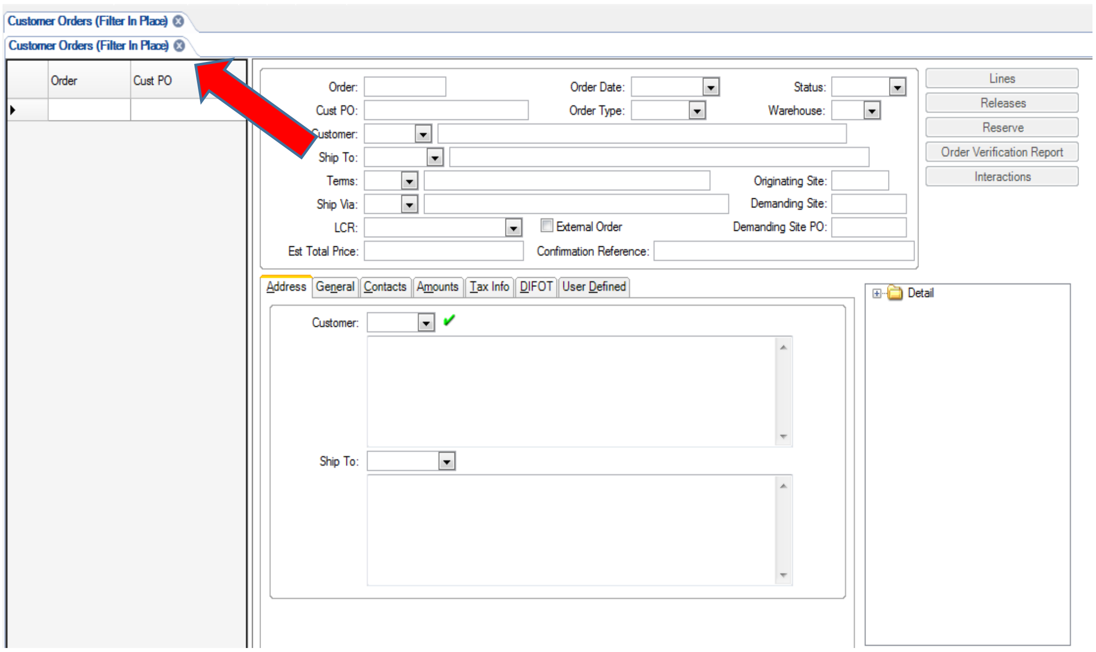
Customer Orders

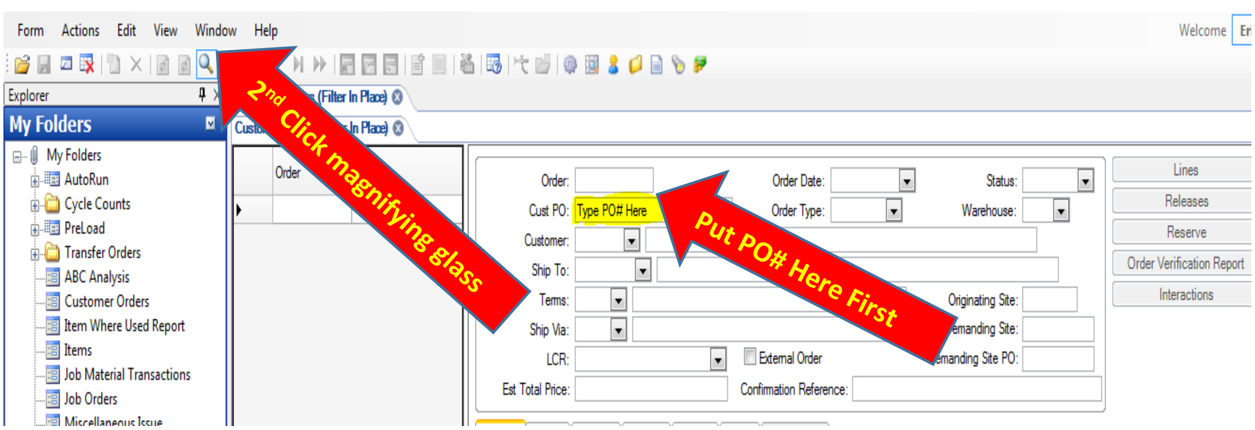
1. Monitor customer portal.
2. Decide which orders need to be put in and/or changed
3. Go to Syteline and enter or change the order.

Steps to add a release to an existing blanket order:

