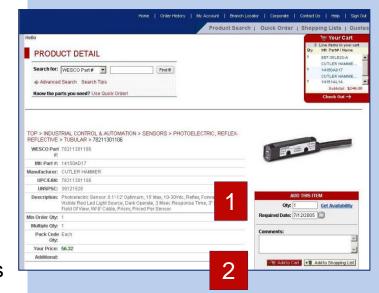
Hold the items you want to purchase in your Shopping Cart.

To add items to the Shopping Cart

- Enter order quantity information in the blank "Quantity" field next to the item you wish to order
- 2. Click on "Add to Cart" to add item(s) to cart You will receive a confirmation message once items are added to cart.

To delete items in the "Shopping Cart"

- Click on "Clear Cart" on the "Shopping Cart" screen
- 2. Click on "OK" when asked if you are sure you want to delete the "Shopping Cart"



Shopping Cart

There are two ways to review items in your Shopping Cart

- 1. View the "Mini-Cart" in the upper right-hand corner of the home page for a preview of the items in the "Shopping Cart."
- Click on the "Manufacturer Part #" and "Name" to view the "Product Detail" screen

-Or-

Click on "Your Cart" to view the details of the items in the "Shopping Cart"



Shopping Cart

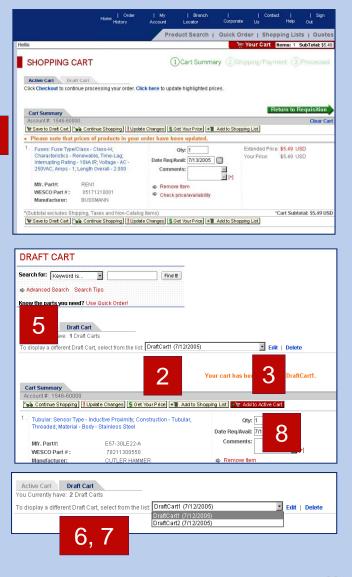
Use the "Draft Cart" when you want to hold an order to be completed at a later time. This feature allows you to work on multiple orders at one time.

To "Save" a "Draft Cart"

- 1. Click on "Save to Draft Cart" in the Shopping Cart screen to save the current Draft Cart.
- The cart will be saved under a default Draft Cart name—"DraftCart#(Date)."
- 3. Click on "Edit" to rename the Draft Cart.
- 4. Click on "Save" to save with new name.

View Saved Draft Carts

- Click on "Draft Cart" tab to view all saved Draft Carts.
- Click on the drop-down arrow in the "Draft Cart" field.
- Highlight the Draft Cart name to select the Draft Cart you wish to view.
- 8. Click on "Add to Active Cart" to move items from the Draft Cart to the Active Cart.
- 9. The Active Cart screen will be displayed.



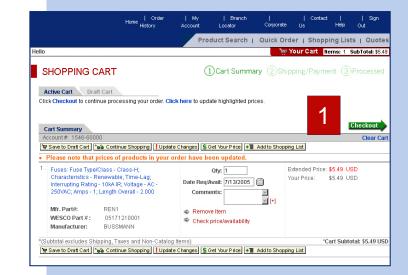
Checkout

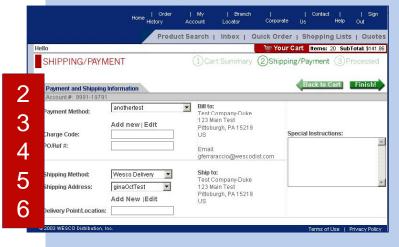
To Use "Checkout"

1. Click on "Checkout" to get Shipping/Payment form.

To Complete "Payment Method" Section

- Click on drop-down arrow of "Payment Method" field. Highlight payment method choice to select it.
- 3. Click in blank "Charge Code" field to enter information if applicable.
- Click in blank "PO/Ref #" field to enter information if applicable.
- Click on drop-down arrow to show "Shipping Method" choices. Highlight "Shipping Method" choice to select it.
- 6. Click on drop-down arrow to show "Shipping Address" choices. Highlight "Shipping Address" choice to select it.

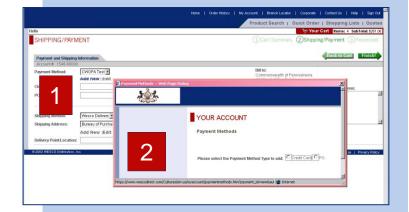




Checkout (Continued)

To Add New / Edit Payment Information

- Click on "Add New" under "Payment Method."
- Click on "Credit Card" or "PO" to enter or edit payment method
- Click in field(s) to edit or enter information





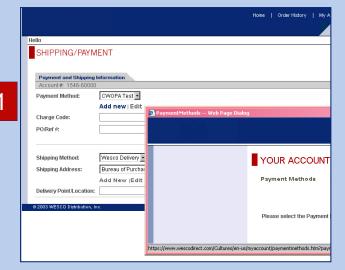
Checkout (Continued)

To Add a New Shipping Address or Edit Existing

- 1. Click on "Add New" or "Edit" as appropriate.
- Click in blank "Add New" shipping address fields to enter or edit information
- 3. Click on "Yes" option of "Default Address" to make default address
- 4. Click on "Save" to save address

