



CUSTOMER FRONT END TRAINING GUIDE

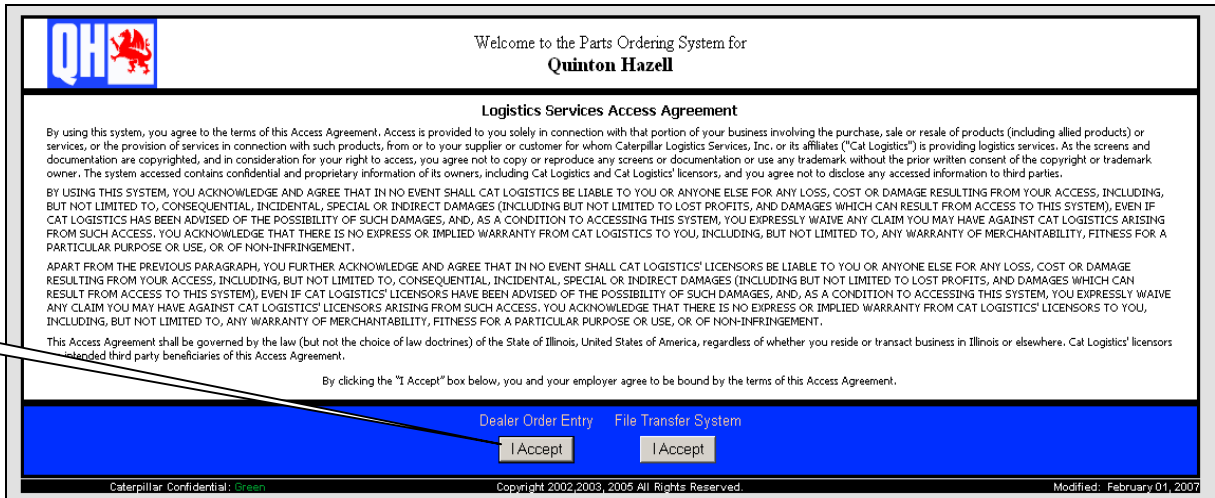
CONTENTS

Logging In	3
Order Entry.....	4
Product Availability	6
Order Status Report	7
Formatting	10
Extracting.....	11
Backorder Delivery Dates.....	13
Logging Off.....	16

