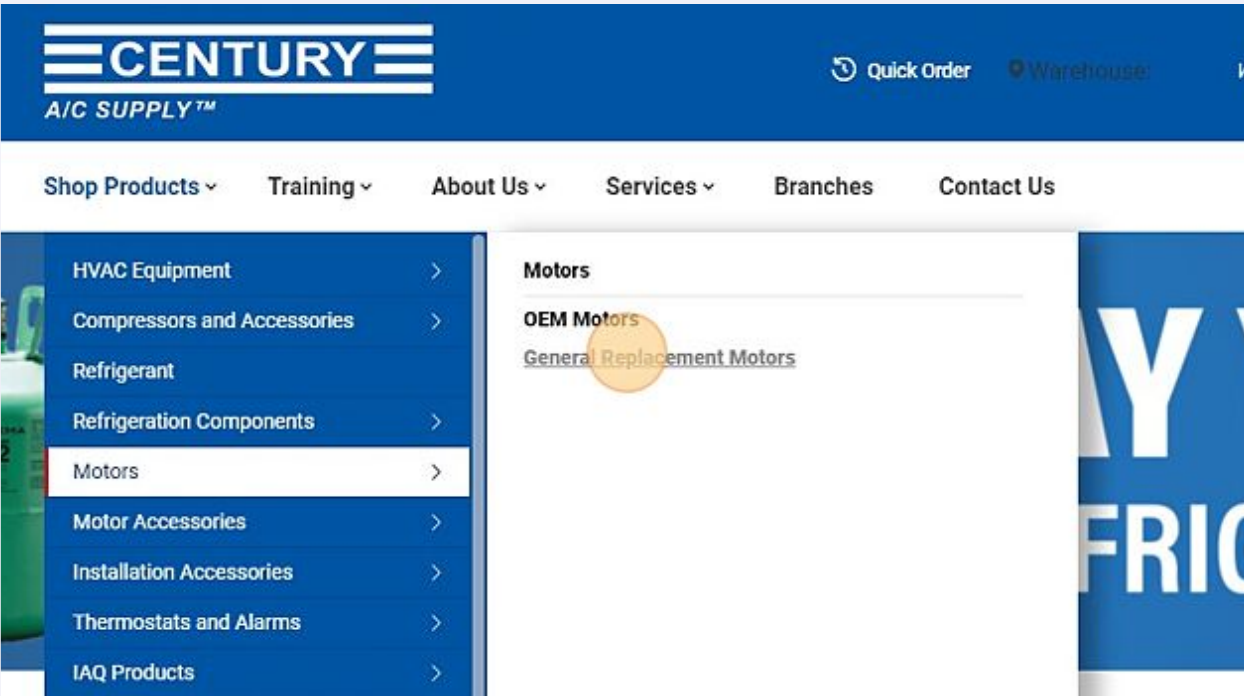




Creating a Worksheet from Cart

Create custom shopping lists to quickly access commonly placed orders or groups of items to check out in just a few clicks.



1 Select a category to shop in the "Shop Products" tab.






2 Select a product to purchase and add a quantity number.


<input type="checkbox"/> Compare 001C1621 1859 1/6 230V 1075 TENC MTR 48fr \$93.54 / EA Quantity On Hand : 79 Network Quantity : 359 <input type="text" value="1"/> ADD TO CART	<input type="checkbox"/> Compare 001C1622 1901 1/6 230V 1075 RE MTR \$183.50 / EA Quantity On Hand : 4 Network Quantity : 36 <input type="text"/> ADD T
	

3 Click "Add to Cart".



<input type="checkbox"/> Compare 001C1621 1859 1/6 230V 1075 TENC MTR 48fr \$93.54 / EA Quantity On Hand : 79 Network Quantity : 359 <input type="text" value="6"/> ADD TO CART	<input type="checkbox"/> Compare 001C1622 1901 1/6 230V 1075 REV 5.1 TENC MTR \$183.50 / EA Quantity On Hand : 4 Network Quantity : 36 <input type="text"/> ADD TO CART
	


