

THIBAUT

INFOR

Training Guide

Showroom Edition

United States

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Customer Service Requests
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Overview

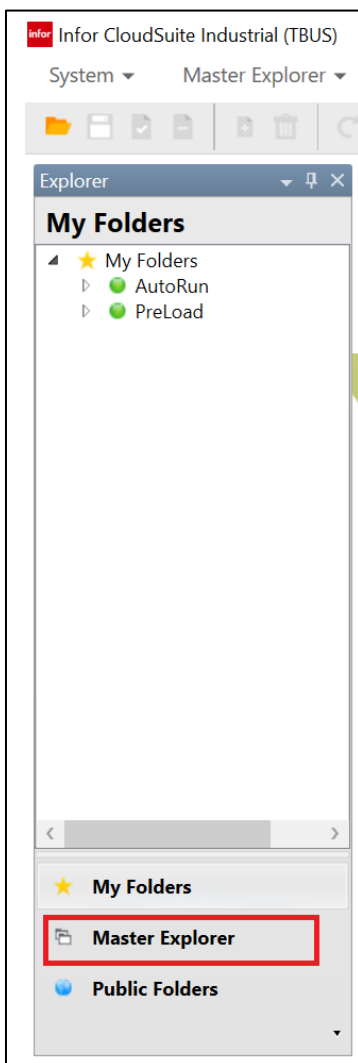
This document is intended to guide user in setting-up modules and using Infor to create documents for communicating and managing accounts for Interior Designers.

Set up My Folder

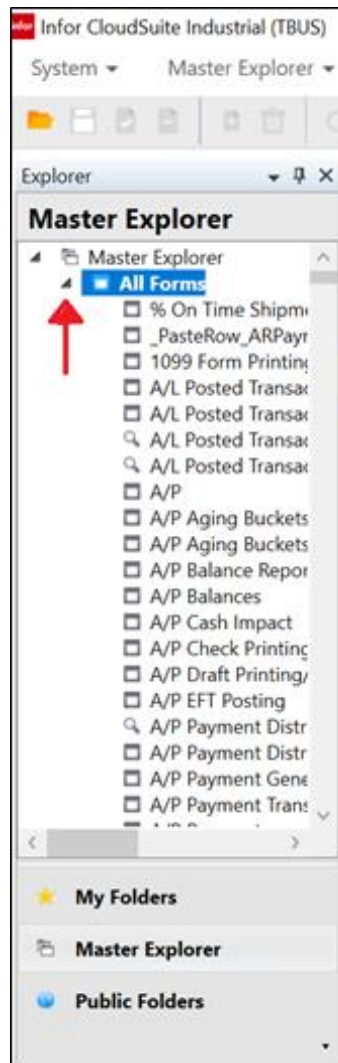
The Manager provides the list of most frequently used modules by the showroom to be place in *My Folders*.

1. In the Explorer tool on the left hand of screen, click **Master Explorer** to change from the *My Folders* to the *Master Explorer* menu.
2. In the *Master Explorer* menu click **Arrow** next to *All Forms* to reveal modules.

NOTE: The menu takes 1-2 minutes to open.

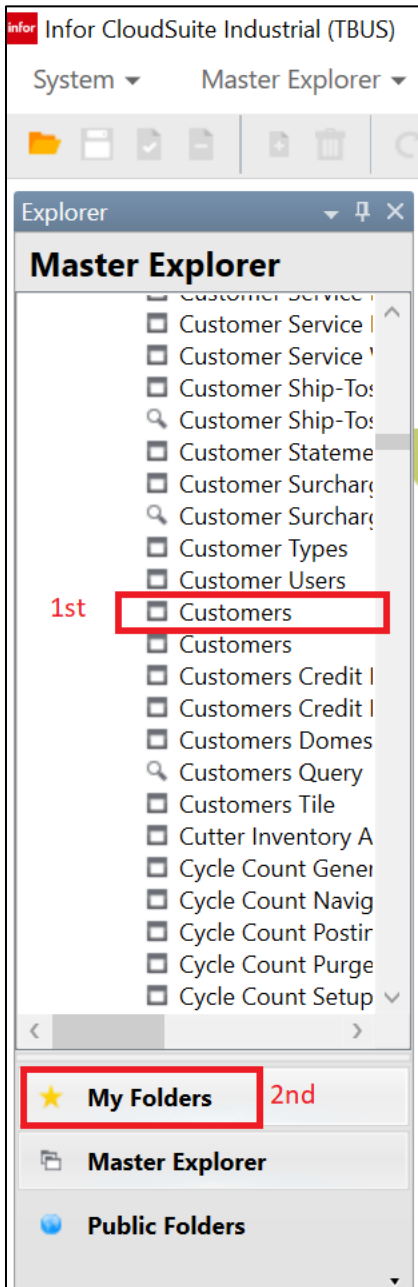


My Folders Menu

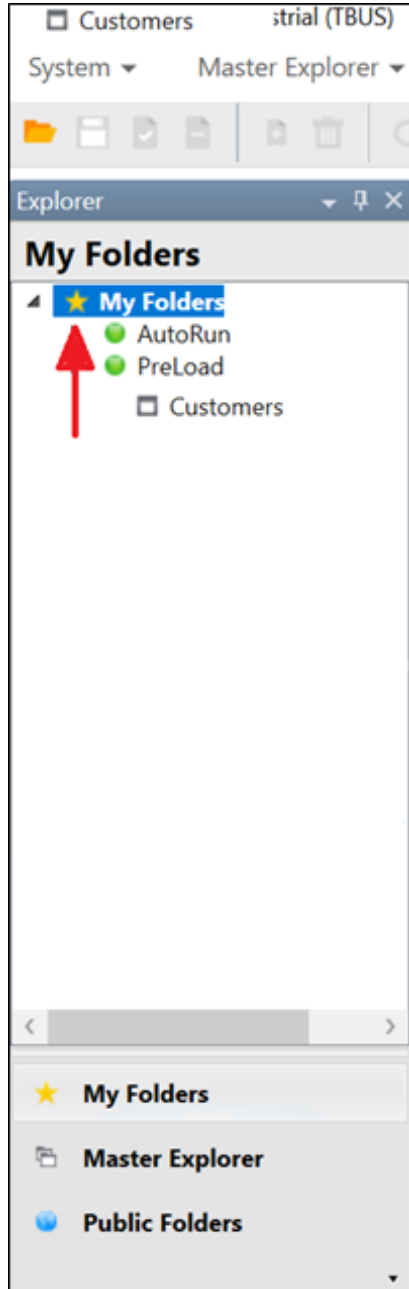


Master Explorer

3. Once the menu is visible, scroll for the module (example: *Customers*).
4. Once located click **Right** and select Copy.
5. Once Captured click **My Folders** at the bottom to return to the *My Folders* menu.
6. Point **Cursor** on the yellow star next to *My Folders*, click **Right** and select **Paste**.
7. *Customers* should now be visible in *My Folders*.
8. These steps should be followed for the addition of all modules to be used by the showroom.



Capturing Module

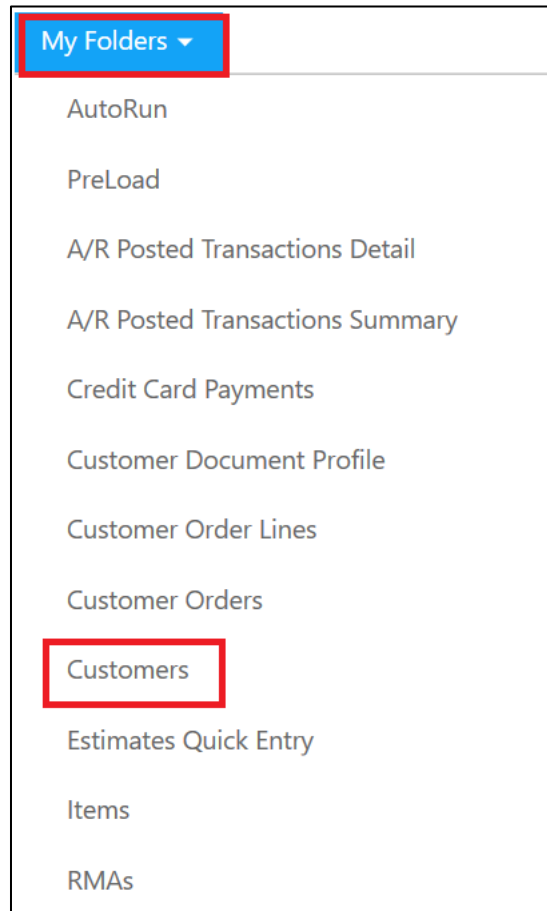


My Folders

Customer Look-Up

1. Click **My folders** to reveal a pull-down menu of modules.
2. Click **Customers** to go to the main screen.

NOTE: The *Customers* module should remain open while using Infor.



Modules Folder

3. There are three options for looking up customers.
 - A. Option I for Customer Look up is by *Account Number* (Preferred Method).
 - i. Click **Cursor** in the first field of the Customer line.
 - ii. Type in number provided by the Designer.

Customer: 123456 ✓

Master Account

Address [1]:

Address [2]:

Address [3]:

Address [4]:

City: Prov/St:

Postal/ZIP: County:

Country: EU Code:

Corporate Cust:

Customer Information Section

- iii. Click **Filter** on the Tool Bar or **F4** on the keyboard to retrieve the information.



Filter

- B. Option II for Customer Look up is by *Phone* (Most commonly used)
 - i. Click **Cursor** in the phone field and type number with dashes.

Contact

Primary Contact:

Phone: 123-456-7890

Fax Num:

[External E-mail](#)

[Internal E-mail](#)

Billing Contact:

Phone:

Other Phone:

Internet URL:

Contact Information Section

- ii. Click **Filter** on the Tool Bar or hit **F4** on the keyboard to retrieve the information.



Filter

- C. Option III for Customer Look-up is by *Name* (Least Preferred Method).
 - i. Click **Cursor** in the second field of the Customer line.
 - ii. Type an astrick (*) at the beginning and end of the name. A partial name is sufficient.

Customer: ✓

Master Account

Address [1]:

Address [2]:

Address [3]:

Address [4]:

City: Prov/St:

Postal/ZIP: County:

Country: EU Code:

Corporate Cust:

Customer Information Section

- iii. Click **Filter** on the Tool Bar or **F4** on the keyboard to retrieve the information.



Filter

- 4. To look-up another customer, click **Filter** a second time and hit **F5** or **Delete** on the keyboard to clear the information.

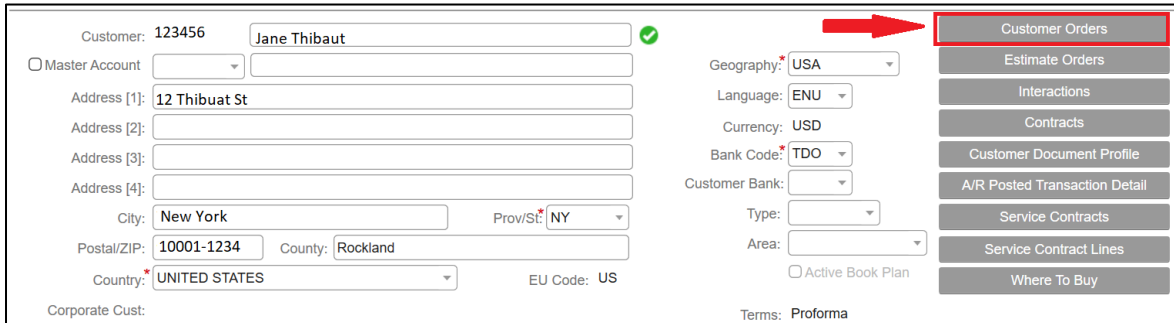


Filter

Create New Order

The following steps show how to prepare a wallcovering or fabric order for a client with payment.

1. Look-up customer. For instructions see *Customer Look-Up* on page 6
2. Once customer has been located, click **Customer Orders** from menu on right hand.



The screenshot shows the 'Customer Screen' with the following details:

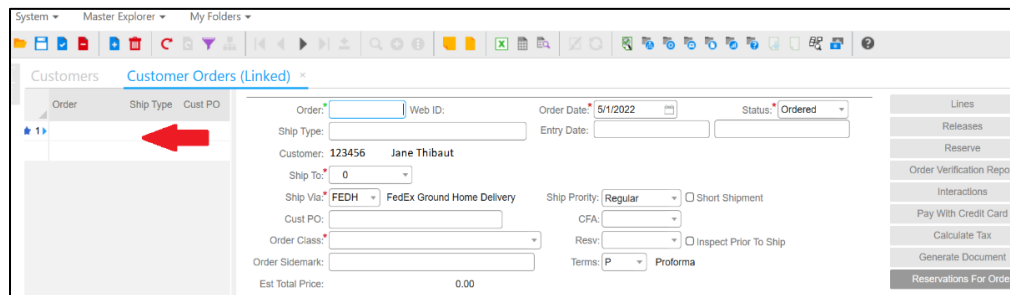
- Customer: 123456 Jane Thibaut
- Address [1]: 12 Thibaut St
- City: New York, Prov/St: NY
- Postal/ZIP: 10001-1234, County: Rockland
- Country: UNITED STATES, EU Code: US
- Geography: USA, Language: ENU, Currency: USD, Bank Code: TDO
- Customer Bank: (empty), Type: (empty), Area: (empty)
- Terms: Proforma

On the right side, there is a menu with the following items: Customer Orders (highlighted with a red box and a red arrow), Estimate Orders, Interactions, Contracts, Customer Document Profile, A/R Posted Transaction Detail, Service Contracts, Service Contract Lines, and Where To Buy.

Customer Screen

3. This opens the *Customer Orders (Linked)* module.
4. The information visible on the screen prompts the next action to be taken.
 - A. If no list is visible on the left hand, order entry can begin in the empty fields,

NOTE: No list means the account hasn't placed any orders



The screenshot shows the 'Order List' screen with the following details:

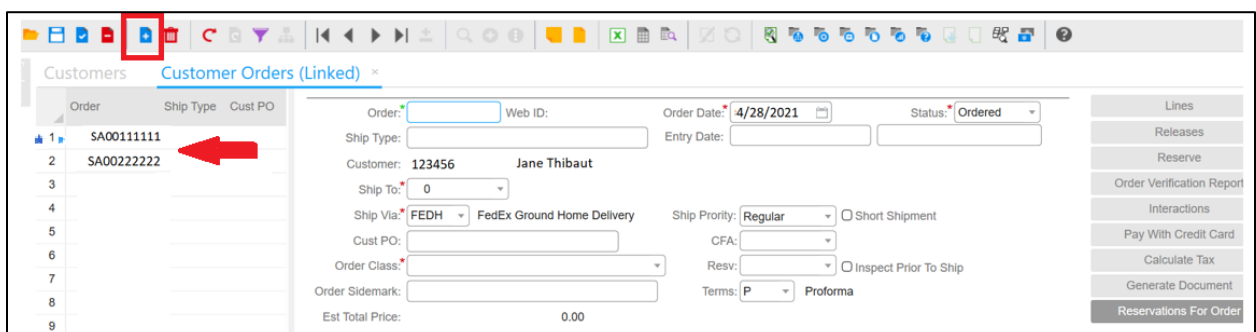
- Order: (empty), Web ID: (empty), Order Date: 5/1/2022, Status: Ordered
- Ship Type: (empty), Entry Date: (empty)
- Customer: 123456 Jane Thibaut
- Ship To: 0
- Ship Via: FEDH, FedEx Ground Home Delivery, Ship Priority: Regular, Short Shipment: (unchecked)
- Cust PO: (empty), CFA: (empty), Resv: (empty), Inspect Prior To Ship: (unchecked)
- Order Class: (empty), Order Sidemark: (empty), Terms: P, Proforma
- Est Total Price: 0.00

A red arrow points to the 'Add' button in the toolbar on the left.