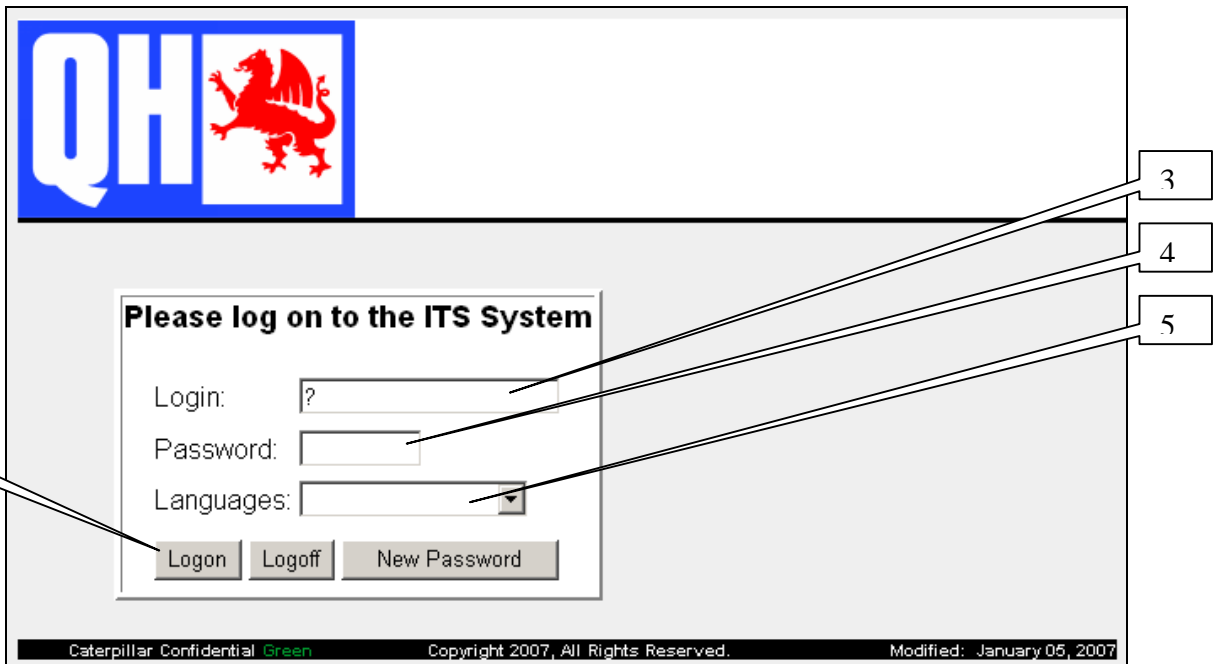
LOGGING IN



1. Input the CFE Internet address.



2. Select the **'I Accept'** button for the Dealer Order Entry system.



3. Input Login number (Customer's account number).
4. Input password.
5. Select Language from drop down box.
6. Select Logon button

ORDER ENTRY

Dealer Initial Screen - Microsoft Internet Explorer

QH

Sold-To-Party 0000123456

ORDERS

- [Create VOR Sales Order](#)
- [Create Stock Sales Order](#)

UTILITIES/REPORTS

- [Product Inquiry](#)
- Please Select Required Report

BACK ORDER

- Backorder Estimated Availability Date

1. Select Create Sales Order

Create VOR Sales Order

Customer No. 0000123456

Purchase Order No. *

Delete	Item #	Material *	Quantity	Customer Material No.	Description	Invoice Price	Avail.

Note:
Fields Marked With * are Required

2. Input Purchase Order No. (Customer's own reference number)
3. Input Material number
4. Input Quantity
5. Input Customer material number (**Optional**)
6. Select Update/Add new Line

continued...

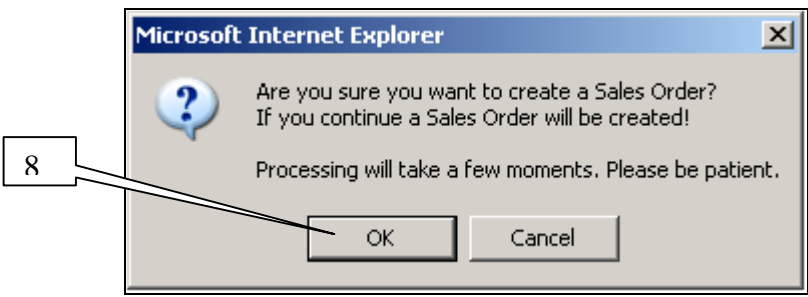
Delete	Item #	Material	Quantity	Customer Material No.	Description	Invoice Price	Avail.
<input type="checkbox"/>	25	BDC5169	1		BRAKE DISC	99.99	Yes

Update/Add New Line Main Menu Create Sales Order

7

Note. Repeat steps 3 to 6 for every part, which is to be added to the order.

7. Select Create Sales Order



8. Confirm

The below message will be displayed to confirm that an order has been created.



PRODUCT AVAILABILITY

Dealer Initial Screen - Microsoft Internet Explorer

QH

Sold-To-Party 0000123456

ORDERS

- [Create VOR Sales Order](#)
- [Create Stock Sales Order](#)

UTILITIES/REPORTS

- [Product Inquiry](#)
- Please Select Required Report.

BACK ORDER

- Backorder Estimated Availability Date

1. Select Product Inquiry

Order Type *	Material *	Quantity *
<input checked="" type="radio"/> Stock	<input type="text"/>	1
<input type="radio"/> VOR		

2. Select ordering type
- UK Domestic = VOR
 - Export = Stock
 - Associate = Stock
 - OE = VOR
 - OES = VOR
3. Input Material number
4. Input Quantity
5. Select Submit

continued...

The screen will automatically refresh with the result showing in the following format:

Availability: In Stock					
Delivery Unit 1,000					
Pricing Group			Product Category Standard item		
Material	Description	Quantity	Unit	Invoice Price	Currency
BDC5169	BRAKE DISC	1	EA		GBP

The above is an example of a part in Stock, however if there was no stock available then a message will display to say **Availability: Out Of Stock**.

If there is a super session on the part then this will also show in this summary. The superseded part will be displayed underneath the original part.

