

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

The screenshot shows the 'Customer Orders (Filter In Place)' form. On the left, there is a table with columns 'Order' and 'Cust PO'. A red arrow points to the 'Cust PO' column header. The main form area contains various fields for order details: Order, Order Date, Status, Cust PO, Order Type, Warehouse, Customer, Ship To, Terms, Ship Via, LCR, Est Total Price, Confirmation Reference, Originating Site, Demanding Site, and Demanding Site PO. There are also buttons for 'Lines', 'Releases', 'Reserve', 'Order Verification Report', and 'Interactions'. At the bottom, there are tabs for 'Address', 'General', 'Contacts', 'Accounts', 'Tax Info', 'D/FOT', and 'User Defined'.

2. Filter the CO form by customer PO#, find the one that has an "Ordered" status.

The screenshot shows the 'Customer Orders (Filter In Place)' form with a 'My Folders' pane on the left. The 'Cust PO' field in the top left table is highlighted in yellow. A red arrow points to the 'Cust PO' field with the text '2nd Click magnifying glass'. Another red arrow points to the 'Cust PO' field with the text 'Put PO# Here First'. The main form area contains various fields for order details: Order, Order Date, Status, Cust PO, Order Type, Warehouse, Customer, Ship To, Terms, Ship Via, LCR, Est Total Price, Confirmation Reference, Originating Site, Demanding Site, and Demanding Site PO. There are also buttons for 'Lines', 'Releases', 'Reserve', 'Order Verification Report', and 'Interactions'. At the bottom, there are tabs for 'Address', 'General', 'Contacts', 'Accounts', 'Tax Info', 'D/FOT', and 'User Defined'.

Customer Orders

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

The screenshot shows the 'Customer Orders' form. On the left is a table with columns 'Cust PO' and 'Customer'. The main form area contains fields for Order (55484), Order Date (07/24/2013), Status (Order), Cust PO (5500053777), Order Type (Blanket), and Warehouse (PPI). The Customer is BRIGGS & STRATT (41). The Ship To is BSPPG MCDONOUGH (3). The Terms are NET 30 DAYS (30). The Ship Via is GENCO (GEN). The LCR is Genco. The Est Total Price is 2,998.05. The Confirmation Reference is empty. Below these fields are tabs: Address, General, Contacts, Amounts, Tax Info, DIFOT, and User Defined. The Address tab is selected, showing the Customer address (BRIGGS & STRATT, PO BOX 702, MILWAUKEE WI 53201, USA) and the Ship To address (BSPPG MCDONOUGH, 535 MACON STREET, MCDONOUGH GA 30253). A red arrow points to the Ship To address with the text 'Verify this address'.

	Cust PO	Customer
1▶	5500053777	
2	5500053777	
3	5500053777	
*		

Order: 55484 Order Date: 07/24/2013 Status: Order
Cust PO: 5500053777 Order Type: Blanket Warehouse: PPI
Customer: 41 BRIGGS & STRATT
Ship To: 3 BSPPG MCDONOUGH
Terms: 30 NET 30 DAYS Originating Site: WTF
Ship Via: GEN GENCO Demanding Site:
LCR: Genco Demanding Site PO:
Est Total Price: 2,998.05 Confirmation Reference:
Address General Contacts Amounts Tax Info DIFOT User Defined
Customer: 41 ✓
BRIGGS & STRATT
PO BOX 702
MILWAUKEE WI 53201
USA
Ship To: 3
BSPPG MCDONOUGH
535 MACON STREET
MCDONOUGH GA 30253
Verify this address

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

The screenshot shows the same 'Customer Orders' form as before. On the right side of the form, there is a vertical stack of buttons: Lines, Releases, Reserve, Order Verification Report, and Interactions. A red arrow points to the 'Releases' button. The rest of the form is identical to the previous screenshot.

Order: 55484 Order Date: 07/24/2013 Status: Order
Cust PO: 5500053777 Order Type: Blanket Warehouse: PPI
Customer: 41 BRIGGS & STRATT
Ship To: 3 BSPPG MCDONOUGH
Terms: 30 NET 30 DAYS Originating Site: WTF
Ship Via: GEN GENCO Demanding Site:
LCR: Genco Demanding Site PO:
Est Total Price: 2,998.05 Confirmation Reference:
Address General Contacts Amounts Tax Info DIFOT User Defined
Customer: 41 ✓
BRIGGS & STRATT
PO BOX 702
MILWAUKEE WI 53201
USA
Ship To: 3
BSPPG MCDONOUGH
535 MACON STREET
MCDONOUGH GA 30253
Releases

Customer Orders

5. Make a "New Release"

Click either one to get a new Release

	Status	Projected	Due Date
1	Filled		07/23
2	Ordered		09/18

Order: 55484 Demanding Site: Order Date: 07/24/2013
Name: BRIGGS & STRATT

Line: 1 Blanket Quantity: 20,000.000 EA
Item: 1737330 Contract Price: 0.50600
BRIGGS 1737330 ROD SPEED SELECT Unit Cost: 0.29904
Customer Item: 1737330

Manufacturer: Manufacturer Item:
Release: 2 Release Date: 09/17/2013 Ordered Release: 1,000.000

