## The tool of the trade

westburne.ca

Your Quick User Guide To Westburne.ca
Web Features

## The tool of the trade





### Your guide to understanding Westburne.ca

#### **JOBLIST**

A joblist is a list of products you can create and save. A list could be a frequently ordered group of products that you often need or expect to re-order in the future, or a list of products you require for a particular job or project.



#### STOCK AVAILABILITY

If you have a web account linked to your Westburne Trade Account number, you can view the inventory of all the branches in your region, ensuring that we've got everything you need when placing an order for delivery and/or pick-up.



#### FAST ORDER

In a hurry? Save time using Fast Order. With this feature, you can skip searching for a product and directly enter specific part numbers on our online form, upload your own CSV. file, or copy and paste from any excel file.



#### **ORDER HISTORY**

With a Westburne web account, you have 24/7 access to all previous orders and invoices from the past two years, whether purchased in-branch or online. You can view the status of your orders, and search by date, invoice number, P.O number or order amount.



#### **EASY-TO-SHOP CATALOGUES**

Our interactive catalogues provide detailed product information, high-quality images, and seamless navigation to help you find exactly what you need. Click on the "Catalogues" tab to start browsing and add products directly to your cart.



#### **LIVE CHAT**

Our National Service Centre team can assist our customers by answering any questions you may have. Chat instantly with one of our product experts by clicking on the LiveChat button located on the right side of any page on Westburne.ca.



#### **QUOTE TO CART**

Quote customization is now available (cherry picking, updating quantity, changing P.O or delivery address). When the quote is ordered by the customer on the web, a new web order is created. You can find your web order number under the order history page.



#### **COMPANY MANAGEMENT**

With a Westburne web account, individuals that are set up as admin have the option to create web logins for their employees, manage delivery addresses, update profile information, approve new users, set up order approval process and much more.



#### **MOBILE APPLICATION**

Customers can access their web account on the go by downloading the mobile application - perfect for those working on the road or on construction sites. Plus, with the barcode scanner, you can quickly look up pricing, view stock availability and place an order all from your smartphone.



#### **AUTO TRADE ACCOUNT**

New customers can now apply for a Westburne Trade Account directly from our website. The process allows for a a quick online credit check. Once approved, you will be issued a new trade account number and web account on the spot.



#### **BRANCH STOCK**

You can now filter products based on branch stock to display only items that are currently available in the selected branch, making it easier for you to find and purchase the products you need.



### How to apply for your credit account

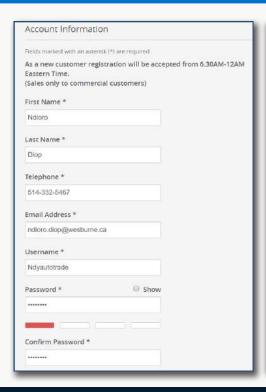
STEP 1:

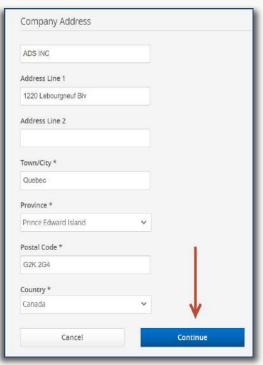
FROM THE HOMEPAGE CLICK ON **REGISTER**. SELECT **NO.REGISTER FOR A NEW ACCOUNT** THEN CHOOSE **APPLY FOR A WESTBURNE ACCOUNT**.



STEP 2:

ENTER YOUR PERSONAL INFORMATION & COMPANY ADDRESS





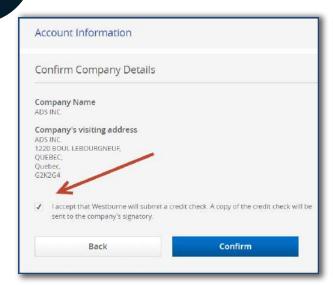
# Trade Account westburne.ca

### How to apply for your credit account

STEP 3:

#### ACCEPT TO SUBMIT TO A CREDIT CHECK BY CHECKING THE BOX

Please note that you must have a good credit score standing and your company information must match the information at the credit bureau in order for your credit check to be approved.

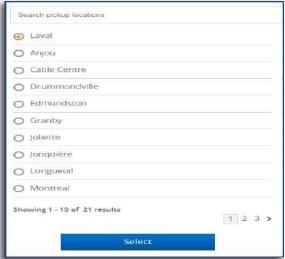




STEP 4:

ONCE YOUR CREDIT CHECK IS APPROVED, YOU WILL BE INVITED TO CHOOSE YOUR MANAGING BRANCH (THIS FIELD IS MANDATORY)







### How to apply for a credit account

STEP 5:

AGREE TO THE TERMS & CONDITIONS THEN CLICK ON **CONFIRM**. A NEW TRADE ACCOUNT NUMBER & WEB ACCOUNT WILL BE AUTOMATICALLY CREATED.