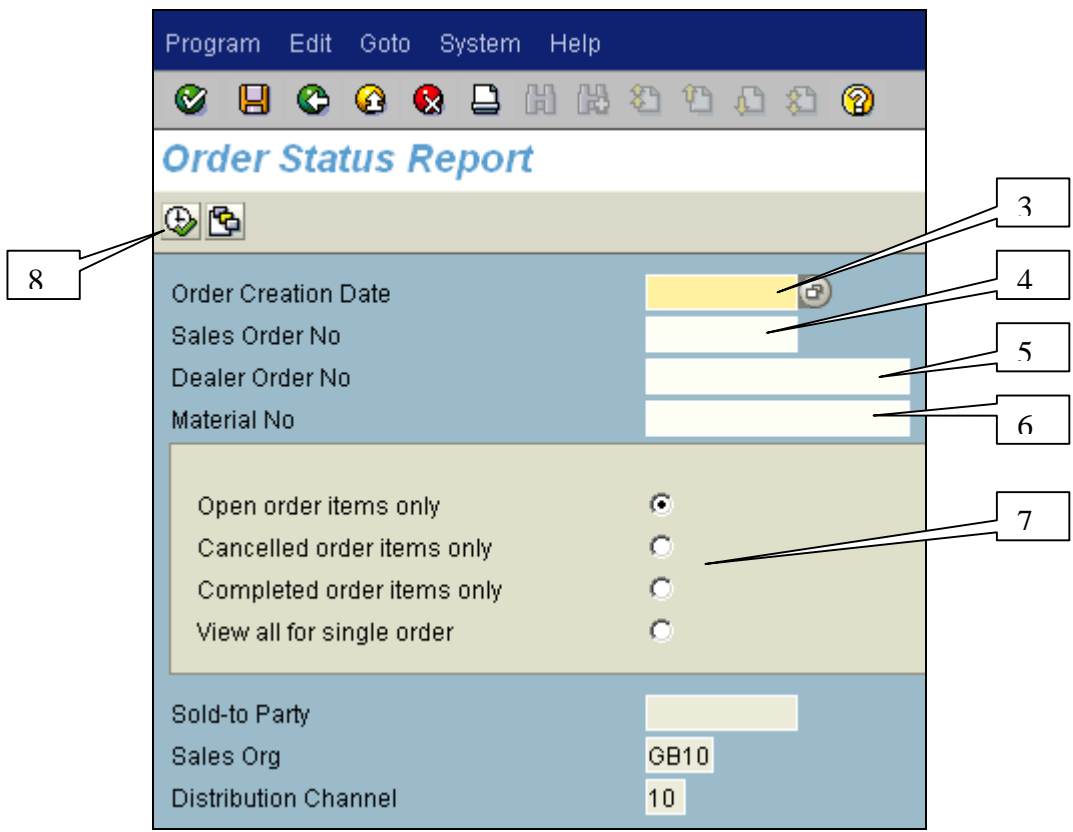
ORDER STATUS REPORT

The screenshot shows a web application interface. At the top left is a logo with the letters 'QH' in a blue box and a red dragon. Below the logo is the text 'Sold-To-Party 0000123456'. The interface is divided into several sections: 'ORDERS' with links for 'Create VOR Sales Order' and 'Create Stock Sales Order'; 'UTILITIES/REPORTS' with a link for 'Product Inquiry' and a dropdown menu labeled 'Please Select Required Report.' with a 'Continue' button; 'BACK ORDER' with a field for 'Backorder Estimated Availability Date' and an 'OK' button; and a 'Logoff' button at the bottom left. Callout 1 points to the 'ORDER STATUS REPORT' option in the dropdown menu, and callout 2 points to the 'Continue' button.

1 Select Order Status Report from drop down menu

2 Select Continue

continued...



- 3 Input order creation date
- 4 Input sales order number
- 5 Input dealer order number (Purchase order number)

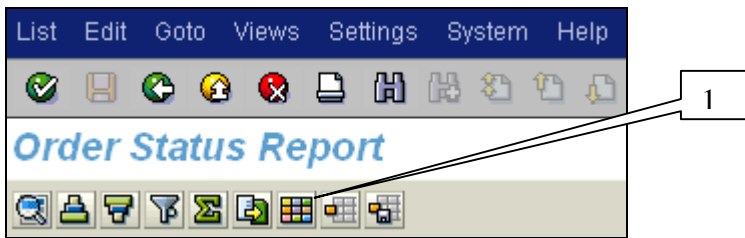
Note. One or a combination of the above three are required to initiate the search.

