



750 N. BAKER DRIVE, ITASCA, IL 60143 • 1.800.419.4583 • F: 888.371.8314

CGM Customer Portal Navigation

1. Once logged into the customer portal there are five options to obtain various information. This article will help you navigate and determine where to go to get the information you are looking for.



ACCOUNT ACTIVITY



VIEW TRANSACTIONS



VIEW ORDERS



ORDER ENTRY

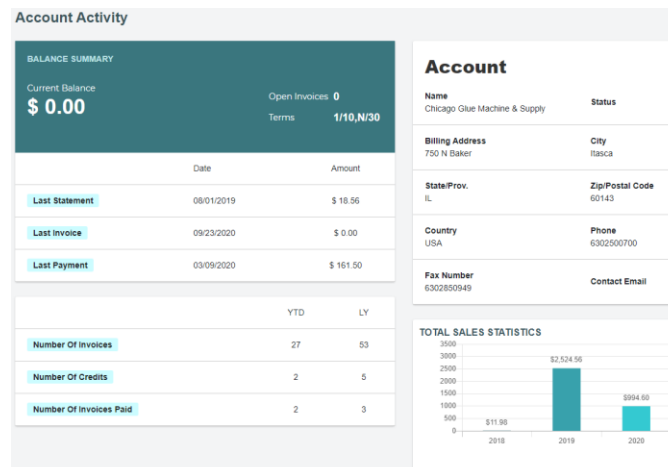


CONTACT US

2. As you navigate through the various pages you have the option to go back to the home page (image above) or go directly to the other options.

HOME ACCOUNT ACTIVITY VIEW TRANSACTIONS VIEW ORDERS ORDER ENTRY

3. Account Activity- This view will have various information about your company and account with CGM.
 - a. It will show:
 - i. Current Balance
 - ii. Number of Open Invoices
 - iii. Current Credit Terms
 - iv. Your Last Statement, Invoice, and Payment with the date and amount of those items.
 - v. YTD and LY Number of Invoices, Number of Credits, and Number of Invoices Paid.
 - vi. Various company information like billing address, phone number, and email.
 - vii. Total Sales Statistics over three years.





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4. View Transactions- This view has all of your transactions with CGM. There are two filters that you can access via a drop down arrow that will help you narrow down what you are looking for.

a. Your options for the first drop down are:

- i. Invoice
- ii. Unapplied Cash
- iii. Debit Note
- iv. Credit Note
- v. Interest
- vi. Prepayment
- vii. Receipt
- viii. Refund

b. Your option on the second drop is Open Only

View Transactions

Transaction Type: All Show: All Transactions per page: 10

TYPE	DOCUMENT NO.	DOC.DATE	DUE DATE	PO#	ORIG.AMT	APPLIED AMT	BALANCE
INVOICE	183885	09/23/2020	10/23/2020	RA# 8121	\$ 0.00	\$ 0.00	\$ 0.00
INVOICE	183748	09/15/2020	10/15/2020	SAMPLE/ ADAM	\$ 0.00	\$ 0.00	\$ 0.00
INVOICE	183682	09/09/2020	10/09/2020	ADAM IN THE LAB	\$ 0.00	\$ 0.00	\$ 0.00
INVOICE	183664	09/08/2020	10/08/2020	SAMPLE/ JOE	\$ 0.00	\$ 0.00	\$ 0.00
INVOICE	183465	08/25/2020	09/24/2020	SAMPLE/ HUNTER	\$ 0.00	\$ 0.00	\$ 0.00
INVOICE	183129	07/30/2020	08/29/2020	WARRANTY	\$ 0.00	\$ 0.00	\$ 0.00
INVOICE	182934	07/17/2020	08/16/2020	BRAD	\$ 0.00	\$ 0.00	\$ 0.00
INVOICE	182872	07/15/2020	08/14/2020	WARRANTY	\$ 0.00	\$ 0.00	\$ 0.00
INVOICE	182810	07/10/2020	08/09/2020	SAMPLE STEVE	\$ 0.00	\$ 0.00	\$ 0.00
INVOICE	182616	06/25/2020	07/25/2020	DEMOADAM	\$ 0.00	\$ 0.00	\$ 0.00

Next Page >

c. You can also access the invoice document by clicking on the Document Number

TYPE	DOCUMENT NO.	DOC.DATE	DUE DATE	PO#	ORIG.AMT	APPLIED AMT	BALANCE
INVOICE	183885	09/23/2020	10/23/2020	RA# 8121	\$ 0.00	\$ 0.00	\$ 0.00



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- d. Below is an example of what that invoice would look like. There is also an option to print the invoice in the bottom right.

