

Invoices & Statements

Website Tutorial

Welcome to *My Account* – a fast and easy way to manage your WinWholesale account online!
This tutorial will provide you with step-by-step instructions for accessing and navigating the **Invoices and Statements** website.

Getting Started

Here are a few tips to help you easily navigate to the website and assure that you are able to log in each and every time with no issues.

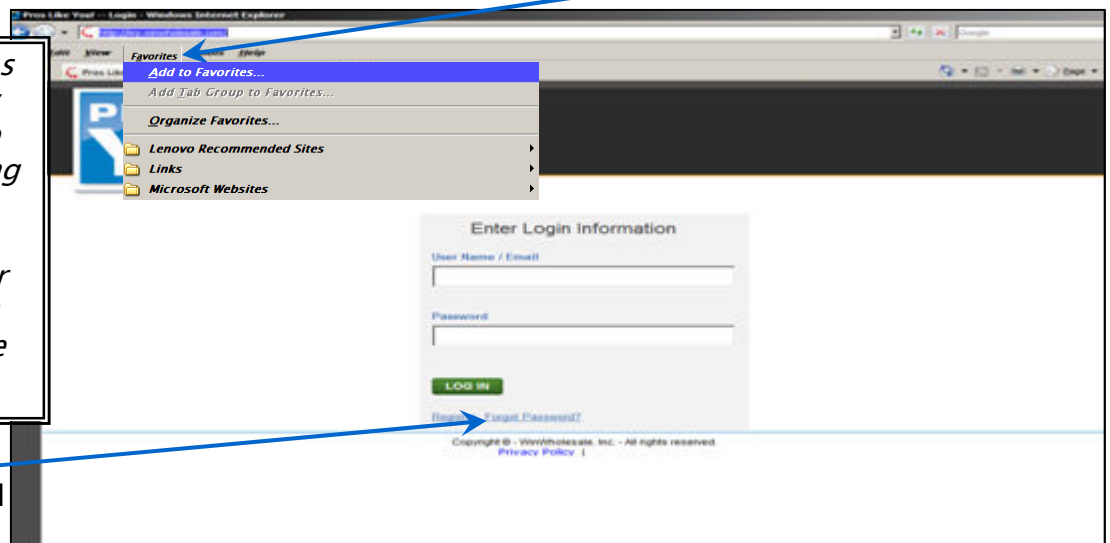
Setting up a Favorite

At this point, you will have already completed the registration process and have a username and a password. If you visit the site on a regular basis, you may want to set up a Favorite within your web browser.

- Go to www.winwholesale.com
- Click on the drop-down arrow in the top right-hand corner of the screen titled 'Login'
- Select 'My Account'. This will take you to the *My Account* login page.
- Click on **Favorites** at the top of your web browser. Then select **Add to Favorites**.

Now you can access the site by simply opening your web browser and clicking on the favorite!

Easily retrieve your username and/or password from the login page!



Password Issues?

If you have misplaced or forgotten your username and/or password, you can easily retrieve it from the *My Account* login page.

- Click on **Forgot Password**.
- Key in the e-mail address assigned to your account.
- Key the characters displayed into the second box, then click Submit.
- An e-mail containing a password reset link will be sent to you. Just click the link to set up a new password.

Managing Your Invoices:

After you've logged into the website and clicked the **Invoices and Statements** image, the Invoices screen will display by default. If you need to navigate back to the Invoices screen, simply click on the **Invoice List** tab at the top left-hand corner of your screen.

Invoices & Statements

Website Tutorial

Searching / Filtering Invoices

At the top of the Invoices screen, you'll see a box titled "Search", where you have the following search/filter options:

- Invoice or PO Number.
- Filter – select Open, Paid, or Any
- Dates – select Last 30 days, 60 days, 90 days, 120 days, or ALL
- Supplier – if you do business with multiple Win/Noland companies, you can filter the screen for a particular company or select ALL
- Job – select a particular job accounts (if available).

After you've selected your search/filter criteria, click on **Get Invoices** to update the screen with your selected invoices.

