



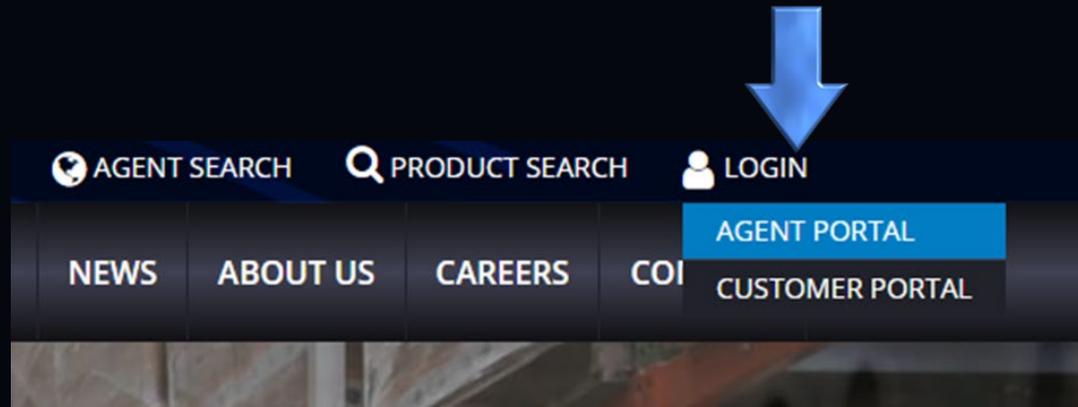
CANTEX

AGENT TRAINING—AGENT PORTAL

Agent Portal Instructions

Click on this link to access the Web page: <https://www.cantexinc.com/>

You will see a LOGIN icon at the top right of the website. When you click on the LOGIN icon a drop down menu will appear. Select AGENT PORTAL and click on it.



You should now see this login screen.

User Name: If you have not been assigned a username, please contact CANTEX customer service at esm@cantexinc.com.

Password: You will be assigned Cantex@2024! as a temporary password. You will be prompted to change this password the first time you log in.

To stay logged in you can use the Remember me tab.

Also note: There is a Forgot Password link. You can use this to enter your user name or email address to reset your password.

AGENT SEARCH PRODUCT SEARCH LOGIN

CANTEX HOME PRODUCTS RESOURCES NEWS ABOUT US CAREERS CONTACT

You should now see the login screen:

User Name: *

Password: *

Login

Remember me [Forgot Password?](#)

Find and Track Orders

Once you're logged in, you will be taken to the first form which is the Find and Track Orders form on the Header Screen (see below). This screen can also be accessed from other pages by clicking on Inquiry (at the top) then Find and Track Orders.



Welcome, Bruce! Choose a Ship To # or click on Find Orders to get started. Alternatively, an order can be started by selecting an order type under Place Order above.

Ship To #:

Order Number:

PO #:

Item Number:

Order Type:

Invoice #:

Order Date

From:

To:

Requested Date

From:

To:

Ship To	Order #	Document Type	PO #	Order Amount	Order Date	Requested Date
No record found.						

- Use this form to find orders with any data combination entered in the header section and clicking Find Orders.
- The flashlight icons next to Ship To # and Item Number can be used to find Ship To account #'s or Item #'s.

FINDING ORDER INFORMATION

CANTEX

Find and Track Orders

EXAMPLE: See below. Note that I have selected a specific Ship To # and clicked Find Orders to populate the grid section below the header section. Also note that there are arrows with will allow you to scroll forward or backward to find the data you wish to see.

Welcome, Bruce! Choose a Ship To # or click on Find Orders to get started. Alternatively, an order can be started by selecting an order type under Place Order above.

Ship To #:

Order Number:

PO #:

Item Number:

Order Type:

Invoice #:

Order Date
From:

To:

Requested Date
From:

To:

[Find Orders](#) [Reset Filters](#)

Ship To	Order #	Document Type	PO #	Order Amount	Order Date	Requested Date		
725526	2626989	SA	TEST ORDER 6-10-18	\$0.00	6/10/2018	6/10/2018	Order Details	Order Documents
725526	2625209	SA	278343	\$9,224.63	5/31/2018	6/5/2018	Order Details	Order Documents
725526	2606689	SA	274926	\$313.50	2/09/2018	2/21/2018	Order Details	Order Documents
725526	2581148	SA	268773	\$735.70	9/13/2017	9/15/2017	Order Details	Order Documents
725526	2575335	SG	267680	\$9,952.84	8/15/2017	8/15/2017	Order Details	Order Documents
725526	2572681	SG	266879	\$13,413.08	8/1/2017	8/1/2017	Order Details	Order Documents
725526	2553246	SG	263179	\$69.70	4/18/2017	4/18/2017	Order Details	Order Documents

<< < > >> Total record found: 7. Displaying record 1 to 7.

Clicking on Order Details (next to last column on far right of the grid) will open another form which displays the order details.

FINDING ORDER INFORMATION

Order Details

EXAMPLE: Note that in the status column in the example below this order has been Invoiced.

