

Customer Self Information (CSI) - Manual

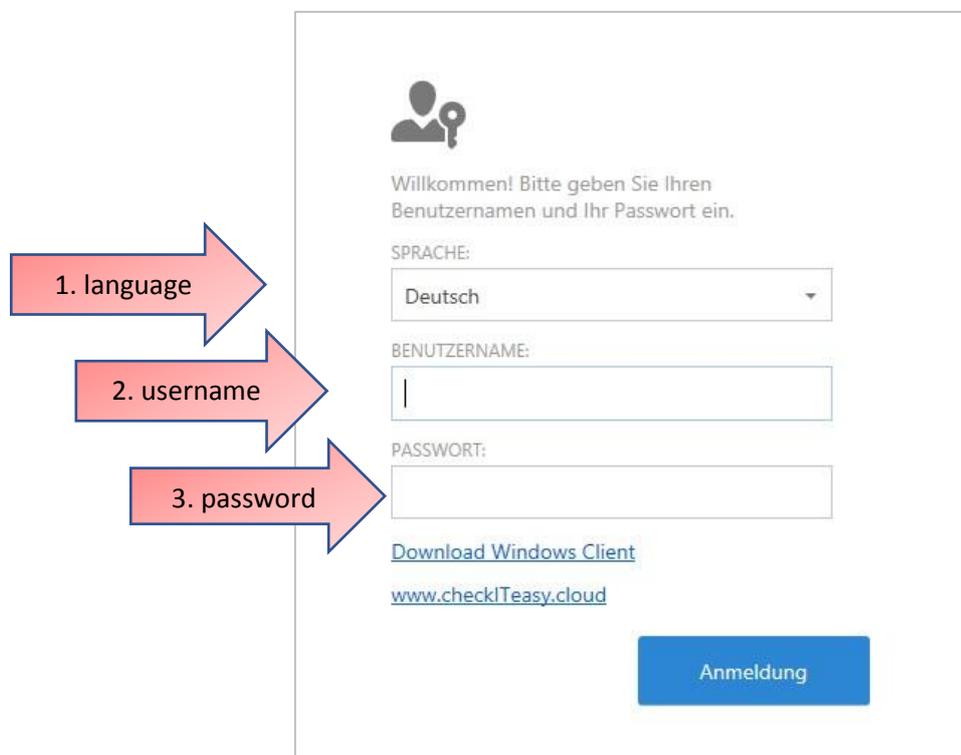
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1. registration

To help make the first-time use of our new CSI tool as straightforward as possible, this tutorial will provide you with a step-by-step guide to the tool's various uses. You can access the login either via our website www.guede.net or directly via the checkiteasy homepage <https://portal.checkiteasy.cloud/Login.aspx?ReturnUrl=%2f>.

First select the language. Afterwards enter your personal username and password, you received with the e-mail, in the spaces provided:



The image shows a login form with the following elements:

- A user icon at the top.
- Text: "Willkommen! Bitte geben Sie Ihren Benutzernamen und Ihr Passwort ein."
- Label: "SPRACHE:"
- Dropdown menu: "Deutsch"
- Label: "BENUTZERNAME:"
- Text input field: empty
- Label: "PASSWORT:"
- Text input field: empty
- Link: [Download Windows Client](#)
- Link: www.checkTeasy.cloud
- Button: "Anmeldung"

Three red arrows point to the form fields:

1. language (points to the language dropdown)
2. username (points to the username input field)
3. password (points to the password input field)

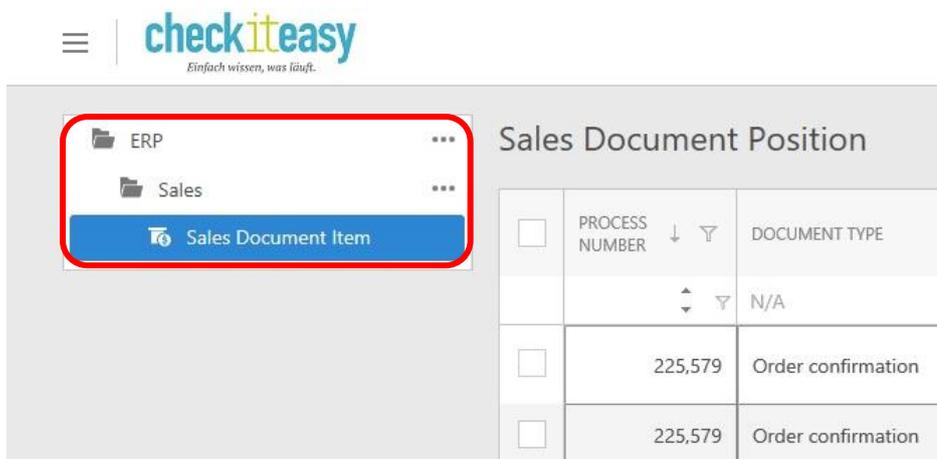
As soon as you log in the first time, you will be asked to change the password. The new password must contain at least 8 symbols.