4 Select another product to purchase and add a quantity number.

 <input type="checkbox"/> Compare MTR	 <input type="checkbox"/> Compare 001E2520 1391 1/4 230V 1050 5IN REV 3SPD MTR \$206.94 / EA Quantity On Hand : 3 Network Quantity : 26 <input type="text"/> ADD TO CART	 <input type="checkbox"/> Compare 001E2521 1971 1/4 230V 1075 5.6 3SPD REV MTR \$106.97 / EA Quantity On Hand : 97 Network Quantity : 344 <input type="text" value="1"/> ADD TO CART
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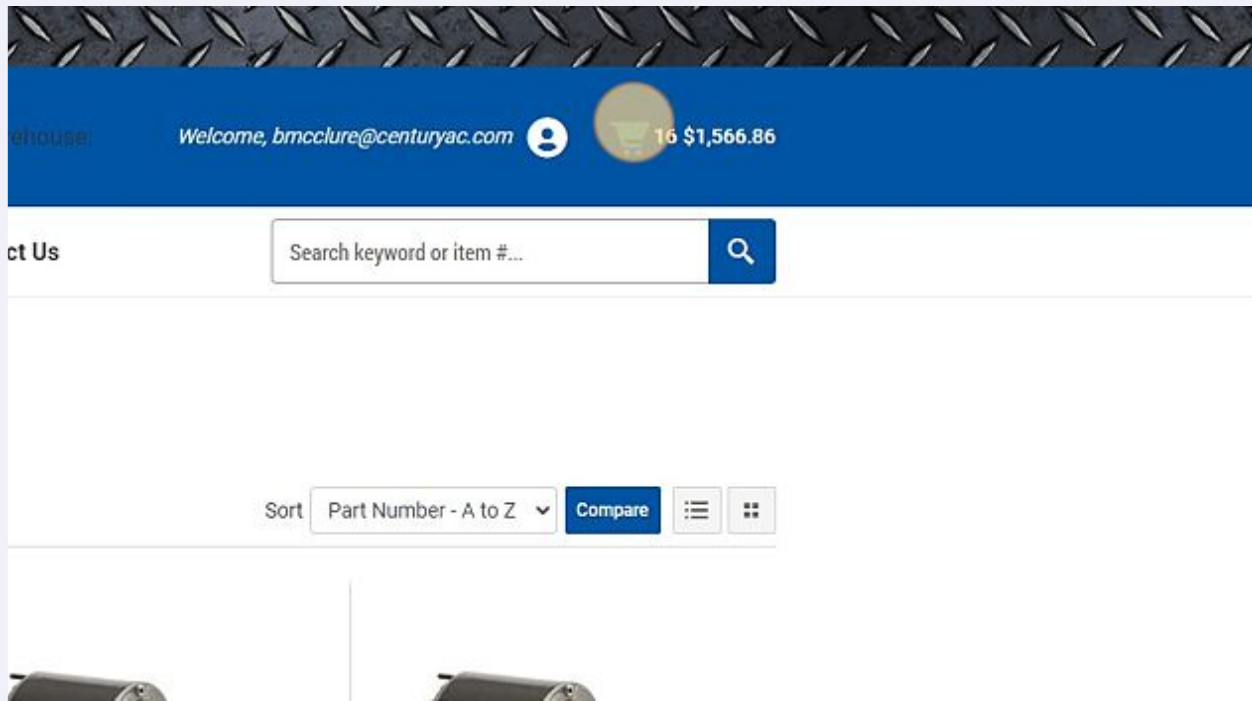


5 Click "Add to Cart".

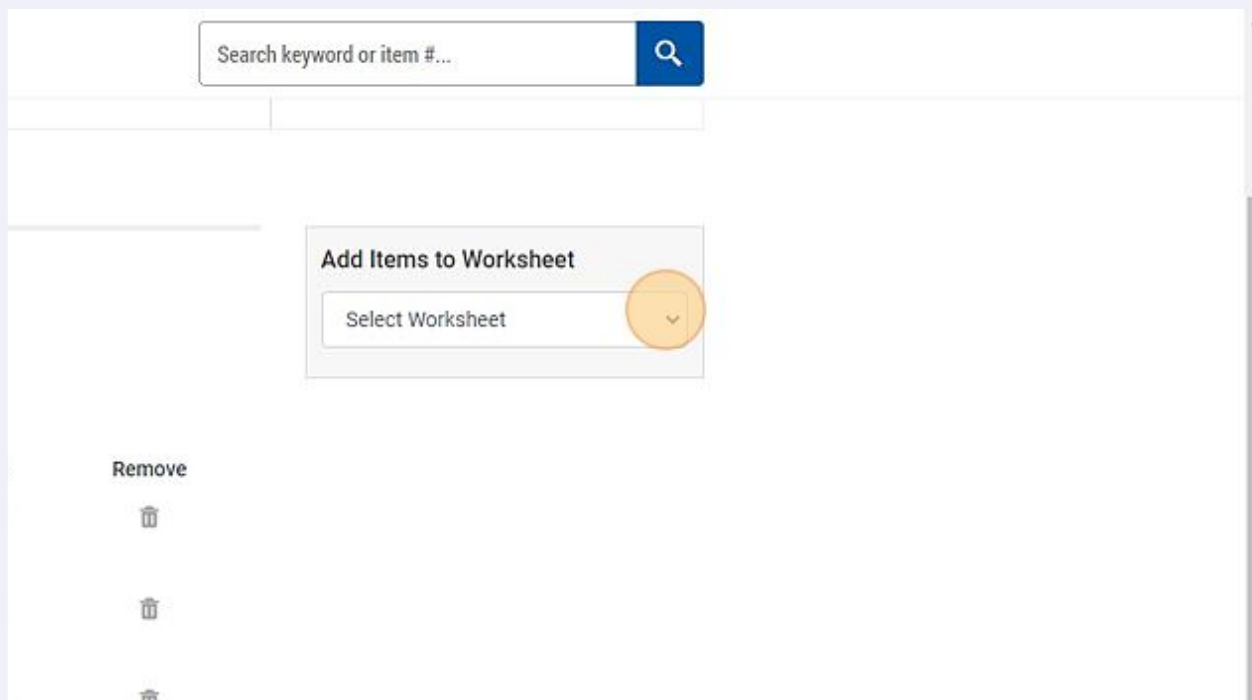
 <input type="checkbox"/> Compare 001E2520 1391 1/4 230V 1050 5IN REV 3SPD MTR \$206.94 / EA Quantity On Hand : 3 Network Quantity : 26 <input type="text"/> ADD TO CART	 <input type="checkbox"/> Compare 001E2521 1971 1/4 230V 1075 5.6 3SPD REV MTR \$106.97 / EA Quantity On Hand : 97 Network Quantity : 344 <input type="text" value="2"/> ADD TO CART
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6 When ready to check out, click the shopping cart icon to view your order.



