

Using Lists

SHARING LISTS! Now you can share lists within your group of users making it easy for all to access

Simply select the list you want to share and choose 'Share List'. Select the check box next to each account that you wish to share. Click 'Share' and all users within selected accounts will now have access to this list in their My List tab. The original list owner will maintain full control of the list and any updates made will be automatically made in the shared views.

w walseley
express.com

Shop My Wolseley Services Support

Lists

1 My Lists (5) 2 Express Lists

Add to Cart New List Import Delete

LIST NAME	PRODUCTS	LAST MODIFIED	TYPE
<input type="checkbox"/> All Ordered Products	188	May 11, 2015	Shared
<input type="checkbox"/> Bathroom Rough In	54	May 11, 2015	Custom
<input checked="" type="checkbox"/> Basement Reno	31	May 11, 2015	Custom
<input type="checkbox"/> Truck Restock	35	May 11, 2015	Custom
<input type="checkbox"/> ABS Pipe & Fittings 1 1/2"	5	May 11, 2015	Shared
<input type="checkbox"/> ADP Coils	94	May 11, 2015	Shared
<input type="checkbox"/> Copper Drainage (DWV)	12	May 11, 2015	Custom
<input type="checkbox"/> Fixtures Consumables	18	May 11, 2015	Custom
<input type="checkbox"/> Fixtures Commercial	12	May 11, 2015	Shared
<input type="checkbox"/> Watts Drains	11	May 11, 2015	Custom

Lists make ordering fast and easy

My Lists are found on the right portion of the My Wolseley page and in the My Wolseley drop down menu.

- 1 **Use 'My Lists'** to order items that you purchase frequently, eliminating the need to search every time. These lists can be created by: Downloading My Ordered Products, Creating a list from Product Search, and by Uploading a Spreadsheet. Anything added to your cart can be saved as a list.
- 2 **Express lists** are multiple product lists that include the most popular items. These custom lists are created by region for anyone to view for quick reference. Select 'Add to My Lists' to automatically save an Express List to your My Lists tab, where you can share, export or edit to customize.

Express Lists

Saving an Express List to My Lists

1. Go to My Lists and click on the Express Lists tab to view all the lists.
2. Click the check box to the left of the Express List Name, then click the 'Add To My Lists' button in the top left portion of the screen. This will automatically save the list to your My Lists tab.
3. Once added to My Lists, the list can be added to cart, edited, printed, shared or exported.

Using Lists

The screenshot shows the 'My Walseley' page on the Walseley Express website. At the top, there is a search bar and a shopping cart icon. The user is identified as 'Joe Plumber' with a dropdown arrow and the address '6499 - ABC Company'. Below the navigation menu, there is a table of orders and two sidebars: 'Ordered Products' and 'My Lists'. Numbered callouts are placed over the interface: '4' is over the search bar, '3' is over the 'Download My Ordered Products' link in the 'Ordered Products' sidebar, and '5' is over the 'Upload a Spreadsheet' link in the same sidebar.

ORDER #	WEB REFERENCE #	DATE	CUSTOMER PO #	SUBTOTAL	STATUS
12345	1234567	Jul 11, 2015	R&S	\$1234.56	Open
12345	1234567	Jul 11, 2015	R&S	\$234.56	Open
12345	1234567	Jul 11, 2015	R&S	\$34.56	Invoiced
12345	1234567	Jul 11, 2015	R&S	\$1234.56	Invoiced
12345	1234567	Jul 11, 2015	R&S	\$1234.56	Invoiced
12345	1234567	Jul 11, 2015	R&S	\$234.56	Invoiced
12345	1234567	Jul 11, 2015	R&S	\$34.56	Cancelled
12345	1234567	Jul 11, 2015	R&S	\$1234.56	Cancelled

3 Downloading My Ordered Products

1. Click on 'Download My Ordered Products' from My Walseley page.
2. Save the .csv file to your hard drive or desktop. This file will include ALL the products you have ordered in the last 12 months.
3. Use this file to sort the items you need and create targeted lists that can then be uploaded to the platform.

4 Creating a List from Product Search

1. You can search for products using the available Categories or by using the search bar at the top of each page.
2. In the product search results click the 'Add' button and select 'Add to List'. The 'Add to My Lists' box will pop up.
3. Choose an existing list if you would like to add the product to a list you have already created, or you can create a 'New List'. You can also add to more than one list at a time.

5 Uploading a Spreadsheet

1. Click on 'Upload a Spreadsheet' in the 'Ordered Products' section of the My Walseley page.
2. On the 'Upload a Product Spreadsheet' page, click on 'Browse' to select the .csv file that you would like to upload.
3. Choose the location to upload to 'My Lists' or the 'Cart'.
4. Choosing 'Cart' will automatically load the products into your Shopping Cart where you can Checkout or Save as a Draft Order.
5. When choosing 'My Lists', name the list and click 'Upload'. Your file will now be saved in the 'My Lists' section for future ordering.

Please note to properly upload a spreadsheet:

- Files should contain only two columns of text
- First column is Quantity
- Second column is Product Code
- Remove header ie. Quantity, Product Code, Description
- Do not include any spaces or blank cells in your list
- Must be saved in a CSV format.