1. Open “Customer Orders” (CO) form

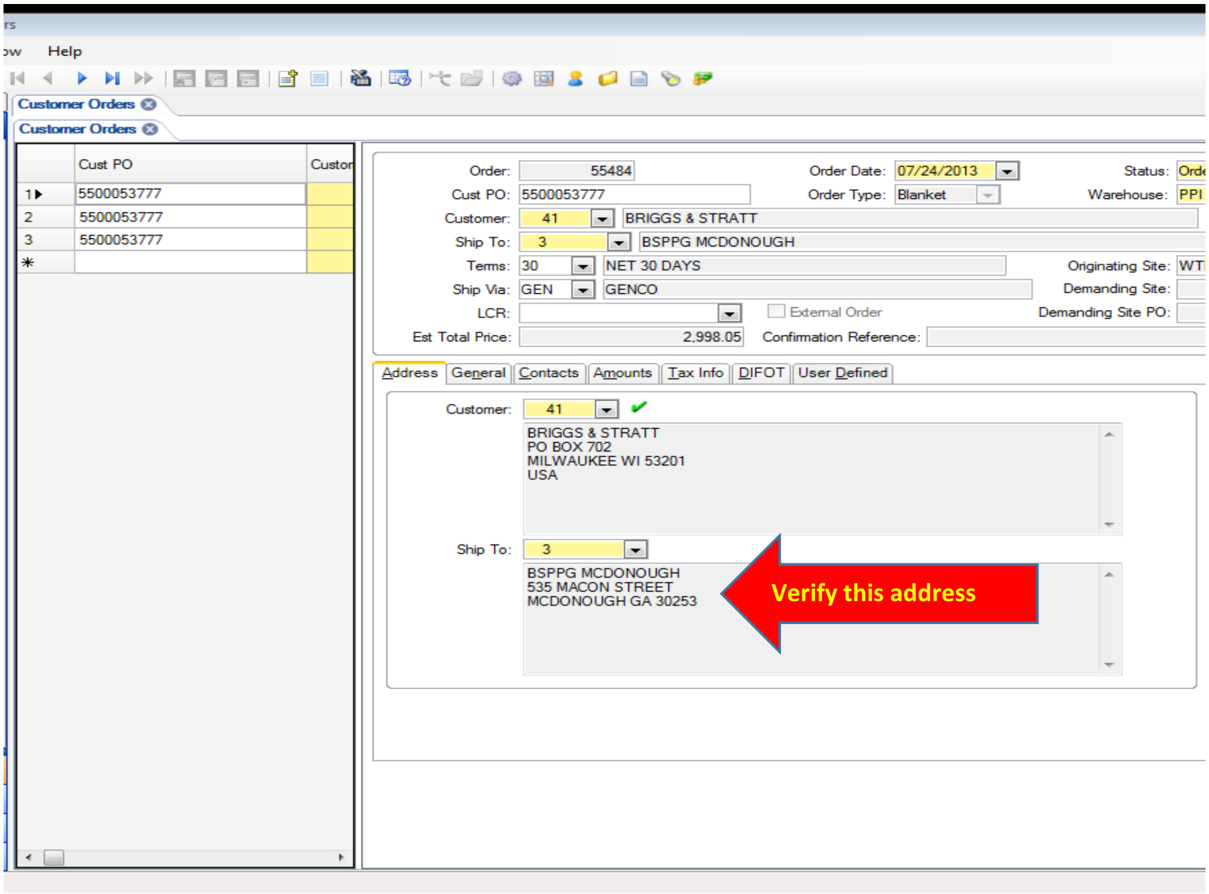


2. Filter the CO form by customer PO#, fined the one that has an “Ordered” status.

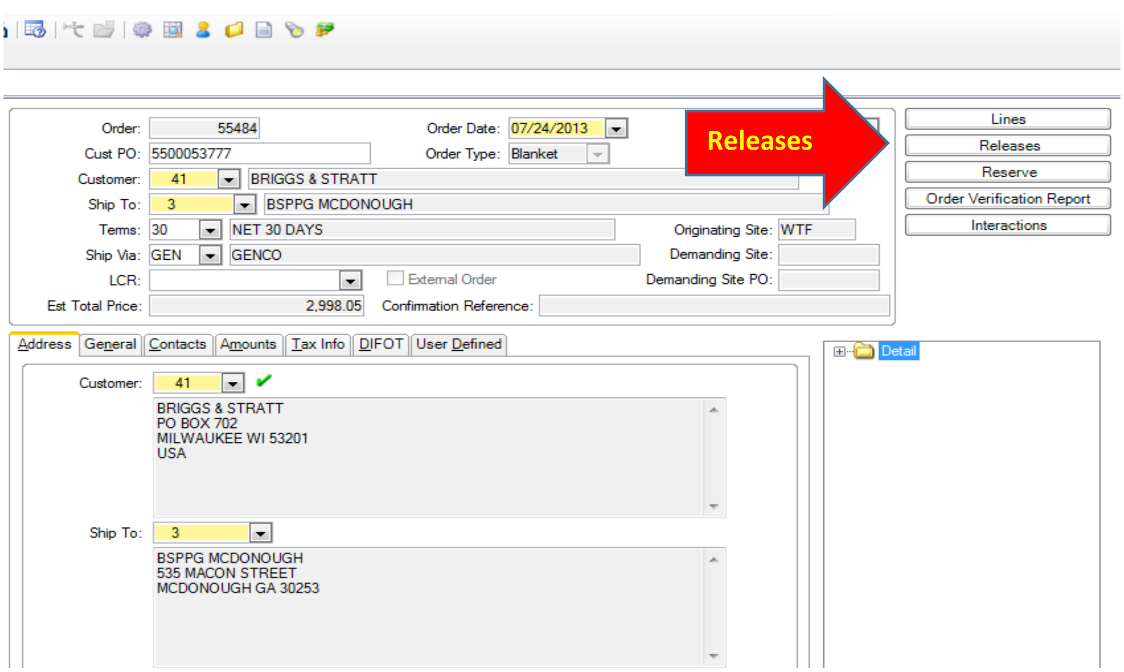


Customer Orders

3. Verify the ship to address with address on customer portal