Order List

- B. If a list is visible on the left hand, click **Add** in the toolbar to create a blank screen to begin order entry.

NOTE: An existing list are orders place by account. The information on screen are details for the last order placed.



The screenshot shows the 'Main Order Screen' with the following details:

- Order: SA00111111, Web ID: (empty), Order Date: 4/28/2021, Status: Ordered
- Ship Type: (empty), Entry Date: (empty)
- Customer: 123456 Jane Thibaut
- Ship To: 0
- Ship Via: FEDH, FedEx Ground Home Delivery, Ship Priority: Regular, Short Shipment: (unchecked)
- Cust PO: (empty), CFA: (empty), Resv: (empty), Inspect Prior To Ship: (unchecked)
- Order Class: (empty), Order Sidemark: (empty), Terms: P, Proforma
- Est Total Price: 0.00

A red arrow points to the 'Add' button in the toolbar on the left.

Main Order Screen

5. An empty space on left hand list showing an arrow and star signals screen is ready.
6. Choose appropriate *Ship Via*. Place cursor in field and type FE to call up FedEx shipping options menu. Codes to be provided by Manager (example: FEDH = FedEx Ground Home Delivery for a residence). Hit **Tab** for the next field.

Customers Customer Orders (Linked) x

Order	Ship Type	Cust PO
1	SA00111111	
★ 2		
3	SA00222222	
4		
5		
6		
7		
8		
9		

Order: [] Web ID: [] Order Date: 4/28/2021 Status: Ordered

Ship Type: [] Entry Date: []

Customer: 123456 Jane Thibaut

Ship To: 0

Ship Via: FEDH FedEx Ground Home Delivery

Ship Priority: Regular Short Shipment

Cust PO: [] CFA: []

Order Class: [] Resv: [] Inspect Prior To Ship

Order Sidemark: [] Terms: P Proforma

Est Total Price: 0.00

Lines
Releases
Reserve
Order Verification Report
Interactions
Pay With Credit Card
Calculate Tax
Generate Document
Reservations For Order

Main order Screen Ship Via

7. Choose *Ship Priority* and hit **TAB**
 - A. Regular – default, which remains for most cases
 - B. Today – same day shipment
 - C. By Tomorrow – never needed

Customers Customer Orders (Linked) x

Order	Ship Type	Cust PO
1	SA00111111	
★ 2		
3	SA00222222	
4		
5		
6		
7		
8		
9		

Order: [] Web ID: [] Order Date: 4/28/2021 Status: Ordered

Ship Type: [] Entry Date: []

Customer: 123456 Jane Thibaut

Ship To: 0

Ship Via: FEDH FedEx Ground Home Delivery

Ship Priority: Regular Short Shipment

Cust PO: [] CFA: []

Order Class: [] Resv: [] Inspect Prior To Ship

Order Sidemark: [] Terms: P Proforma

Est Total Price: 0.00

Lines
Releases
Reserve
Order Verification Report
Interactions
Pay With Credit Card
Calculate Tax
Generate Document
Reservations For Order

Main Order Screen Ship Priority

8. Input *Customer PO* (if provided by customer) and hit **Tab**

The screenshot shows the 'Customer Orders (Linked)' interface. On the left, there is a table with columns 'Order', 'Ship Type', and 'Cust PO'. The main form area contains various fields: Order, Web ID, Order Date (4/28/2021), Status (Ordered), Ship Type, Entry Date, Customer (123456 Jane Thibaut), Ship To (0), Ship Via (FEDH FedEx Ground Home Delivery), Ship Priority (Regular), Short Shipment checkbox, CFA, Resv, Inspect Prior To Ship checkbox, Order Class, Order Sidemark, Terms (P Proforma), and Est Total Price (0.00). The 'Cust PO' field is highlighted with a red rectangular box.

Main Order Screen Customer PO

9. Choose *Order Class* and hit **Tab**

- A. Fabric – Type **FA** and click arrow to display pull down menu and select **Fabric (Dom)**
- B. Wallcovering – Type **WA** and click arrow to display pull down menu and select **Wallcovering (Dom)**

This screenshot shows the 'Customer Orders (Linked)' interface with the 'Order Class' dropdown menu open. The dropdown list contains 'Fabric (Dom)' (highlighted in blue), 'Furniture (TFF)', and 'Furniture Consignment (TFF)'. The 'Cust PO' field is also highlighted with a red box. Other fields in the form are visible, including Order Date (5/3/2022) and Status (Ordered).

Order Class

10. Input *Sidemark* (if provided by customer) and hit **Tab**

The screenshot shows the 'Customer Orders (Linked)' interface. The 'Order Sidemark' field is highlighted with a red rectangular box. Other fields in the form are visible, including Order Date (4/28/2021) and Status (Ordered).

Sidemark

11. Input *Ship To* address for order.
 - A. *Ship To* defaults to customer's address

Customer: 123456 ✓

Jane Thibaut
12 Thibaut St
New York, NY 10001-1234
UNITED STATES

Ship To: * 0

Jane Thibaut
12 Thibaut St
New York, NY 10001-1234
UNITED STATES

Current

Prepaid:* 0.00

Total Weight: 0.00 # Packages: 0

No Freight Charges

One Time Freight: 0.00 **Calculate Freight**

Cutting Charges:* 0.00

Credit Hold

Credit Hold Ship Hold

Reason: P

Ship To

- B. Click **Arrow** for pull down menu to check if *Ship To* already exists in system. If available in menu, click **appropriate name** to update the *Ship To* address.

Customer: 123456 ✓

Jane Thibaut
12 Thibaut St
New York, NY 10001-1234
UNITED STATES

Ship To: * 0

- 0 Jane Thibaut
- 1 Jane Thibaut
- 2 Plaza Hill Interiors

Current

Prepaid:* 0.00

Total Weight: 0.00 # Packages: 0

No Freight Charges

One Time Freight: 0.00 **Calculate Freight**

Cutting Charges:* 0.00

Credit Hold

Credit Hold Ship Hold

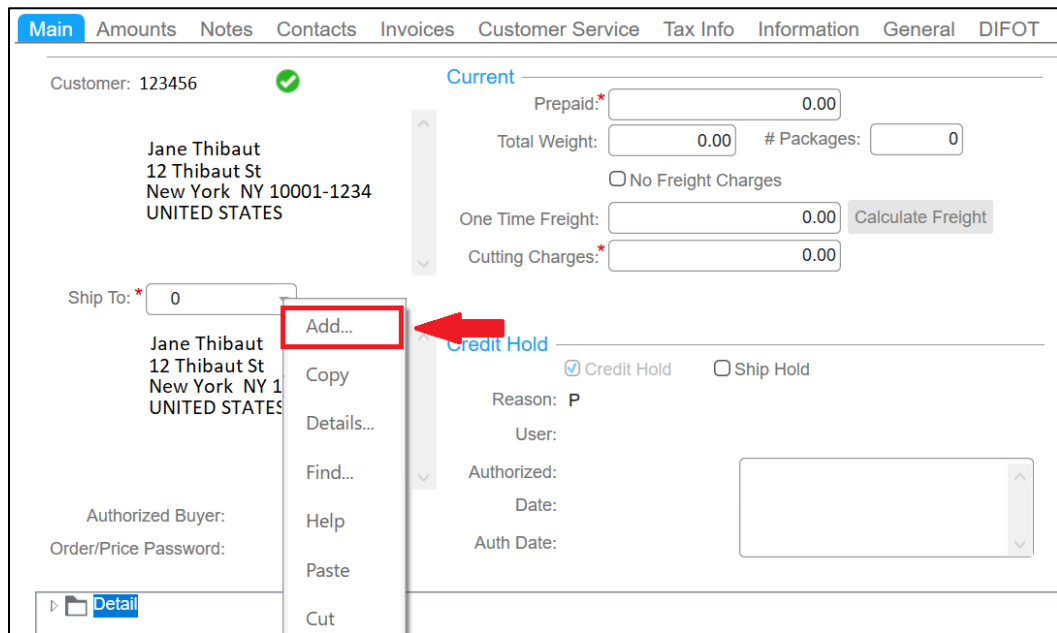
Reason: P

User:

Authorized:

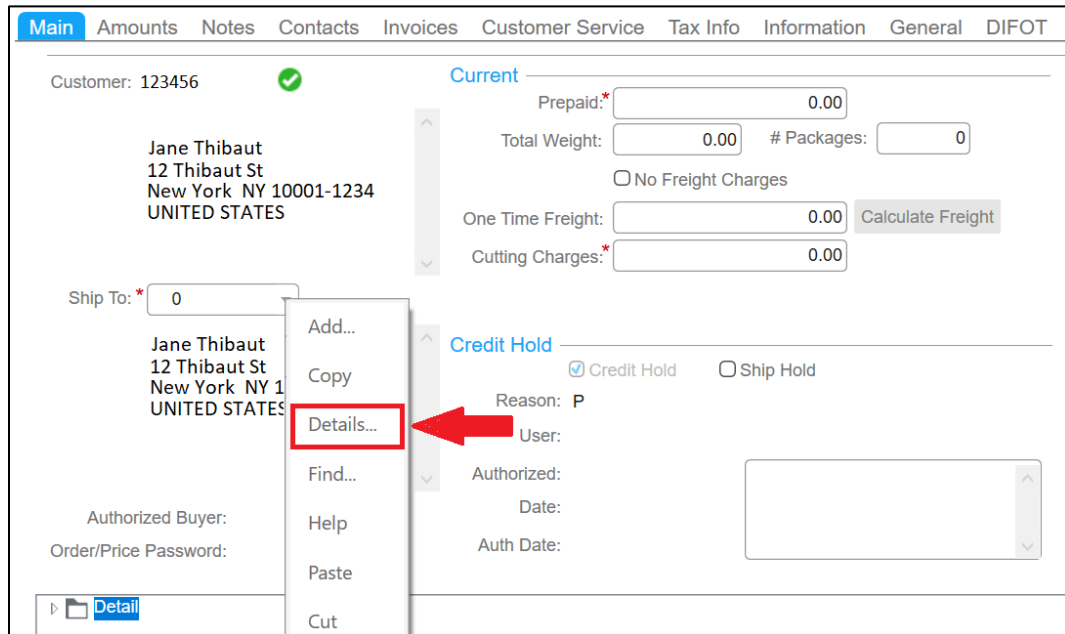
Ship to Menu

- C. If not in the menu, ensure cursor in Ship To box, mouse click Right and select Add. This calls up the Customer Ship-Tos (Find) module to input address. For full instructions see Ship To Address in Order on page 21



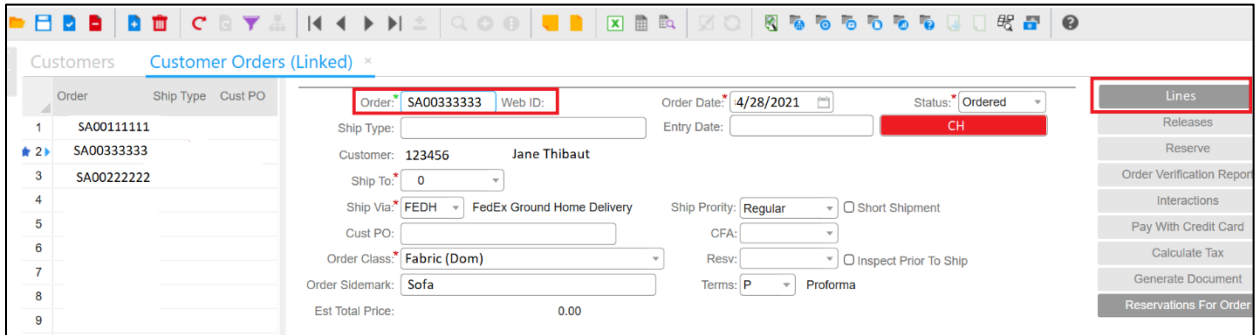
Ship to Add

- D. Click **Details** if want to make change to an existing address



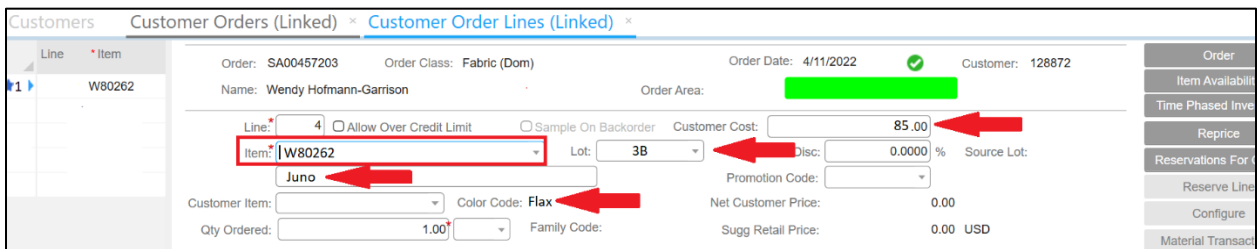
Ship To Details

12. Once the Ship To address is confirmed click **Save**. The system allocates an order number beginning with SA.
13. Click **Lines** – on right area of screen to begin Line Item input.



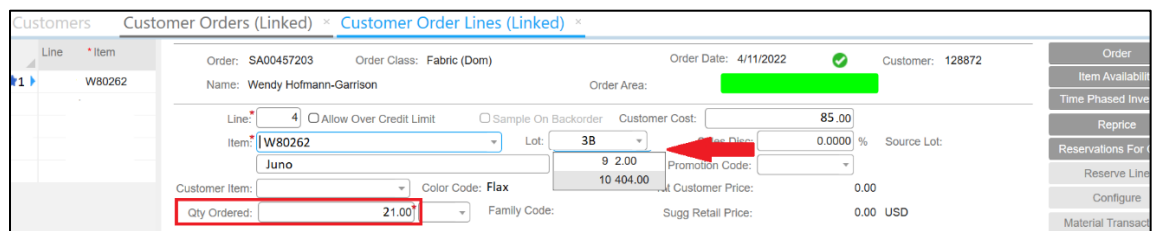
SA # & Lines

14. The Custom Order Lines (Linked) Module appears
15. Type pattern number and hit **Tab** for information to populate and dyelot to preliminary allocate.



Item

16. Type quantity and hit **Tab** to go to next field
 - A. Click **Lot** pull down to view dyelots available and stock if want to change



Quantity

NOTES: If stock not available, the system places a Backorder (B/O). Also, need to add a new line for balance of stock if available in different pieces.