- 6 Input material number (Leave blank if searching for multiple parts)
- 7 Select order type to be searched for (i.e. open, cancelled, completed)
- 8 Execute (F8)

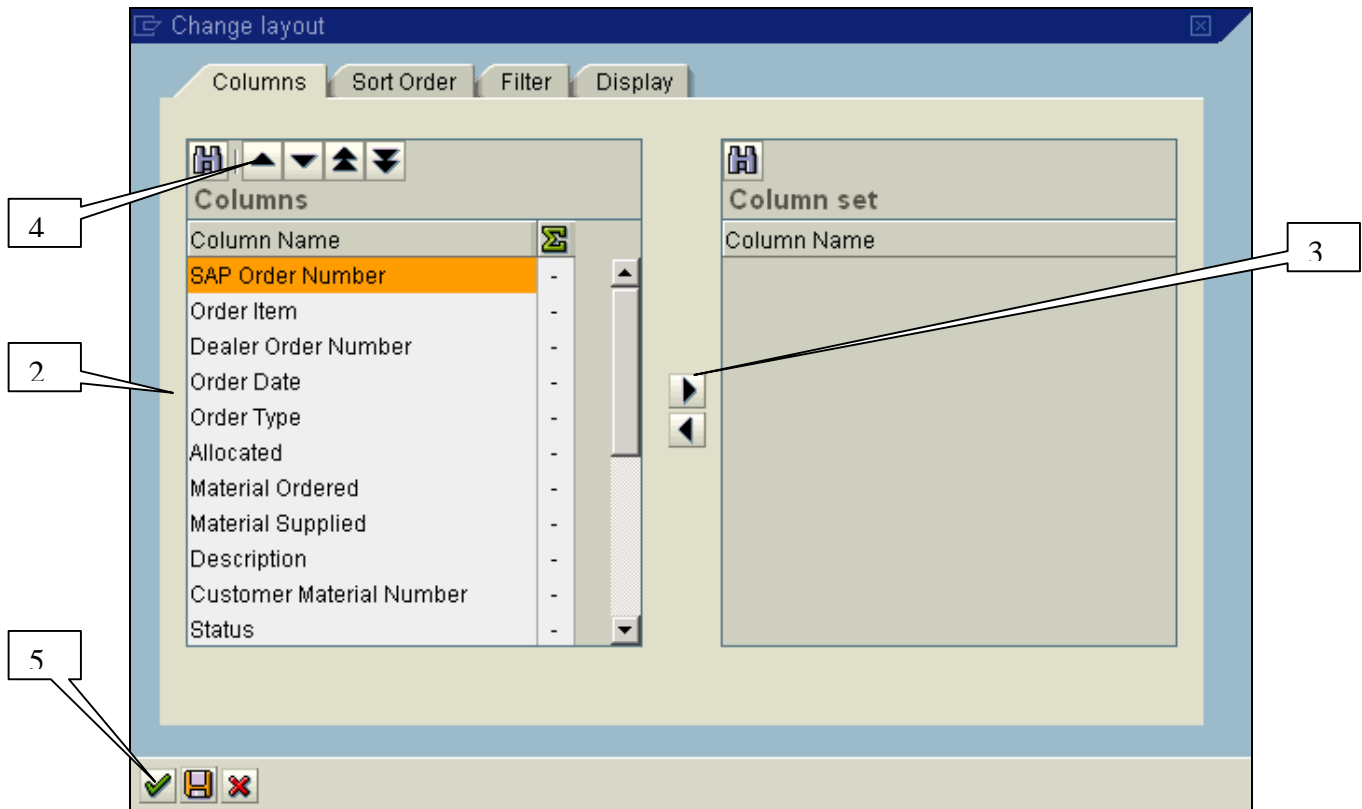
SAP Order Number	Order Item	Dealer Order Number	Order Date	Order Type	Allocated	Material Ordered	Material Supplied	Description
0001002634	25	CFEOL0G0001	06.04.2007	ZEMG	06.04.2007	EM3088	EM3088	MOUNTING (ENGINE)
0001002634	50	CFEOL0G0001	06.04.2007	ZEMG	06.04.2007	EMS1494	EMS1494	MOUNTING (SUSPENSION ARM BUSH)
0001002634	75	CFEOL0G0001	06.04.2007	ZEMG	06.04.2007	EMS2654	EMS2654	MOUNTING (SUSPENSION ARM BUSH)
0001002634	100	CFEOL0G0001	06.04.2007	ZEMG	06.04.2007	QBK112	QBK112	TENSIONER KIT (TIMING BELT)
0001002634	125	CFEOL0G0001	06.04.2007	ZEMG	06.04.2007	QBK115	QBK115	TENSIONER KIT (TIMING BELT)
0001002634	150	CFEOL0G0001	06.04.2007	ZEMG	06.04.2007	QBK116	QBK116	TENSIONER KIT (TIMING BELT)
0001002634	175	CFEOL0G0001	06.04.2007	ZEMG	06.04.2007	QTT108	QTT108	TENSIONER (TIMING BELT)
