

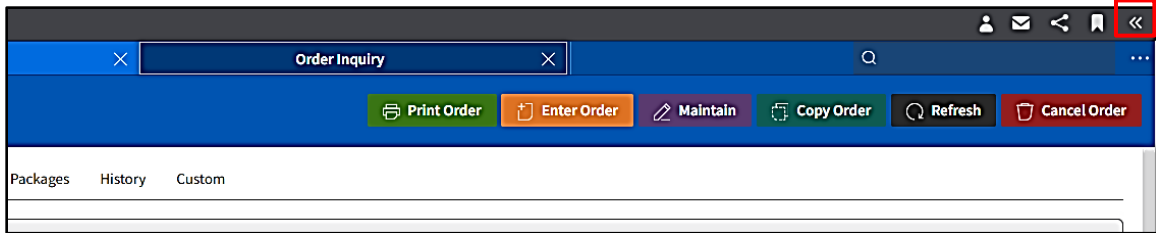


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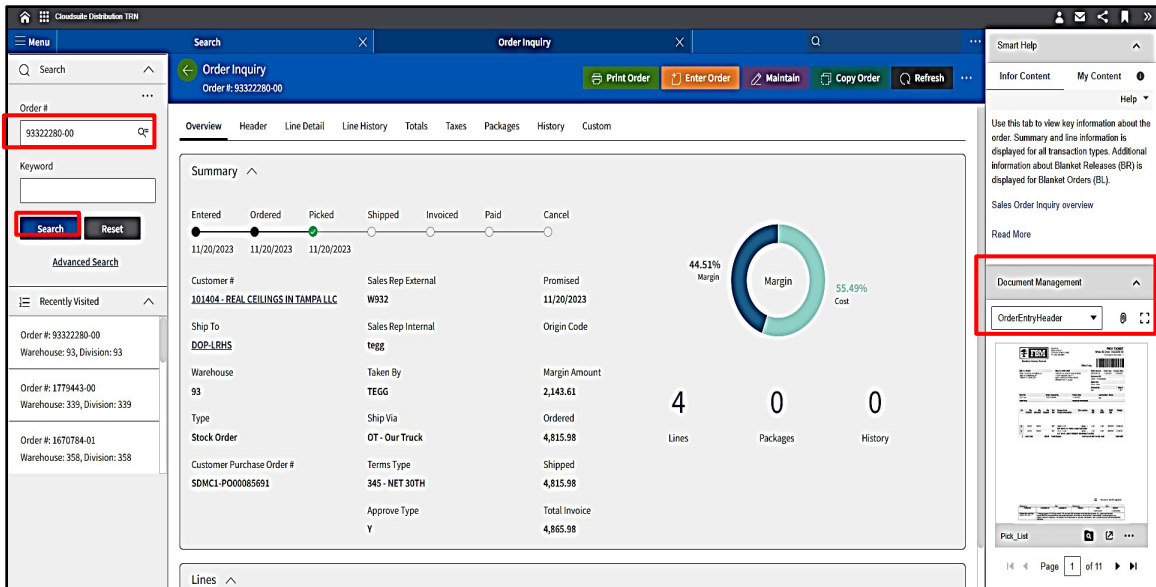
Infor Document Management (IDM)

Infor Document Management (IDM) is used to store documents generated from CloudSuite Distribution and documents that are emailed to IDM. In CloudSuite Sales Order Inquiry (OEIO) and Purchase Order Inquiry (POIP) these documents can be reviewed, printed, downloaded, and emailed from the Document Management section in the Context App.

To retrieve documents from CloudSuite in the Context App in Order Inquiry (OEIO or POIP), enter the order number you need to find and click Search, then expand the Context App by clicking on the chevron << in the black bar in the top right corner of CloudSuite.