17. Click **Save**.



Save

18. To enter new line – click **Add** in the toolbar and follow input line steps



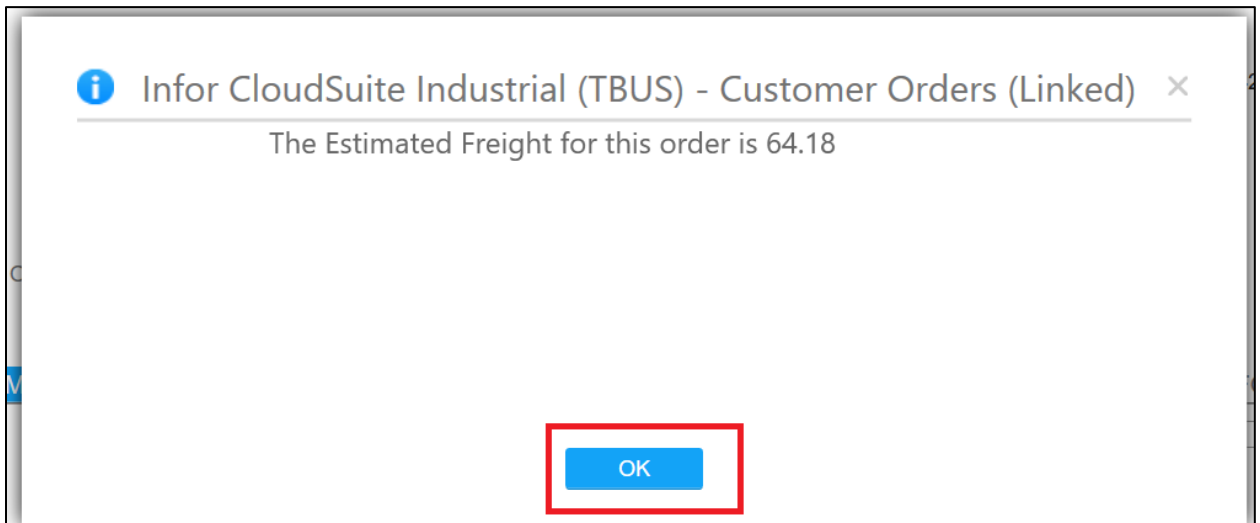
Add

19. Once complete – close out module by clicking **X** in the tab to go back to the main screen

20. Input freight– click Calculate Freight

Freight Charges

21. Click **OK** on pop-up which displays freight charge



Freight Pop-Up

22. In Notes tab, type any pertinent client notes such as: expiration date or Final Ship

23. SAVE – Order complete

24. To generate paperwork to send to client, Click Order Verification Report

The screenshot shows the 'Customer Orders (Linked)' interface. On the left is a table with columns 'Order', 'Ship Type', and 'Cust PO'. The main area contains order details for Order SA00333333, Customer Jane Thibaut, and Ship To Plaza Hill Interiors. A sidebar on the right contains buttons for 'Lines', 'Releases', 'Reserve', 'Order Verification Report' (highlighted with a red box), 'Interactions', 'Pay With Credit Card', 'Calculate Tax', 'Generate Document', and 'Reservations For Order'. The status is 'Ordered' and the entry date is 4/11/2022.

Order Verification

25. Click **Preview**

The screenshot shows the 'Order Verification Report' pop-up window. It has several sections: 'CO Type' with radio buttons for Regular CO, Planned, Filled, Blanket CO, Ordered, and Complete; 'Dates' with 'Display Date' set to 'Due Date' and 'Date To Appear' set to 5/7/2022; 'Note Types' with checkboxes for Print Blanket Notes, Print Bill To Notes, Print Ship To Notes, Print Order Notes, and Print Line/Release Notes; 'Print Text' with checkboxes for Print Standard Order Text, Print Item or Customer Item, and Print Company Name On Form; 'Print Planning Item Materials', 'Print Euro Total', and 'Print Price' options; 'Order Verification Template' set to 'Standard'; 'Templates' section with checkboxes for Drawing Number, Delivery/Inco Terms, Commodity Code, Currency Code, Tax Code, EU Code, Origin Code, and Header On All Pages; and 'Starting' and 'Ending' order numbers (SA00457203) with a 'Preview' button highlighted in a red box. Other buttons include 'Print Doc-Trak' and 'Print with Attachments'.

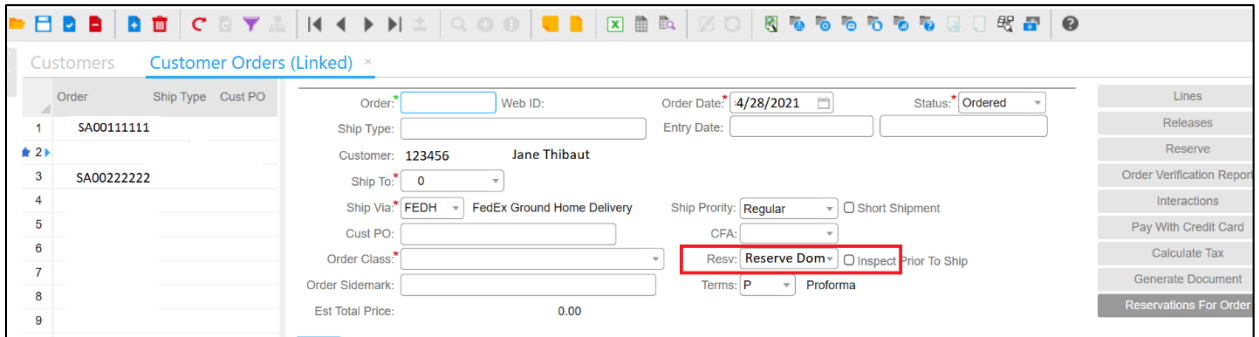
Pop-Up

26. Print or Save to files.

Create Reserve Order without a CFA

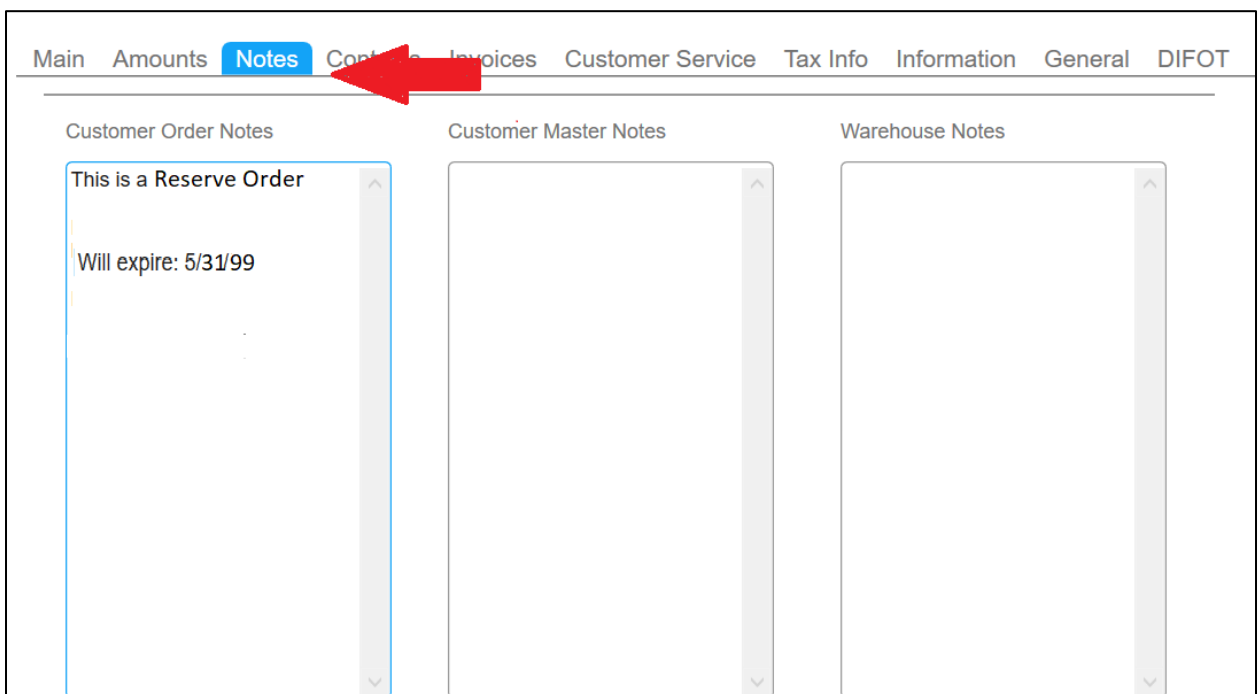
The instruction show how to prepare a wallcovering or fabric order for a client who wants to secure and hold goods without requesting a CFA (cutting for approval). Expires in 14 days.

1. Follow all instructions to create a new order see Create New Order on page 9
2. On main order screen input Reserve Dom



Reserve

3. Continue with following New Order Entry instructions.
4. In Notes tab, write pertinent information (example: expiration date or Final Ship to is TBD)



Notes

5. Click Save, order is complete

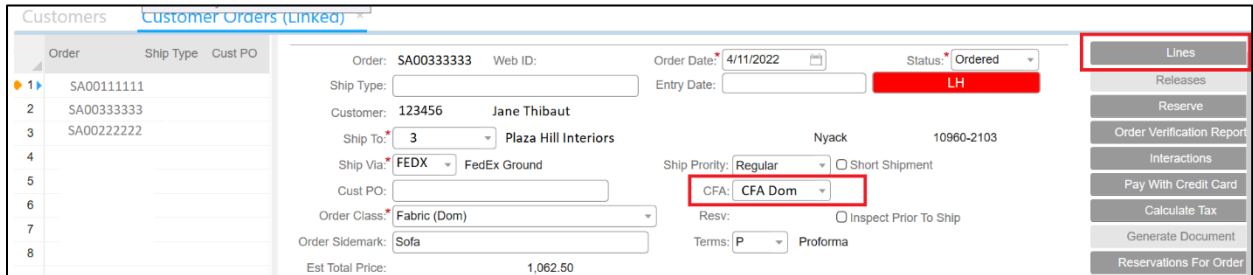


Save

Create Reserve Order with CFA

The following steps show how to prepare a wallcovering or fabric order for a client who wants to secure and hold goods with a CFA (cutting for approval). Expires in 21 days.

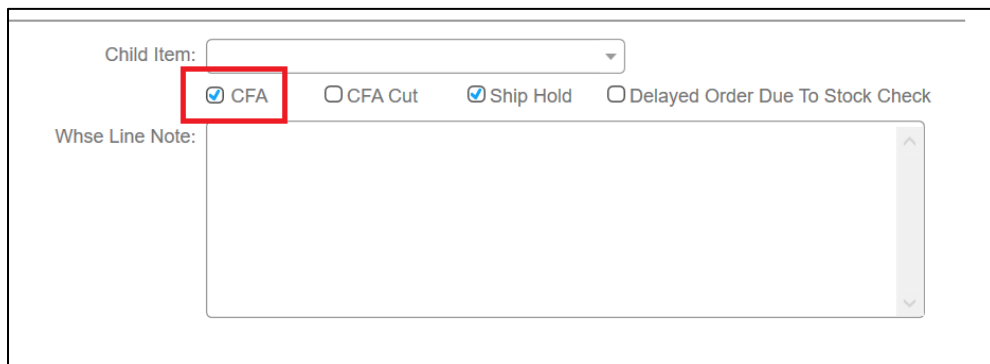
1. Follow all instructions to create a new order see Create New Order on page 9
2. On main order screen input CFA Dom and continue with entry of fields
3. Click **Save** when complete and click Lines on right hand to go to Line Item (linked) module.



The screenshot shows the 'Customer Orders (Linked)' interface. The main area displays order details for Order SA00333333, including customer information (Jane Thibaut), shipping details (Plaza Hill Interiors), and order class (Fabric (Dom)). A red box highlights the 'CFA: CFA Dom' dropdown menu. The sidebar on the right contains a 'Lines' button, also highlighted with a red box, along with other options like 'Releases', 'Reserve', and 'Order Verification Report'.

CFA

4. Follow line item entry in a new order and in bottom of screen check CFA



The screenshot shows the line item entry screen. The 'Child Item' dropdown is visible. Below it, the 'CFA' checkbox is selected and highlighted with a red box. Other options include 'CFA Cut', 'Ship Hold', and 'Delayed Order Due To Stock Check'. A 'Whse Line Note' text area is located below the checkboxes.

CFA in Line Item

5. Click Save, click X on Tab to go back to main screen
6. In main screen, freight must remain as zero to not charge client for shipping of CFA
7. Verify and ensure current Ship To is where CFA is to be sent

Customer: 123456 ✓

Jane Thibaut
12 Thibaut St
New York NY 10001-1234
UNITED STATES

Ship To: 0

Jane Thibaut
12 Thibaut St
New York NY 10001-1234
UNITED STATES

Prepaid: 0.00

Total Weight: 41.42 # Packages: 0

No Freight Charges

One Time Freight: 0.00 Calculate Freight

Cutting Charges: 0.00

Reason: P Proforma

User: WHG

Authorized: _____

Date: _____

Auth Date: _____

CFA Ship To

8. Go to Notes tab and type Final Ship To address (If known) or TBD (if not known) and Expiration date

Main Amounts **Notes** Contacts Invoices Customer Service Tax Info Information General DIFOT

Customer Order Notes

This is a Reserve Order

Will expire: 5/31/99

Final Ship To: Plaza Hill Interiors
456 Design Way
Richmond, Hill, NY
11418

Customer Master Notes

Warehouse Notes

Notes

9. Back in Main Screen, check if Final Ship To in List and add if necessary.

The screenshot displays a software interface with a navigation bar at the top containing tabs: Main, Amounts, Notes, Contacts, Invoices, Customer Service, Tax Info, Information, General, and DIFOT. The main content area is divided into sections. On the left, under 'Customer: 123456', there is a green checkmark and the address: Jane Thibaut, 12 Thibaut St, New York, NY 10001-1234, UNITED STATES. Below this is a 'Ship To: *' dropdown menu with a red border, which is open to show three options: '0 Jane Thibaut' (highlighted in blue), '1 Jane Thibaut', and '2 Plaza Hill Interiors'. To the right, under the 'Current' section, there are input fields for 'Prepaid: *' (0.00), 'Total Weight: 0.00', and '# Packages: 0'. There is a radio button for 'No Freight Charges' and a 'Calculate Freight' button. Below these are fields for 'One Time Freight: 0.00' and 'Cutting Charges: *' (0.00). The 'Credit Hold' section has a checked 'Credit Hold' radio button and an unchecked 'Ship Hold' radio button. Below that are fields for 'Reason: P', 'User:', and 'Authorized:'.

Ship to Menu

10. Click **Save**, order is complete and CFA to be shipped

Ship To Address in Order

The instructions show the steps in adding or changing an address to an order once it is located through the Customer or Customer order Module.

Changing to an already existing address

1. Click **Arrow** for pull down menu to check if Ship To already exists in system. If available in menu, click **appropriate name** (example: Plaza Hill Interiors) to update the Ship To address.

The screenshot shows the 'Ship To' dropdown menu with the following options:

- 0 Jane Thibaut
- 1 Jane Thibaut
- 2 Plaza Hill Interiors

Ship To Pull Down Menu

2. Click **OK on Pop-up**

The pop-up dialog box contains the following text:

Ship To is 0 and will be 2 for Customer Order that has [Order: SA00457203].

At least one CO Line/Release exists.

CO Line/Release must be manually adjusted.

CO Shipment that has [Order: SA00457203] exists.

Invoice that has [Order: SA00457203] and [Customer: 128872] exists.

Pick List that has [Order: SA00457203] and [Customer: 128872] exists.