Invoice List | Statement List | Alerts

To view invoices, you need [Adobe Acrobat Reader 8.0 and higher](#)

Search Invoices

Enter start of invoice or PO number

Filter: Open

Dates: Last 30 Days

Supplier: Select a Supplier ...

Job:

Get Invoices

Sorting and Exporting

At the top of the Invoices list, you'll notice up/down arrows next to the Column Headers. These arrows indicate that you are able to click on a Column Header to sort the screen (ascending or descending) by that column. For example, to sort all available invoices by Invoice Date, click the **Inv Date** column header. You may also do this for Supplier, Invoice#, Due Date, etc.

To export your list of Invoices to an Excel Spreadsheet, click **Export List to Excel**.

Total Invoices: 8 Display: 10 per page [Export List to Excel](#)

Select	Supplier	Invoice #	Inv Date	Due Date	Invoice Total	Amount Paid	Amount Due	PO Number	Printed?
<input type="checkbox"/>	Winnelson Co.	213966 00	Jan 8, 2010	Mar 9, 2010	\$23.68	\$23.68 [Details]	\$0.00	JIM JOHNS	N
<input type="checkbox"/>	Winnelson Co.	213912 00	Jan 6, 2010	Mar 7, 2010	\$649.08	\$649.08 [Details]			
<input type="checkbox"/>	Winnelson Co.	213933 00	Jan 6, 2010	Mar 7, 2010	\$13.56	\$13.56 [Details]			
<input type="checkbox"/>	Winnelson Co.	213938 00	Jan 6, 2010	Mar 7, 2010	\$8.80	\$8.80 [Details]	\$0.00	JIMMY JOHNS	N

Payment Date	Amount	Discount	Payment Ref Number
Feb 11, 2010	\$8.80	\$0.00	1874

Viewing Payment Details

To view payment details for a particular invoice, hover your cursor over the **Details** link under the 'Amount Paid' column. This will display a small window with Payment Date, Amount, Discount, and Payment Reference Number information.

Invoices & Statements

Website Tutorial

Viewing / Printing Invoices

Viewing and Printing your invoices is simple! From the 'Select' column on the far left side of your screen...

- Click on the check box next to an invoice you would like to view or print.
- Select as many as you wish, or select them all at once by clicking the check box directly beneath the word 'Select'.
- Click on the **View** or **Print** buttons located at the top and bottom of the 'Select' column to perform that action.
- A .PDF document will display containing all of your selected invoices.

*Click on **View** or **Print** to display your selected invoices!*

Select	Supplier	Invoice #	Inv Date	Due Date	Invoice Total	Amount Paid	Amount Due	PO Number	Printed?
<input checked="" type="checkbox"/>	Winair Co.	540045 00	Apr 24, 2009	May 30, 2009	\$821.77	\$821.77 [Details]	\$0.00	TED	Y
<input checked="" type="checkbox"/>	Winair Co.	540045 01	Apr 14, 2009	May 30, 2009	\$821.77	\$821.77 [Details]	\$0.00	TED	Y
<input checked="" type="checkbox"/>	Winair Co.	522753 00	Aug 6, 2008	Sep 30, 2008	\$786.83	\$786.83 [Details]	\$0.00	ADAM	Y
<input type="checkbox"/>	Winair Co.	536155 00	Feb 4, 2009	Mar 30, 2009	\$729.49	\$729.49 [Details]	\$0.00	ADAM	
<input type="checkbox"/>	Winair Co.	520415 00	Jul 13, 2008	Aug 30, 2008	\$698.08	\$698.08 [Details]	\$0.00	ADAM	
<input type="checkbox"/>	Winair Co.	538728 00	Mar 19, 2009	Apr 30, 2009	\$697.41	\$697.41 [Details]	\$0.00	ADAM	
<input type="checkbox"/>	Winair Co.	526391 00	Sep 23, 2008	Oct 30, 2008	\$673.98	\$673.98 [Details]	\$0.00	ADAM	

The 'Printed' column will update to a 'Y' for all printed Invoices.