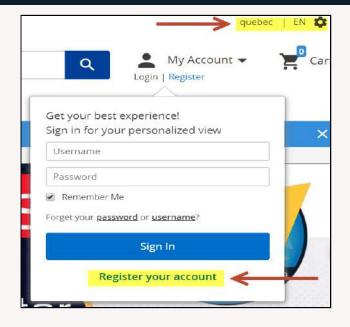




Congratulation! Your trade account and web account have now been created. If you have any questions about our products & services, please contact your local Westburne branch by visiting westburne.ca/store-finder or by calling our National Service Center at 1-866-585-3338.



## How to Create a web account

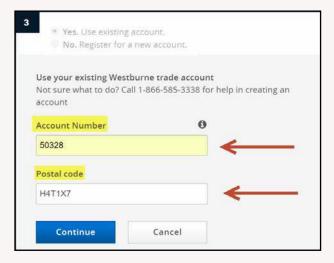


Register

Do you or your company have a Westburne account?

Yes. Use existing account.

No. Register for a new account.



- **1.** Make sure you are in the right division web page and click on **Register**.
- 2. If you have a Trade Account number with Westburne select YES. If you dont have a Trade Account number, please refer to the guide "Trade Account".
- 3. once you've clicked on **YES**, enter your Account Number and Postal Code. Please note that the postal code and account number must match the information we have on record (ie: your billing address).
- Fill out the form with your information and click on Register.
- Contact your account manager or email us at webinfo@westburne.ca to validate your new web account.



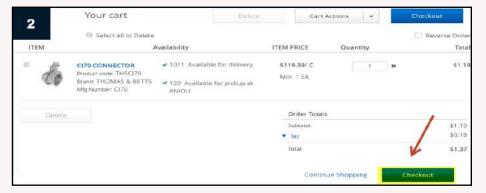




## How to Place an order



**1**. Log into your account, search for your product and click **Add to cart**.



Click on My Cart and then on Checkout.



 Enter a P.O. Number, choose your shipping option
 Delivery or Pick up – and then click on Place Order.

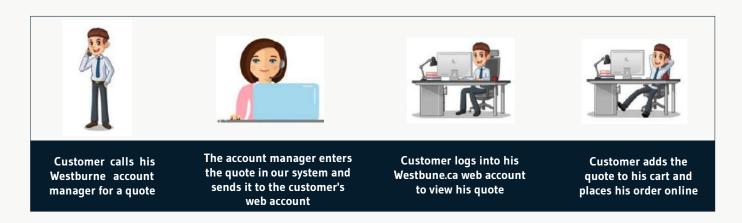
You will receive an email confirmation with a summary of your purchase and an order confirmation number. To inquire about your order, please contact your local Westburne branch by visiting westburne.ca/store-finder or by calling our National Service Center at 1-866-585-3338



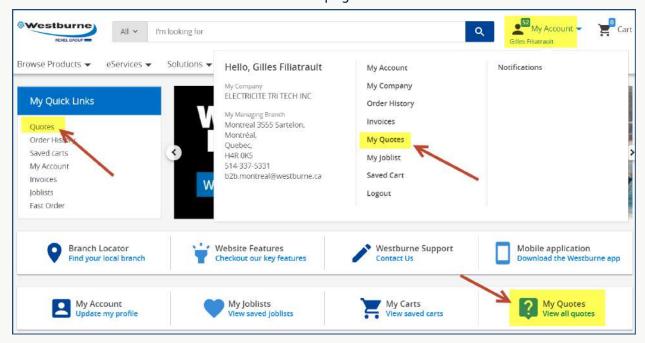


### YOUR HOW TO GUIDE

#### **HOW DOES QUOTE TO CART WORKS**



To access your quotes online, simply log into your web account and click on "My Quotes" located under **My Quick Links, My Account** or on the **Thin Promo Banner** on the homepage.