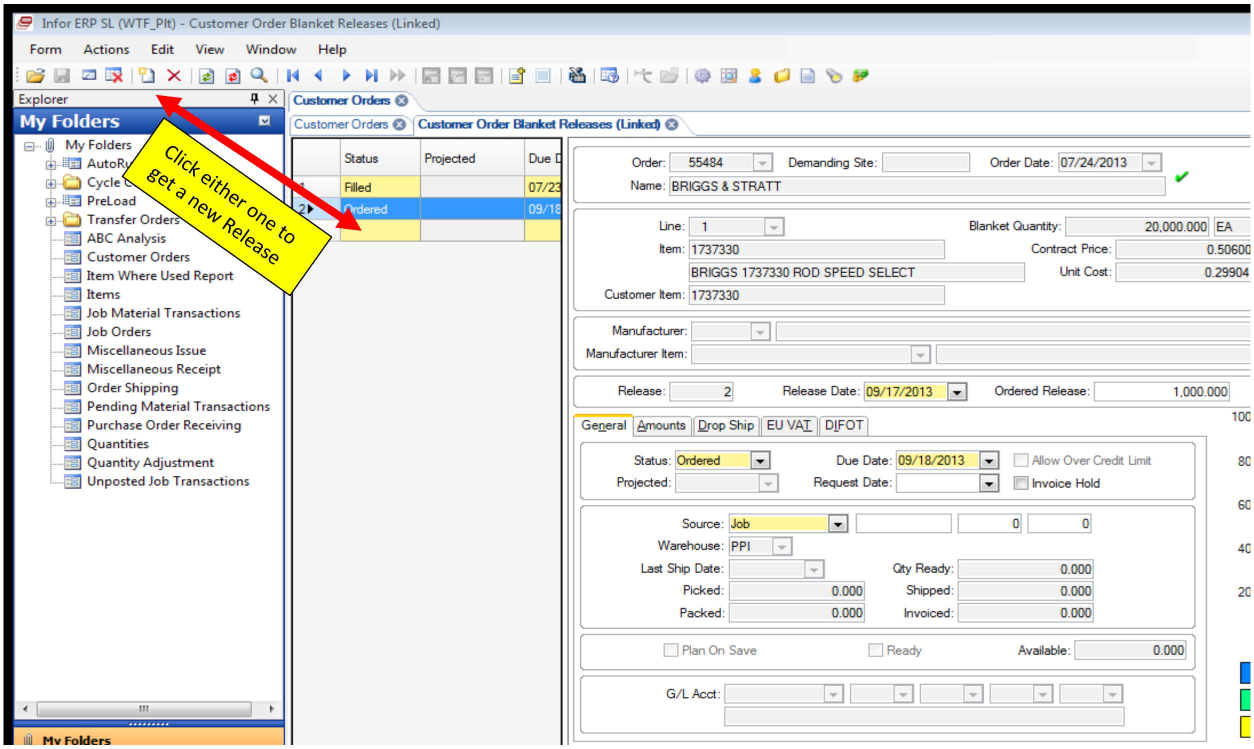


4. In the set of buttons on the right side of the form find the one that says “Releases”

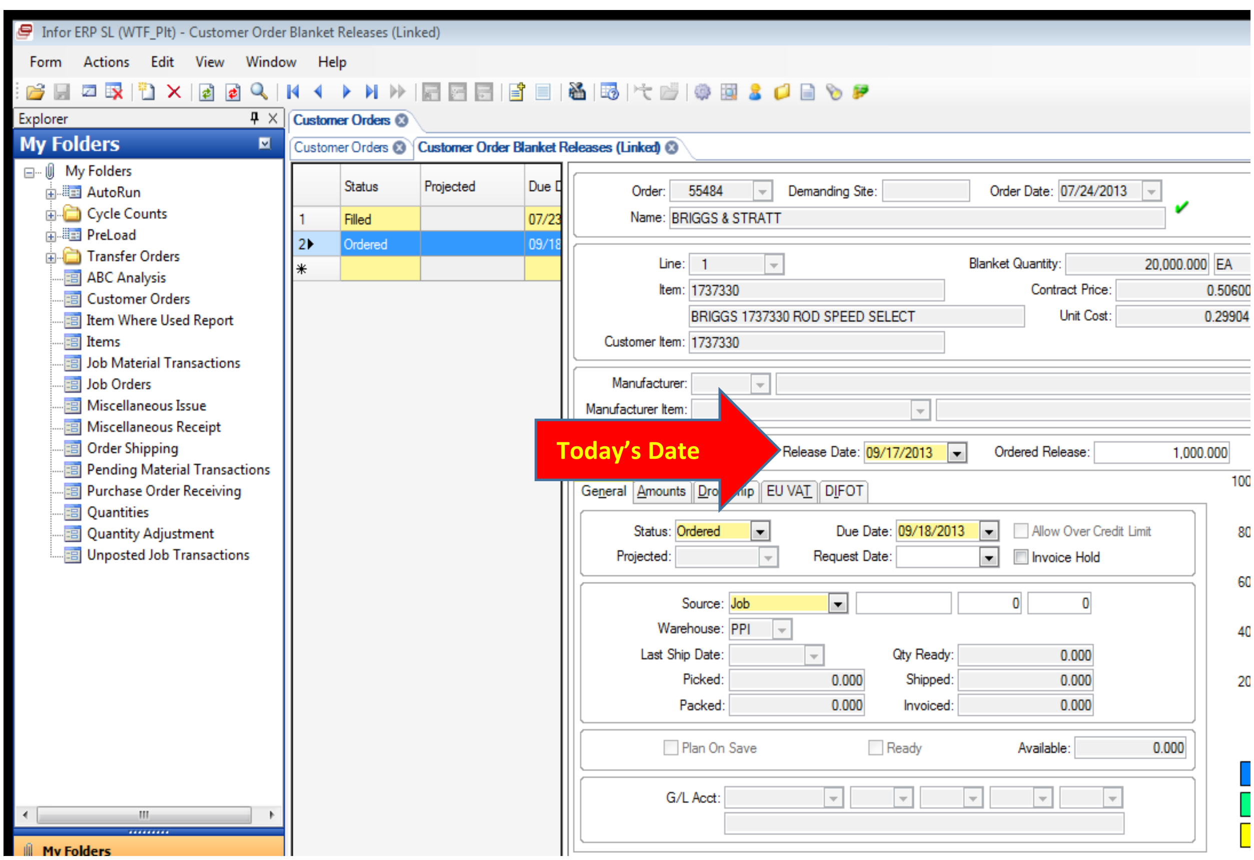


Customer Orders

5. Make a "New Release"

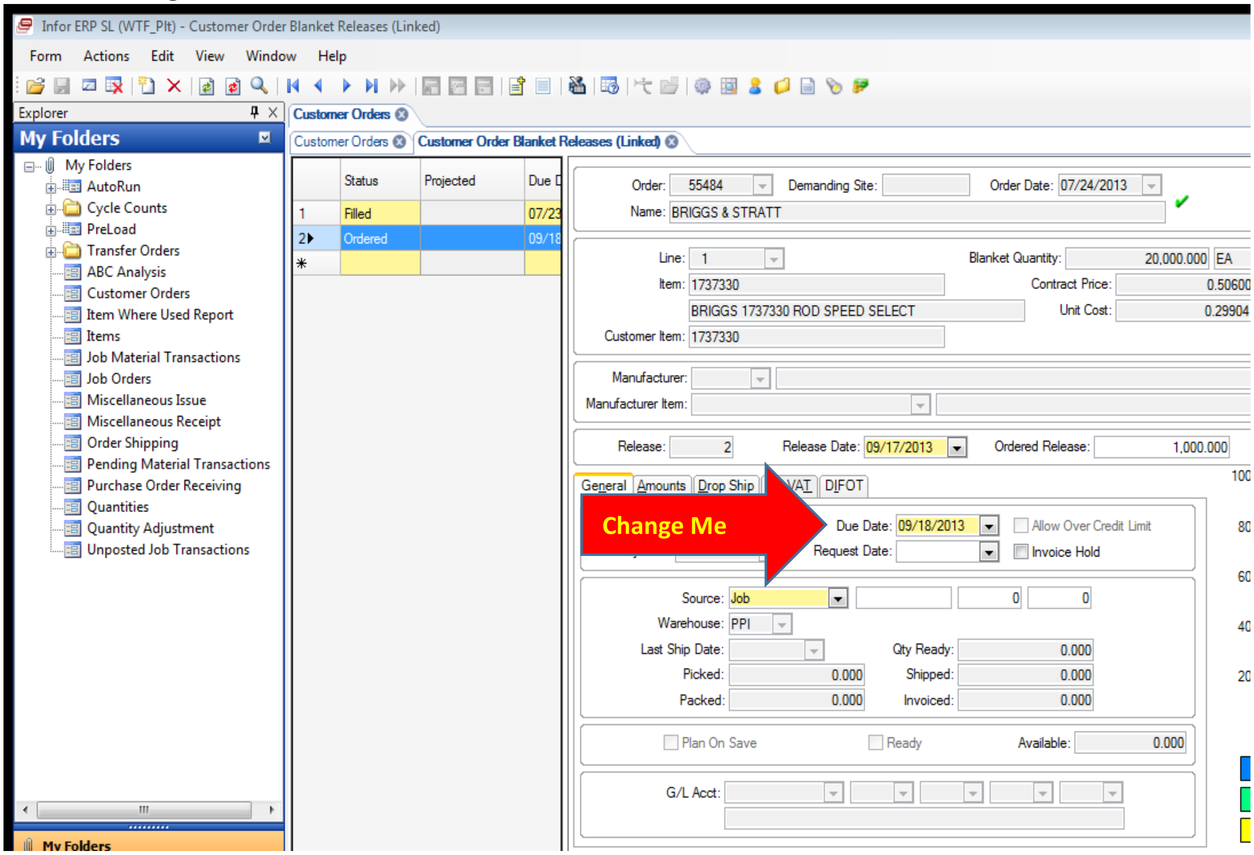


