USING THE ORDER STATUS TILE IN THE CUSTOMER CONNECT PORTAL

Searching in the Order Status Tile in the Customer Portal

To access the Order Status tile:

- 1. Start at the Home Page for Customer Portal.
- 2. Click the **My Apps** tab.



- 3. The **My Apps** tile page will open. The number and variety of tiles that you see will vary by role.
- 4. Click the Order Status tile.

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My Apps 4			
Order Status	FAQ	Customer Survey	
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- 5. The Order Status page will open.
- 6. To ensure that you are starting a new **Search** without any unwanted data, click **Clear**. (This also **Clears** the auto-populated **Date** range).
- 7. For this example, we are going to **Search** for **Orders** by **Plant** (though you have the option of using any of the displayed categories to **Search** by and the process is the same). Click the down arrow in the **Plant** line.

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Standard * 🗸 🗸					Go Hide Filter Bar Clear Filters (1)
From Planned Ship Date:	To Planned Ship Date:	Customer PO #:	SAP Order Number:	Shipment Number:	Invoice Number: 6
e.g. 12/31/2023	e.g. 12/31/2023				
Bill-To:	Sold-To:	Ship-To:	Store Number:	Plant Type:	Plant:
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Vehicle ID:	Created By:	Exclude Status:			
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- 8. A drop-down menu of **Plants**, listed alphabetically, opens.
- 9. Scroll through the list until you find the **Plant(s)** that you are looking for. In this case we will start by selecting **PHILADELPHIA-MS SWL**.

Standard * 💙					Go	Hide Filter Bar	Clear Filters (2)
From Planned Ship Date:	To Planned Ship Date:	Customer PO #:		SAP Order Number:		Shipment Numbe	r:
e.g. 12/31/2023 🛗	e.g. 12/31/2023						
Invoice Number:	Bill-To:	Sold-To:		Ship-To:		Store Number:	
	đ		ð		ð		
Plant Type:	Plant:	Vehicle ID:		Created By:		Exclude Status:	
<all> ~</all>	ORT-AL SWL ×						~
	NORTH BERGEN-NJ RLD R	RLD DIST 0971					
Order List (0)	ORLANDO-FL DIXIE VMI EV	WP 0456		Search		Q ↓↑ Sort	⊥ Excel 🔯
Sold-To Ship-To	OROVILLE-WA RM RLD SW	L 0906	port Mode	Status	Plant	Pl	anned Ship Date
	PALMETTO-FL MNTE LGST	PRT DIST 4054					
_		LD DIST 0063					
	PHILADELPHIA-MS SWL	0261					
-	PHOENIX-AZ DIST	0128					
	PHOENIX-AZ PCI RLD DIST	0673					
	PHOENIX-AZ PCI RI D SWI	4044					

Standard * Y					Go	Hide Filter Bar	Clear Filters (3)	
From Planned Ship Date:	To Planned Ship Date:	Customer F	PO #:	SAP Order Number:		Shipment Num	ber:	
09/16/2023	10/23/2023							
Invoice Number:	Bill-To:	Sold-To:		Ship-To:		Store Number:		
	ð		ð		ð			
Plant Type:	Plant:	Vehicle ID:		Created By:		Exclude Status		
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		ET THE OTTE	1012					
Onderstate	HARRISONVILLE-MO	UNVSL VMI SWL	0692	Consch			L Event 62	
Order List	HILLSBORO-IL HXSO	N VMI SWL	0998	Search			t <u> </u>	
Sold-To Ship-To		/MI EWP	sport Mode	Status	Plant		Planned Ship Date	
	JANESVILLE-WI UNVS	SL VMI SWL	0749					
	KANSAS CITY-TX BC	VMI SWL	4037					
	LANSING-MI UNVSL	/MI SWL	0680					
	MARYSVILLE-CA NOR	CAL VMI EWP	0953					
	MILLPORT-AL SWL		0363					
	MORGAN HILL-CA JS	N LB VMI DIST	4045					

10. Click on another **Plant** to add it to your selections (MILLPORT-MS SWL).

- 11. The Plant line reads 2 Items (the two Plants that you selected).
- 12. Click Go.
- 13. The Search displays 20 results in the Order List.