General Amounts Drop Ship EU VAT DJFOT

Status: Ordered Due Date: 09/18/2013
Projected: Request Date: Allow Over Credit Limit Invoice Hold

Source: Job Warehouse: PPI
Last Ship Date: Qty Ready: 0.000
Picked: 0.000 Shipped: 0.000
Packed: 0.000 Invoiced: 0.000

Plan On Save Ready Available: 0.000

G/L Acct:

6. Make sure the "Release Date" is today's date

Today's Date

	Status	Projected	Due Date
1	Filled		07/23
2	Ordered		09/18

Order: 55484 Demanding Site: Order Date: 07/24/2013
Name: BRIGGS & STRATT

Line: 1 Blanket Quantity: 20,000.000 EA
Item: 1737330 Contract Price: 0.50600
BRIGGS 1737330 ROD SPEED SELECT Unit Cost: 0.29904
Customer Item: 1737330

Manufacturer: Manufacturer Item:
Release Date: 09/17/2013 Ordered Release: 1,000.000

General Amounts Drop Ship EU VAT DJFOT

Status: Ordered Due Date: 09/18/2013
Projected: Request Date: Allow Over Credit Limit Invoice Hold

Source: Job Warehouse: PPI
Last Ship Date: Qty Ready: 0.000
Picked: 0.000 Shipped: 0.000
Packed: 0.000 Invoiced: 0.000

Plan On Save Ready Available: 0.000

G/L Acct:

Customer Orders

7. Change the "Due Date"

Infor ERP SL (WTF_Plt) - Customer Order Blanket Releases (Linked)

Form Actions Edit View Window Help

Explorer

My Folders

- My Folders
- AutoRun
- Cycle Counts
- PreLoad
- Transfer Orders
- ABC Analysis
- Customer Orders
- Item Where Used Report
- Items
- Job Material Transactions
- Job Orders
- Miscellaneous Issue
- Miscellaneous Receipt
- Order Shipping
- Pending Material Transactions
- Purchase Order Receiving
- Quantities
- Quantity Adjustment
- Unposted Job Transactions

	Status	Projected	Due D
1	Filled		07/23
2	Ordered		09/18
*			

Order: 55484 Demanding Site: Order Date: 07/24/2013
Name: BRIGGS & STRATT

Line: 1 Blanket Quantity: 20,000.000 EA
Item: 1737330 Contract Price: 0.50600
BRIGGS 1737330 ROD SPEED SELECT Unit Cost: 0.29904
Customer Item: 1737330

Manufacturer: Manufacturer Item:

Release: 2 Release Date: 09/17/2013 Ordered Release: 1,000.000

General Amounts Drop Ship WAT DJFOT

Change Me

Due Date: 09/18/2013 Allow Over Credit Limit
Request Date: Invoice Hold

Source: Job Warehouse: PPI
Last Ship Date: Qty Ready: 0.000
Picked: 0.000 Shipped: 0.000
Packed: 0.000 Invoiced: 0.000

Plan On Save Ready Available: 0.000

G/L Acct:

8. Put QTY in the "Ordered Release" field

Infor ERP SL (WTF_Plt) - Customer Order Blanket Releases (Linked)

Form Actions Edit View Window Help

Explorer

My Folders

- My Folders
- AutoRun
- Cycle Counts
- PreLoad
- Transfer Orders
- ABC Analysis
- Customer Orders
- Item Where Used Report
- Items
- Job Material Transactions
- Job Orders
- Miscellaneous Issue
- Miscellaneous Receipt
- Order Shipping
- Pending Material Transactions
- Purchase Order Receiving
- Quantities
- Quantity Adjustment
- Unposted Job Transactions

	Status	Projected	Due D
1	Filled		07/23
2	Ordered		09/18
*			

Order: 55484 Demanding Site: Order Date: 07/24/2013
Name: BRIGGS & STRATT

Line: 1 Blanket Quantity: 20,000.000 EA
Item: 1737330 Contract Price: 0.50600
BRIGGS 1737330 ROD SPEED SELECT Unit Cost: 0.29904
Customer Item: 1737330

Manufacturer: Manufacturer Item:

Release: QTY that was shipped Ordered Release: 1,000.000

General

Status: Ordered Due Date: 09/18/2013 Allow Over Credit Limit
Projected: Request Date: Invoice Hold

Source: Job Warehouse: PPI
Last Ship Date: Qty Ready: 0.000
Picked: 0.000 Shipped: 0.000
Packed: 0.000 Invoiced: 0.000

Plan On Save Ready Available: 0.000

G/L Acct:

Customer Orders

9. Make sure the "Warehouse" field is the right warehouse.

The screenshot shows the 'Customer Order Blanket Releases (Linked)' window. On the left is a 'My Folders' tree. The main area has a table with columns: Status, Projected, Due Date. The first row is 'Filled' with a due date of 07/23. The second row is 'Ordered' with a due date of 09/18. Below the table is a form for 'Order: 55484' and 'Name: BRIGGS & STRATT'. The 'Line: 1' section shows 'Item: 1737330' and 'Blanket Quantity: 20,000.000 EA'. The 'Release: 2' section shows 'Release Date: 09/17/2013' and 'Ordered Release: 1,000.000'. The 'General' tab is active, showing 'Status: Ordered' and 'Due Date: 09/18/2013'. A red arrow points to the 'Warehouse: PPI' field with a text box that says 'This should be the same as the warehouse that will ship the item'.