You may click on this column to sort the screen by Printed 'Y' or 'N'

View – Simply opens a .PDF document containing your selected invoices.

Print – Opens the same .PDF document as View does, as well as a *Printer Selection* box allowing you to choose your printer destination. By selecting **Print**, you will also update the 'Printed?' column on the far right to a 'Y' for all selected invoices.

Managing Your Statements:

After logging into to your Invoices and Statements site, click on the **Statement List** tab located at the top of your Invoices page.

What's New? | Feedback Logged in as rh385 | Logout |

Invoice List | **Statement List** | Alerts

To view statements, you need [Adobe Acrobat Reader 8.0 and higher](#)

Search Statements

Month: January
Year: 2010
Supplier: Select a Supplier ...
Job: -----

Get Statements

Invoices & Statements

Website Tutorial

Searching / Filtering Statements

Search/filter options for Statements are similar to those for Invoices. At the top of the Statements screen, you have the following:

- Month – select a particular month, or select ALL.
- Year – select the year.
- Supplier – if you do business with multiple Win/Noland companies, you can filter the screen for a particular company, or select ALL
- Job – select a particular job account (if available).

After you've selected your filter criteria, click on **Get Statements** to update the screen with your selected statements.

Invoice List Statement List Alerts

To view statements, you need [Adobe Acrobat Reader 8.0](#) and higher

Search Statements

Month: February
Year: 2010
Supplier: Winnelson Co.
Job:

Get Statements

NOTE: Statements will only be available for viewing/printing from February 2010 and forward.

Viewing / Printing Statements

Viewing and Printing your statements is very similar to invoices. From the 'Select' column on the far left side of your screen...

- Click on the check box next to a statement you would like to view or print
- Select as many as you wish, or select them all at once by clicking on the check box directly beneath the word 'Select'.
- Click on the View or Print buttons located at the top and bottom of the 'Select' column to perform that action.
- A .PDF document will display containing all of your selected statements.

Click **View** or **Print** to display your selected statements!

View Print Check here to include all job-accounts on primary account statement Total Display: 10

Select	Supplier	Customer/Job Name	Stmt Date	Stmt Total	Printed?
<input type="checkbox"/>	Winnelson Co.	LEE PLUMBING INC	02/2010	\$3,927.02	Y
<input type="checkbox"/>	Winnelson Co.	CORE	02/2010	\$0.00	Y
<input type="checkbox"/>	Winnelson Co.	DEL 47	02/2010	\$0.00	Y

Update your 'Printed?' column by clicking the **Print** button for selected Statements!

TIP: Check here to include all job-accounts on primary account statement. By selecting this option, when you view/print a statement for a primary account, your job-accounts will be included on the statement, sub-totaled by account number. This option will only display if you have available job-accounts.

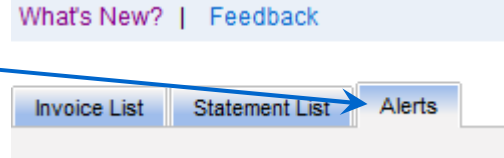
Invoices & Statements

Website Tutorial

Alerts

Alerts help you manage your Invoices and Statements by notifying you via e-mail whenever a new Invoice or Statement has posted to your account.

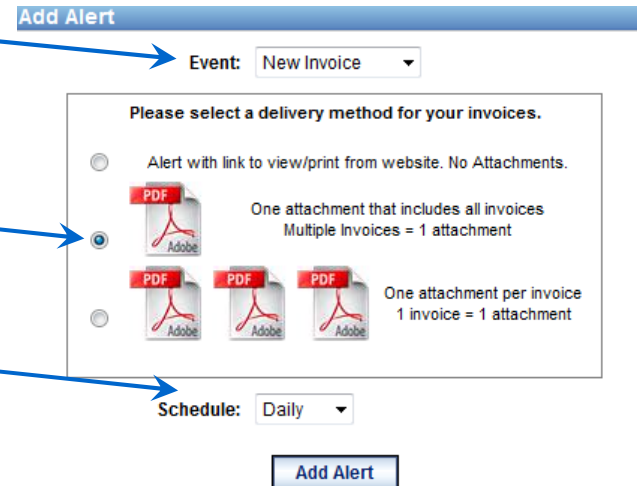
To navigate to the Alerts page, click on the **Alerts** tab located at the top of your *Invoices* page.