0001002634	200	CFEOL0G0001	06.04.2007	ZEMG	06.04.2007	QWB240	QWB240	WHEEL BEARING KIT
0001002637	25	CFEOL0G0001B	06.04.2007	ZEMG	06.04.2007	QBK115	QBK115	TENSIONER KIT (TIMING BELT)
0001002637	50	CFEOL0G0001B	06.04.2007	ZEMG	06.04.2007	QBK116	QBK116	TENSIONER KIT (TIMING BELT)
0001002638	25	TEST 0.04.07	06.04.2007	ZEMG	06.04.2007	QCP1350	QCP1350	WATER PUMP
0001002638	50	TEST 0.04.07	06.04.2007	ZEMG	06.04.2007	QBK115	QBK115	TENSIONER KIT (TIMING BELT)
0001002640	25	CFEOL0G0001	06.04.2007	ZEMG	06.04.2007	QBK112	QBK112	TENSIONER KIT (TIMING BELT)
0001002640	50	CFEOL0G0001	06.04.2007	ZEMG	06.04.2007	QBK115	QBK115	TENSIONER KIT (TIMING BELT)
0001002641	175	CFEOL0G0001	06.04.2007	ZEMG	06.04.2007	QTT118	QTT118	TENSIONER (TIMING BELT)
0001002649	25	CFEOL0G00019	06.04.2007	ZEMG	06.04.2007	XG0060	XG0060	IGNITION LEAD (UNIVERSAL SINGLES)
0001002649	50	CFEOL0G00019	06.04.2007	ZEMG	06.04.2007	QFP14	QFP14	FUEL PUMP (MECHANICAL)