Pop-Up

3. The new address is now visible

The screenshot shows a software interface with a top navigation bar containing tabs: Main, Amounts, Notes, Contacts, Invoices, Customer Service, Tax Info, Information, General, and DIFOT. The 'Main' tab is active. The interface is divided into several sections:

- Customer:** 123456 (with a green checkmark icon). Address: Jane Thibaut, 12 Thibaut St, New York NY 10001-1234, UNITED STATES.
- Ship To:** A dropdown menu is highlighted with a red box, showing the value '2'. Below it, the new address is displayed: Plaza Hill Interiors, 456 Design Way, Richmond Hill NY 11418-2640, UNITED STATES.
- Current:** A section with various input fields: Prepaid* (0.00), Total Weight (41.42), # Packages (0), One Time Freight (0.00), and Cutting Charges* (0.00). There is a 'Calculate Freight' button and a checkbox for 'No Freight Charges'.
- Credit Hold:** A section with checkboxes for 'Credit Hold' and 'Ship Hold', a 'Reason' field set to 'P' (Proforma), and a 'User' field set to 'WHG'. There are also fields for 'Authorized:', 'Date:', and 'Auth Date:'.

Main Screen Ship to

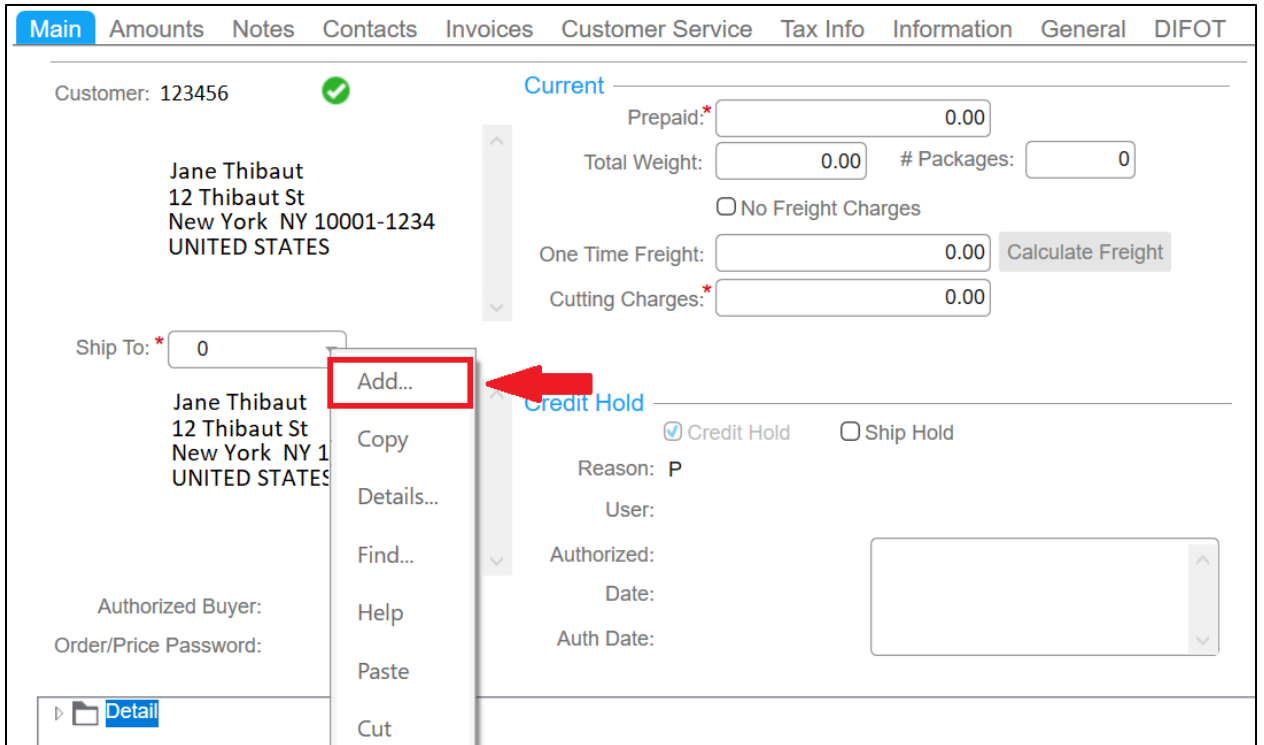
4. Click Save in the Toolbar



Save

Adding a new address

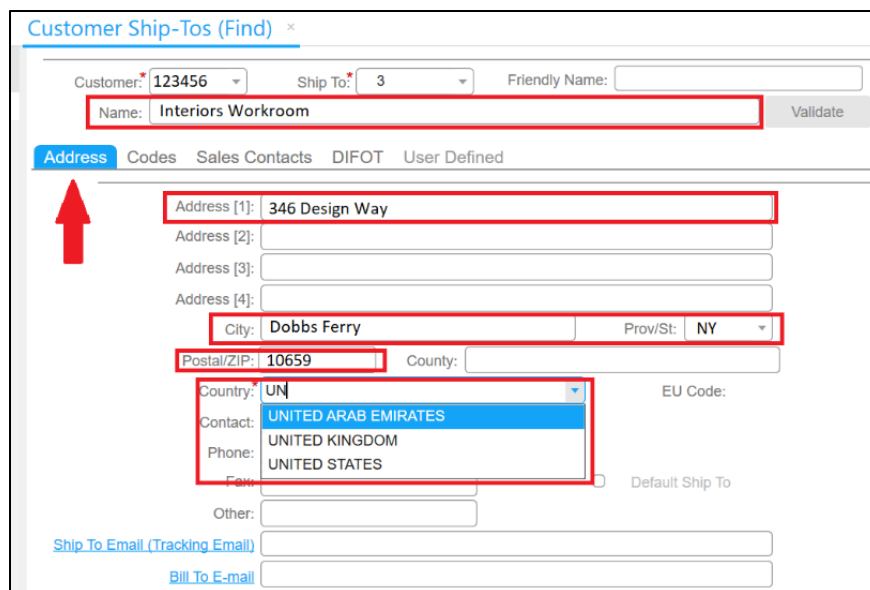
1. Ensure cursor is in *Ship To* box by number, mouse click **Right** and select **ADD** to call up the Customer Ship-Tos (Find) module



The screenshot shows a software interface with a menu bar at the top: Main, Amounts, Notes, Contacts, Invoices, Customer Service, Tax Info, Information, General, DIFOT. The main area displays customer information for Customer: 123456. The address is Jane Thibaut, 12 Thibaut St, New York NY 10001-1234, UNITED STATES. The 'Ship To' field contains the number '0'. A right-click context menu is open over the 'Ship To' field, with 'Add...' highlighted in red. A red arrow points to the 'Add...' option. Other fields include 'Prepaid:* 0.00', 'Total Weight: 0.00', '# Packages: 0', 'One Time Freight: 0.00', and 'Cutting Charges:* 0.00'. There is also a 'Credit Hold' section with 'Reason: P' and 'User:'.

Ship To Add

2. In the Address Section, fill in the *Name*, *Address*, *City*, *State*, and *Zip* fields
3. Type **UN** and press **F2** to call up country options and click **UNITED STATES**



The screenshot shows the 'Customer Ship-Tos (Find)' window. The 'Customer' field is set to 123456 and 'Ship To' is set to 3. The 'Name' field contains 'Interiors Workroom'. The 'Address' section is active, with 'Address [1]: 346 Design Way', 'City: Dobbs Ferry', and 'Postal/ZIP: 10659'. The 'Country' dropdown menu is open, showing 'UN' selected, with a list of options: UNITED ARAB EMIRATES, UNITED KINGDOM, and UNITED STATES. A red arrow points to the 'Address' section. The 'Validate' button is visible next to the 'Name' field.

Address Section

3. In the Codes Section input the correct Ship Via/Residential Indicator for a shipment to be delivered to either a residence or commercial address.

A. Residential - input FEDH/Residential

The screenshot shows the 'Customer Ship-Tos (Find)' form. At the top, there are fields for 'Customer:' (123456), 'Ship To:' (3), and 'Friendly Name:'. Below these is a 'Name:' field and a 'Validate' button. The 'Address' section has tabs for 'Codes', 'DIFOT', and 'User Defined', with 'Codes' selected and highlighted by a red arrow. The 'Ship Site:' is 'TBUS'. The 'Warehouse:' is empty. The 'Ship Via:' is 'FEDH' (FedEx Ground Home Delivery), highlighted with a red box. Below it is a link 'Show In Drop-Down Lists'. The 'Residential Indicator*' is 'Residential', also highlighted with a red box. Other fields include 'Consignment Warehouse:', 'Bill Transportation To:' (Shipper), 'Carrier Account:', 'Carrier Upcharge' (0.00), 'Ship Early' (checked), and 'Include Orders In Excise Tax Report' (unchecked). At the bottom, there are fields for 'Salesperson: 99', 'Currency: USD', 'Language: ENU', 'Export Type: Non-Export', 'Pref Geo Code:', 'Tax Code: EXTRNL', 'No tax', 'Tax ID:', and 'Branch ID:'.

Residential Codes

B. Commercial - input FEDX/Commercial

The screenshot shows the 'Customer Ship-Tos (Find)' form with commercial settings. The 'Ship Via:' is 'FEDX' (FedEx Ground), highlighted with a red box. The 'Residential Indicator*' is 'Commercial', also highlighted with a red box. All other fields and layout are identical to the residential form above.

Commercial Codes

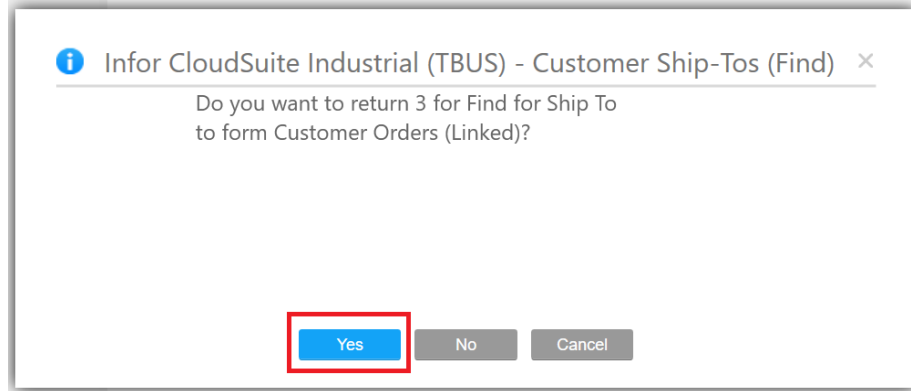
4. Click **Save** and the address also validate



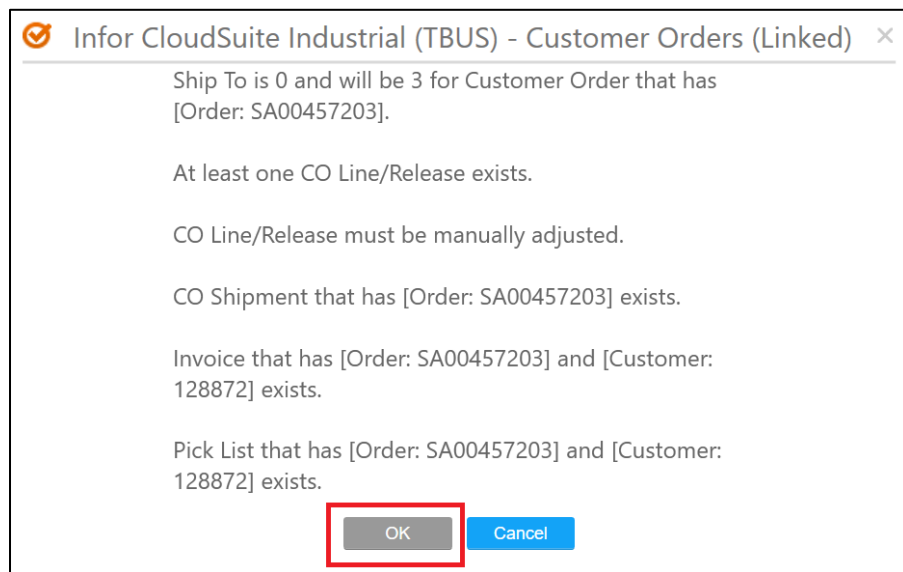
Save

5. Click **X** next to the Customers Ship-Tos (Find) to exit the module

6. Click **Yes** when pop-up 1 appears
7. Click **OK** when pop-up 2 appears

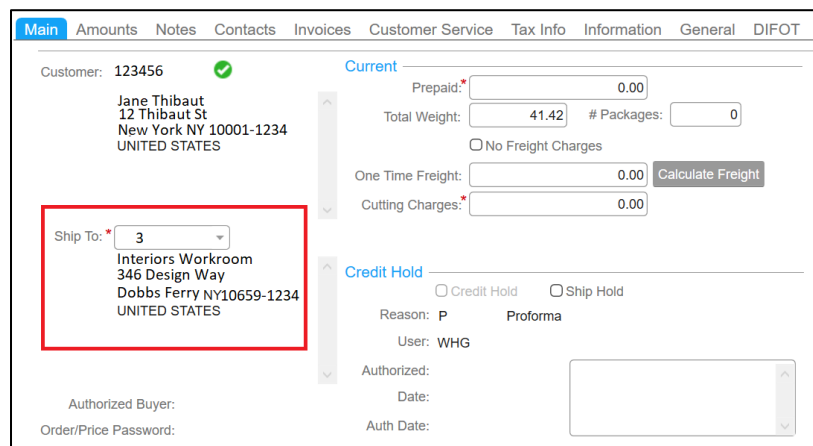


Pop-up 1



Pop-up 2

8. The new address should now be visible in the main screen. Click **Save** in the Toolbar



New Address

Changing details on an existing address

1. Click **Arrow** for pull down menu to search name of Ship To address and click on **appropriate name**.

The screenshot shows a software interface with a 'Ship To' dropdown menu open. The menu lists three options: '0 Jane Thibaut', '1 Jane Thibaut', and '2 Interior Workroom'. The first option is highlighted in blue. A red box highlights the dropdown menu area. The background shows a customer profile for 'Jane Thibaut' with address '12 Thibaut St, New York, NY 10001-1234, UNITED STATES'. Other fields include 'Prepaid: 0.00', 'Total Weight: 0.00', '# Packages: 0', 'One Time Freight: 0.00', and 'Cutting Charges: 0.00'.

Ship To Details

2. Once address showing as the Ship To, Click **Right** and click **Details**

The screenshot shows the same software interface as the previous one, but with a context menu open over the 'Ship To' dropdown. The context menu has several options: 'Add...', 'Copy', 'Details...', 'Find...', 'Help', 'Paste', and 'Cut'. The 'Details...' option is highlighted in red, and a red arrow points to it from the right. The background shows the same customer profile and shipping details as the previous screenshot.

Ship To Details

- When the Customer Ship-Tos (Find) module opens, make the necessary changes in *Address* and *Code* tabs.

Customer Ship-Tos (Find) ×

Customer: 123456 Ship To: 3 Friendly Name:

Name: Interiors Workroom

Address Codes Sales Contacts DIFOT User Defined

Address [1]: 346 Design Way

Address [2]:

Address [3]:

Address [4]:

City: Dobbs Ferry Prov/St: NY

Postal/ZIP: 10659 County:

Country: UN

Contact: UNITED ARAB EMIRATES

Phone: UNITED KINGDOM

UNITED STATES

Other:

Ship To Email (Tracking Email)

Bill To E-mail

Ship To Address

Customer Ship-Tos (Find) ×

Customer: 123456 Ship To: 3 Friendly Name:

Name:

Address Codes DIFOT User Defined

Ship Site: TBUS Consignment Warehouse:

Warehouse: Bill Transportation To: Shipper

Ship Via: FEDX Carrier Account:

FedEx Ground Carrier Upcharge: 0.00

Show In Drop-Down Lists Ship Early

Residential Indicator: Commercial Include Orders In Excise Tax Report

Salesperson: 99 Currency: USD

Language: ENU Export Type: Non-Export Pref Geo Code:

Tax Code: NT No tax

Tax ID: Branch ID:

Ship To Codes

- Click **Save** and Click the **X** next to the *Ship Tos (Find)* to return back to the main screen.