Status	Projected	Due Date
Filled		07/23
Ordered		09/18

Order: 55484 Demanding Site: Order Date: 07/24/2013
Name: BRIGGS & STRATT

Line: 1 Blanket Quantity: 20,000.000 EA
Item: 1737330 Contract Price: 0.50600
BRIGGS 1737330 ROD SPEED SELECT Unit Cost: 0.29904
Customer Item: 1737330

Manufacturer: Manufacturer Item:

Release: 2 Release Date: 09/17/2013 Ordered Release: 1,000.000

General Amounts Drop Ship EU VAT DJFOT

Status: Ordered Due Date: 09/18/2013
Projected: Request Date: Invoice Hold

Source: Job Warehouse: PPI
Last Ship Date: Picked: 0.000 Shipped: 0.000
Packed: 0.000 Invoiced: 0.000

Plan On Save Ready Available: 0.000

G/L Acct:

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

The screenshot shows the same 'Customer Order Blanket Releases (Linked)' window. A red arrow points to the 'Save' button in the top toolbar. The 'Warehouse' field is still highlighted with a red arrow pointing to it, with a text box that says 'This should be the same as the warehouse that will ship the item'.

Form Actions View Window Help

Explorer My Folders

Order: 55484 Demanding Site: Order Date: 07/24/2013
Name: BRIGGS & STRATT

Line: 1 Blanket Quantity: 20,000.000 EA
Item: 1737330 Contract Price: 0.50600
BRIGGS 1737330 ROD SPEED SELECT Unit Cost: 0.29904
Customer Item: 1737330

Manufacturer: Manufacturer Item:

Release: 2 Release Date: 09/17/2013 Ordered Release: 1,000.000

General Amounts Drop Ship EU VAT DJFOT

Status: Ordered Due Date: 09/18/2013
Projected: Request Date: Invoice Hold

Source: Job Warehouse: PPI
Last Ship Date: Picked: 0.000 Shipped: 0.000
Packed: 0.000 Invoiced: 0.000

Plan On Save Ready Available: 0.000

G/L Acct:

Customer Orders

11. Click the “Notes button”

Form Actions Edit View Window Help

Explorer

My Folders

- My Folders
 - AutoRun
 - Cycle Counts
 - PreLoad
 - Transfer Orders
 - ABC Analysis
 - Customer Orders
 - Item Where Used Report
 - Items
 - Job Material Transactions
 - Job Orders
 - Miscellaneous Issue
 - Miscellaneous Receipt
 - Order Shipping
 - Pending Material Transactions
 - Purchase Order Receiving
 - Quantities

	Status	Projected	Due D
1	Complete		11/27
2	Complete	11/27/2012	11/20
3	Complete	12/04/2012	12/01
4	Filled		01/22
5	Filled		03/19
6	Filled		04/09
7	Filled		05/07
8	Filled		06/24
9	Filled		06/25
10	Filled		07/30
11	Filled		09/03
*			

Order: [Dropdown] Demanding Site: [Dropdown]
Name: BRIGGS & STRATT

Line: 1
Item: 1755633
BRIGGS 1755633 ROD DASH SU
Customer Item: [Dropdown]
Manufacturer: [Dropdown]
Manufacturer Item: [Dropdown]
Release: 11 Release Date: 09
General Amounts Drop Ship EU VAT DIFOT

Click to add Notes

12. Enter the following

Customer Orders Customer Order Blanket Releases (Linked) Object Notes (Linked)

	Subject
1 (n)	
*	

Subject: [Text Field]

☒ Internal ☐ Reusable ☐ System

Attach File... Open Attachment..