Setting up Alerts

Follow these instructions to set up an Alert:

- *Select an Event...* New Invoice, New Statement, or Payment
- *Select a Delivery Method ...* This option allows you to select between having your Invoices or Statements sent to you via a link back to the *My Account* site, or to have them combined into a single .PDF attachment, or to have a .PDF attachment per Invoice/Statement.
- *Select a Schedule...* This is how often you will receive the alert. You may select Daily or Weekly for invoices and payments. Select Monthly for statements.
- To complete the setup process, click **Add Alert**.



NEW - You can now have the PDF attachments e-mailed to you directly!!

Using the Alerts

- *Payments...* displays a list of payments recently posted to your account. Please note, these are not *Payment Reminders*.
- *Invoices/Statements...* displays a list of recently added Invoices or Statements that have posted to your account. Depending on which *Delivery Method* you selected when setting up your Alert, you will either have a link you can click on that will direct you back to the website for your Invoices/Statements, or you will have .PDF attachments in your e-mail so you can open them directly or save them to your pc.
- *From any Alert...* you can click on my.winwholesale.com to navigate to your *My Account* page and login.

Click the link to display all alerted Invoices or Statements in a single .PDF!

The following statements have been posted to your WinWholesale *My Account*. You may log into my.winwholesale.com to view or print one or more of these statements, or work with your *My Account*. Click [here](#) to view a single PDF document containing all of these statements:

Statement for: 02/2010 - Amount: \$65642.54
Statement for: 02/2010 - Amount: \$6739.74

You may change your Statement Alert settings at any time by signing into my.winwholesale.com and clicking on the Alerts tab.

Thank you.

Invoices & Statements

Website Tutorial

Pay Invoices and Statements online using My Payments!

You can now pay your Invoices and Statements from the My Account site using our simple, convenient My Payments feature! When you log into My Account, choose the Invoices and Statements link, then choose the **Make Payment** tab.

Step 1 of 4 - Select Who, What, and How to pay

If you have multiple Win or Noland locations you do business with, use the "Select supplier to pay" drop-down menu to choose which location to submit payment to. You can choose to pay your Last Statement, a Specific Invoice(s), or to pay a Fixed dollar Amount. When you choose the fixed Dollar amount, the payment will be applied to your oldest Invoices first. Payment options include Credit Card, Consumer Check, or Commercial Check. Check payments are processed as ACH payments. Select your supplier (if applicable), select what to pay, choose your payment method, then click Continue.

Invoice List | Statement List | **Make Payment** | Manage Alerts

Step 1 of 4

Select supplier to pay

AnytownWinnelson Co. ▾

Outstanding Balance
\$9,506.04

Select what to pay

Payments are picked up for processing after ? (Monday - Friday except holidays) Any payments entered after this time will be considered payment for the next business day.

Would you like to pay:

Last Statement(s)

Select Invoice(s)

Fixed Amount

For Fixed Amount, we will automatically choose service charges first then oldest invoices up to amount entered. If you would like to choose which invoices for the Fixed Amount, then please click on Select Invoice(s) option.

Select payment method

You may make payments via electronic check, VISA, Mastercard, Discover or American Express.

Credit Card

Consumer Check

Commercial Check

Continue

Step 2 of 4 - Select Invoices and Statements to pay

Invoice List | Statement List | **Make Payment** | Manage Alerts

Step 2 of 4

Select Invoice(s) to Pay

Select one to many invoices to View or Pay. You can filter the list of invoices using the fields below. For each selected invoice you may adjust Amount to Pay. You will be prompted for short pay reason.

