Step 1 – Start a New Quote

On the **New Quote** screen, to view available in-stock replacement options, enter the existing unit details.

In the **Find a replacement unit** section, complete the following fields:

- Equipment Type *(defaults to Package System)*
- Existing Brand
- Existing Model
- Unit Type
- Unit Orientation
- Tonnage
- Voltage

Click **Search Unit**

Note: Fields marked with a **red asterisk (*)** are required to proceed.

*Step 2 – Review Search Results*

The **Results for Rooftop Units** screen will display all available units that match the entered criteria.

To see location and quantity details, click the **Available** button under the unit.

Tip: Reviewing availability helps ensure that the chosen unit is in-stock at a nearby location.
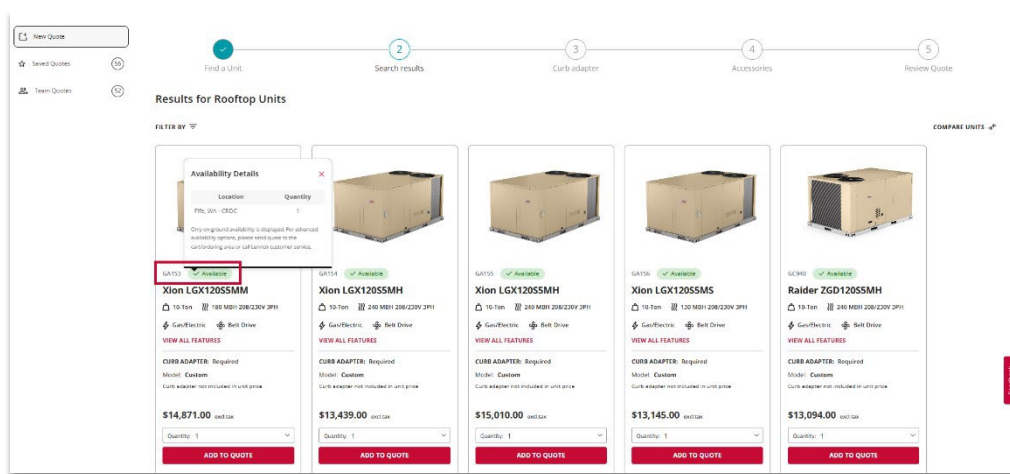
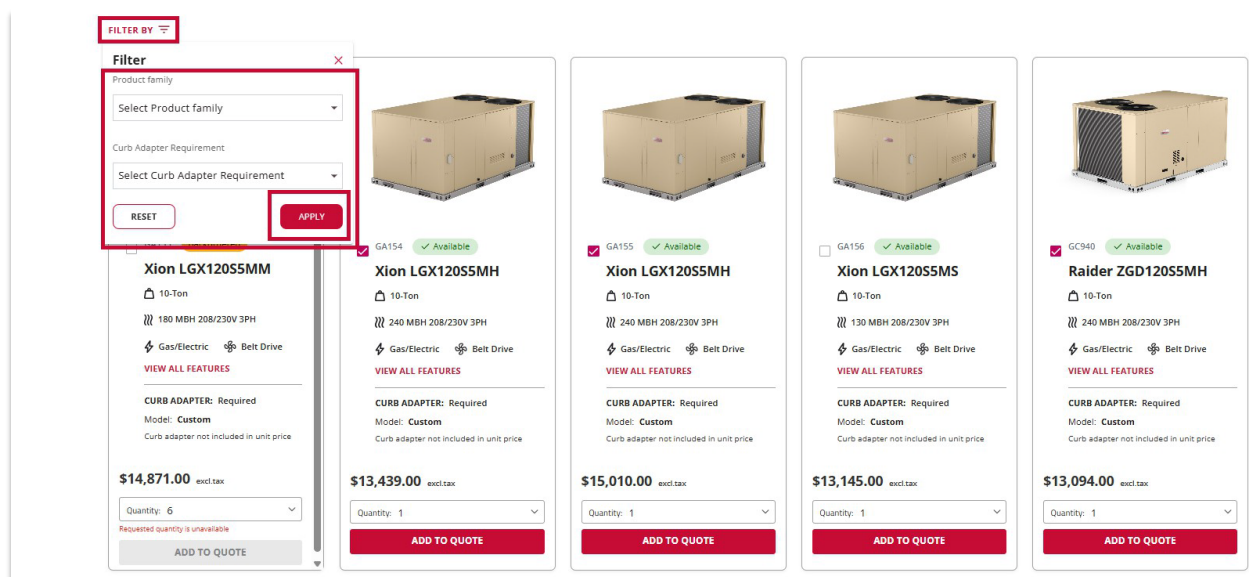To review detailed specifications, click the **VIEW ALL FEATURES** link located under the picture of the unit.
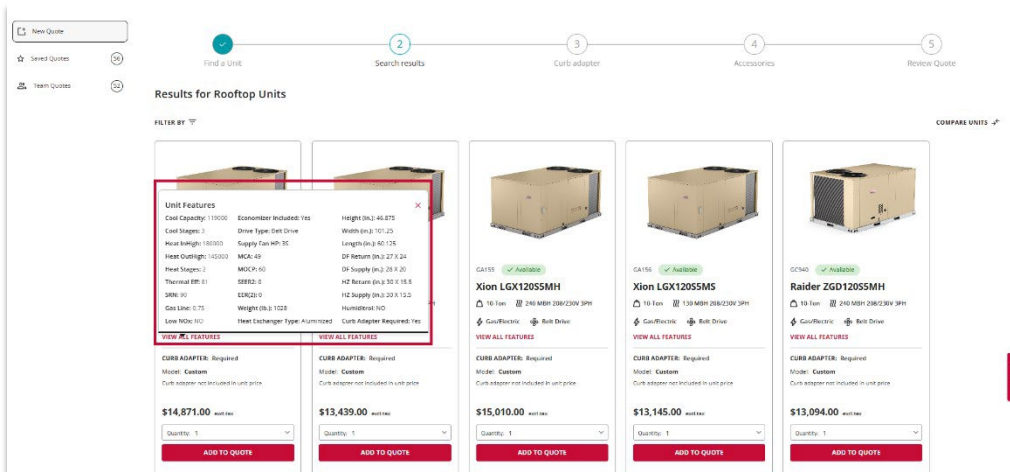
Step 3 – Filtering Results