INVOICE NUMBER 183885		INVOICE DATE 09/23/2020				
ORDER NO. 118170	ORDER DATE 09/22/2020	CUSTOMER CH200	SALESPERSON HOUSE	PO# RA# 8121	SHIP VIA UPSGN	TERMS NET030

INVOICE [Web Copy](#)

Chicago Glue Machine and Supply Co
750 Baker Drive
Itasca, IL
60143-1308 United States
Phone: 603-250-0700

INVOICED TO:
Chicago Glue Machine & Supply
750 N Baker
Itasca, IL, USA
60143
Phone: 6302500700

SHIPPED TO:
[REDACTED]

LINE	ITEM NO.	DESCRIPTION	UOM	QTY	QTY SHIPPED	QTY B/ORDER	UNIT PRICE	LINE TOTAL
1	FREIGHT	Shipping and Handling Charge	Freight	1	1	0	\$ 0.00	\$ 0.00
2	WARRANTY VENDOR	PN: KNS0045 - Kit, Heater Manifold 240V	Each	1	1	0	\$ 0.00	\$ 0.00

ITEM TOTAL
SHIPPING SUBTOTAL
SUBTOTAL
TAX
TOTAL

\$ 0.00
\$ 0.00
\$ 0.00
\$ 0.00
\$ 0.00

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5. View Orders- This view shows all orders that you have placed with CGM. There are three filters to narrow down the information you are trying to find.
- Your options for the first drop down are:
 - Orders
 - Items
 - Your options on the second the drop down are:
 - Active
 - Future
 - Standing
 - Quote
 - The options on the third drop down are:
 - All
 - Open Only



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View Orders

View By: **Orders** Type: **All** Show: **All** Orders per page: 10

DOCUMENT NO.	DOC.DATE	DESCRIPTION	PO#	STATUS	BALANCE
118211	09/24/2020	TEST	TEST	AWAITING SHIPMENT	\$ 0.00
118193	09/23/2020		QUALITY HOLD	AWAITING SHIPMENT	\$ 0.00
118170	09/22/2020	Warranty Issue PO 70137 / 70087 / Order 117804	RA# 8121	INVOICED	\$ 0.00
118152	09/21/2020	TEST CLOSED 9/21/20	DO NOT SHIP	AWAITING SHIPMENT	\$ 0.00
118147	09/18/2020	TEST and CLOSED	TEST FROM NIREL - DELE	AWAITING SHIPMENT	\$ 0.00

- d. You can also access Order Confirmations from this view by clicking on the Document number that you would like to access.

View Orders

View By: **Orders** Type: **All** Show: **All** Orders per page: 10

DOCUMENT NO.	DOC.DATE	DESCRIPTION	PO#	STATUS	BALANCE
118211	09/24/2020	TEST	TEST	AWAITING SHIPMENT	\$ 0.00
118193	09/23/2020		QUALITY HOLD	AWAITING SHIPMENT	\$ 0.00
118170	09/22/2020	Warranty Issue PO 70137 / 70087 / Order 117804	RA# 8121	INVOICED	\$ 0.00
118152	09/21/2020	TEST CLOSED 9/21/20	DO NOT SHIP	AWAITING SHIPMENT	\$ 0.00

- e. Once clicking on the Document Number you should see all the details from that order.

ORDER NUMBER 118193 ORDER DATE 09/23/2020

REFERENCE	PO#	CUSTOMER	SALESPERSON	SHIP VIA	TERMS
MH	QUALITY HOLD	CHI200	ILREP		NET030

ORDER [Web Copy](#)

Chicago Glue Machine and Supply Co
750 Baker Drive
Itasca, IL
60143-1308 United States
Phone: 603-250-0700

INVOICED TO:

Chicago Glue Machine & Supply
750 N Baker
Itasca, IL, USA
60143
Phone: 6302500700

SHIPPED TO:

Chicago Glue Machine & Supply
750 N Baker
Itasca, IL, USA
60143
Phone: 6302500700

LINE	ITEM NO.	DESCRIPTION	UOM	QTY	QTY SHIPPED	QTY B/ORDER	UNIT PRICE	LINE TOTAL
1	2126108N	Hose, L4 RTD2, 8 ft, 120V Dura-Braid Cover Ref# 1014140	Each	1	0	1	\$ 0.00	\$ 0.00
2	754528899	L4 Handgun, 120V, RTD, No Hose Ref# 1020534	Each	1	0	1	\$ 0.00	\$ 0.00

ITEM TOTAL \$ 0.00
SHIPPING SUBTOTAL \$ 0.00
SUBTOTAL \$ 0.00
TAX \$ 0.00
TOTAL \$ 0.00

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- f. You can also see a sneak peak of that order by clicking the + symbol in the main view.

View Orders

View By: Orders | Type: All | Show: All | Orders per page: 10

DOCUMENT NO.	DOC. DATE	DESCRIPTION	PO#	STATUS	BALANCE
 118211	09/24/2020	TEST	TEST	AWAITING SHIPMENT	\$ 0.00
 118193	09/23/2020		QUALITY HOLD	AWAITING SHIPMENT	\$ 0.00
ITEM NO.	DESCRIPTION	SHIP DATE	QTY	UOM	LINE TOTAL
754528899	L4 Handgun, 120V, RTD, No Hose Ref# 1020534	0	1	Each	\$ 0.00
2126108N	Hose, L4 RTD2, 8 ft, 120V Dura-Braid Cover Ref# 1014140	0	1	Each	\$ 0.00
 118170	09/22/2020	Handgun Ref# 117804	PO 70137 / 70087 / Order Ref# 8121	INVOICED	\$ 0.00

6. Order Entry- This view allows you to place an order with CGM

Order Entry ?