Since this has been Invoiced you will see at the bottom of the screen that you can reprint an Invoice by clicking on the Invoice # displayed shown below.

Back to Find and Track Orders

Order Header

Order #: 252509 Order Type: SA
Order Date: 5/31/2018 Ordered By:
PO Reference: 278343 Hold Code:

Billing Address

725526
BOOTH ELECTRIC SUPPLY AD
101 E SECOND ST
ELMIRA NY 14901

Shipping Address

725526
BOOTH ELECTRIC SUPPLY AD
101 E SECOND ST
607-733-9188 SARAH
ELMIRA NY 14901

Order Note

pricing per rich freight allowed per rich

Order Details

Line #	Item #	Item Description	Requested Date	Shipment #	Freight Handling Code	Status	UOM	Qty. Ord.	Qty. Shippable	Qty. BackOrd.	Qty. Cancelled	Cantex Price	Price Override	Ext. Price	Weight	
1.000	AS2AG12	3/4 PVC TC-40 10'BE	6/5/2018	2843427	PP	Invoiced	FT	4400	4400	0	0	\$18.6200	\$18.62	\$819.28	1,013.32 Lbs	Shipment Information
2.000	AS2BE12	1 1/2 PVC TC-40 10'BE	6/5/2018	2843427	PP	Invoiced	FT	2250	2250	0	0	\$46.2800	\$46.28	\$1,041.30	1,282.80 Lbs	Shipment Information
3.000	AS2CA12	2 PVC TC-40 10'BE	6/5/2018	2843427	PP	Invoiced	FT	5600	5600	0	0	\$58.6200	\$58.62	\$3,282.72	4,294.73 Lbs	Shipment Information
4.000	AS2CE12	2 1/2 PVC TC-40 10'BE	6/5/2018	2843427	PP	Invoiced	FT	930	930	0	0	\$91.8900	\$91.89	\$854.58	1,130.63 Lbs	Shipment Information
5.000	AS2DA12	3 PVC TC-40 10'BE	6/5/2018	2843427	PP	Invoiced	FT	1760	1760	0	0	\$112.3200	\$112.32	\$1,976.83	2,870.63 Lbs	Shipment Information
6.000	AS3CA12	2 UL SCH-80 10'BE	6/5/2018	2843427	PP	Invoiced	FT	1400	1400	0	0	\$89.2800	\$89.28	\$1,249.92	1,473.27 Lbs	Shipment Information

Summary

Weight: 120653.30
Order Total: \$9,224.63

Order Documents

Click Invoice # to Reprint

2465699

Reprint all Invoices

- If the Status was at Ship Confirmed, for example, you would be able to Print a BOL.
- **All printouts will come to your email account.**
- Clicking on the Shipment Information (far right column) will display Carrier and Tracking # information if available.

Check Price and Availability

1. You will need to either enter the Ship To #, Item Number, and Branch Plant or find them using the flashlight next to the field.
2. Quantity will default to 1 if left blank.
3. Click Get Price and Availability.



Check Price And Availability

Ship To, Item Number, and Branch Plant are required.

Ship To #: 725526
Item Number: 5133823
Branch Plant: 101
Quantity:

[Get Price And Availability](#)

- You should now see the next form ...

Check Price And Availability

Ship To, Item Number, and Branch Plant are required.

Ship To #: 725526
Item Number: 5133823
Branch Plant: 101
Quantity: 1

[Get Price And Availability](#)

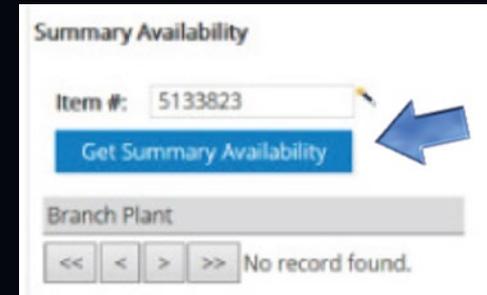
1/2 UL40 90 BND STD R
1 PL = 108 CA / 1 CA = 50 EA [View Summary Availability](#)

Unit Price:	\$24.1000	Extended Price:	\$24.10
Availability:	14105	UOM:	C



Summary Availability

Enter an Item Number or search and select one using the flashlight next to the field and click Get Summary Availability.



You will now see the grid form with branch plants that stock the item.

Summary Availability

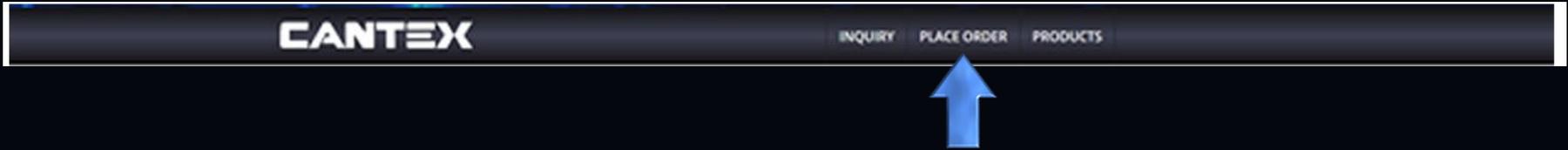
Item #: 5133823 1/2 UL40 90 BND STD R 1 PL = 108 CA / 1 GA = 50 EA