6. Make sure the "Release Date" is todays date

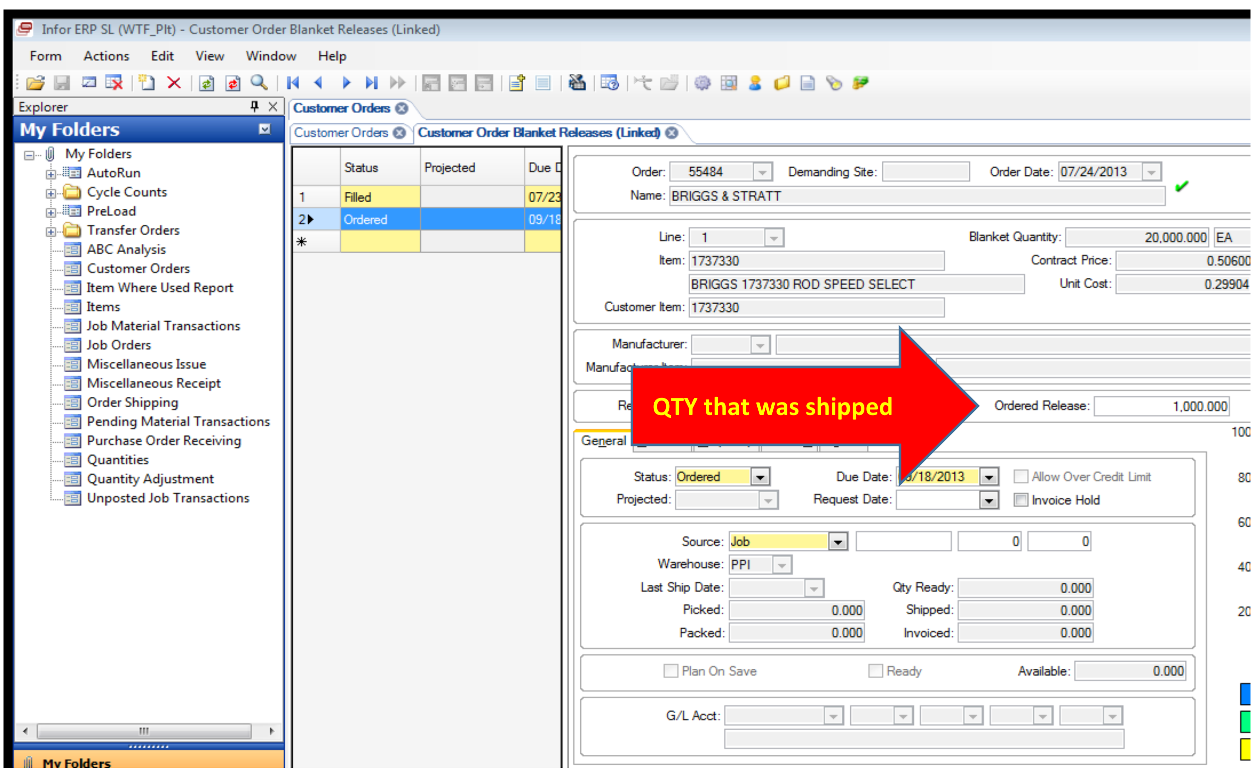


Customer Orders

7. Change the “Due Date”

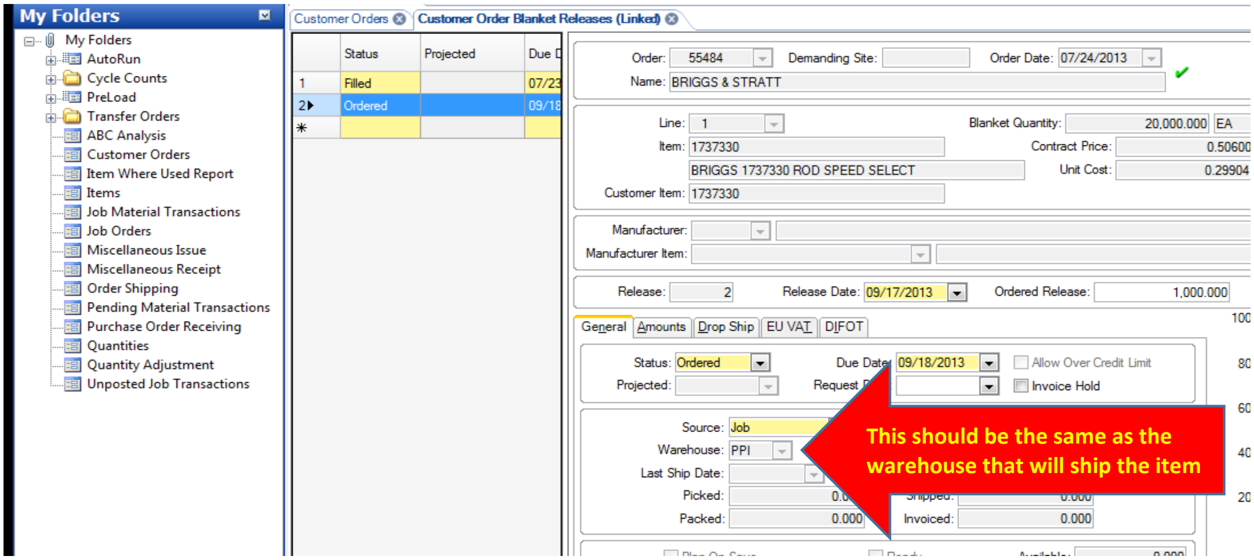


8. Put QTY in the “Ordered Release” field

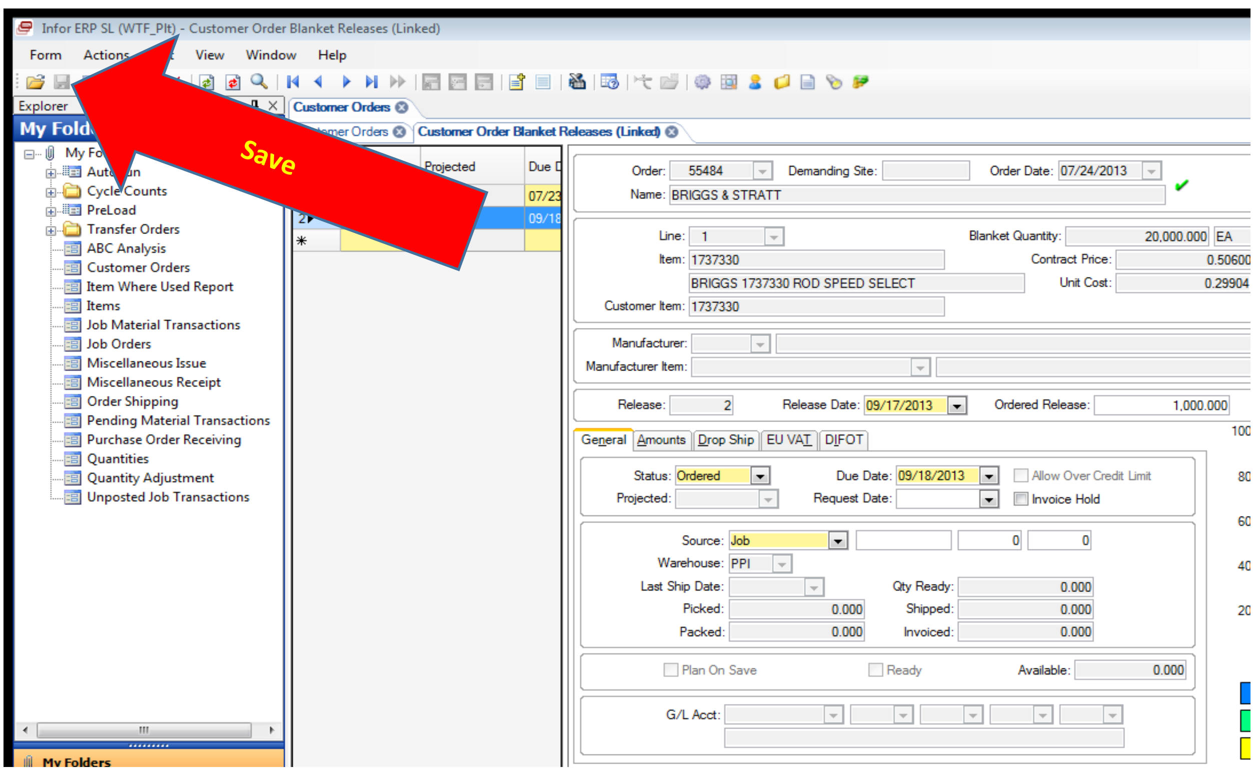