2. orders

2.1 search for orders

You have the option of displaying individual order items or entire orders.

➔ Via **ERP** and **Sales** you will get to the respective menu items:



The screenshot shows the 'checkiteasy' ERP interface. On the left, a navigation menu is visible with a red box highlighting the 'ERP' and 'Sales' folders, and the 'Sales Document Item' option below them. The main area displays a 'Sales Document Position' table with the following data:

<input type="checkbox"/>	PROCESS NUMBER ↓ ▾	DOCUMENT TYPE
	↕ ▾	N/A
<input type="checkbox"/>	225,579	Order confirmation
<input type="checkbox"/>	225,579	Order confirmation

2.2 sales document item

Select the desired operation. You can search the orders using the process number of the order, the document number or your order number (reference number). Alternatively, you can sort the table by specific articles and delivery dates:

Sales Document Position												
PROCESS NUMBER	DOCUMENT TYPE	DOCUMENT NUMBER	REFERENCE NUMBER	REFERENCE CHARACTER	ITEM	CUSTOMER ARTICLE NUMBER	ARTICLE NUMBER	DESCRIPTION 1	DELIVERY DATE	QUANTITY	ORDERED	
	N/A											
<input type="checkbox"/>	225.579	Order confirmation	2019-608777	Test05	20.02.2019	1	B10128A2000	FEDERRING B 10 DIN 128	9/2/2019	1,000	1,000	
<input type="checkbox"/>	225.579	Order confirmation	2019-608777	Test05	20.02.2019	2	B12128A2000	FEDERRING B 12 DIN 128	9/2/2019	1,000	1,000	
<input type="checkbox"/>	225.579	Order confirmation	2019-608777	Test05	20.02.2019	3	B14128A2000	FEDERRING B 14 DIN 128	9/2/2019	1,000	1,000	
<input type="checkbox"/>	225.578	Order confirmation	2019-608776	Test 03	16.02.2019	1	Z1125A2A00	ZA-SCHEIBE 1 13 DIN 6	7/22/2019	1,000	1,000	
<input type="checkbox"/>	225.578	Order confirmation	2019-608776	Test 03	16.02.2019	2	ZENT1800100	ZENTRIERRING 18 MM	7/22/2019	1,000	1,000	
<input type="checkbox"/>	225.576	Order confirmation	2019-608774	Test03	18.02.2019	1	SKR0400100	SPERRKANTRING 4 WK	5/13/2019	1,000	1,000	
<input type="checkbox"/>	225.576	Order confirmation	2019-608774	Test03	18.02.2019	2	12798000500	FEDERRING M 12 DIN 7980	5/13/2019	1,000	1,000	
<input type="checkbox"/>	225.576	Order confirmation	2019-608774	Test03	18.02.2019	3	SKSM08A4000	SPERRKANTSCHIBE M	5/13/2019	1,000	1,000	
<input type="checkbox"/>	225.575	Order confirmation	2019-608773	TEST02	20.02.2019	1	A06127A2A00	FEDERRING A 6 DIN 127	6/17/2019	1,000	1,000	
<input type="checkbox"/>	225.575	Order confirmation	2019-608773	TEST02	20.02.2019	2	A08127A2A00	FEDERRING A 8 DIN 127	6/17/2019	1,000	1,000	
<input type="checkbox"/>	224.368	Order confirmation	2019-607571	TEST3	18.01.2019	1	146796A2A00	SPANNSCHIBE 14 DIN 6796	1/18/2019	2,000	2,000	

Within the list, you can also see which quantities have already been delivered and calculated and whether the item is fulfilled. For further information on the respective position, click on it at any point.

2.3 request documents

In the order or the respective order item you will find the button **Request pdf via Email** in the upper right corner. As soon as you click on the button, you will receive an e-mail with the concerning document.



3. various

3.1 change the layout of the tables

If you want to change the arrangement of the columns within the tables, hold the respective column with the left mouse button and move it to the desired position.