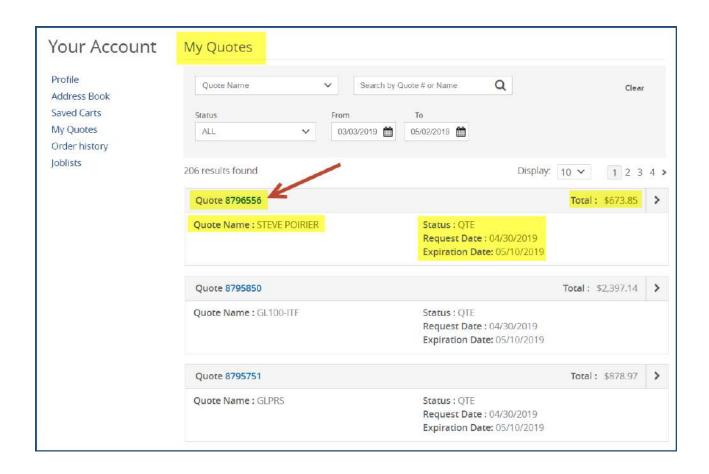




### YOUR HOW TO GUIDE

Within the quote page, you can search for a specific quote by filtering by name, number, status or date. For each quote, you will see the quote number, the quote name, its status, its request and expiration dates and the quote's total amount.

To view a specific quote simply click on the quote number.





### YOUR HOW TO GUIDE

Click on **select all** to add all the products to your cart or individually select the ones you want to add.

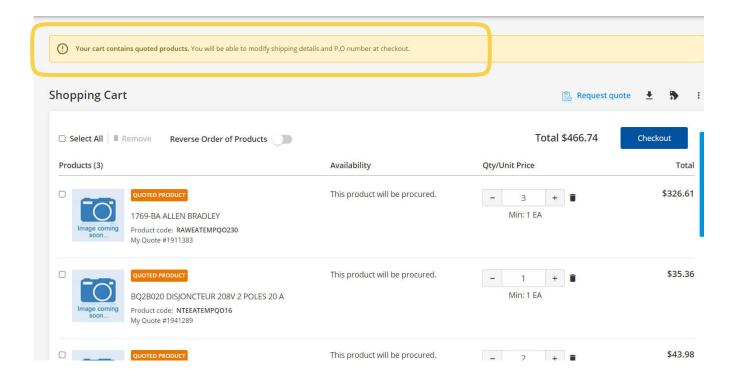
	Expiration Date: 10/05/2024		
Your Quoted Products(2)			Add Selected Product(s) to Cart
Select All	BQ2B020 DISJONCTEUR 208V 2 POLES 20 A	Total: \$35.36	Quantity:
Image coming soon	Product Code: NTEEATEMPQO16	This product will be procured.	Quantity:  1 EA  Min:1
Image coming soon	BQ1B015 DISJONCTEUR 120V 1 POLE 15A Product Code: NTEEATEMPQ017	Total: \$43.98 This product will be procured.	Quantity:  2 EA Min:1
			Add Calassad Bundings(s) on Care

Add Selected Product(s) to Cart



### YOUR HOW TO GUIDE

Please note that **a quote can now be modified online**. You can now add/remove products, edit quantities or change shipping information for a quote.



643 chemin de la Haute-Rivière,

Châteauguay, Quebec.

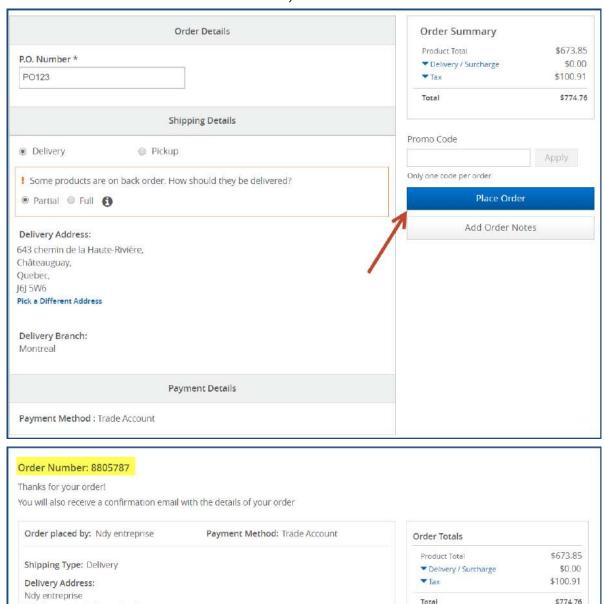
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Continue Shopping

### YOUR HOW TO GUIDE

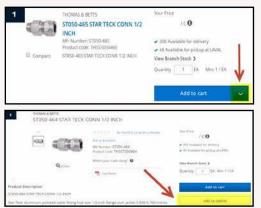
To complete your purchase, click on **Place Order**. You will receive an email with your order confirmation number. Please note that your **quote number is now your the web order number**. Be sure communicate this number to your Westburne representative when inquiring about your order.