Customers can filter search results by **Product Family** and **Curb Adapter Requirement**.

To apply filters:

- Click the Filter By button at the top left corner of the search results.
- Select the desired filter options and click **Apply.**

Step 4 – Access Unit Specifications

To view more information about the unit, click the name. The unit specifications page displays:

Links to the Engineering Handbook and Installation Instructions *(links open in a new window to view the PDF)*

- Unit description
- Price
- Product Features

To request this unit, click the **ADD TO QUOTE** button.

To return to the Search Results, click the **CLOSE** button at the bottom left of the screen.

Step 5 – Compare Units

Customers can compare up to three units at a time to review differences.

Comparing units side by side helps highlight differences in features, specifications, and pricing.

To compare units:

- Click **Compare Units**.
- Select **up to three units** from the list.
- Scroll down and click **Compare Selected**.

Step 6 – Adding Units to a Quote

To select the desired unit, use the drop-down to set the **Quantity**, then click **ADD TO QUOTE**.

Note: If the selected quantity exceeds available stock, the system will display a notification indicating that the requested quantity is unavailable.

After a unit has been **ADDED TO THE QUOTE**, all other units in the list will appear **greyed out** to indicate they cannot be selected, ensuring the quote reflects a single replacement choice.

To continue building the quote, scroll down, and click **NEXT**.

Step 7 – Selecting a Curb Adapter

After a unit is added to a quote, if a curb adapter is required, the system will display a reminder and will display two options:

- ▪ I want to source my own curb adapter.
- ▪ I want a Lennox representative to provide pricing and availability for a custom curb adapter.