Order List (20)					Search	Q	↓↑ Sort <u>↓</u> Excel	ŵ
Sold-To	Ship-To	Order #	PO #	Transport Mode	Status	Plant	Planned Ship Date	
BIG BUILDERS LLC	BIG BLDR-WARSAW	00018181	00018181	Truck	Order Accepted	MILLPORT-AL SWL	05/30/2023	>
BIG BUILDERS LLC	BIG BLDR-WARSAW	00018143	00018143	Truck	Invoiced	PHILADELPHIA-MS SWL	05/15/2023	>
BIG BUILDERS LLC	BIG BLDR-WARSAW	00018142	00018142	Truck	Invoiced	PHILADELPHIA-MS SWL	05/11/2023	>
BIG BUILDERS LLC	BIG BLDR-WARSAW	00018242	00018242	Truck	Invoiced	PHILADELPHIA-MS SWL	05/11/2023	>
BIG BUILDERS LLC	BIG BLDR-WARSAW	00018248	00018248	Truck	Invoiced	PHILADELPHIA-MS SWL	05/11/2023	>

- 14. Use the **Search** box in the **Order List** section to filter your results.
- 15. For example, you could enter **Invoiced** to filter the **Order List** to only include **Orders** that have an invoiced **Status**.
- 16. Click the Search (Magnifying Glass) icon.

17. The Search yields 18 Orders that list Invoiced as their Status.

Order List (18)					16	Invoiced X Q	↓↑ Sort <u>↓</u> Excel	¢
Sold-To	Ship-To	Order #	PO #	Transport Mode	Status	Plant	Planned Ship Date	
BIG BUILDERS LLC	BIG BLDR-WARSAW	00018143	02368813	Truck	Invoiced	PHILADELPHIA-MS SWL	05/15/2023	>
BIG BUILDERS LLC	BIG BLDR-WARSAW	00018222	19881822	Truck	Invoiced	PHILADELPHIA-MS SWL	05/11/2023	>
BIG BUILDERS LLC	BIG BLDR-WARSAW	00018000	19344822	Truck	Invoiced	PHILADELPHIA-MS SWL	05/11/2023	>

18. Another way to filter your results is to use the **Sort** option. Click **Sort**.

Order List (18)					In	voiced	↓↑ Sort	ŝ
Sold-To	Ship-To	Order #	PO #	Transport Mode	Status	Plant	Planned Ship Date	
BIG BUILDERS LLC	BIG BLDR-WARSAW	0001814338	023688138	Truck	Invoiced	PHILADELPHIA-MS SWL	05/15/2023	>
BIG BUILDERS LLC	BIG BLDR-WARSAW	00018222	19881822	Truck	Invoiced	PHILADELPHIA-MS SWL	05/11/2023	>
BIG BUILDERS LLC	BIG BLDR-WARSAW	00018000	19344822	Truck	Invoiced	PHILADELPHIA-MS SWL	05/11/2023	>

19. The Sort pop-up window will open. You have the option of selecting a Sort Order (Ascending or Descending) and a Sort By (a list of categories that you'll need to scroll down to view all of them).



This will not reduce the number of Orders in the Order List, but it will organize them with different priorities based on your Sort selections.

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	 Status 				
2	 Transport Mode 				IE
	Ship To PO #				L
	O PO #				
	Order #				
	Ship-To				ł
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	Descending				I
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	Sort Order				l
tor	Sort			Reset	l

- 20. As an example, you could select Ascending as the Sort Order.
- 21. And then select **Sold-To** as the **Sort By** option.
- 22. Click **OK** to generate the **Sort** results.

You can continue Sorting and/or Searching by different categories and combinations to manipulate the data to find what you are looking for.