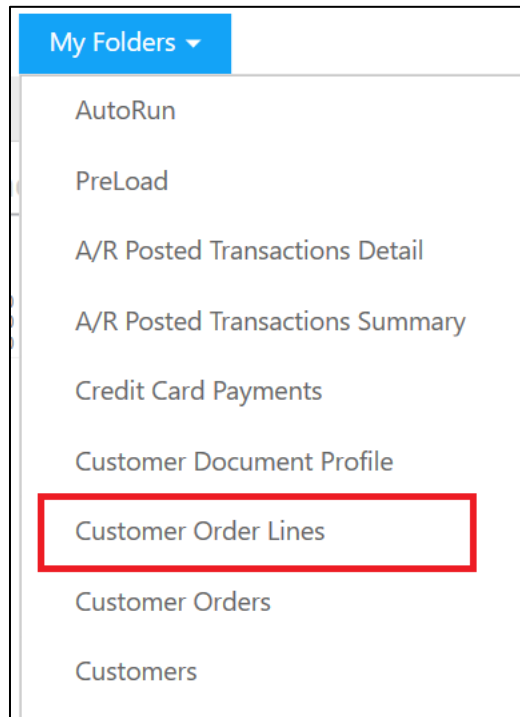
Save

Revise Reserve/Order

The following steps show how to update an already existing reserve order to quantity, deleting a line and cancelling an order.

Making Changes to a Reserve Order

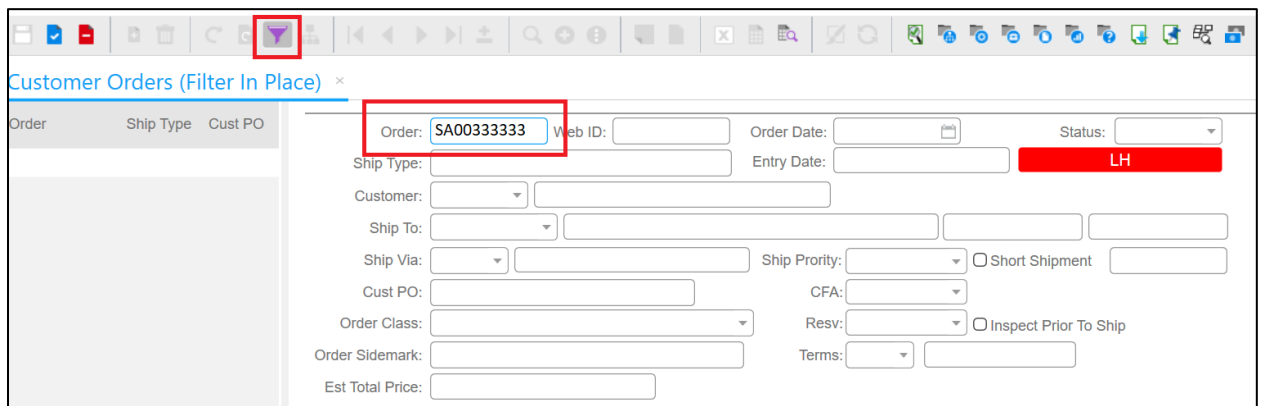
1. Need to have the SA order number.
2. Open *Customer Orders* module in My Folders



Customer Orders

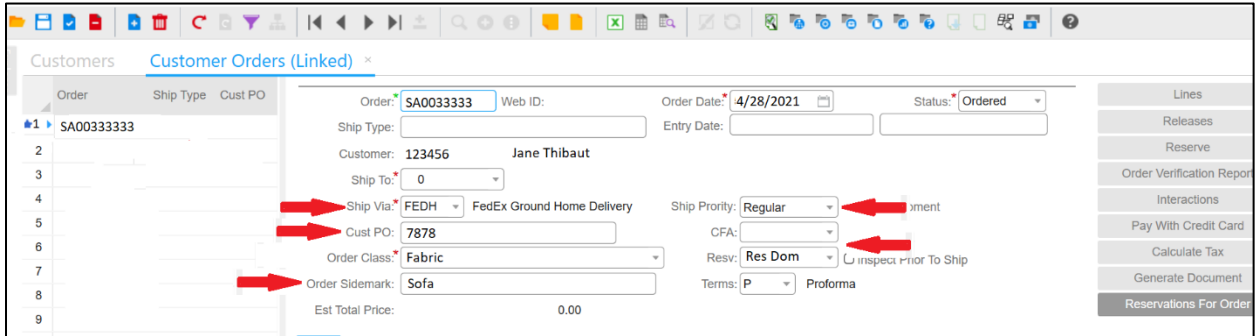
NOTE: Order can also be located through Customers → Customers Orders modules and scrolling through the list of orders. For instructions see Create New Order on page 9

3. Input SA number in the *order field* and click **Filter** in tool bar to view order information

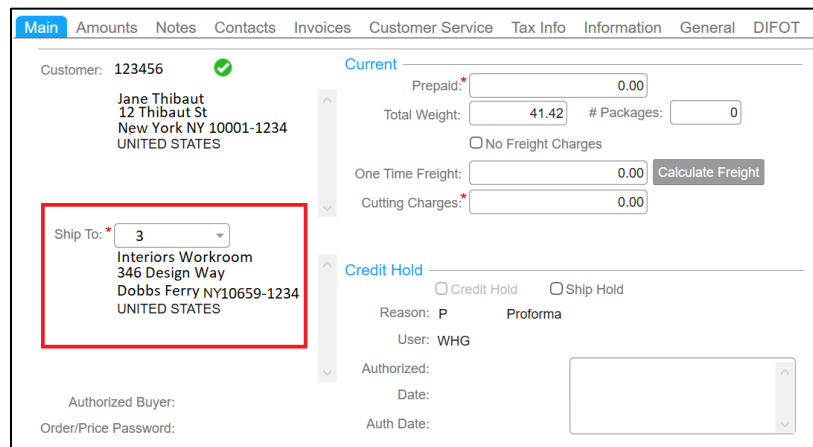
A screenshot of a software interface showing the 'Customer Orders (Filter In Place)' form. The form is titled 'Customer Orders (Filter In Place) ×'. It contains various fields for order information, including Order, Ship Type, Cust PO, Order Date, Status, Ship Type, Entry Date, Customer, Ship To, Ship Via, Ship Priority, Short Shipment, Cust PO, CFA, Order Class, Resv, Inspect Prior To Ship, Order Sidemark, Terms, and Est Total Price. The 'Order' field is highlighted with a red rectangular box and contains the value 'SA00333333'. The 'Status' field is set to 'LH'.

Customer Orders

4. The fields where changes may occur in the main screen are:
 - A. Ship Via
 - B. Ship Priority
 - C. Reserve/CFA
 - D. Customer PO
 - E. Sidemark
 - F. Ship To



Main Order Screen



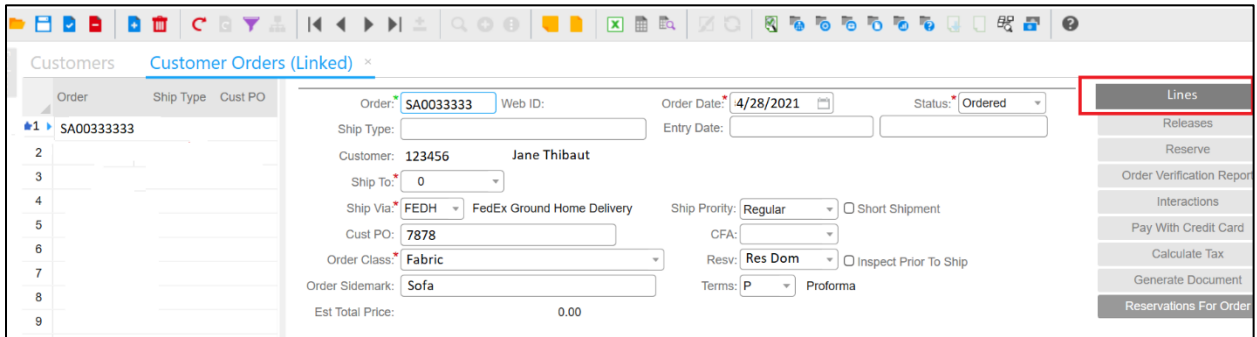
Ship To

5. After change made click **Save**.



Save

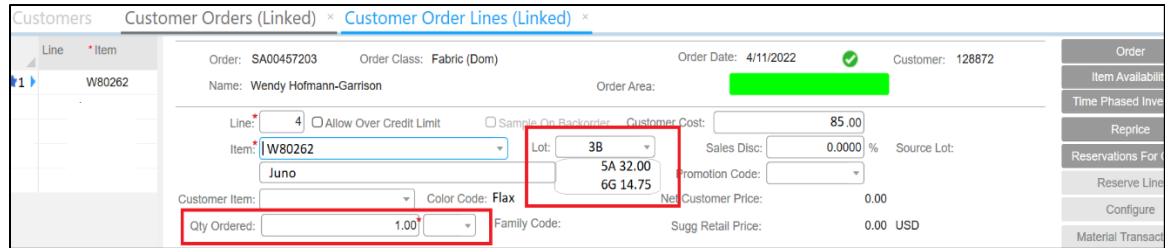
6. On the right hand menu, click **Lines** to open the Custom Lines (Linked) module



Customer Order Lines

7. In the Customer Order Lines (Linked) the fields where changes may occur are

- A. Quantity – click dyelot menu to check stock and view choices
- B. Dyelot – click dyelot menu to view dyeot option



Customer Order Lines

8. Once the choices have been made in the dyelot menu or to quantity

9. Click **Save**.



Save

10. Ensure the Quantity Ready/Reserve match and Location number assigned showing quantity

General Thibaut Line History Amounts Drop Ship Shipping Other Source EU VAT DIFOT Features Post Configuration

Status: **Ordered** Due Date: 6/22/2022 Priority: Config Hold
Projected: 6/22/2022 Request Date: Replenish Invoice Hold

Change Reason: Qty Ready: 1.00 Packed: 0.00
Change Date: Reserved: 1.00 Shipped: 0.00
Changed By: Picked: 0.00 Invoiced: 0.00

Ship Site: TBUS Multi-Site Source RMA: 0
Warehouse: MAIN Last Pick List:
G/L Acct:

Location	Qty Reserved	Area
1 ▶ 306-10-C-13	8.00	

General line Information

11. Click X on the module tab and go back to main screen

12. Click Freight to re-calculate the freight if change to quantity made

Main Amounts Notes Contacts Invoices Customer Service Tax Info Information General DIFOT

Customer: 123456
Jane Thibaut
12 Thibaut St
New York NY 10001-1234
UNITED STATES

Ship To: * 2
Plaza Hill Interiors
456 Design Way
Richmond Hill NY 11418-2640
UNITED STATES

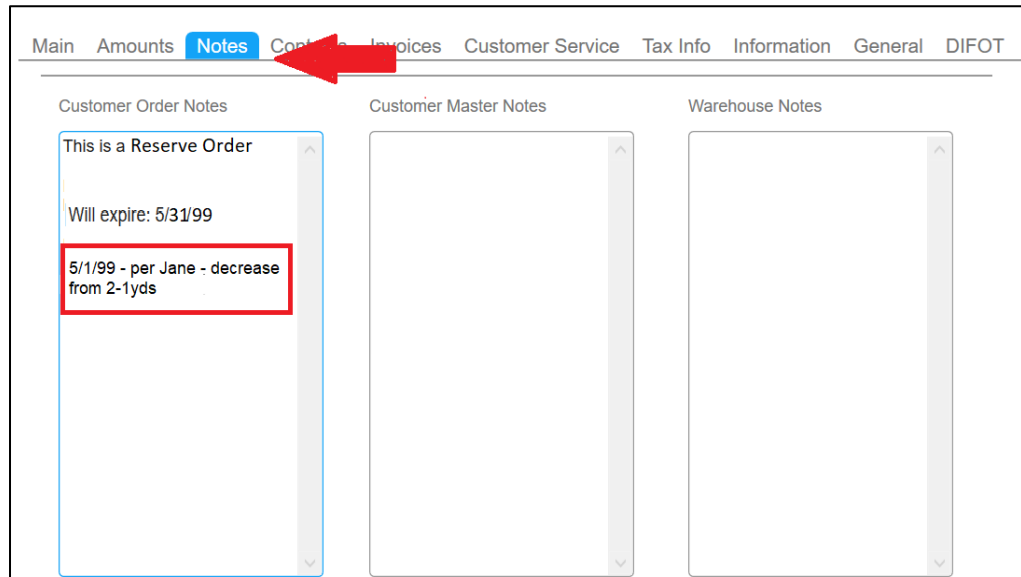
Authorized Buyer:
Order/Price Password:

Current
Prepaid: 0.00
Total Weight: 41.42 # Packages: 0
 No Freight Charges
One Time Freight: 0.00 **Calculate Freight**
Cutting Charges: 0.00

Credit Hold
 Credit Hold Ship Hold
Reason: P Proforma
User: WHG
Authorized:
Date:
Auth Date:

Freight

13. In Notes tab write
- A. Date
 - B. Name of person making change
 - C. change to quantity made



Notes

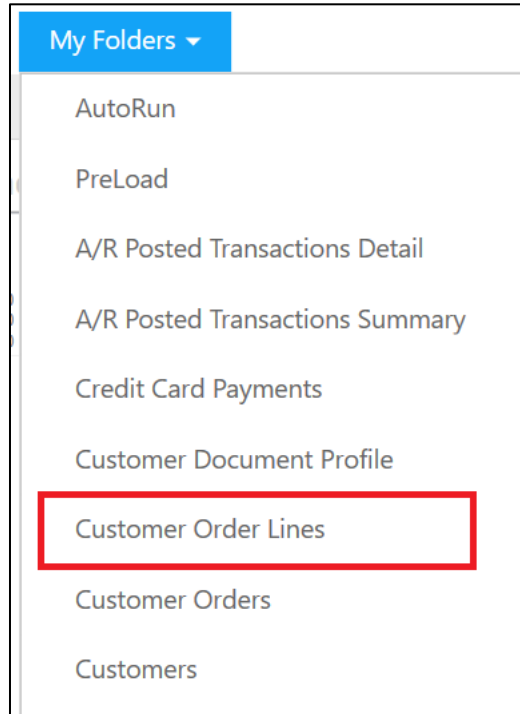
14. Click **Save** and change complete



Save

Add or Delete Line

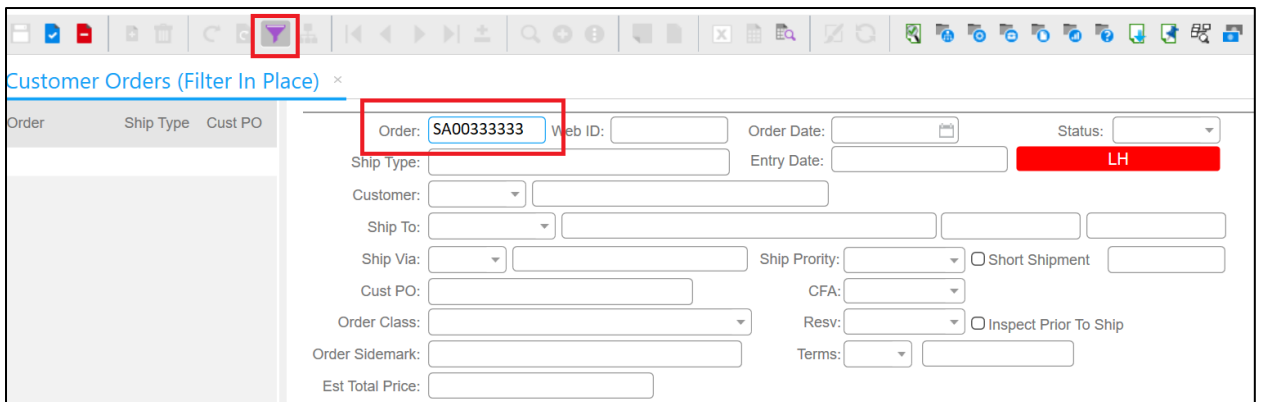
1. Need to have the SA order number.
2. Open *Customer Orders* module in My Folders



My Folders

NOTE: Order can also be located through Customers → Customers Orders modules and scrolling through the list of orders. For instructions see Create New Order on page 9

3. Input SA number in the *order field* and click **Filter** in tool bar to populate order information

A screenshot of a software interface showing a form titled 'Customer Orders (Filter In Place)'. The form contains various fields for order information, including Order, Ship Type, Cust PO, Order Date, Status, Ship Type, Entry Date, Customer, Ship To, Ship Via, Ship Priority, Short Shipment, Cust PO, CFA, Order Class, Resv, Inspect Prior To Ship, Order Sidemark, Terms, and Est Total Price. The 'Order' field is highlighted with a red rectangle and contains the value 'SA00333333'. The 'Filter' icon in the toolbar is also highlighted with a red rectangle.