Customer Orders

9. Make sure the “Warehouse” field is the right warehouse.

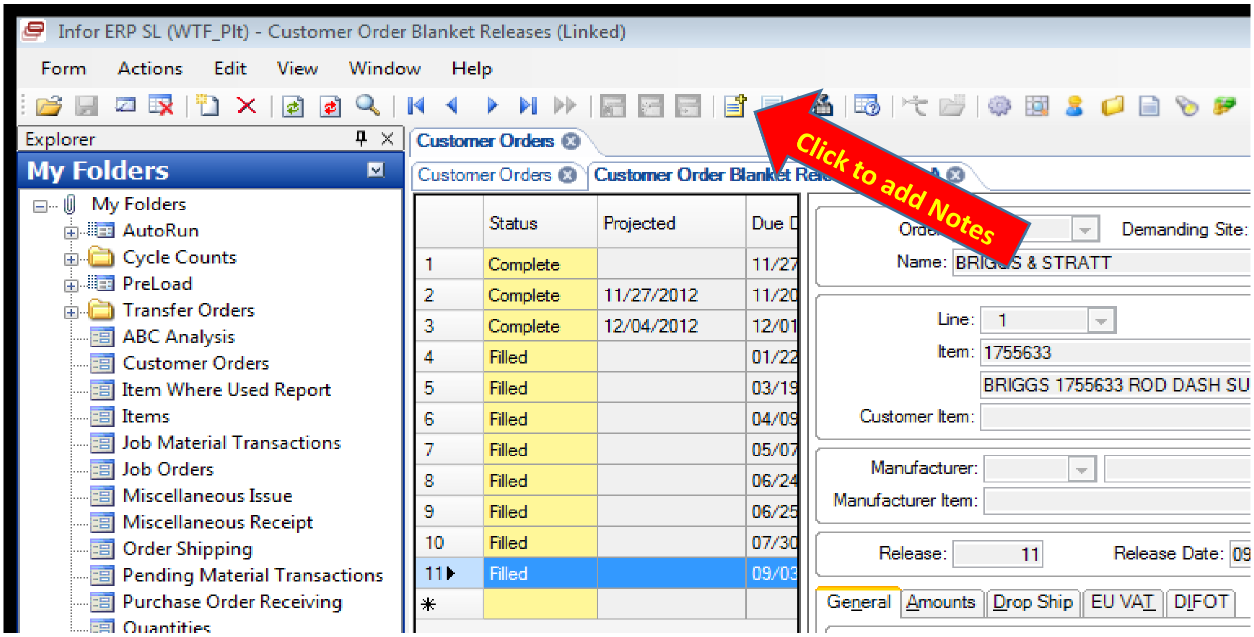


10. Click save. If order is for MTD or HOP proceed to step 11 otherwise your done.

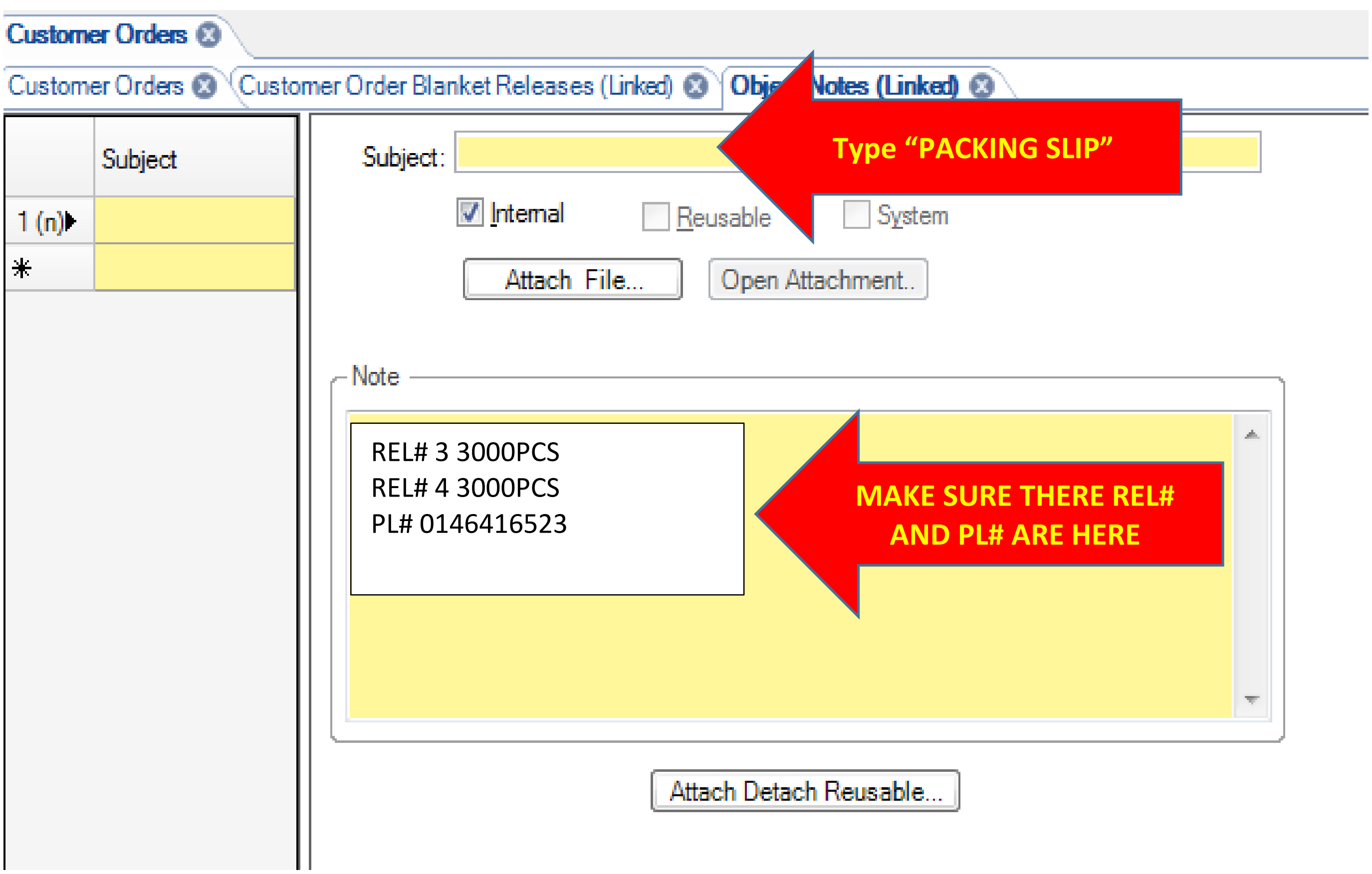


Customer Orders