Note

REL# 3 3000PCS
REL# 4 3000PCS
PL# 0146416523

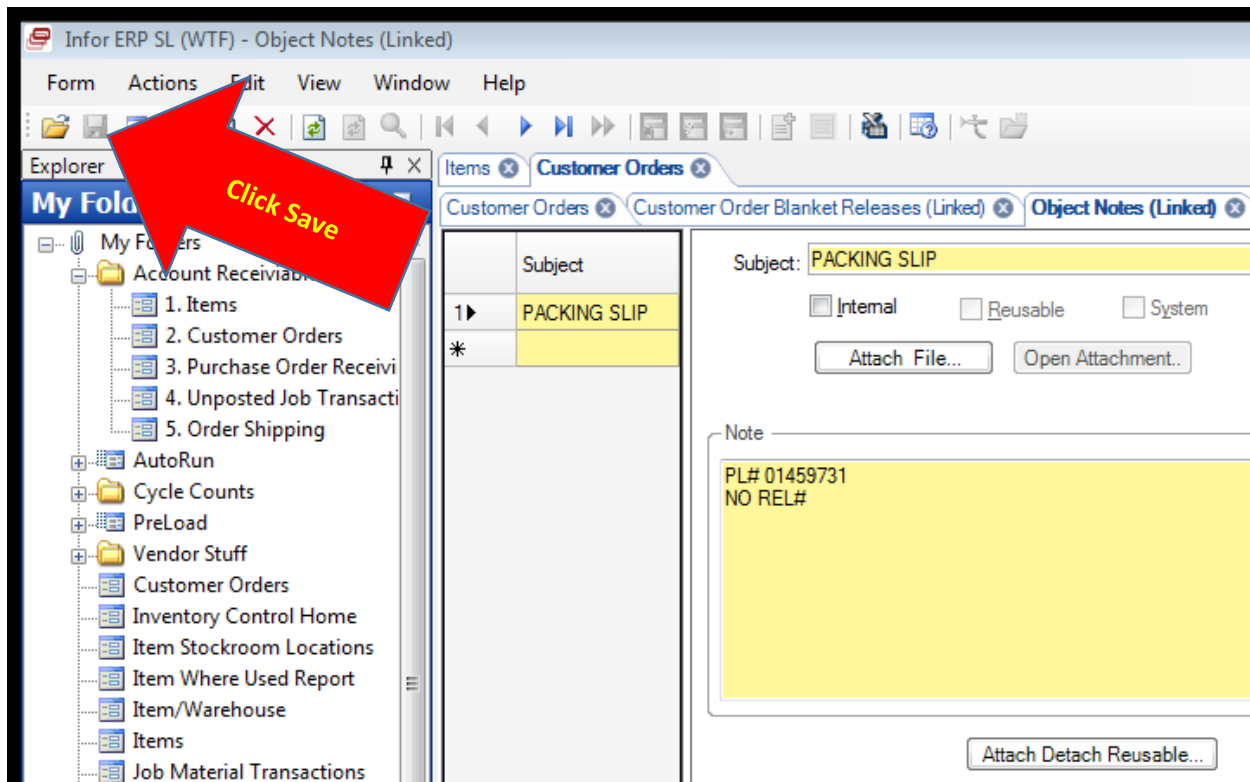
Attach Detach Reusable...

Type "PACKING SLIP"

MAKE SURE THERE REL# AND PL# ARE HERE

Customer Orders

13. Click Save



The screenshot shows the Infor ERP SL (WTF) - Object Notes (Linked) window. The window has a menu bar (Form, Actions, Edit, View, Window, Help) and a toolbar with various icons. A red arrow points to the 'Save' icon in the toolbar with the text 'Click Save'.

The left pane shows a tree view of 'My Folders' with the following items:

- Account Receivable
 - 1. Items
 - 2. Customer Orders
 - 3. Purchase Order Receivable
 - 4. Unposted Job Transactions
 - 5. Order Shipping
- AutoRun
- Cycle Counts
- PreLoad
- Vendor Stuff
 - Customer Orders
 - Inventory Control Home
 - Item Stockroom Locations
 - Item Where Used Report
 - Item/Warehouse
 - Items
 - Job Material Transactions

The main pane shows a table with the following data:

	Subject
1▶	PACKING SLIP
*	

The right pane shows the 'Object Notes (Linked)' tab. It contains the following information:

Subject: PACKING SLIP

☐ Internal ☐ Reusable ☐ System

Attach File... Open Attachment..

Note

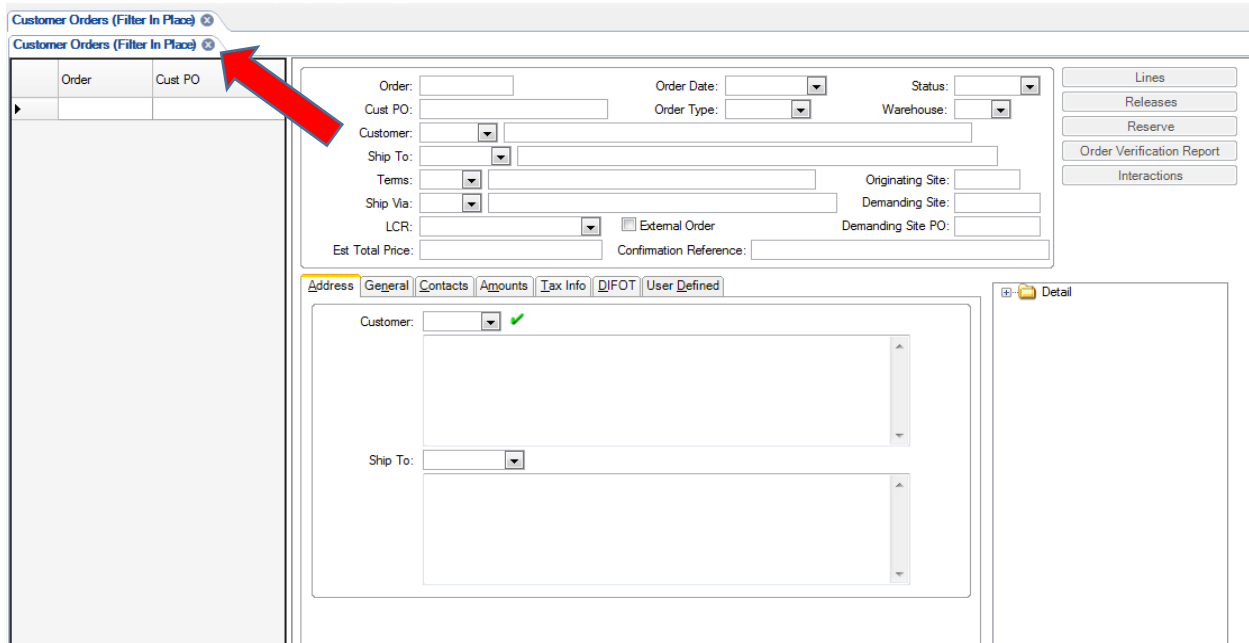
PL# 01459731
NO REL#

Attach Detach Reusable...