7 When viewing your shopping cart, click the "Select Worksheet" dropdown.



8 Enter a worksheet name.

The screenshot shows a 'Create New Worksheet' dialog box overlaid on a software interface. The dialog box has a title bar with a close button (X) and contains two input fields: 'Enter Worksheet Name' and 'Enter Comment'. The 'Enter Worksheet Name' field is highlighted with an orange circle. Below the input fields is a green 'Create' button. The background interface shows a table with columns for 'Unit of Measure', 'Price', 'Qty', 'Ext. Amt.', and 'Remove'. The table contains three rows of data:

	Unit of Measure	Price	Qty	Ext. Amt.	Remove
30V 1075 TENC MTR 48fr 1C1621	EA	\$93.54	6	\$561.24	
30V 1075 5.6 3SPD REV MTR 1E2521	EA	\$106.97	2	\$213.94	
30V 1075 5.6 3SPD REV MTR 1E2521	EA	\$93.54	6	\$561.24	

9 Enter a comment or description.

The screenshot shows the same 'Create New Worksheet' dialog box. In this step, the 'Enter Comment' field is highlighted with an orange circle. The 'Enter Worksheet Name' field now contains the text 'Motor List'. The 'Create' button remains visible at the bottom right of the dialog box.

10 Click "Create"

The screenshot shows a 'Create New Worksheet' dialog box with a close button (X) in the top right. It contains a 'Motor List' input field, a text area with 'adjust quantity as needed', and a 'Create' button highlighted with a yellow circle. Below the dialog is a table with columns: Measure, Price, Qty, Ext. Amt., and Remove. The table contains three rows of data.

Measure	Price	Qty	Ext. Amt.	Remove
	\$93.54	6	\$561.24	🗑️
	\$106.97	2	\$213.94	🗑️
	\$98.96	8	\$791.68	🗑️

11 To access your new worksheet, click "My Account".

The screenshot shows a user account menu with options: 'My Account', 'Change Defaults', and 'Log Out'. Below the menu is a search bar with the text 'Search keyword or item #...'. There are two main navigation buttons: '3 Billing' (Enter billing information) and '4 Submission' (Verify order details). At the bottom, there is an 'Add Items to Worksheet' section with a 'Select Worksheet' dropdown menu.

12 Click "Create/View Worksheets"

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Return Home
Account Home
Create/View Worksheets
View Unconfirmed Orders
View Order History
Import Shopping List
View Item History
View Open Quotes
View Open Orders
Change Warehouse
Upload Orders

Account Dashboard

ORDER HISTORY

Invoice Number	Invoice Da
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ITEM HISTORY

Item ID	De
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OPEN ORDERS

13 Click your new worksheet to view the entire list.

View Order History
Import Shopping List
View Item History
View Open Quotes
View Open Orders
Change Warehouse
Upload Orders
Billtrust Account
Credit Line Increase Request

test	
Monthly Filter Order	adjust qty as needed
motor stock	as needed
Mid Season Stock	Purchase during seasonal rush
Motor List	Adjust quantity as needed