3.2 export the tables

If you want to export the tables, use the bar **Export to** and select the desired file type:

Sales Document Position													
Viewing options Sales Document Posi Export to Text to search...													
PROCESS NUMBER	DOCUMENT TYPE	DOCUMENT NUMBER	REFERENCE NUMBER	REFERENCE CHARACTER	ITEM	CUSTOMER ARTICLE NUMBER	ARTICLE NUMBER	DELIVERY DATE	QUANTITY	ORDERED			
	N/A												
<input type="checkbox"/>	225,579	Order confirmation	2019-608777	Test05	20.02.2019	1	B10128A2000	9/2/2019	1,000	1,000			
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<input type="checkbox"/>	224,368	Order confirmation	2019-607571	TEST3	18.01.2019	1	146796A2A00	1/18/2019	2,000	2,000			

3.3 invoke date of delivery

If you want to check the announced delivery date, you will find it in the corresponding column:

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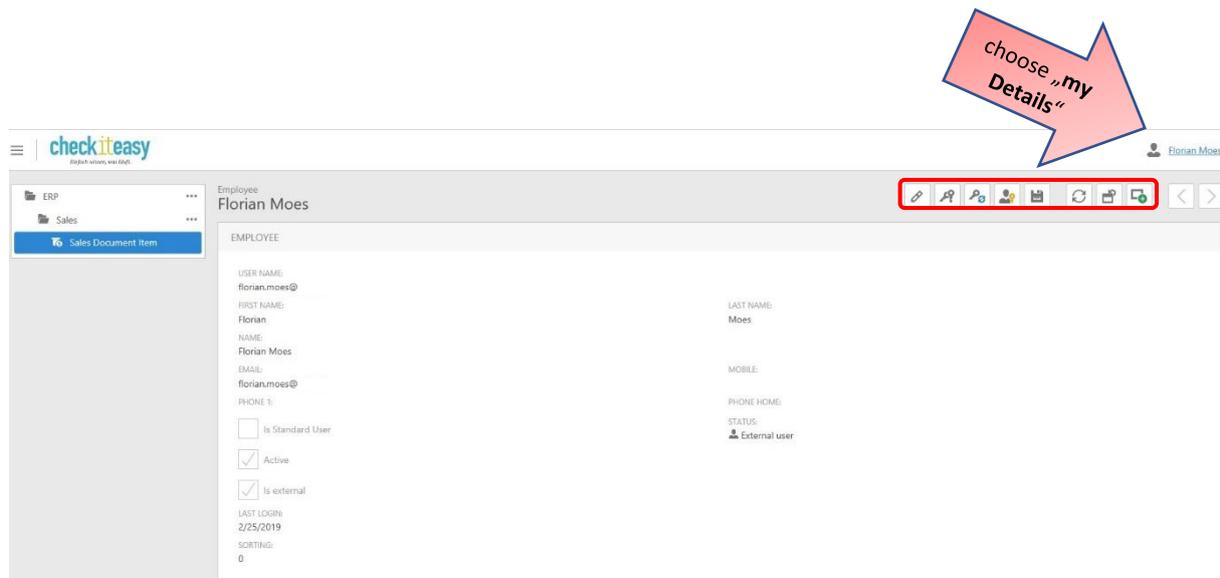
ERP Sales Sales Document Item

Sales Document Position

PROCESS NUMBER	DOCUMENT TYPE	DOCUMENT NUMBER	REFERENCE NUMBER	REFERENCE CHARACTER	ITEM	CUSTOMER ARTICLE NUMBER	ARTICLE NUMBER	DESCRIPTION 1	DELIVERY DATE	QUANTITY	ORDERED	DELIVERED
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225.579	Order confirmation	2019-608777	Test05	20.02.2019	3		B14128A2000	FEDERRING B 14 DIN 128	9/2/2019	1.000	1.000	
225.578	Order confirmation	2019-608776	Test 03	16.02.2019	1		Z125A2A00	ZA-SCHEIBE I 13 DIN 6135	7/22/2019	1.000	1.000	
225.578	Order confirmation	2019-608776	Test 03	16.02.2019	2		ZENT1800100	ZENTRIERRING 18 MM	7/22/2019	1.000	1.000	
225.576	Order confirmation	2019-608774	Test03	18.02.2019	1		SKR0400100	SPERRKANTRING 4 W	5/13/2019	1.000	1.000	
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224.368	Order confirmation	2019-607571	TEST3	18.01.2019	1		146796A2A00	SPANNSCHEIBE 14 DIN 6796	1/18/2019	2.000	2.000	

4. invoke master data and access data

The tool also gives you the opportunity to view your master data or change your access data. After choosing **my Details** in the upper right corner, you will reach the following menu item:



In the upper bar various buttons are deposited. Here you have the possibility to change your master data or the password or to generate new access data.

5. contact

Do you still have questions regarding the functionality or the possibilities of the tool? You still see improvement opportunities in the provision of information or in usability? Then feel free to contact us.

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