- 23. Once you have found your orders, you can view further information about the order. Click on the order you want to view.
- 24. It will open up a new screen with further details: **Items, Invoices, Partners, Packing List, Shipment Details** and **Notes.**

Items	Invoices	Partners Packing List Shipment D	etails Note	es				
	Item #	Description	SKU	Cust SKU	Order Quantity	Shipped Quantity	Unit Price	Total
	10	SoPine Kiln Wet S4S MR NGS 2"X12"-12'	71029234		4.000 PAC	4.000 PAC		PTS
	20	SoPine Kiln Wet S4S MR NGS 2"X10"-12'	71030457		7.000 PAC	7.000 PAC		PTS
	30	SoPine Kiln Wet S4S MR NGS 2"X06"-14'	71028569		1.000 PAC	1.000 PAC		PTS
	40	SoPine Kiln Wet S4S MR NGS 2"X06"-18'	71028570		2.000 PAC	2.000 PAC		PTS

- 25. The **Order** page will open in the default **Items** view.
- 26. This view shows you the **Item #**, **Description**, **SKU**, **Cust SKU** (if applicable), **Order Quantity**, **Unit Price**, and **Total**.

Reset

Sort

20

21

Sort Order

Sort By

Ship-ToOrder #

O PO #

Status

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Ship To PO #

Transport Mode

OK

22

Cancel

Ascending
 Descending

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SAP Ord	der Numbe	er: SDI0987889								
Ship To	o PO #:	PO #: 55000 Status	: Invoiced Weight: 19	93,284 LB	Order Amount:	PTS Created: A	NDERSLI 01/17/23			
Items	Invoices	Partners Packing Li	st Shipment Details	Notes						
	Item #	Description		SKU	Cust SKU	Order Quantity	Shipped Quantity	Unit Price	Total	

- 27. Clicking on the **Invoices** tab will open the invoice details. From here you can view the invoice, download and save it to your computer or print it out as required.
- 28. The **Packing List** tab will show you the details of the items that are included, and you will also be able to print or download a Packing list PDF if required.

SAP Order Numb	er: SDI0987889				
Ship To PO #:	PO #: \56000 Status: Inv	oiced Weight: 45,580.8 LB Order Am	ount: PTS Created: CORDEL	M 05/11/23	
		^			
Items Invoices	Partners Packing List S	hipment Details Notes			
Delivery	~ ii	Vehicle ID: 1761			<u>↓</u> Excel <u>↓</u> PDF
Item #	Material	Description	Identifier	Gross Weight	Shipped Quantity
10	71029234	SWL SP KWT S4S MR NGS 2X12-12	SDI0987889	2,995.200 LB	64.000 PCE
			SD10988389	2,995.200 LB	64.000 PCE
			SD10956889	2,995.200 LB	64.000 PCE
			SDI1087889	2,995.200 LB	64.000 PCE
20	71030457	SWL SP KWT S4S MR NGS 2X10-12	SD100977889	3,072.000 LB	80.000 PCE
			SDI09667889	3,072.000 LB	80.000 PCE

29. Clicking on the Shipment Details tab will show you the Shipment/BOL Mode, Delivery Shipment Status,

Shipped On, Plant, Planned Ship – Actual Ship, Shipment Appointment, and ETA.

30. If the order was sent by rail, you will also be able to view the **Railcar details.**

SAP Order Numbe	er: SDI0987889					
Ship To PO #:	PO #: 56000 Status: In	voiced Weight: 193,284 LB C	Order Amount: PTS Created	I: ANDERSLI 01/17/23		
Items Invoices	Partners Packing List	Shipment Details 29	^			
Shipment/BOL Mode	Delivery Shipment Status	Shipped On	Plant	Planned Ship Actual Ship	Shipment Appointment	ЕТА
504811462 Pail	809792659	60' Hi-Cube Boxcar UNION PACIFIC RAILROAD 888-870-8777	HUDSON BAY-SK OSB	01/27/2023 01/23/2023		2/9/2023
Railcar Details	Invoiced	TBOX667730				

Adapting Filters in the Order Status Tile

- 1. Start at the Home Page for <u>Customer Portal</u>.
- 2. Click the **My Apps** tab.
- 3. The **Application** tile page will open. The number and variety of tiles that you see will vary by role.
- 4. Click the **Order Status** tile.

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My Apps			
My Apps	-		
Order Status	FAQ	Customer Survey	
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- 5. The Order Status page will open.
- 6. To ensure that you are starting a new **Search** without any unwanted data, click **Clear**. (This also **Clears** the auto-populated **Date** range).