The above is an example of how the order status report will look once executed. There are many columns that are not shown above, however by following the process headed **Formatting the report** the user will be able to format the layout to their own specifications.

FORMATTING THE REPORT



1. Select the change layout button



Note. The left hand Column shows all the headings, which are currently shown in the report. If any are to be removed then the following steps will need to be carried out.

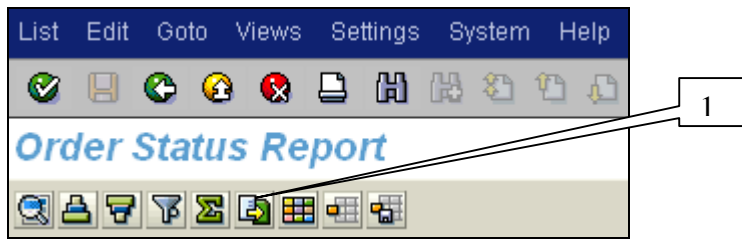
2. Select the heading to be removed
3. Click the arrow to move the heading into the right hand column (headed Column Set)

Note. Repeat the above 2 steps for all headings, which are to be removed.

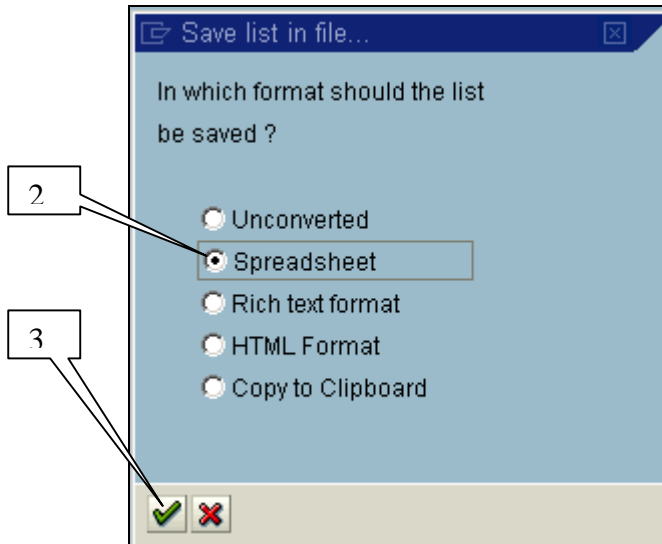
4. Select a heading and use the up / down arrow to change the order in which the report is displayed.
5. Save the layout

The report will refresh and will display in the specified layout.

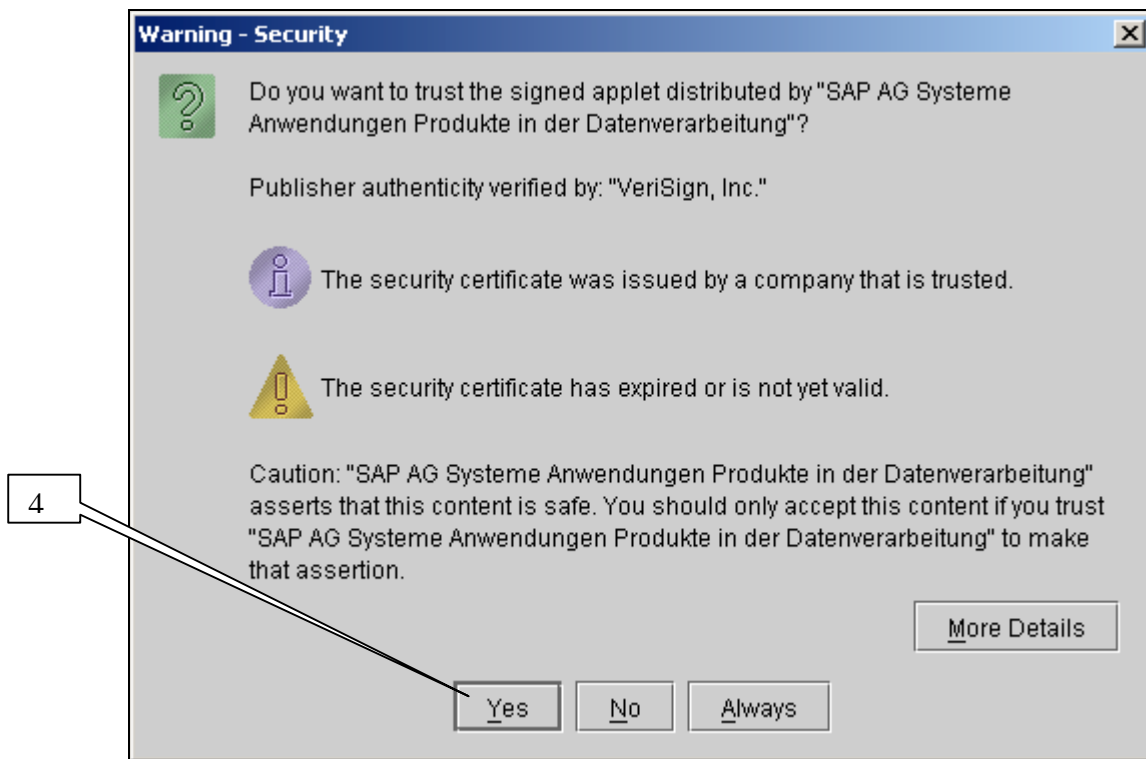
EXTRACTING TO EXCEL



1. Select the Local File icon

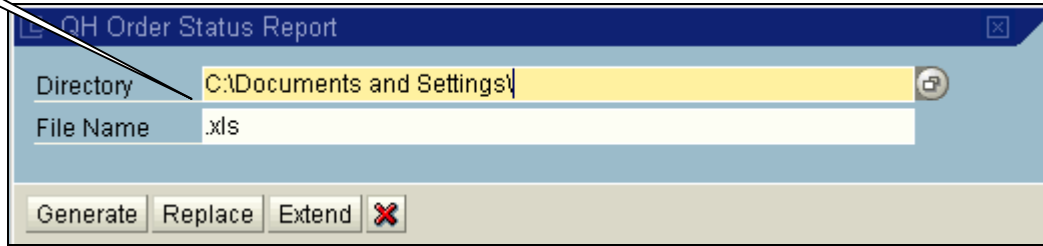


2. Select Spreadsheet
3. Confirm
4. If the following security warning comes up on screen then the user will need to click YES to accept.