To Use "Delivery Point Location"

Click in blank "Delivery Point Location" field to enter delivery point location information



Account#: 1546-60000	
Payment Method:	¥
	Add new Edit
Charge Code:	
PO/Ref #:	
Shipping Method:	Wesco Delivery 🔻
Shipping Address:	Bureau of Purchases
	Add New Edit
Delivery Point/Location:	

5

Checkout (Continued)

To Use "Special Instructions"

1. Click in blank "Special Instructions" field to enter special instruction information

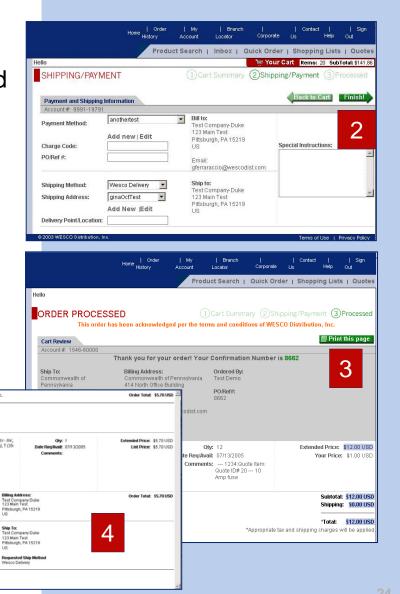
To "Finish"

- Click on "Finish" once all applicable fields are complete
- Click on "Print This Page" to print hard copy for record keeping

mation - WESCO Distribution. Inc

Order #: 8632 Date Ordered: 7/12/2005 PORM #: 8632

You will also receive an email confirmation

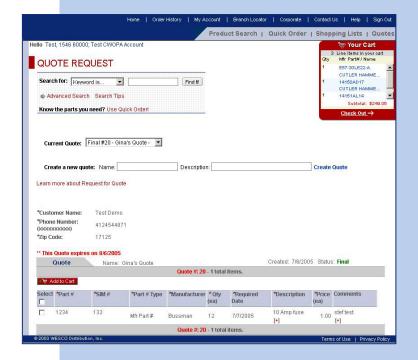


Quote Functionality

The "Quote" feature allows you to submit a free-form Request for Quote for items that are either not currently available online or could not be found in a product search.

Your RFQ is sent to the appropriate WESCO Sales Contact(s).

Once the quote is finalized, you will receive an email notification. At that time, you may retrieve the quote.

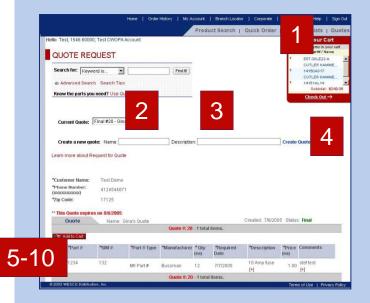


Quote Functionality

To create a new "Quote"

- Click on "Quotes"
- 2. Click in blank Name field to enter "Quote" name
- 3. Click in blank Description field to enter "Quote" description
- 4. Click on "Create Quote"
- 5. Click in the blank Part # field to enter part number
- Click on drop-down arrow of "Part # Type" box to select Part # Type
- Click in blank Manufacturer field to enter manufacturer information
- 8. Click in blank Quantity field to enter quantity
- Click in the blank Required Date field to enter date information
- Click in the blank Description field to enter description information

Click on "Request Quote" when all of the "Quote" information has been entered. The Quote status will be listed as pending.



Please note that once the quote is finalized by the branch, you may only purchase the exact quantity for which you submitted the quote

Quote Functionality

To view a finalized "Quote"

- Click on "Quotes."
- 2. Click on drop-down arrow of the "Current Quote" field.
- 3. Highlight a "Quote" name to select it.
- The "Quote" will appear with a price assigned to the items.
- 5. Please note that the Quote status will be listed as final.
- 6. Click the check box (in the Select column) next to the item(s) to add them to the Shopping Cart.
- Click on Add to Cart to add item(s) to Shopping Cart.

Please note that if the item does not have a checkbox next to it, the item cannot be supplied by WESCO.

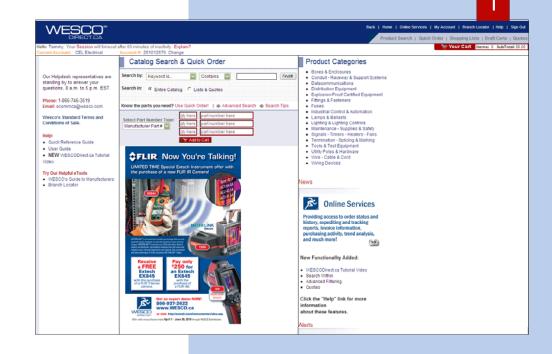
If you wish to purchase additional quantities or items after the quote has been finalized, please submit a new quote.



Help

To Use Help

- 1. Click on "Help" to view help options
- 2. Click on the appropriate link to view the Quick Reference Guide, User Guide, or video tutorial.



Helpdesk hours: 8AM-5PM EST

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