Customer Orders

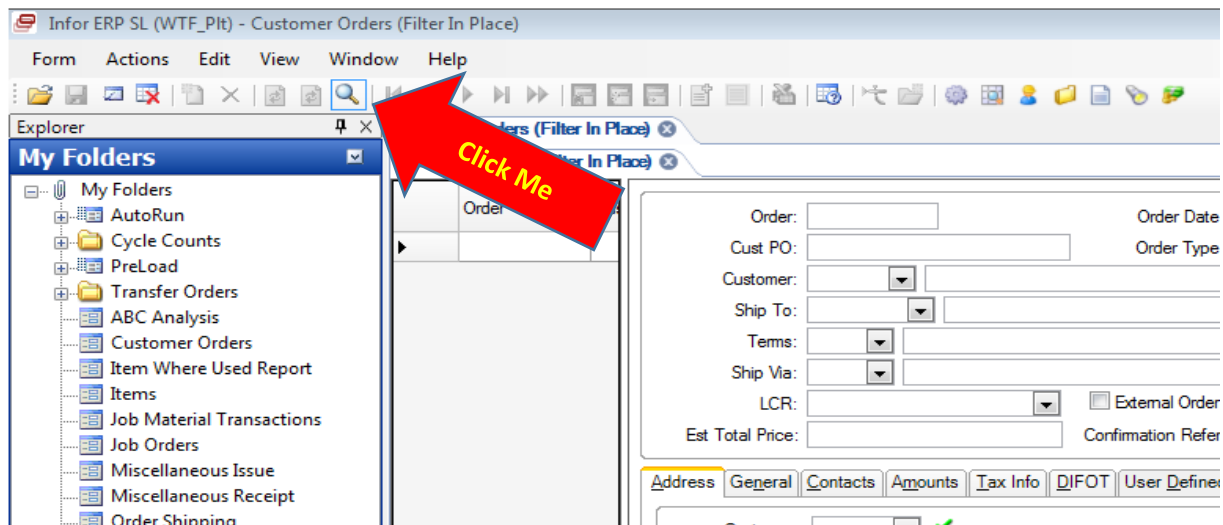
Creating a customer order from scratch:

1. Open "Customer Orders" (CO) form



The screenshot shows the 'Customer Orders (Filter In Place)' form. The form has a table on the left with columns 'Order' and 'Cust PO'. A red arrow points to the 'Filter In Place' button in the top left corner. The main form area contains fields for Order, Cust PO, Customer, Ship To, Terms, Ship Via, LCR, Est Total Price, Order Date, Order Type, Warehouse, Status, Originating Site, Demanding Site, and Demanding Site PO. There are also buttons for Lines, Releases, Reserve, Order Verification Report, and Interactions. The form is divided into tabs: Address, General, Contacts, Amounts, Tax Info, DIFOT, and User Defined.

2. Take off the "Filter in Place"



The screenshot shows the 'Infor ERP SL (WTF_Plt) - Customer Orders (Filter In Place)' form. The form has a menu bar (Form, Actions, Edit, View, Window, Help) and a toolbar. On the left, there is an 'Explorer' pane with 'My Folders' expanded, showing a list of folders including AutoRun, Cycle Counts, PreLoad, Transfer Orders, ABC Analysis, Customer Orders, Item Where Used Report, Items, Job Material Transactions, Job Orders, Miscellaneous Issue, Miscellaneous Receipt, and Order Shipping. A red arrow points to the 'Filter In Place' button in the top left corner of the form, with the text 'Click Me' written next to it. The main form area contains fields for Order, Cust PO, Customer, Ship To, Terms, Ship Via, LCR, Est Total Price, Order Date, Order Type, and Confirmation Reference. There are also buttons for Address, General, Contacts, Amounts, Tax Info, DIFOT, and User Defined.

Customer Orders

3. Make a new Order

Click to make a new order

Order: 55858
Cust PO: 4500118814
Customer: 245 JOERNS HEALTHCARE II
Ship To: 2 JOERNS HEALTHCARE II
Terms: 60 NET 60 DAYS

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.