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Standard * 🗸 🗸				G	o Hide Filter Bar Clear Filters (1)
From Planned Ship Date:	To Planned Ship Date:	Customer PO #:	SAP Order Number:	Shipment Number:	Invoice Number: 6
e.g. 12/31/2023	e.g. 12/31/2023				
Bill-To:	Sold-To:	Ship-To:	Store Number:	Plant Type:	Plant:
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Vehicle ID:	Created By:	Exclude Status:			
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- 7. The Order Status page has pre-set Filter fields.
- 8. If you want to change the **Filters** that are displayed, click **Filters**.

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Standard * 🗸 🗸				Go	Hide Filter Bar Clear	Filters (1)
From Planned Ship Date:	To Planned Ship Date:	Customer PO #:	SAP Order Number:	Shipment Number:	Invoice Number:	
e.g. 12/31/2023	e.g. 12/31/2023					8
Bill-To:	Sold-To:	Ship-To:	Store Number:	Plant Type:	Plant:	
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Vehicle ID:	Created By:	Exclude Status:				
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- 9. The **Filters** pop-up menu will open.
- 10. The Fields that are checked are the ones that are displayed on the Order Status page (scroll down to view all).
- If you do not feel that you will use some Fields, you can remove them. For this example, we will remove the Plant, Invoice Number and Vehicle ID fields by unchecking them (you will need to scroll through the menu to locate them all).
- 12. Click **OK**.
- 13. You are returned to the **Order Status** page.

Filters	
All 🗸	Show Values
Search for Filters	Q
🕻 Field	Active
From Planned Ship Date	* ^ * *
✓ To Planned Ship Date	۰
Customer PO #	
SAP Order Number	
Shipment Number	
✓ Invoice Number	
Bill-To	
Sold-To	
Ship-To	
Store Number	
✓ Plant Type	۰
✓ Plant	
Vehicle ID	
	12 OK Cancel

14. The unchecked **Fields** no longer display. This option can give you a cleaner looking page that is easier to navigate.

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Standard * 🗸 🗸				Go	Hide Filter Bar Clear	Filters (1)
From Planned Ship Date:	To Planned Ship Date:	Customer PO #:	SAP Order Number:	Shipment Number:	Bill-To:	
e.g. 12/31/2023	e.g. 12/31/2023					ð
Sold-To:	Ship-To:	Store Number:	Plant Type:	Plant:	Created By:	
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Exclude Status:						
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15. Any **Fields** that you remove via the **Filters** button can be added back to your page by using the **Filter** and selecting the **Fields** that you want to return to the default view.

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Standard * 🗸 🗸				Go	Hide Filter Bar Cle	ar Filters (1)
From Planned Ship Date:	To Planned Ship Date:	Customer PO #:	SAP Order Number:	Shipment Number:	Bill-To:	
e.g. 12/31/2023	e.g. 12/31/2023					đ
Sold-To:	Ship-To:	Store Number:	Plant Type:	Plant:	Created By:	
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Exclude Status:						
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16. To save the filter view that you just modified, click on the caret next to **Standard.**

17. From the dropdown, select Save As.

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Standard * 🔽 16						Go Hid	de Filter Bar	Clear	Filters
My Views	Date:	Custome	r PO #:	Shipment	Number:	Invoid	e Number:		
Standard	3 🛱								
	-	Ship-To:		Store Num	ber:	Creat	ed By:		
	đ		đ						
					Search	Q	↓ ↑ Sort	↓ Excel	\$
	Order #	PO #	Transport Mode	Status	Plant		Planned S	Ship Date	
	-		No Data						
Save As Manage									

- 18. On the next screen, give the customized view a name, for example, **Everyday View** and check the box next to **Apply Automatically.**
- 19. Click Save.

From Planned Ship	Date:	To Planned Ship	Date:	Customer PO #:	Invoice Nur	nber:	Bill-To:	
09/16/2023		10/23/2023						đ
Sold-To:		Ship-To:		Store Number:	Plant Type:		Plant:	
	ð		ð		<all></all>	~		~
rder List						Search	Q Lt :	Sort ↓ Excel ≸
old-To	Ship-To		Order : Sa	we View	tatus	Plant		Planned Ship Date
			18	veryday View				
				Set as Default				
				Apply Automatically				
					a –			

20. This will save the filter view you just customized. This saved filter view is also known as **Variant.** The next time you log into the portal, you will be able to toggle between **Standard View** and **Variants.** You can have multiple **Variants** saved.