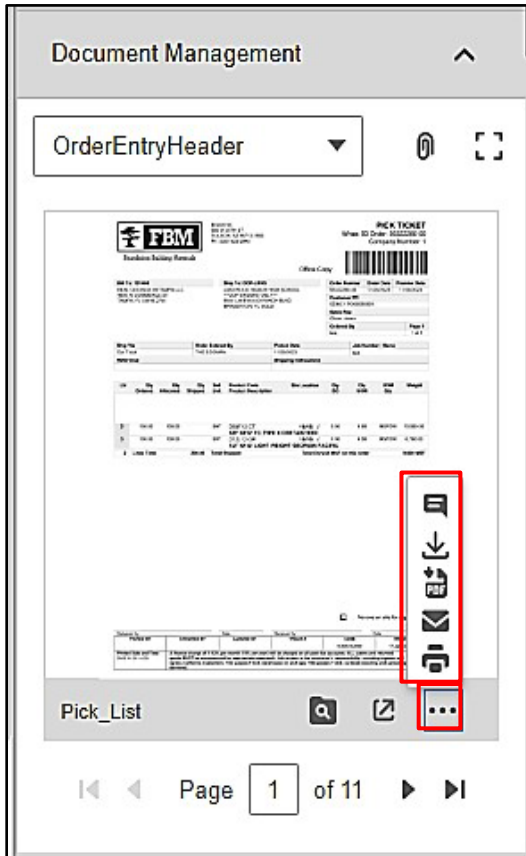
Scroll down to the Document Management section and select OrderEntryHeader.





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Click on the 3 dots to display options to download, email or print the document.



After completing delivery of sales orders and PO receipts, the signed Pick Ticket and PO Receiving Report can be emailed to idmcapture@fbmsales for proof of delivery or receipt as a batch. Supporting documents can be emailed with the Pick Ticket and PO Receiving Report which will be available for retrieval with the document in OEIO and POIP.

Sales order Proof of Delivery:

- Signed Pick Ticket
- Copy of customer purchase order
- Delivery stocking instructions
- Other documents related to the sales order.

Purchase Order Proof of Receipt:

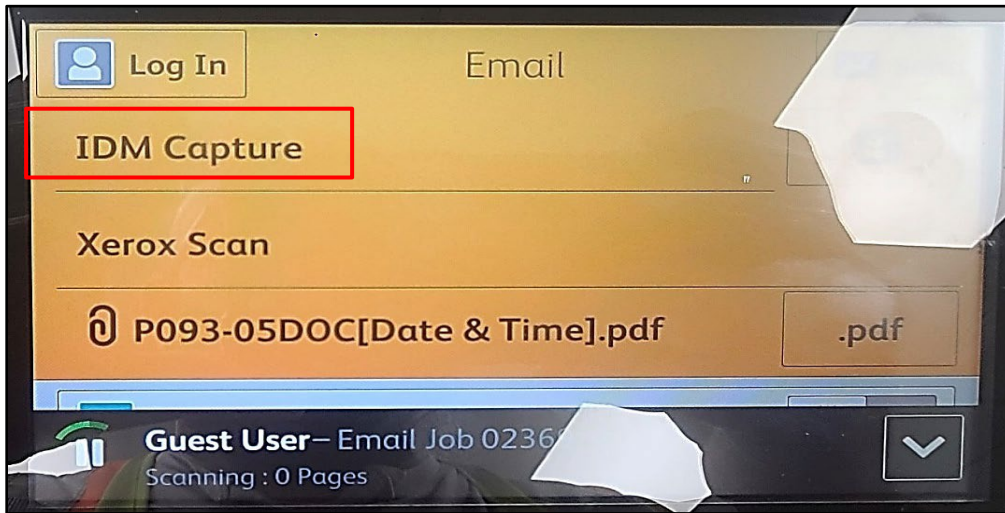
- PO Receiving Report
- PO Pre-receiving Report (PORII)
- Vendor Packing List
- Vendor Acknowledgement
- Bill of Lading



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- Other documents related to the PO.

The IDM Capture email address can be found in the Address Book on your branch multi-function printer to send Pick Tickets and PO Receiving Reports and related documents via email to ldmcapture@fbmsales.com.



After scanning your documents to IDM Capture, these documents will be filed in Document Management and can be retrieved in the Context App in the Document Management section.