Not Yellow but MOST important

Auto fills

Auto fills

Auto fills

To find see end of document

Auto fills when Cust # is put in

Set to blanket unless onetime order

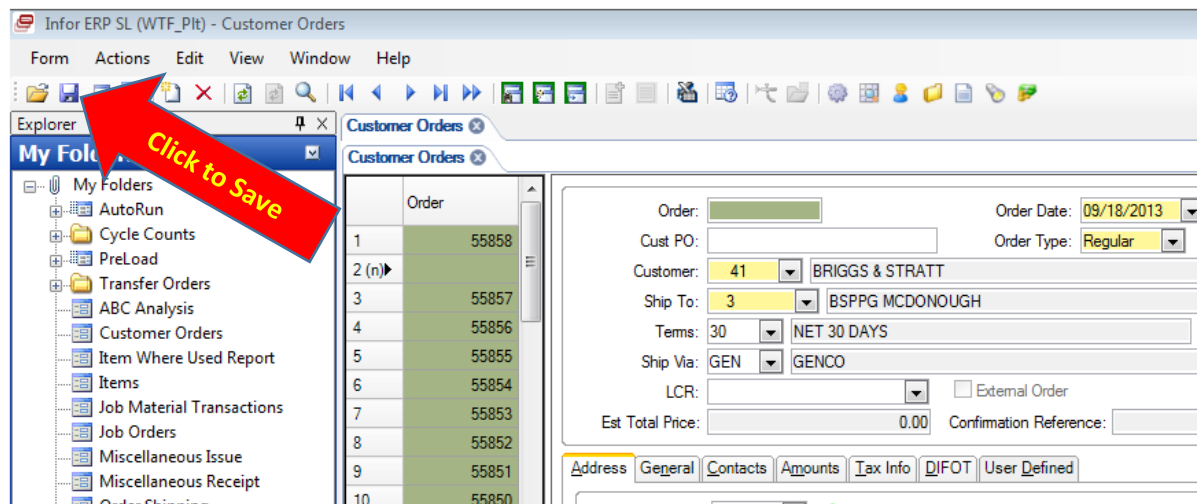
Should be set to shipping warehouse

Auto fills. Just verify

Auto fills. Just verify

Customer Orders

5. Save the Order



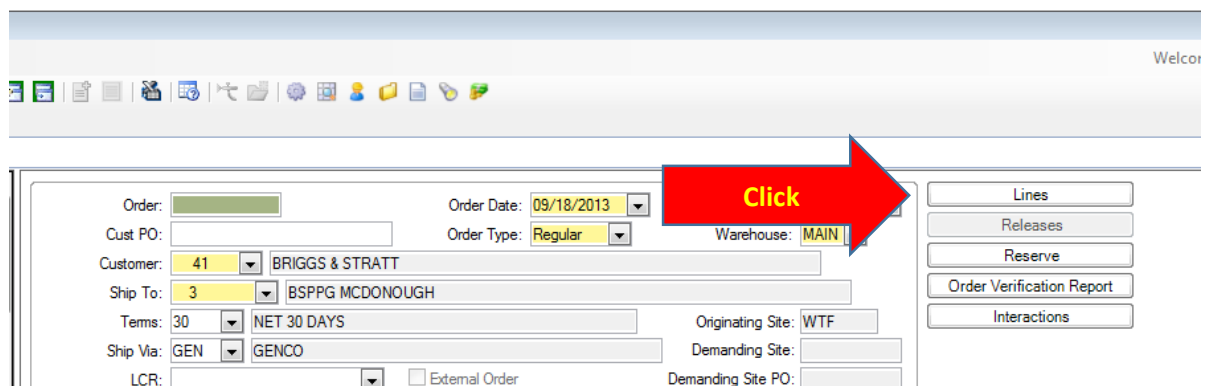
The screenshot shows the Infor ERP SL Customer Orders form. A red arrow points to the Save icon in the toolbar. The form includes a menu bar (Form, Actions, Edit, View, Window, Help), a toolbar with various icons, and a left-hand Explorer pane. The Explorer pane shows a tree structure with folders like My Folders, AutoRun, Cycle Counts, PreLoad, Transfer Orders, ABC Analysis, Customer Orders, Item Where Used Report, Items, Job Material Transactions, Job Orders, Miscellaneous Issue, Miscellaneous Receipt, and Order Shipments. The main area displays a list of orders with columns for Order, Order Date, and Order Type. The right-hand pane shows the details of the selected order, including Customer, Ship To, Terms, Ship Via, LCR, and Est Total Price.

Order	Order Date	Order Type
1	55858	
2 (n)		
3	55857	
4	55856	
5	55855	
6	55854	
7	55853	
8	55852	
9	55851	
10	55850	

Order: Order Date: 09/18/2013
Cust PO: Order Type: Regular
Customer: 41 BRIGGS & STRATT
Ship To: 3 BSPPG MCDONOUGH
Terms: 30 NET 30 DAYS
Ship Via: GEN GENCO
LCR: ☐ External Order
Est Total Price: 0.00 Confirmation Reference:

Address General Contacts Amounts Tax Info DIFOT User Defined

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



The screenshot shows the Infor ERP SL Customer Orders form. A red arrow points to the Lines button in the right-hand pane. The form includes a menu bar (Form, Actions, Edit, View, Window, Help), a toolbar with various icons, and a left-hand Explorer pane. The main area displays a list of orders with columns for Order, Order Date, and Order Type. The right-hand pane shows the details of the selected order, including Customer, Ship To, Terms, Ship Via, LCR, and Est Total Price.