Select Aging Period: All Records ▾ Job: -- Select All Jobs -- ▾

Apply Filters

To view invoices, you need [Adobe Acrobat Reader 8.0](#) and higher

View Display: 10 per page ▾ Total Invoices: 19

Select	Invoice #	Supplier	Inv Date	Due Date	Invoice Total	Amount Paid	Amount To Pay	PO Number
<input checked="" type="checkbox"/>	318405 00	Winnelson Co.	Nov 22, 2011	Dec 10, 2011	\$1,651.43	\$0.00	\$1,651.43	
<input type="checkbox"/>	318510 00	Winnelson Co.	Nov 29, 2011	Dec 10, 2011	\$98.50	\$0.00	\$98.50	RIALTO
<input type="checkbox"/>	318528 00	Winnelson Co.	Dec 5, 2011	Jan 10, 2012	\$16.36	\$0.00	\$16.36	
<input type="checkbox"/>	318678 00	Winnelson Co.	Dec 6, 2011	Jan 10, 2012	\$1,485.27	\$0.00	\$1,485.27	

Totals: Invoice Total \$9,706.04 Amount Paid \$200.00 Selected Count: 0 Selected Invoice Total \$0.00 Selected Amount To Pay \$0.00

View

Previous **Continue**

Invoices & Statements

Website Tutorial

Step 2 of 4 – Select Invoices and Statements to pay – continued

If you choose to pay by Last Statement, the screen will default with all Invoices that are included on that Statement selected to pay. You may select some or all of these Invoices by using the “Select” column to the left. If you choose to Select Invoices, you can choose the “Select” option at the top of the column header to select all Invoices displayed on the page, or choose as many individual Invoices as you would like. The “Amount To Pay” for each Invoice is editable, so if you would like to pay only a partial amount on a specific Invoice you can edit your payment amount by clicking the figure in this column. Make your payment selections and hit Continue.

Step 3 of 4 – Payment Method screen

This screen allows you to add a Credit Card, select a previously added Credit Card, or update the information for an existing saved Credit Card. Likewise, if you have selected to pay by Consumer or Commercial Check, you can select, save, and edit your Checking Account information from the same screen. Select your Credit Card or Bank Account and hit Continue.

Step 3 of 4

Select Credit Card

Please select one credit card you wish to use for this payment and click Next. You may also select a credit card and click "Delete Card" if you no longer wish to have that card information stored, or click "Update Card" to update the expiration date.

Select	Your Credit Cards	Name	Expiration Date
<input checked="" type="checkbox"/>	Mastercard ending in 1128	Your Name Here	06/2014
<input type="checkbox"/>	Visa ending in 4113		06/2014
<input type="checkbox"/>	American Express ending in 4376		06/2014
<input type="checkbox"/>	Discover ending in 6011		06/2014

Delete Card Update Card Add Card

Previous Start Over Continue

Step 4 of 4 – Review and Submit Payment screen

This screen displays the final payment information, including the payment method, Invoices being paid, and amount of the payment. Simply click the “Submit Payment” button to process your payment! A confirmation email will be sent to the email address associated with your account.

Step 4 of 4

Review and Submit

Please review your selected invoices and payment method. When you are satisfied, click the Submit Payment button.

Payment Type: Credit Card
Mastercard Number *****1128 Expires 06/2014
Change Credit Card

Invoice #	Supplier	Due Date	Invoice Total	Amount Paid	Amount To Pay	PO Number
318510 00	Winnelson Co.	Dec 10, 2011	\$98.50	\$0.00	\$98.50	RIALTO
Total			\$98.50	\$0.00	\$98.50	

Total Invoices: 1

Previous Cancel Payment Submit Payment

Invoices & Statements

Website Tutorial

Feedback

Have something you would like to share with us? Maybe a suggestion for the *Invoices and Statements* website? Feel free to send us a message by clicking on the **Feedback** link in the top left corner of your screen. Key in your comment and click **Submit Comment** to notify our support team!