**QUICK REFERENCE SHEET FOR SUPPLY ORDERS**

***(Revised as of June 2016)***

The system is set up with your individual account information but it may not display your current location/address. **DON’T WORRY, you can change it later.** Continue processing your Sales Order. **After you have added the last item to the cart, the system will allow you to change the 37 #. When saved, the correct address will be displayed.**

**BASIC ORDERING PROCESS:**

1. Login: Salesforce with your e-auth
2. Click: **Create/Review Sales Order**
3. Click: **New Sales Order.** A new Sales Order Number (SO-XXXXXX) will be created (Top Left).
4. Scroll down to the bottom of the screen and click: **Add New Item.**
5. In the Filter box, enter the item name/number/description of the item you wish to order. **Click: Apply Filter** to search. Click on the item Name.
6. That product number will appear on the Item # field (top right). Enter the quantity (delete the zeros-0.0000, enter quantity, i.e. 1 or 3). Click **SAVE**.

Note: You’ll get a popup box that will let you know you must submit order when finished, **press OK**.

1. Click: **Go to Sales Order.** Scroll to bottom, you will see the item added. To add more items to order, repeat steps 4-7.
2. When finished you **must** click: **Submit Order**. You will get a popup box to confirm the delivery address. **If correct**, click **OK**. **If not,** follow the steps on the next two pages (Changing Customer ID Process).

**CHANGING CUSTOMER ID PROCESS:**

You will see the default address at the bottom right of your screen. If the address is not correct for your order, you can edit/change the address by entering the Customer ID for that location/establishment. To do this, either click Edit (top image) or double-click the Customer ID field (bottom image) and enter the alternate Customer ID. Click **SAVE**.

After changing the Customer ID on the order, the associated address will be displayed as the Delivery Address (bottom right of screen).



Submit order by clicking **Submit Order**. You will get a popup box to confirm the delivery address. If correct, click **OK**.