Order	Order Date	Order Type
1	55858	
2 (n)		
3	55857	
4	55856	
5	55855	
6	55854	
7	55853	
8	55852	
9	55851	
10	55850	

Order: Order Date: 09/18/2013
Cust PO: Order Type: Regular
Customer: 41 BRIGGS & STRATT
Ship To: 3 BSPPG MCDONOUGH
Terms: 30 NET 30 DAYS
Ship Via: GEN GENCO
LCR: ☐ External Order
Warehouse: MAIN
Originating Site: WTF
Demanding Site:
Demanding Site PO:

Lines
Releases
Reserve
Order Verification Report
Interactions

Customer Orders

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

Customer Order Blanket Lines (Linked)

Name: BRIGGS & STRATT

Order: 55859 Demanding Site: Order Date: 09/18/2013 ✓

Name: BRIGGS & STRATT

Line: 1 Blanket Quantity: 0.000

Item: [Empty] Contract Price: 0.00000

Customer Item: Unit Cost: 0.00000

Manufacturer: Manufacturer Item:

General DIFOT Features

Line Status: Ordered Price Code: Currency: USD Released: 0.000

Effective Date: Shipped: 0.000

Expiration Date: Reserved: 0.000

Ship Site: WTF

4

3

2

8. Save

Infor ERP SL (WTF_Plt) - Customer Order Blanket Lines (Linked)

Form Actions Edit View Window Help

Explorer

My Folders

- AutoRun
- Cycle Counts
- PreLoad
- Transfer Orders
- ABC Analysis
- Customer Orders
- Item Where Used Report
- Items

Customer Orders

Customer Order Blanket Lines (Linked)

Order: 55859 Demanding Site: Name: BRIGGS & STRATT

Line: 1 Blanket

Item: 1755645 Contract Price: 0.00000

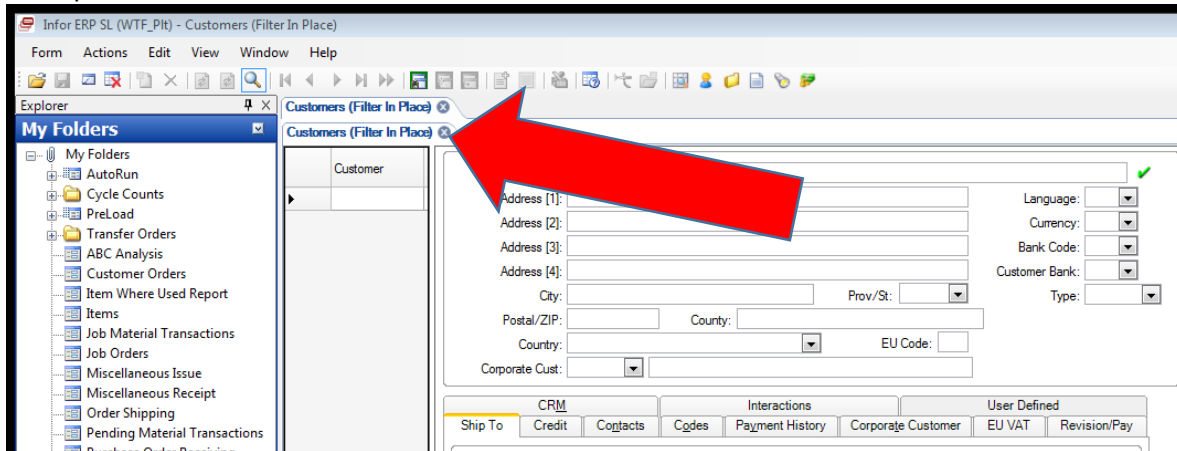
Customer Item: BRIGGS 1755645 ROD FREE WHEEL

Save

Customer Orders

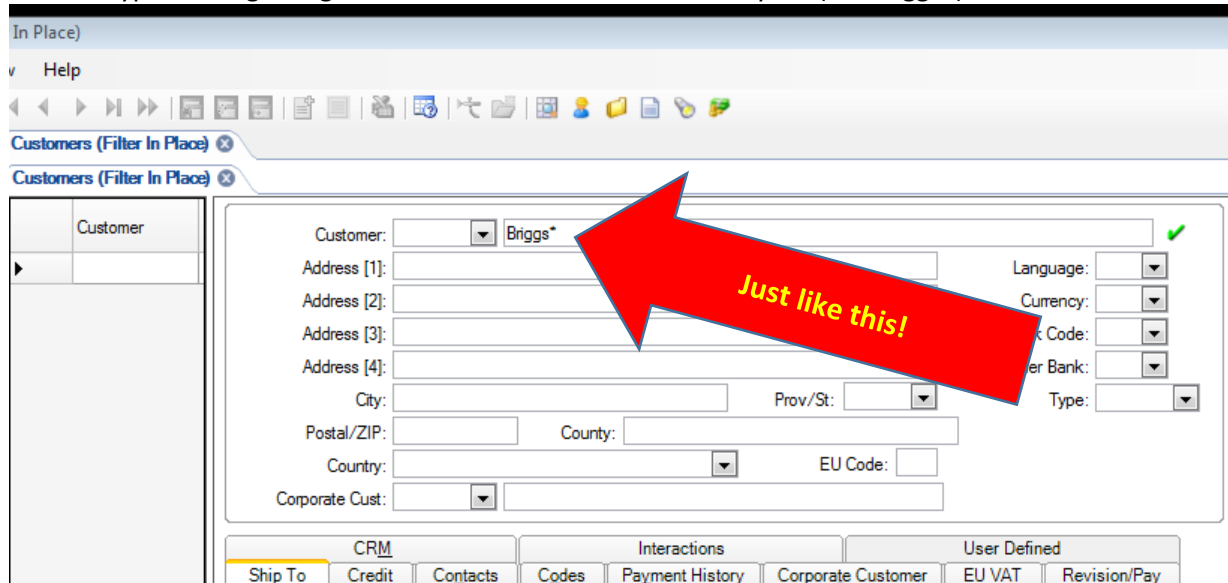
How to find a customer number:

1. Open the "Customers" form



The screenshot shows the 'Customers (Filter In Place)' form in the Infor ERP SL (WTF_Pit) application. The form is titled 'Customers (Filter In Place)' and has a menu bar with 'Form', 'Actions', 'Edit', 'View', 'Window', and 'Help'. A red arrow points to the 'Customer' field in the form, which is currently empty. The form also includes fields for 'Address [1]', 'Address [2]', 'Address [3]', 'Address [4]', 'City', 'Postal/ZIP', 'Country', 'Prov/St', 'Language', 'Currency', 'Bank Code', 'Customer Bank', 'Type', and 'EU Code'. The 'Customer' field is highlighted with a red arrow.

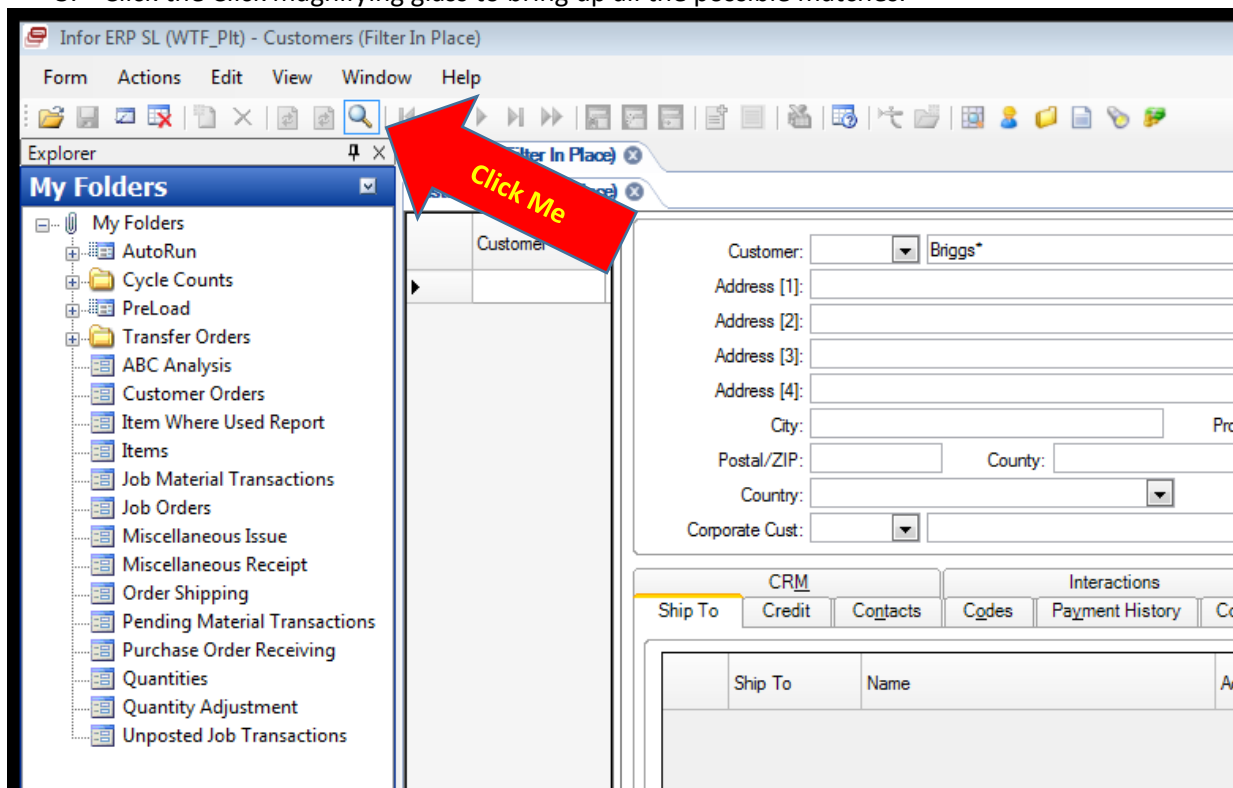
2. Type the beginning of the customer's name followed by a * (i.e. Briggs*)



The screenshot shows the 'Customers (Filter In Place)' form in the Infor ERP SL (WTF_Pit) application. The 'Customer' field now contains the text 'Briggs*'. A red arrow points to the 'Customer' field, and the text 'Just like this!' is written in yellow on the arrow. The form also includes fields for 'Address [1]', 'Address [2]', 'Address [3]', 'Address [4]', 'City', 'Postal/ZIP', 'Country', 'Prov/St', 'Language', 'Currency', 'Bank Code', 'Customer Bank', 'Type', and 'EU Code'. The 'Customer' field is highlighted with a red arrow.

Customer Orders

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



4. Pick the one that has the right address.