The customer must select one of the options then click **Next** to continue.

- ▪ If the customer selects the option for Lennox to provide curb adapter pricing and availability, after adding desired accessories, on the Review quote screen, the SEND TO MY REP button will generate an email to the assigned Lennox team to complete the process.

- ▪ When a customer selects an in-stock curb adapter, the system displays the curb adapter details, price and a PDF of the Curb Adapter Cutsheet.

Step 8 – Review Recommended Accessories

On the next screen, **Recommended Accessories** for the selected unit are displayed. Click **View All** in the top-right to see more.

Review and add any desired accessories to the quote, then click **Next.**

Note: If a customer attempts to add duplicate accessories, the system will automatically de-select the duplicate to prevent multiple entries of the same item.

Step 9 – Add to Cart

If the customer has chosen to source their own curb adapter or selected a Direct Replacement unit, the Review quote screen will display two options.

- Save Quote
- Add to cart
- If an in-stock curb adapter is selected, it will appear on this screen along with the rest of the quote. From here, customers can add all available items to their cart.

To proceed with completing the transaction, click the ADD TO CART button.

Note: If an item is not available or there is an issue adding it to the cart, the system will display a message indicating the CAT# of the item that could not be added.

*You don't need to re-add any other items. Everything not included in the error message will automatically remain in your cart. To continue, click the cart icon in the top-right corner to proceed to checkout.

Step 10 – Review Quote

The **Review quote** screen displays all items added to the quote, including **unit features** and **subtotal**.

Customers have the following options:

- **Save Quote** – Save the quote and return at a later time.

- **Send to My Rep** – Proceed to the next step with assistance from a Lennox representative.

Note: This step is applicable when a **curb adapter is required,** and the customer has chosen to have a Lennox representative assist with the quote.

A confirmation message appears at the top of the screen indicating the email has been successfully sent.
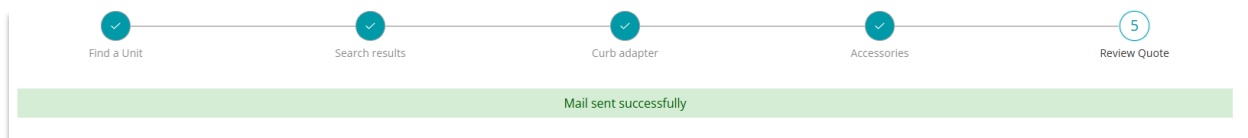
Step 11a – Reviewing Active Cart

The Active Cart screen will display the:

- **Price** of each item
- **Items** included in the order
- **Shipping information**
- **Estimated total**

Step 11b – Edit Shipping Address

The shipping address defaults to the address associated with the customer's LennoxPros account.

To change the shipping address for an item, click **Edit Details** next to the specific item.

A dialog box will display, allowing the customer to:

- Select a **Delivery Method**
- Verify **Estimated Arrival** time or select a **Future Date**
- **Verify or update the shipping address**
- Select the **Shipping Method**, with prices for express shipping displayed

Once all information has been reviewed and confirmed, click **Done**.

Step 12 – Adding a Promo Code

If the customer has a **promo code**, to apply the discount to the order, enter the code in the designated field, then click **Apply**. When finished, click **PROCEED TO CHECKOUT.**

Step 13 - Review Payment Method

On the Checkout screen, customers can then select their Payment Method and if desired, set it as their default. Then click **Review Order.**

Step 14 – Review and Submit Order

Customers can review their order one final time before submission.
On this screen, they can:

- Enter **Order Comments**
- Review and **edit payment method**
- Review **order information** and items in the cart

Once all information has been verified, click **Submit Order** to complete the purchase.

Step 15 – Order Confirmation

On the Order Confirmation screen, customers should make note of their Order number and indicate how they wish to receive notifications for their order.

Tip: Customers should save the order number for reference and confirm notification preferences to stay updated on order status.

Questions: Contact your manager for more information.

For training questions email CommercialTraining@Lennox.com