Customer order

4. Once information populates click **Lines** in the left hand menu to open Custom Order Lines (Linked) module
5. To Add a line
 - A. Click **Add** in the toolbar to open a new line for pattern entry. The line with a blue star and arrow is the active Line



Add

Line	Item
1	1 W80263
★ 2▶	2

Order:	SA00333333	Order Class:	Fabric (Dom)	Order Date:	5/21/2022	Customer:	128872
Name:	Jane Thibaut	Order Area:					
Line:	2	<input type="checkbox"/> Allow Over Credit Limit	<input type="checkbox"/> Sample On Backorder	Customer Cost:	0.00		
Item:		Lot:		Sales Disc:	0.0000 %	Source Lot:	
Customer Item:		Color Code:		Net Customer Price:	0.00		
Qty Ordered:	1.00	Family Code:		Sugg Retail Price:	0.00 USD		
Manufacturer:		Manufacturer Item:		Demanding Site:			

Line Item entry

- B. Input pattern number and hit **Tab** to populate pattern information

Line	Item
1	1 W80263
★ 2▶	2 W73402

Order:	SA00333333	Order Class:	Fabric (Dom)	Order Date:	5/21/2022	Customer:	128872
Name:	Jane Thibaut	Order Area:					
Line:	2	<input type="checkbox"/> Allow Over Credit Limit	<input type="checkbox"/> Sample On Backorder	Customer Cost:	58.00		
Item:	W73402	Lot:	10C	Sales Disc:	0.0000 %	Source Lot:	
Customer Item:	VISTA	Color Code:	Sand	Net Customer Price:	0.00		
Qty Ordered:	1.00	Family Code:		Sugg Retail Price:	0.00 USD		
Manufacturer:		Manufacturer Item:		Demanding Site:			

Pattern

- C. Enter quantity

Line	Item
1	1 W80263
★ 2▶	2 W73402

Order:	SA00333333	Order Class:	Fabric (Dom)	Order Date:	5/21/2022	Customer:	128872
Name:	Jane Thibaut	Order Area:					
Line:	2	<input type="checkbox"/> Allow Over Credit Limit	<input type="checkbox"/> Sample On Backorder	Customer Cost:	58.00		
Item:	W73402	Lot:	10C	Sales Disc:	0.0000 %	Source Lot:	
Customer Item:	VISTA	Color Code:	Sand	Net Customer Price:	0.00		
Qty Ordered:	8.00	Family Code:		Sugg Retail Price:	0.00 USD		
Manufacturer:		Manufacturer Item:		Demanding Site:			

Quantity

D. Click **Save**



Save

E. Check in the dyelot pulldown menu to ensure correct dyelot and bolt are selected or if changes need to be made

Line	Item
1	1 W80263
2	2 W73402

Order: SA00333333 Order Class: Fabric (Dom) Order Date: 5/21/2022 Customer: 128872
Name: Jane Thibaut Order Area: [Redacted]

Line: 2 Allow Over Credit Limit: Sample On Backorder: Customer Cost: 58.00

Item: W73402 Lot: 10C Sales Disc: 0.0000% Source Lot: [Redacted]

Customer Item: [Redacted] Color Code: Sand Promotion Code: [Redacted] Net Customer Price: 0.00

Qty Ordered: 8.00 Family Code: [Redacted] Sugg Retail Price: 0.00 USD

Manufacturer: [Redacted] Demanding Site: [Redacted]

Dyelot

F. Click **Save**



Save

NOTE: The empty line for a pattern opens under the active line indicated by a blue star and arrow. The added line appears in the proper numerical order of entry once Save is clicked.

6. To Delete a line

- A. Locate the line to be deleted from the left hand menu and click to make it active. Once it is active a blue star and arrow appears.
- B. Change **Quantity** to Zero and click **OK** when pop-up appears

Customers Customer Orders (Linked) Customer Order Lines (Linked) x

Order: SA00333333 Order Class: Fabric (Dom) Order Date: 5/21/2022 Customer: 128872

Name: Jane Thibaut Order Area:

Line: 2 Allow Over Credit Limit Sample On Backorder Customer Cost: 58.00

Item: W73402 Lot: 10C Sales Disc: 0.0000 % Source Lot:

VISTA Promotion Code:

Customer Item: Color Code: Sand Net Customer Price: 0.00

Qty Ordered: 0 Family Code: Sugg Retail Price: 0.00 USD

Active Line

Infor CloudSuite Industrial (TBUS) - Customer Order Lines (Linked) x

Qty Ordered is not equal to Qty Reserved.

OK

Pop-up

C. Click **Status** menu and change to complete

Manufacturer: Manufacturer Item: Demanding Site:

General Thibaut Line History Amounts Drop Ship Shipping Other Source EU VAT DIFOT Features Post Configuration

Status: Complete

Projected: Planned Ordered Filled

Change Reason: Change Date: Complete

Changed By:

Due Date: 6/13/2022 Priority: Replenish Invoice Hold

Request Date: Qty Ready: 1.00 Packed: 0.00

Reserved: 0.00 Shipped: 0.00

Picked: 0.00 Invoiced: 0.00

Status Menu

D. Click **OK** on pop-up

Change Reason Code Required x

Change Reason Code Required

OK

Complete Line pop-up

E. Select the **Change Reason** that applies from menu

General Thibaut Line History Amounts Drop Ship Shipping Other Source EU VAT DIFOT Features Post Configuration

Status: Complete Due Date: 6/13/2022 Priority: Config Hold
 Projected: 6/13/2022 Request Date: Replenish Invoice Hold

Change Reason: **Change Reason** Qty Ready: 8.00 Packed: 0.00
 Reserved: 8.00 Shipped: 0.00
 Picked: 0.00 Invoiced: 0.00

RMA: 0 Location Qty Reserved Area
 Last Pick List: 1 306-24-E-12 8.00

Change Reason

F. Click **Save**



Save

G. Line has been successfully deleted when information appears after saving

General Thibaut Line History Amounts Drop Ship Shipping Other Source EU VAT DIFOT Features Post Configuration

Status: Complete Due Date: 6/13/2022 Priority: Config Hold
 Projected: 6/13/2022 Request Date: Replenish Invoice Hold

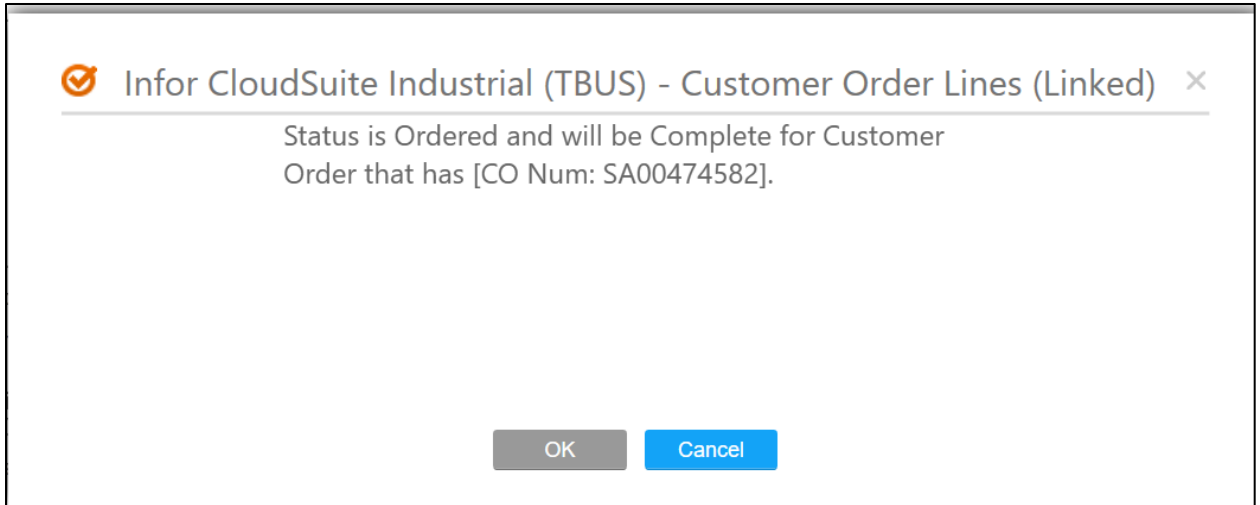
Change Reason: Changed Mind Qty Ready: 8.00 Packed: 0.00
 Change Date: 5/21/2022 12:00:00 AM Reserved: 0.00 Shipped: 0.00
 Changed By: Name of agent making change Picked: 0.00 Invoiced: 0.00

Ship Site: TBUS Multi-Site Source RMA: 0 Location Qty Reserved Area
 Warehouse: MAIN Last Pick List:
 G/L Acct:

Successful Line completion

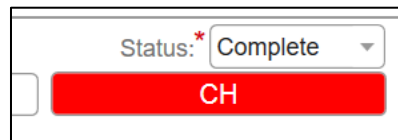
Cancel Order

1. Follow Line Order delete instructions: Add or Delete Line on page 33
2. Once all lines are showing as *Complete*, Click **OK** on Pop-up.



Order Complete Pop-up

3. Go back to the main screen by clicking **X** in the module tab
4. Order is now Completed and closed

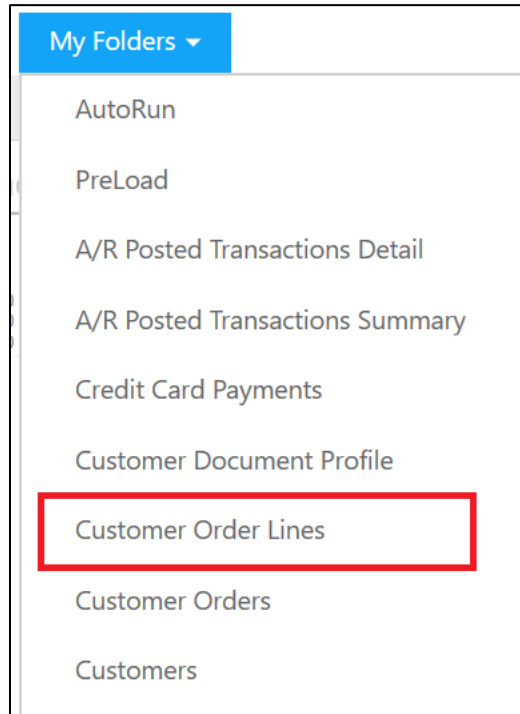


Order Complete

CFA Approval and Reserve Release

The following instructions show how to release an order from a Line Hold due to a Reserve or CFA Approval and prepare the order for payment.

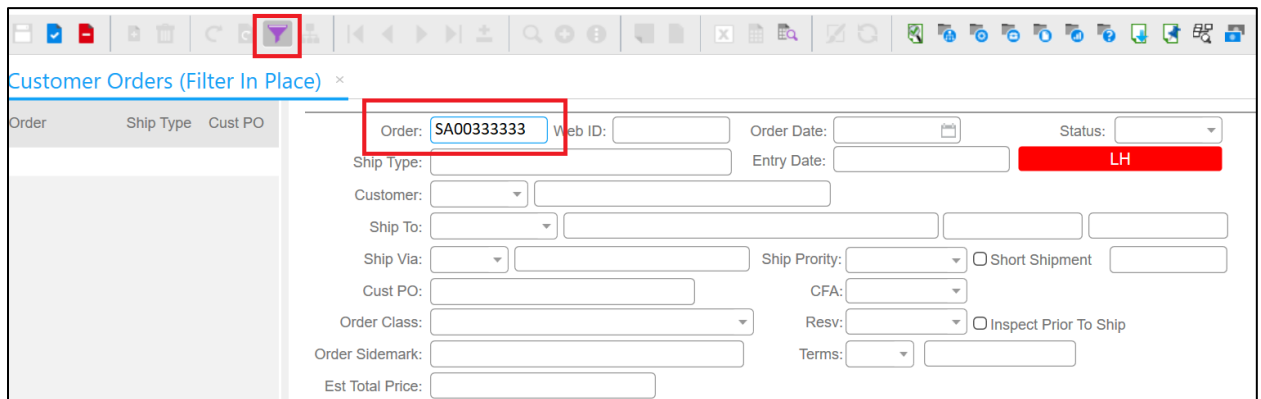
1. Need to have the SA order number.
2. Open *Customer Orders* module in My Folders



My Folders

NOTE: Order can also be located through Customers → Customer Orders modules and scrolling through the list of orders. For instructions see Create New Order on page 9

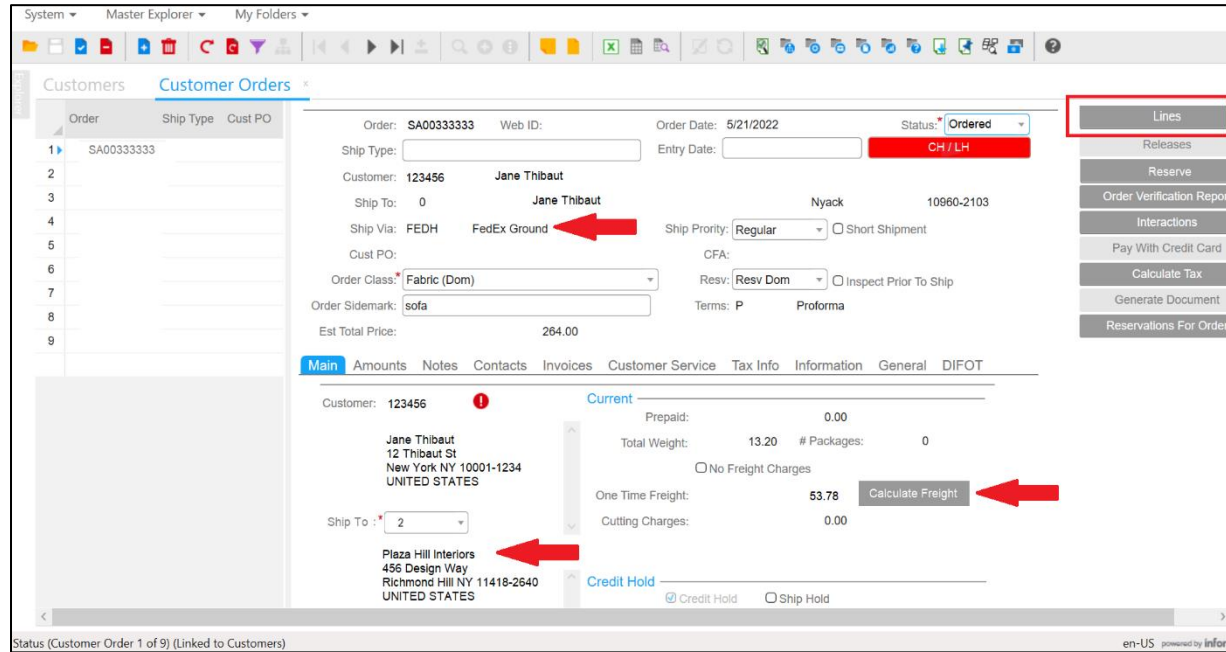
3. Input **SA** number in the *order field* and click **Filter** in tool bar to populate order information

A screenshot of a software interface showing a form titled "Customer Orders (Filter In Place)". The form contains various fields for order information, including "Order", "Ship Type", "Cust PO", "Ship Type", "Customer", "Ship To", "Ship Via", "Cust PO", "Order Class", "Order Sidemark", "Est Total Price", "Web ID", "Order Date", "Entry Date", "Status", "Ship Priority", "Short Shipment", "CFA", "Resv", "Inspect Prior To Ship", and "Terms". The "Order" field is highlighted with a red rectangular box and contains the text "SA0033333". The "Filter" button in the toolbar is also highlighted with a red rectangular box. A red "LH" label is visible in the "Status" field.