11. Click the "Notes button"

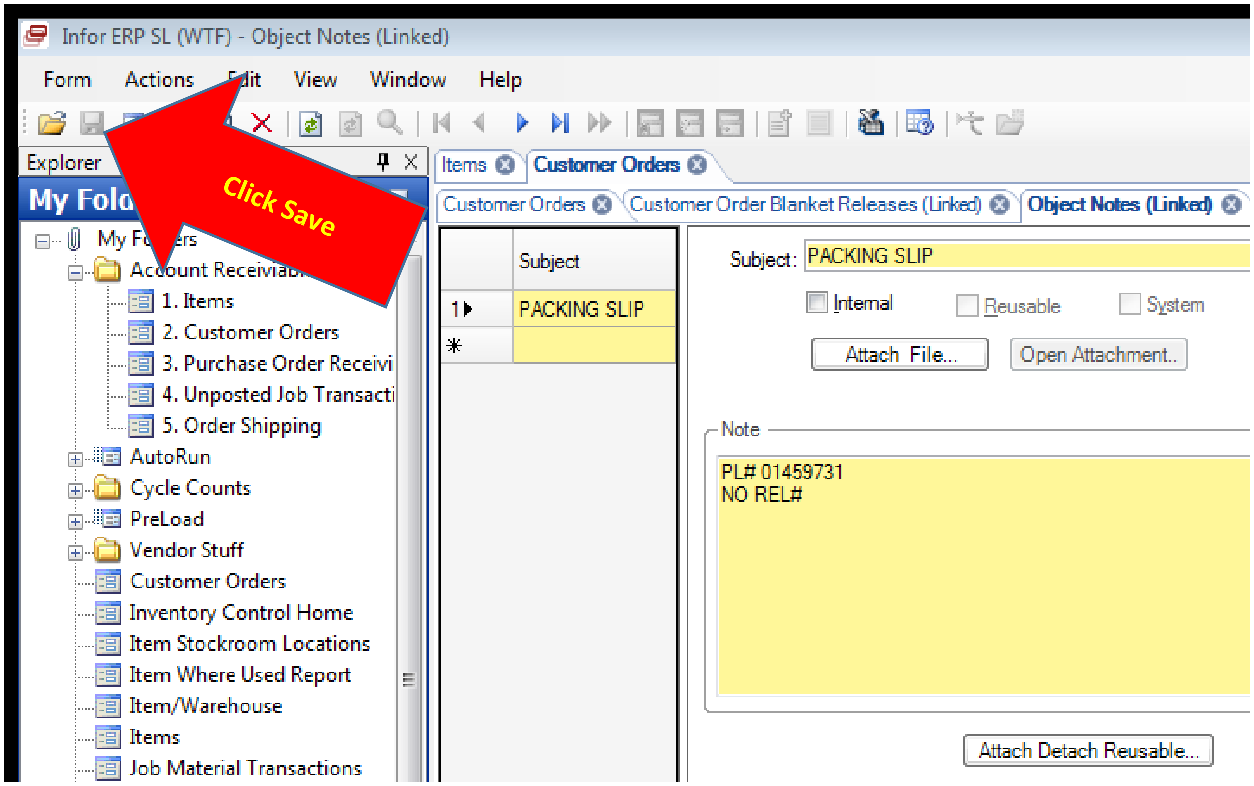


12. Enter the following



Customer Orders

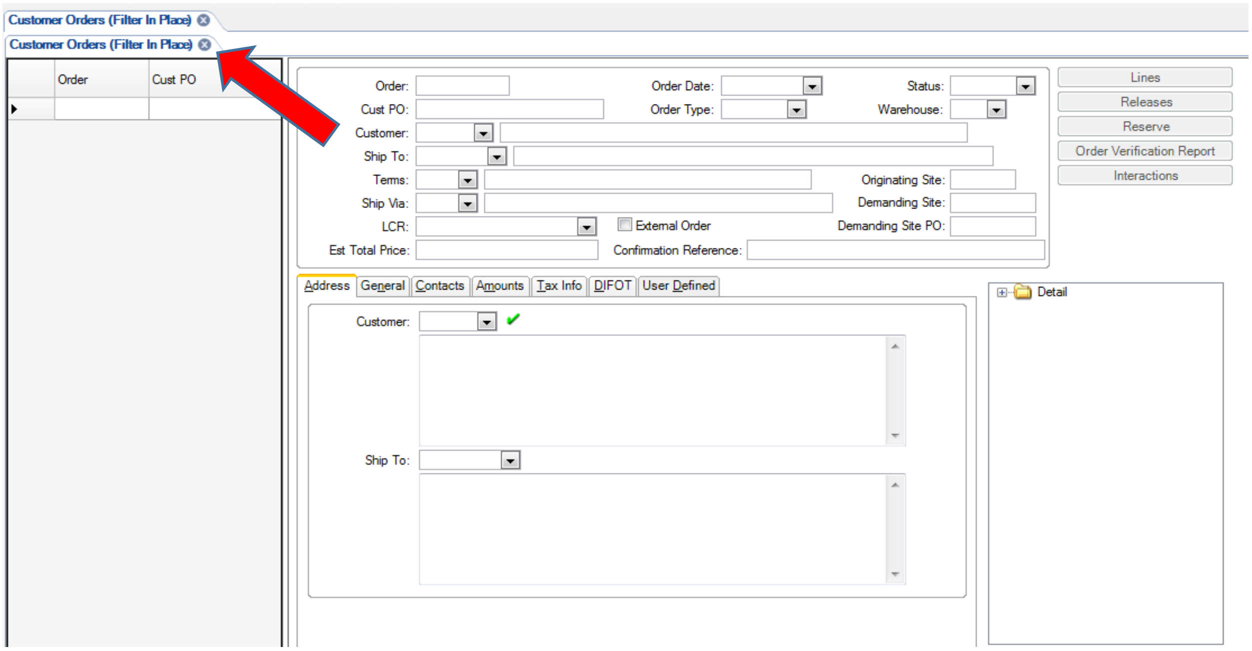
13. Click Save



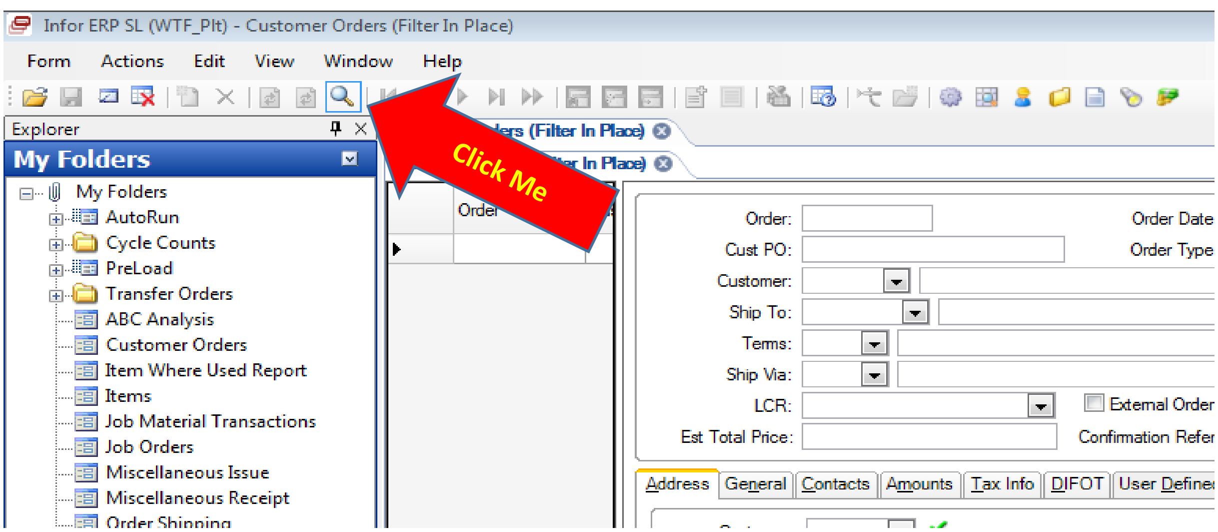
Customer Orders

Creating a customer order from scratch:

1. Open “Customer Orders” (CO) form

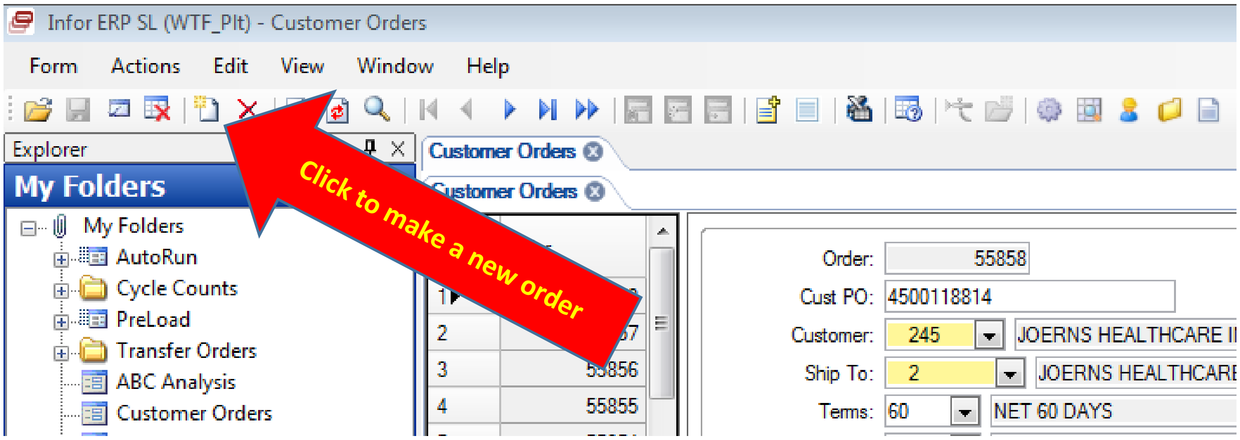


2. **Take off the “Filter in Place”**

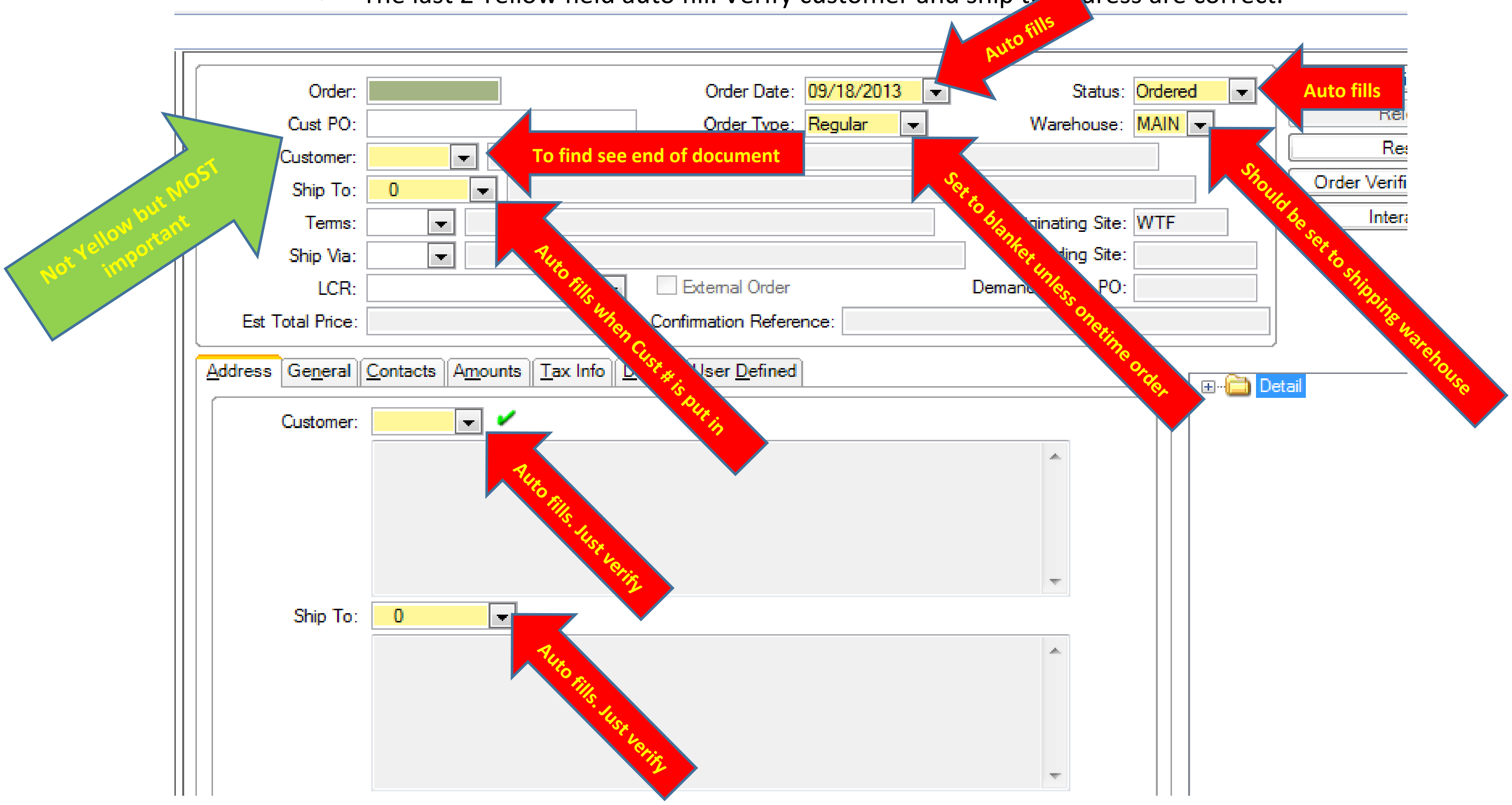


Customer Orders

3. Make a new Order

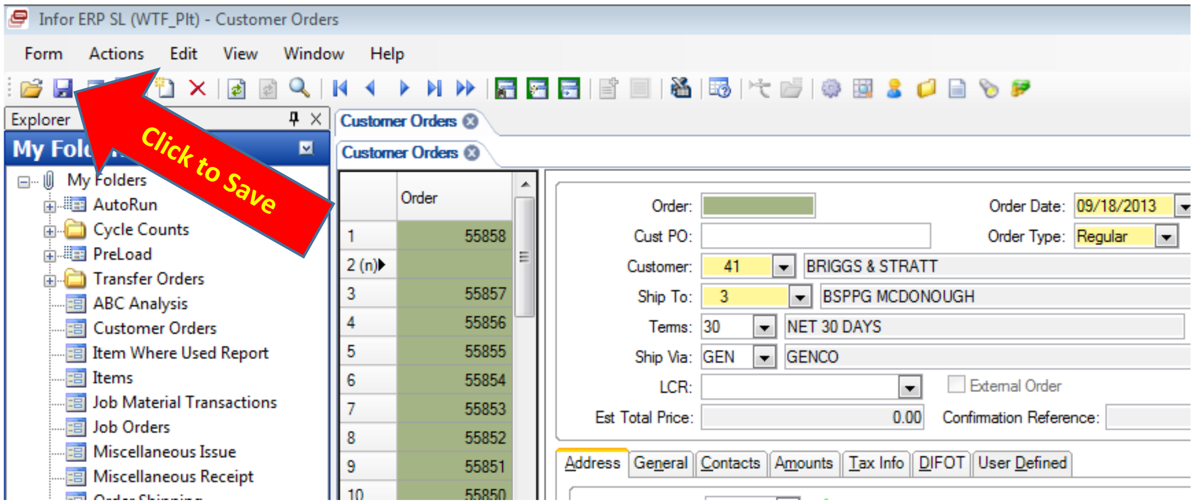


4. Fill in all the Yellow areas and MOST IMPORTANT the "Cust PO"
    - Cust PO MUST be entered here. Can be found on customer portal.
    - Order Date auto fills with today's date
    - Status should be set to "Ordered"
    - Order Type should be blanket unless this is a onetime order
    - Warehouse should be set to the warehouse that will be shipping the Item
    - Customer field needs a number. To find to right customer # see the end of this document
    - After the customer # is entered pick the right Ship To address from the drop menu
    - The last 2 Yellow field auto fill. Verify customer and ship to address are correct.