Ship-to Location: 1125 | PO Number: []

ITEM	DESCRIPTION	QUANTITY	UOM	PRICE	EXT. PRICE	REMOVE
ADD ITEM Search for an item... [Q]						

SUBTOTAL \$0.00

Clear | Place Order

- a. The various ship- to locations that we have in our system for your account will be loaded and can be accessed by selecting the drop down arrow in that field.

Order Entry ?

Ship-to Location: 1125 | PO Number: []

ITEM	DESCRIPTION	QUANTITY	UOM	PRICE	EXT. PRICE	REMOVE
ADD ITEM Search for an item... [Q]						

SUBTOTAL \$0.00

Clear | Place Order



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- b. Input your PO into the text section provided

Order Entry ⓘ

Ship-to Location: 1125

PO Number:

ITEM	DESCRIPTION	QUANTITY	UOM	PRICE	EXT. PRICE	REMOVE
ADD ITEM Search for an item...						

SUBTOTAL \$0.00

Clear Place Order

- i. By clicking the drop down arrow in this section you can select your requested delivery date and add any shipping instructions or other comments for your order. This drop down also exposes the full address from your ship-to location.

Order Entry ⓘ

Ship-to Location: 1125

PO Number:

ITEM	DESCRIPTION	QUANTITY	UOM	PRICE	EXT. PRICE	REMOVE
ADD ITEM Search for an item...						

SUBTOTAL \$0.00

Clear Place Order

Order Entry ⓘ

Ship-to Location: 1125

Address 1: 1125 W. Taylor Rd

Address 2: Attn: Dimitra Shiflet

Country: City: Romeoville

State/Province: IL Zip/Postal Code: 60446

Phone: 6308102032 Email:

PO Number:

Request Delivery Date:

Comments/Shipping Instructions:

- c. Search the item that you would like to place an order for. If you have a unique part number stored into our system that corresponds to our part number, you will be able to input your number.

ITEM	DESCRIPTION	QUANTITY	UOM	PRICE	EXT. PRICE	REMOVE
HMM32PEL	Hot Melt Adhesive Pellets 25 lb Case / 1,350 lb Skid	<input type="text" value="1"/>	Pounds	\$0.00	\$0.00	
ADD ITEM Search for an item...						



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- i. Be sure to select the correct quantity that you would like. Be sure to check the Units of measure when selecting a quantity.

ITEM	DESCRIPTION	QUANTITY	UOM	PRICE	EXT. PRICE	REMOVE
HMM32PEL	Hot Melt Adhesive Pellets 25 lb Case / 1,350 lb Skid	1	Pounds	\$0.00	\$0.00	

ADD ITEM

Search for an item...

- ii. If you have a contract price set up into our system the price will automatically pull in. If you do not have a contract price, you can still place your order and a CGM associate will confirm your price later.
- d. Finally, select place your order.

Order Entry

Ship-to Location: 1125 PO Number:

ITEM	DESCRIPTION	QUANTITY	UOM	PRICE	EXT. PRICE	REMOVE
HMM32PEL	Hot Melt Adhesive Pellets 25 lb Case / 1,350 lb Skid	1	Pounds	\$0.00	\$0.00	

ADD ITEM

Search for an item...

SUBTOTAL \$0.00

- e. After placing your order there will be a pop with your order number.

**Order number:
118220**

Your order has been placed successfully.
Please copy this for your reference

- f. You can also print the confirmation by selecting View/Print in the pop up.

**Order number:
118220**

Your order has been placed successfully.
Please copy this for your reference



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- i. You will see you confirmation and you can select to print that confirmation if you would like.

ORDER NUMBER 118221 ORDER DATE 09/24/2020

REFERENCE Entered on portal by: anorton	PO#	CUSTOMER CHI200	SALESPERSON ILREP	SHIP VIA	TERMS NET030
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ORDER [Web Copy](#)

Chicago Glue Machine and Supply Co
750 Baker Drive
Itasca, IL
60143-1308 United States
Phone: 603-250-0700

INVOICED TO:
Chicago Glue Machine & Supply
750 N Baker
Itasca, IL, USA
60143
Phone: 6302500700

LINE	ITEM NO.	DESCRIPTION	UOM	QTY	QTY SHIPPED	QTY B/ORDER	UNIT PRICE	LINE TOTAL
1	HME0736	Hot Melt Adhesive Pillows 25 lb Case / 1,350 lb Skid	Pounds	1	0	1	\$ 0.00	\$ 0.00

Comment:
[REDACTED]

ITEM TOTAL	\$ 0.00
SHIPPING SUBTOTAL	\$ 0.00
SUBTOTAL	\$ 0.00
TAX	\$ 0.00
TOTAL	\$ 0.00

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Congratulations!!! You have placed your order CGM. You can sit back, kick up your feet, and rest assured that your order is taken care of and will be on its way shortly. If you need anything else or have any other questions please give us call at 630-250-0700!!!