Customer order

4. Before proceeding – CONFIRM
 - A. **Ship Via** is correct
 - B. **Final Ship To** address is updated for shipment to goods
 - C. **Freight** calculated
5. Click **Lines** on right hand column to go to the Customer Order Lines (Linked) Screen

Note: Red bar under status should currently read CH/LH. This shows the order is on a Credit Hold and Line Hold.



Main Order Screen

- 6. Under the General Tab – in middle of page
 - A. Unclick **Ship Hold** which will remove blue check mark

The screenshot shows the 'General' tab selected. A red arrow points to the 'General' tab label. The 'Status' is 'Ordered' and 'Due Date' is '6/15/2022'. The 'Ship Hold' checkbox is checked and highlighted with a red box. Other options include 'CFA', 'CFA Cut', and 'Delayed Order Due To Stock Check'. The 'Whse Line Note' field is empty.

Ship Hold On

The screenshot shows the 'General' tab selected. The 'Ship Hold' checkbox is unchecked and highlighted with a red box. Other options include 'CFA', 'CFA Cut', and 'Delayed Order Due To Stock Check'. The 'Whse Line Note' field is empty.

Ship Hold Off

7. Click **Save**.



Save

- Repeat for every related line. Once complete, click **X** next to Customer Order Lines (Linked) to go back to the main order screen.
- The red Status Bar should now only have **CH**. The order now awaits payment to ship.

Order: SA00333333	Web ID:	Order Date: 5/21/2022	Status: Ordered
Ship Type:	Entry Date:	CH	
Customer: 123456	Jane Thibaut		
Ship To: 0	Jane Thibaut	Nyack	100-2103
Ship Via: FEDH	FedEx Ground	Ship Priority: Regular	<input type="checkbox"/> Short Shipment
Cust PO:	CFA:		
Order Class: Fabric (Dom)	Resv: Resv Dom	<input type="checkbox"/> Inspect Prior To Ship	
Order Sidemark: sofa	Terms: P	Proforma	
Est Total Price:	264.00		

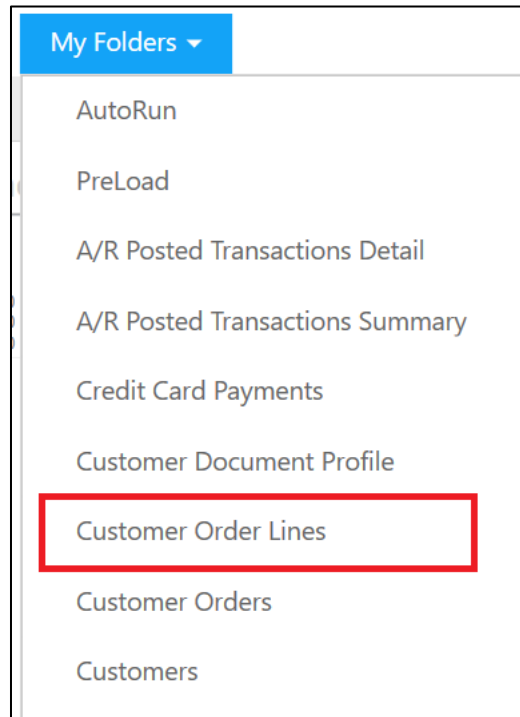
Line Hold Removed

Payments, Release

The following will instruct on how to apply a credit card and check payment to an existing order and remove from a credit hold to ship order.

Check

1. Need to have the SA order number.
2. Open *Customer Orders* module in My Folders



My Folders

NOTE: Order can also be located through Customers → Customer Orders modules and scrolling through the list of orders. For instructions see Create New Order on page 9

- Input **SA** number in the *order field* and click **Filter** in tool bar to populate order information

The screenshot shows the 'Customer Orders (Filter In Place)' window. The 'Order' field is highlighted with a red box and contains the value 'SA00333333'. Other fields include 'Web ID', 'Order Date', 'Status' (set to 'LH'), 'Ship Type', 'Entry Date', 'Customer', 'Ship To', 'Ship Via', 'Ship Priority', 'Short Shipment', 'Cust PO', 'CFA', 'Order Class', 'Resv', 'Inspect Prior To Ship', 'Order Sidemark', 'Terms', and 'Est Total Price'.

Customer Orders

- If Customer provided PO – cross check that all information is correct
- Important that the following data is Confirmed:
 - Ship To** is correct and changed to Final Ship to if needed
 - Ship Via** for FedEx shipment is correct
 - Freight** included

The screenshot shows the 'Main Order Screen' for order SA00333333. The order is 'Ordered' with status 'CH/LH'. The customer is 'Jane Thibaut' (123456) located at '12 Thibaut St, New York NY 10001-1234, UNITED STATES'. The ship to location is 'Plaza Hill Interiors' (Ship To: 2) located at '455 Design Way, Richmond Hill NY 11418-2640, UNITED STATES'. The ship via is 'FedEx Ground' (highlighted with a red arrow). The order class is 'Fabric (Dom)' and the order sidemark is 'sofa'. The estimated total price is 264.00. The 'Calculate Freight' button is highlighted with a red arrow. The status is 'Current' and 'Credit Hold' is selected.

Main Order Screen

6. In Notes – write information regarding check received
 - A. Type – date received check, check #, amount and sent to Janine for processing

Notes for Check

7. Click **Save**.



Save

8. Click **Right** and **Copy** Notes
9. Click Interaction on right hand menu

Main Order Screen Interactions

10. In the Interaction line type **SA number** and in box paste **Notes**

Customers Customer Orders (Linked) Customer Interactions (Linked) x

Interaction: SA00333333 Status: Active
Topic: Interaction Date: 04/29/99 8:46:07 PM
Customer: 128872 Ship To: 0 Follow-Up Date:

Conversations General

Interactions

Sequence	Contact Date	Internal	Incoming	Entry Name
1	04/29/99 8:46:07 PM	<input type="checkbox"/>	<input type="checkbox"/>	CS Rep Name

Type: Other Alert Subscribers Reply

Received check (Number) for (amount) emailed to (Credit Rep)

Interactions

11. Click **Save**



Save

12. Click **X** next to Interactions (Linked) tab to go back to main order screen

13. Click **Lines** on right hand menu

A. Verify pattern number and quantity are correct

Customers Customer Orders (Linked) Customer Order Lines (Linked) x

Order: SA0033333 Order Class: Fabric (Dom) Order Date: 4/11/2022 Customer: 123456
Name: Jane Thibaut Order Area:

Line: 4 Allow Over Credit Limit Sample On Backorder Customer Cost: 85.00
Item: W80262 Lot: 3B Sales Disc: 0.0000 % Source Lot:
Juno Promotion Code:
Customer Item: Color Code: Flax Net Customer Price: 0.00
Qty Ordered: 1.00 Family Code Sugg Retail Price: 0.00 USD

Order
Item Availabilit
Time Phased Inve
Reprice
Reservations For
Reserve Line
Configure
Material Transact

Line Item

14. Click **X** on the Custom Order Lines (Linked (Tab) to return to main order screen
15. Scan **check**
16. Email check and copy of order with instructions to release.
17. Ensure there are no line holds
18. Once check applied by Credit Rep, ensure that order is released by green status bar

The screenshot shows the 'Customer Orders' interface. On the left is a table with columns 'Order', 'Ship Type', and 'Cust PO'. The main area displays order details for Order SA00333333, including customer information (Jane Thibaut), shipping details (FedEx Ground), and order class (Fabric (Dom)). The status is 'Ordered', indicated by a green bar and a red arrow. A sidebar on the right contains various action buttons like 'Releases', 'Reserve', and 'Generate Document'.

Order paid and released

19. Order ready for shipment

Credit Card

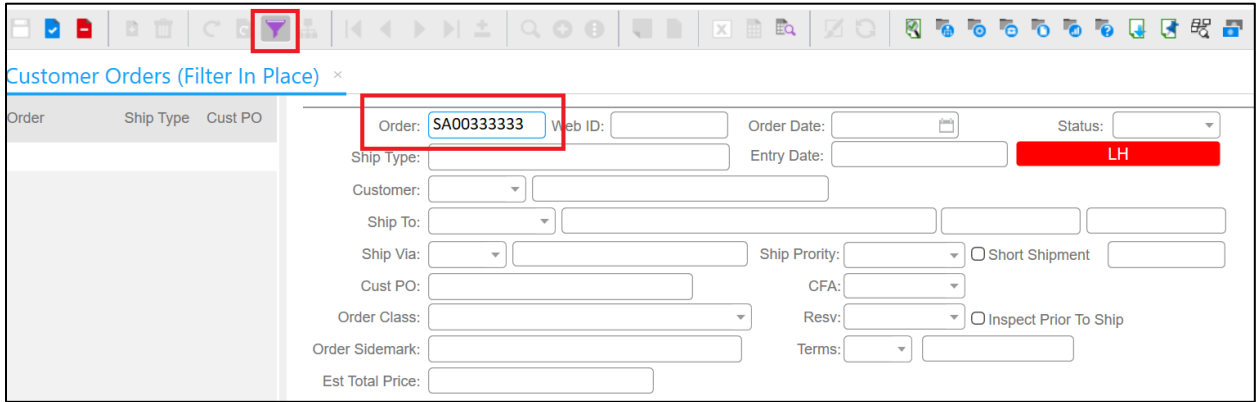
1. Need to have the SA order number.
2. Open *Customer Orders* module in My Folders

The screenshot shows the 'My Folders' dropdown menu. The menu items are: AutoRun, PreLoad, A/R Posted Transactions Detail, A/R Posted Transactions Summary, Credit Card Payments, Customer Document Profile, Customer Order Lines (highlighted with a red box), Customer Orders, and Customers.

Customer Order Lines

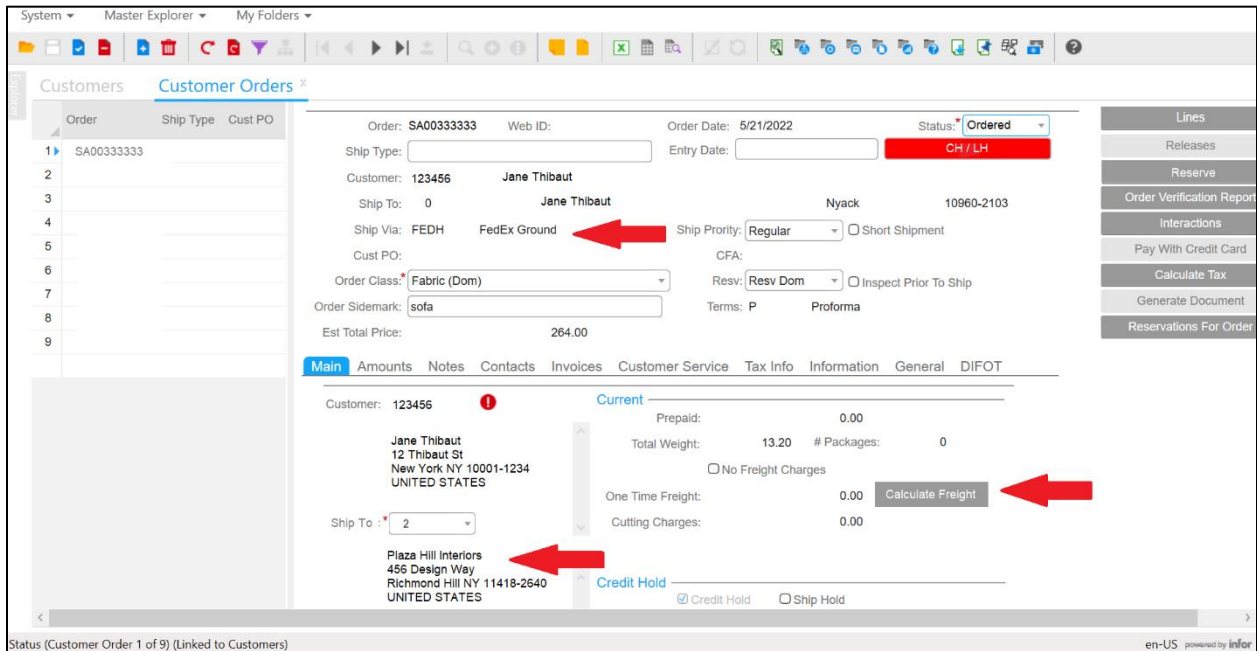
NOTE: Order can also be located through Customers → Customer Orders modules and scrolling through the list of orders. For instructions see Create New Order on page 9

3. Input **SA** number in the *order field* and click **Filter** in tool bar to populate order information



Customer Orders

4. If have Customer PO – cross check that all info is correct
5. Important that the following data is Confirmed:
 - A. **Ship To** is correct and changed to Final Ship to if needed
 - B. **Ship Via** changed for FedEx shipment
 - C. **Freight** included



Main Order Screen

6. Click **Lines** on right hand menu
 - A. Verify **pattern number** and **quantity** are correct

Customers Customer Orders (Linked) Customer Order Lines (Linked)

Order: SA0033333 Order Class: Fabric (Dom) Order Date: 4/11/2022 Customer: 123456

Name: Jane Thibaut Order Area: [Redacted]

Line: 4 Allow Over Credit Limit Sample On Backorder Customer Cost: 85.00

Item: W80262 Lot: 3B Sales Disc: 0.0000 % Source Lot:

Customer Item: Juno Promotion Code:

Customer Item: Color Code: Flax Net Customer Price: 0.00

Qty Ordered: 1.00 Family Code: Sugg Retail Price: 0.00 USD

Line item

7. Click **X** on the Custom Order Lines (Linked (Tab) to return to main order screen
8. Click **Pay with Credit Card** – column in right of page
 - A. If this button is grey – no payment has been made
 - B. If button is green – card on file, but need to confirm card to be used