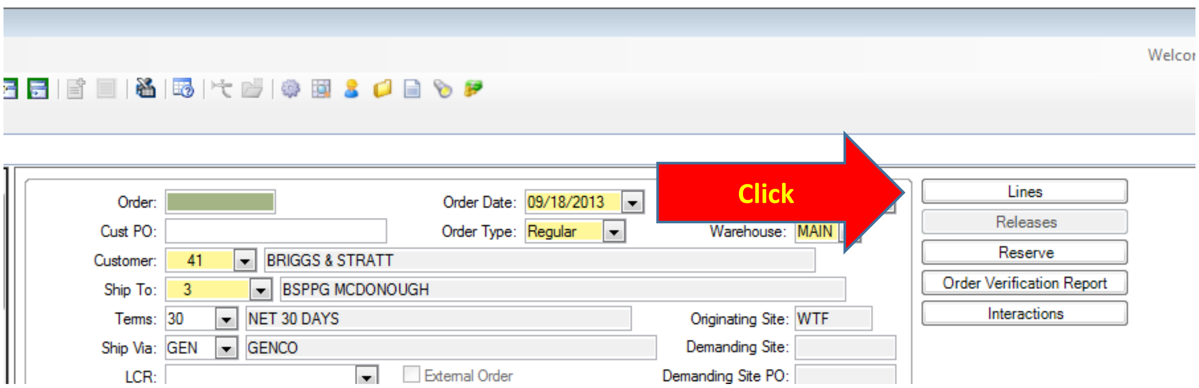


Customer Orders

5. Save the Order

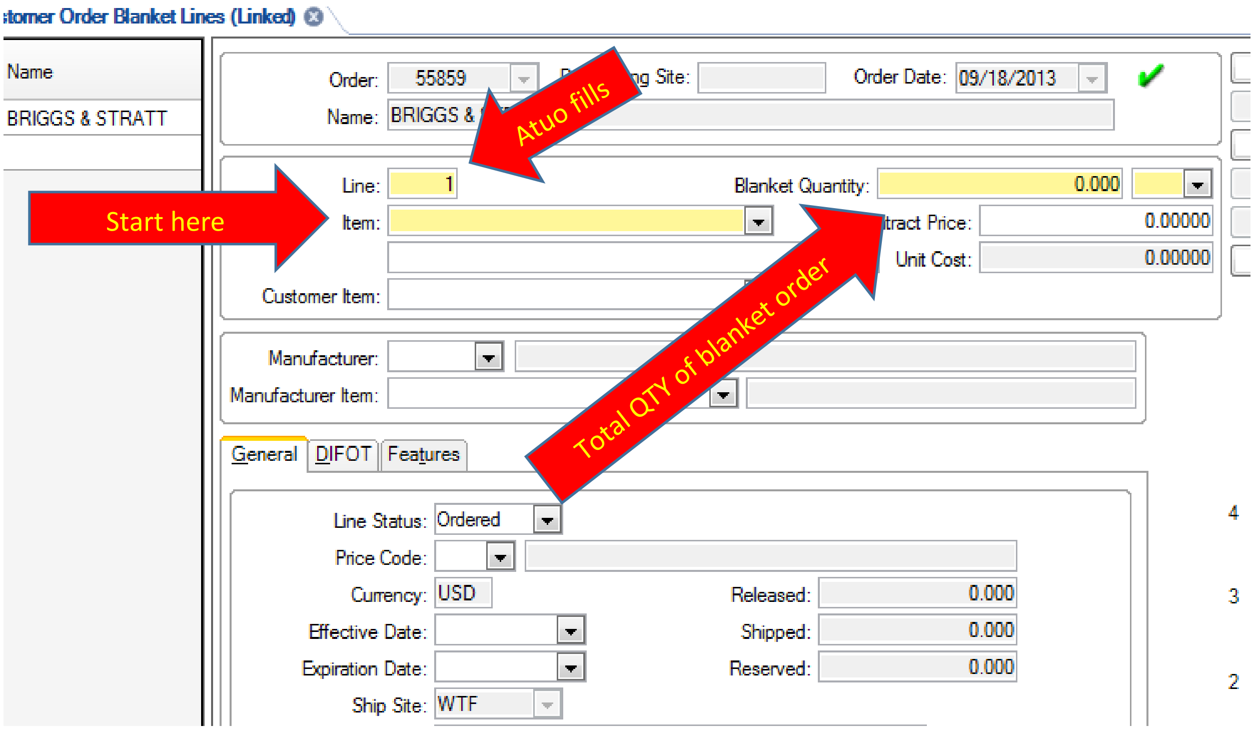


6. Click the “Lines” button on the set of buttons from the right side

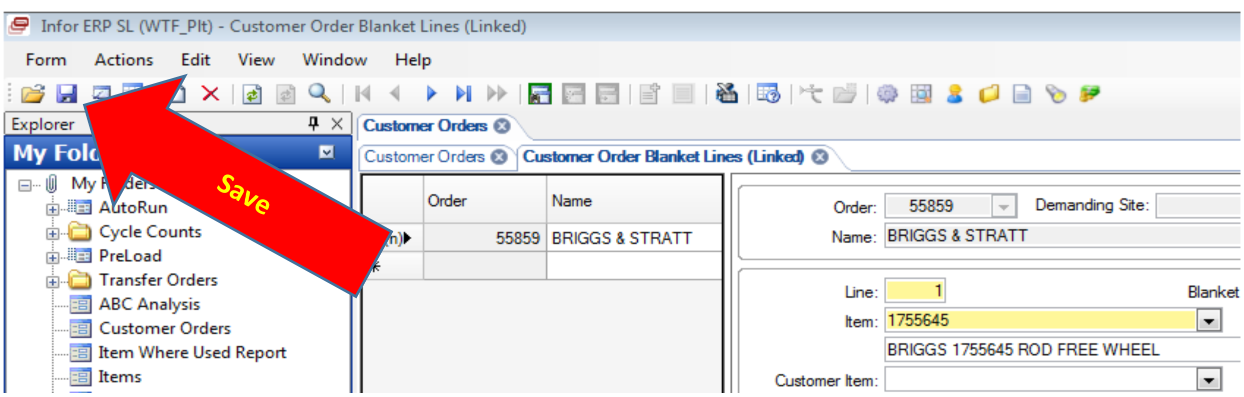


Customer Orders

7. Fill in all Yellow areas. Start with Item.



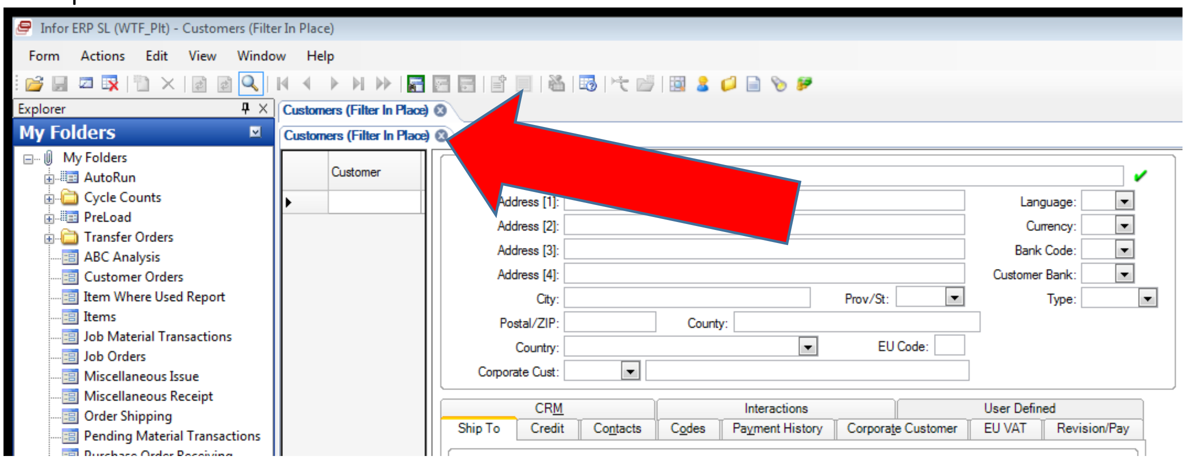
8. Save



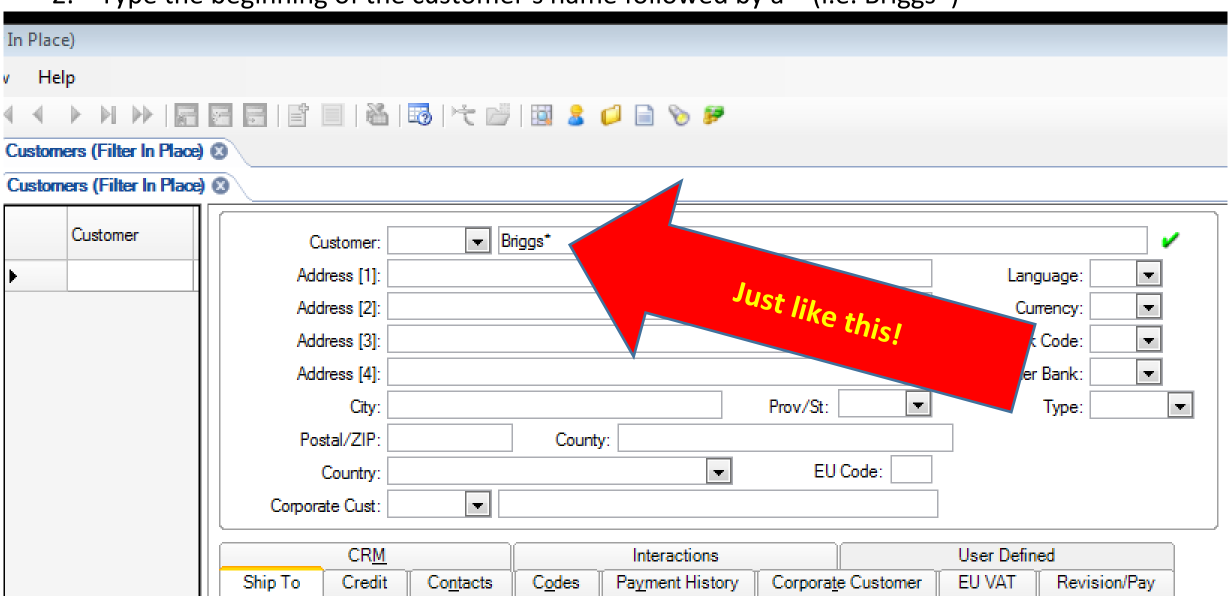
Customer Orders

How to find a customer number:

1. Open the “Customers” form

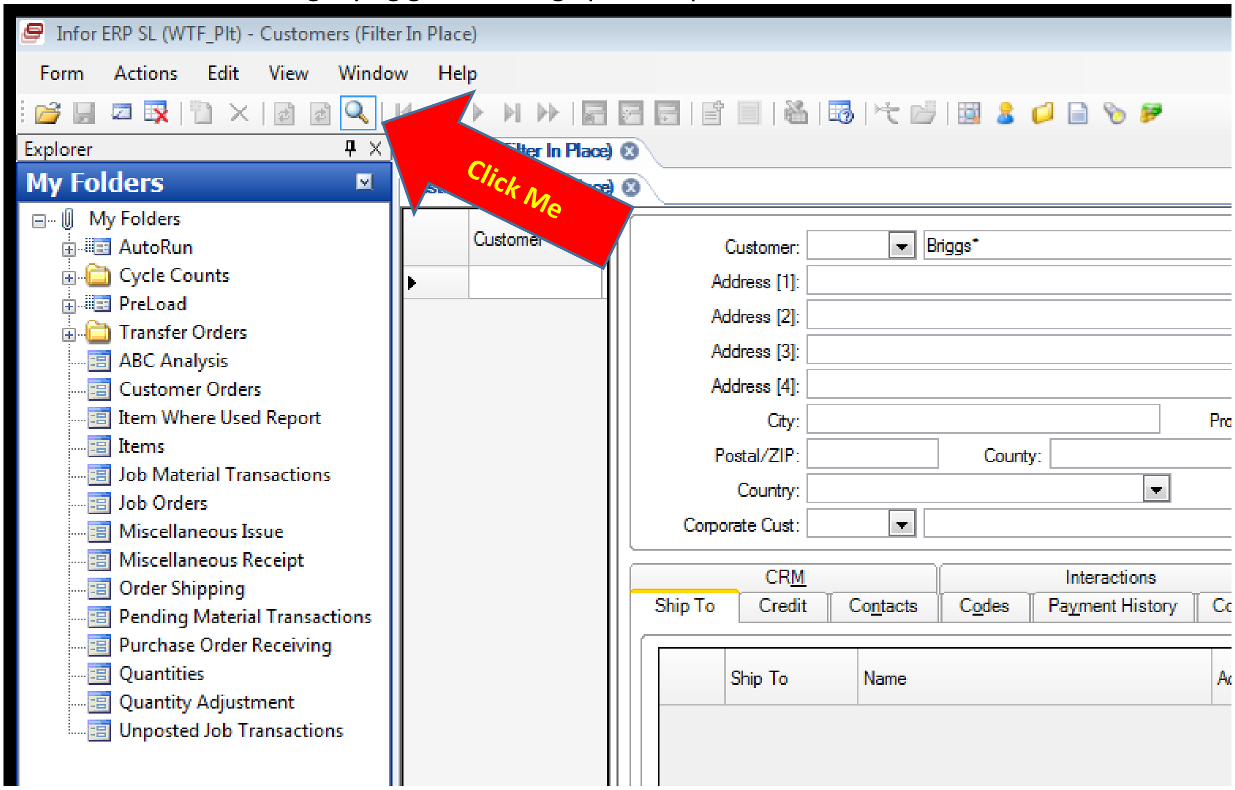


2. Type the beginning of the customer’s name followed by a * (i.e. Briggs*)



Customer Orders

3. Click the Click magnifying glass to bring up all the possible matches.



4. Pick the one that has the right address.