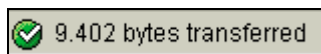
5

5. Specify the directory and file name that the file is to be saved to.



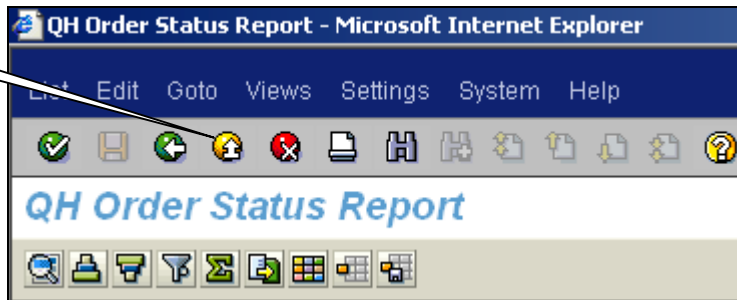
6. Generate

At this point the report will be saved in an Excel format in the specified location. If the save has been successful a message will be displayed at the bottom of the screen:



The report can then be opened in Excel like any other Excel file.

7



7. Use the yellow back button to navigate back the CFE home page.

BACKORDER DELIVERY DATES

Using this function will allow the user to look at the estimated delivery dates of any backorders they may have on their account.

Dealer Initial Screen - Microsoft Internet Explorer

QH

Sold-To-Party 0000123456

ORDERS

- [Create VOR Sales Order](#)
- [Create Stock Sales Order](#)

UTILITIES/REPORTS

- [Product Inquiry](#)
- Please Select Required Report

BACK ORDER

- Backorder Estimated Availability Date

1

2

3

1. Input the SAP order number that the backorder is on
2. Input the part number of the backordered part.
3. Click OK.

Note. If **NO** SAP order number or part number details are entered then the report will show all backorders on the account.

continued.....

The report will look as follows:

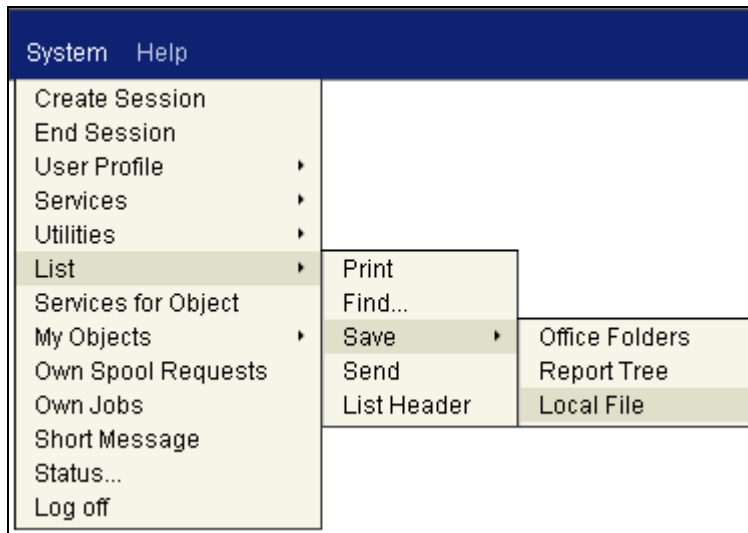
Order No.	Item	Material	Plant	Order Qty	Shipped Qty	Back Ord Qty	Est Mat Avail Date
1002132	000025	QTS140154	GB01	2,000	0,000	2,000	Promise Date not yet Available
1002649	000050	QFP14	GB01	1,000	0,000	1,000	Promise Date not yet Available
1002665	000025	BDC5297	GB01	1,000	0,000	1,000	Promise Date not yet Available
1002780	000025	QFP14	GB01	1,000	0,000	1,000	Promise Date not yet Available

4. If a delivery date is available then this is where it will be displayed.

The following is a description of what each heading refers to:

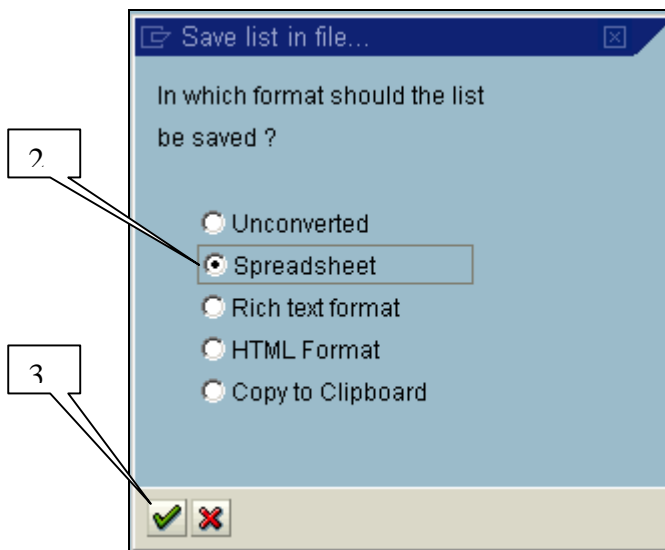
- Order No. – SAP Order number
- Item – The line number that the part is on within the order
- Material – Part which is on backorder
- Plant – GB01 = QH Hinckley
- Order Qty – Quantity originally ordered
- Shipped Qty – Number of parts shipped (if any)
- Back Ord Qty – Total remaining parts on backorder

This report can be exported into an Excel file by following these steps:



1. Navigate the menu function through: System – List – Save – Local File

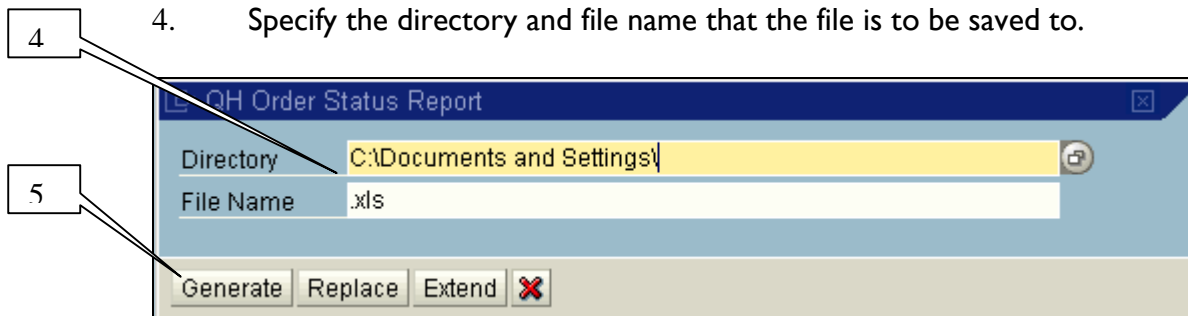
continued...



2. Select Spreadsheet

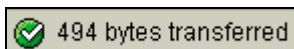
3. Confirm

4. Specify the directory and file name that the file is to be saved to.



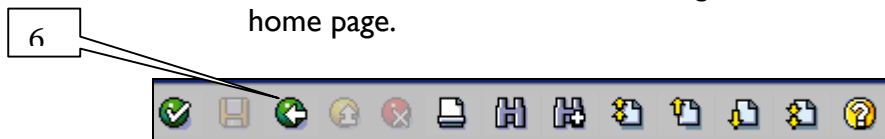
5. Select Generate

At this point the report will be saved in an Excel format in the specified location. If the save has been successful a message will be displayed at the bottom of the screen:



The report can then be opened in MS Excel like any other XLS file.

6. Use the Green back arrow to navigate back to the Customer Front End home page.




LOGGING OFF

To logoff the Customer Front End:

- I. Click the Logoff button

Dealer Initial Screen - Microsoft Internet Explorer

QH 

Sold-To-Party 0000123456

ORDERS

- [Create VOR Sales Order](#)
- [Create Stock Sales Order](#)


UTILITIES/REPORTS

- [Product Inquiry](#)
- Please Select Required Report

BACK ORDER

- Backorder Estimated Availability Date

A message will be displayed to confirm the user has logged off.

QH 

End Of Session

Thank you for working with the Internet Transaction Server!

Caterpillar Confidential Green Copyright 2007, All Rights Reserved. Modified: January 05, 2007