Customers Customer Orders

Order: SA0033333 Web ID: Order Date: 5/21/2022 Status: Ordered

Ship Type: Entry Date: CH / LH

Customer: 123456 Jane Thibaut

Ship To: 0 Jane Thibaut Nyack 10960-2103

Ship Via: FEDH FedEx Ground Ship Priority: Regular Short Shipment

Cust PO: GFA:

Order Class: Fabric (Dom) Resv: Resv Dom Inspect Prior To Ship

Order Sldemark: sofa Terms: P Proforma

Est Total Price: 264.00

Lines

Releases

Reserve

Order Verification Repo

Interactions

Pay with Credit Card

Calculate Tax

Generate Document

Reservations For Orde

Pay with Credit Card

9. In the Credit Card payment (Modal), use a card already on file or a new card
 - A. Click **menu arrow** to see if card on file and choose card

The screenshot shows the 'Credit Card Payments (Modal)' form. At the top, there are tabs for 'Customers', 'Customer Orders (Linked)', and 'Credit Card Payments (Modal)'. The form contains the following fields and options:

- Customer: 123456 (dropdown), Ship To: 0, Reference: Customer Order (dropdown)
- Name: Jane Thibaut, Customer Order: SA00333333 (dropdown)
- Transaction Type: Authorize, Authorize Only
- Total Amount: 264.00 USD, Customer Reference: (text input)
- Credit Card Details** section:
 - Card System ID: 643000 (dropdown)
 - Card Number: (dropdown menu is open, showing 'XXXXXXXXXX0011 12/99')
 - Store For Book Plan
 - Street: (text input), Expiration Date: / (mm/yy)
 - City: (text input), Name On Card: (text input)
 - Prov/St: (text input), P: 10960-2103, CV Num: (text input)
- Buttons: Authorize, Cancel

Credit Card

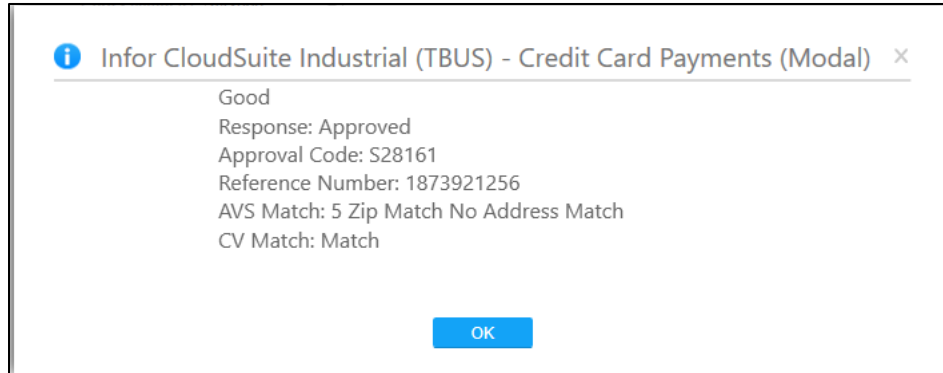
- B. If not on file or using a new card, type in card number, exp date, name on card, Sec Code, and billing address for card
 - C. If want to keep on file – click store for future use

This screenshot is identical to the one above, but with a red rectangular box highlighting the 'Credit Card Details' section. The fields within this section are:

- Card System ID: 643000 (dropdown)
- Card Number: 1111222233334444 (dropdown)
- Store For Future Orders, Store For Book Plan
- Street: 12 Thibaut St, Expiration Date: 02/99 (mm/yy)
- City: New York, Name On Card: Jane Thibaut
- Prov/St: NY, Postal/ZIP: 10001-1234, CV Num: 111

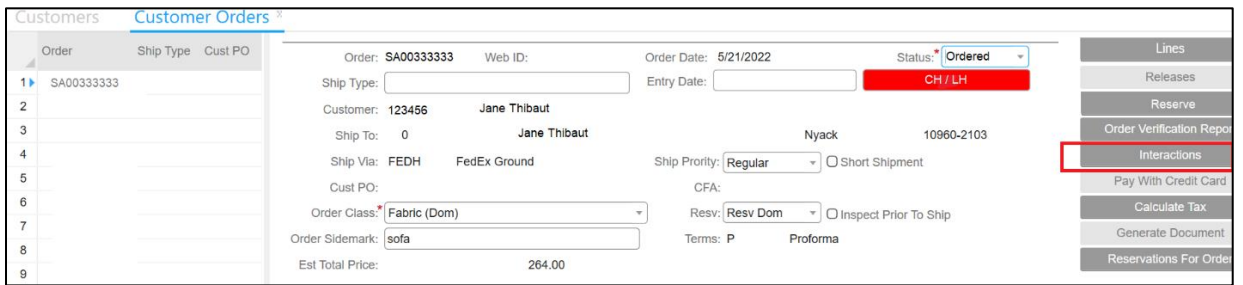
Credit Card Payments

10. Once information in, click “authorize”
11. Once get approval that says “Good” – COPY THIS INFORMATION



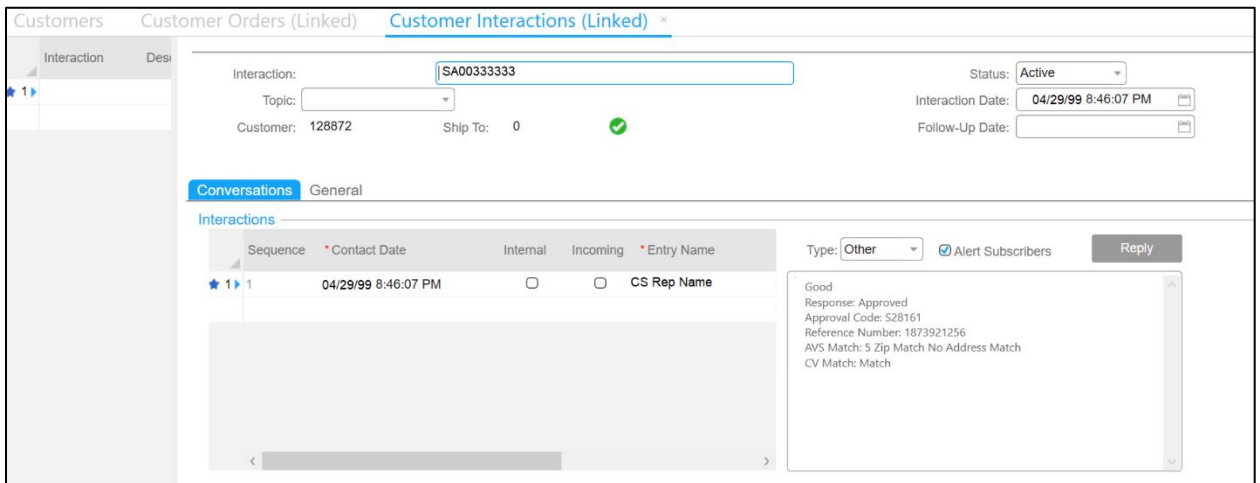
Credit Card Authorization

12. Click **OK** to close out of screen and go back to main page
13. Click **Interactions** on right side of page



Main Screen Interactions

14. Type **SA number** and Paste **Credit card approval** in box provided



Interactions

15. Click **Save**.
16. Click **X** on Customer Interactions (Linked) tab to go back to main screen
17. Ensure that order is released by green status bar

Customers		Customer Orders	
Order	Ship Type	Cust PO	
1	SA00333333		
2			
3			
4			
5			
6			
7			
8			
9			

Order: SA00333333	Web ID:	Order Date: 5/21/2022	Status: Ordered
Ship Type:	Entry Date:		
Customer: 123456	Jane Thibaut		
Ship To: 0	Jane Thibaut		
	Nyack		
Ship Via: FEDH	FedEx Ground	Ship Priority: Regular	<input type="checkbox"/> Short Shipment
Cust PO:		CFA:	
Order Class: Fabric (Dom)		Resv: Resv Dom	<input type="checkbox"/> Inspect Prior To Ship
Order Sidemark: sofa	Terms: P	Proforma	
Est Total Price:	264.00		

Lines
Releases
Reserve
Order Verification Report
Interactions
Pay With Credit Card
Calculate Tax
Generate Document
Reservations For Order

Status Bar

18. Order is ready for shipment

Create a Sample Order

The following steps instruct on creating a sample order in Infor.

1. Look-up customer if account number not available. For instructions see *Customer Look-Up* on page 6
2. Once customer has been located, click **Customer Orders** from menu on right hand.

Customer order Screen

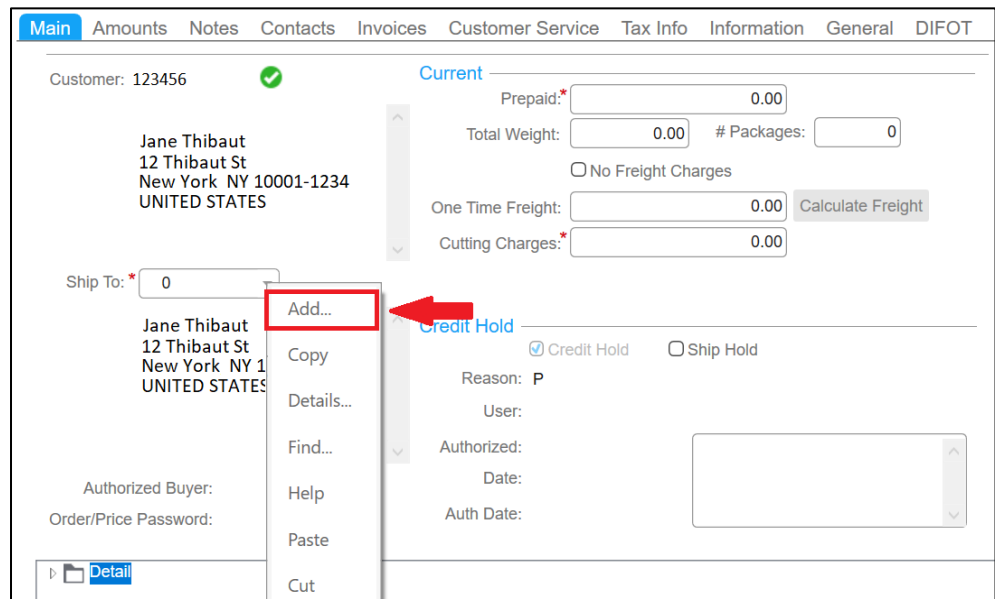
3. Click **Add** in the toolbar to create a new order

Customer Orders

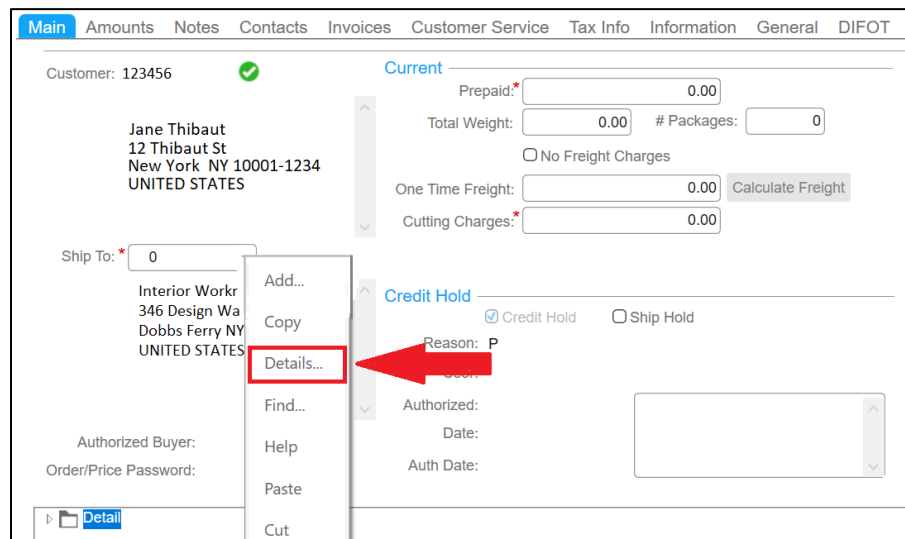
4. Ship Via – select following from pull down menu. Press **Tab** to go to next field
 - A. **FENC** – FedEx No Charge
 - B. **MAIL** – US Mail
5. Ship Priority – leave as regular and press **Tab**
6. Order Class – type **SA** and select **Sample DOM** from pull down menu
7. Sidemark – optional and press **Tab**

Main Order Screen Samples

8. Ship To address_– where are samples shipping (defaults to client). For changes:
 - A. Click pull down menu to check if shipping address already in system
 - B. If not, right click and choose **ADD**
 - C. Click **Details** if want to make change to existing address



Add Ship To



Change Existing Ship To

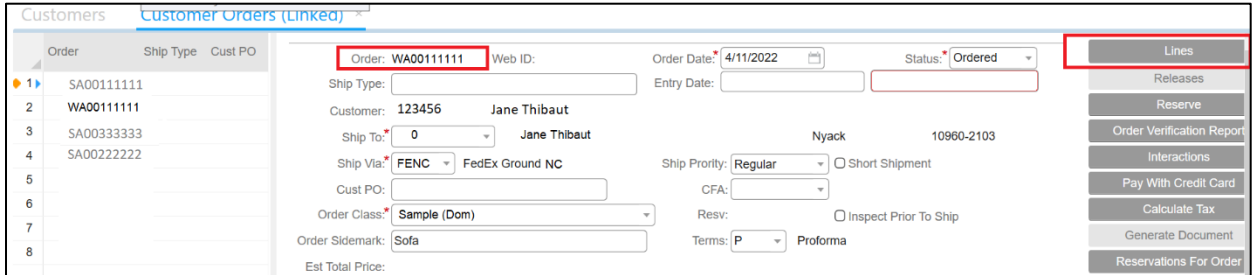
NOTE: For full instructions on Ship To addresses see Ship To Address in Order on page 21

9. Click **SAVE** and a WA order number will be assigned



Save

10. Click **LINES** – on right area of screen to go to Customer Order Lines (Linked) to input pattern



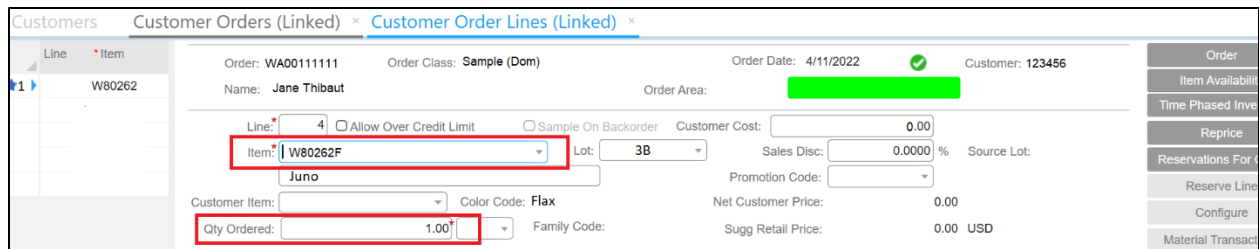
Main Order Screen

11. Type **pattern number**

A. When entering wallcovering – type **W** after pattern number

B. When entering fabric – type **F** after pattern number

12. Type **quantity** - Always default to 1 sample



Enter Line Item

13. Click **Save**



Save

14. To enter additional patterns – click **Add** on toolbar. Follow same steps for all additional lines



Add

15. Click **Save**.



Save

16. Once complete –Click **X** on Customer Order Lines (Linked) tab to go back to main order screen.

17. Click **Order Verification** to view order invoice, print, and save to computer.