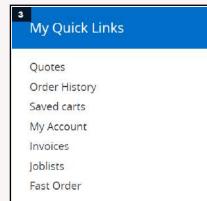


## How to create a Joblist and use Fast order

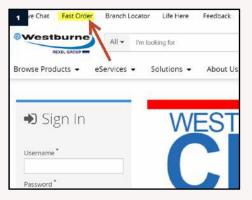
**JOBLIST:** Allows you to create and save a list of your most purchased items or products needed for a specific project. From a product list page or product detail page, click on **Add to Joblist**. Select an already created joblist or create a new one. Click on **My Joblist** under Quick Links on the homepage to view all of your saved joblists.

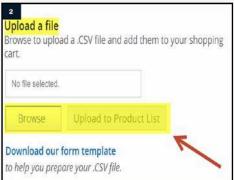


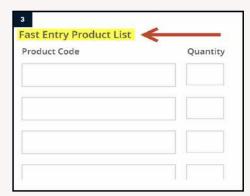


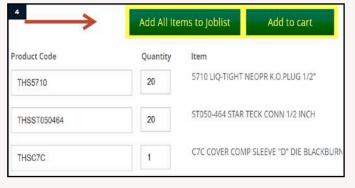


**FAST ORDER:** Allows you to quickly order multiple items at once by importing an excel sheet or typing the product codes in the online form. Click on **Fast Order** on top of the homepage and upload your excel sheet. Be sure to use our template form to upload your file.

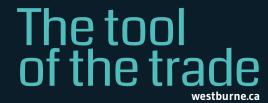






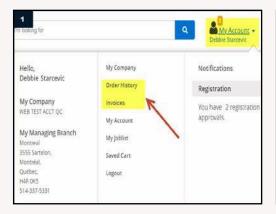


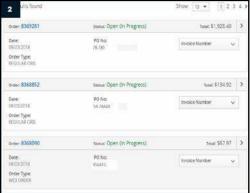


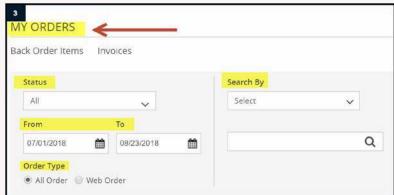


## How to view Order history and Stock availability

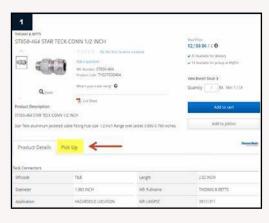
**ORDER HISTORY:** Allows you to view your past orders and invoices made online or in stores and check the status of an order. Click on **Order History** or **Invoices** under My Account and use the filters to find a specific order.

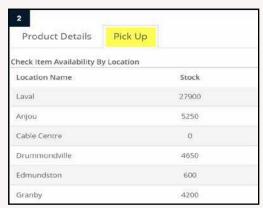






**STOCK AVAILABILITY:** Allows you to view branch inventory in real time. From any product detail page, click on **Pick up** to view stock availability in all branches within your region.









With the Westburne Mobile App, you are sure to have the largest Westburne branch in your pocket. Whether at an appointment, on a work site, on the road or simply at your office, you can instantly source over a million products from our online catalogue with your smartphone or tablet 24/7.

Looking for a specific item? Get real time stock availability from over 100+ branch locations nationwide, and place your order right from the palm of your hand.

## ACCESS YOUR WESTBURNE ACCOUNT ON THE GO

View previous orders/invoices from the past 2 years, create custom joblists, share saved carts and much more.



## PLACE ORDERS FASTER WITH THE BARCODE SCANNER

Scan a product's barcode to instantly look up pricing, view product attributes and place an order.



## VIEW & REQUEST QUOTES FROM THE APP

Get quotes instantly online and place your order by adding your quote directly into your cart.



## SEARCH PRODUCTS AT ANY TIME

Look up product feature, image, specsheet and more by browsing our categories, our brands or by entering your specific part number.



#### CHECK STOCK AVAILABILITIES IN REAL TIME

View our live inventory at any time for any products at any branch



#### FIND YOUR NEAREST BRANCH VIA BRANCH LOCATOR

View branch details, get directions, hours of operations and click to call.



## LIVE CHAT WITH ONE OF OUR EXPERTS:

Our product experts can help answer any questions about our products, our services, our delivery options and more.



Download the Westburne.ca App today on iOS or Android