Get Summary Availability

Branch Plant	City/State	On Hand	Committed	Available	On Receipt
100	MINERAL WELLS TX	91755	1080	90675	0
101	AUBURNDALE FL	15905	1800	14105	0
106	KINGMAN AZ	10285	50	10235	0
116	Wood Dale IL	4650	0	4650	0
123	Indianapolis IN	1790	100	1690	0
125	CANTON MI	190	0	190	290
126	KENT WA	450	50	400	0
127	Clifton NJ	3445	100	3345	0
134	NORCROSS GA	1115	0	1115	400
137	Harahan LA	5589	0	5589	0

<< < > >> Total records found: 11. Displaying record 1 to 10.

Placing Orders



Hovering over Place Order in the menu bar at the top of the screen will display the following drop down menu:

- Agent Order Entry
- Agent Shipping Orders
- Transfer Order Entry
- Lowes Only Transfer Order Entry
- Agent Inquire/Receive Transfer Order

Agent Order Entry

When you select AGENT ORDER ENTRY in the PLACE ORDER drop down menu the Order Info form below will appear.

Order Info - CANTEX Portal

Ship To #: 725526

PO Number: BRUCE'S TEST

Shipping Method: Freight Prepaid

Job Site: No

Requested Date:

Next

- This order form should be used to place standard orders that should be placed against either Texas (100), Florida (101), Ohio (103), or Arizona (106).
- These will get the order type SA.
- Enter or select a Ship To #, PO Number (mandatory), Shipping Method (defaults to Freight Prepaid), Job Site flag (mandatory), and Request Date (if left blank, it will default to today's date).
- After the form is completed, click next.
- Orders should only be placed against the assigned shipping lanes for your region.

Grid Entry Form

After you click next, you should arrive at the Grid Entry form below.

- Note: the default # of lines is 10. However, if more are needed you can add rows by clicking on +1 Row (for 11 rows), +5 (for 15 rows), or +10 (for 20 rows). If you have a 30 line order, you can click on +10 twice.
- If you have a 1 line order, simply enter it and leave the rest of the rows blank.
- Leaving the Branch Plant blank (preferred for this type of order) will allow the system to retrieve the appropriate Branch based upon the Ship To account and Item entered.
- Note the red flag next to each line. Hovering over this flag will tell you the item is invalid because none have been entered/selected.

Order Type: Agent Order, SA
Selected Customer: BOOTH ELECTRIC SUPPLY-AD [725526]
PO Number: BRUCE'S TEST
Clear Order and Deselect Customer

+ 1 Row + 5 Rows + 10 Rows

Job Site	Branch Plant	Item #	Qty	Description	Sub Class	Price Override	Unit Price	Ext. Price	Requested Date	
No						0	\$0.0000	\$0.00	6/14/2018	Remove
No						0	\$0.0000	\$0.00	6/14/2018	Remove
No						0	\$0.0000	\$0.00	6/14/2018	Remove
No						0	\$0.0000	\$0.00	6/14/2018	Remove
No						0	\$0.0000	\$0.00	6/14/2018	Remove
No						0	\$0.0000	\$0.00	6/14/2018	Remove
No						0	\$0.0000	\$0.00	6/14/2018	Remove
No						0	\$0.0000	\$0.00	6/14/2018	Remove
No						0	\$0.0000	\$0.00	6/14/2018	Remove
No						0	\$0.0000	\$0.00	6/14/2018	Remove

Clear Order Submit Order Order/Invoice Total: \$0.00 Update All

Note: When entering your orders on the portal **never** change the branch plant. Distributors are set up with unique shipping lanes per their branch so the correct branch plant will filter on the order.

Grid Entry Form (continued)

- Enter or search and select the Item#(s), Quantity for Item, and if desired a Price Override value.
- Tabbing through will take you to the next line.
- Note: Clicking on Remove (last column on right), you can remove an item if desired.
- Also note that you can change the Job Site flag at the line level as well, if required.

Order Type: Agent Order, SA
Selected Customer: BOOTH ELECTRIC SUPPLY AD [725528]
PO Number: BRUCE'S TEST

Clear Order and Deselect Customer

+ 1 Row + 5 Rows + 10 Rows

Job Site	Branch Plant	Item #	Qty	Description	Sub Class	Price Override	Unit Price	Ext. Price	Requested Date	Remove
No						0	\$0.0000	\$0.00	6/14/2018	Remove
No						0	\$0.0000	\$0.00	6/14/2018	Remove
No						0	\$0.0000	\$0.00	6/14/2018	Remove
No						0	\$0.0000	\$0.00	6/14/2018	Remove
No						0	\$0.0000	\$0.00	6/14/2018	Remove
No						0	\$0.0000	\$0.00	6/14/2018	Remove
No						0	\$0.0000	\$0.00	6/14/2018	Remove
No						0	\$0.0000	\$0.00	6/14/2018	Remove

Clear Order Submit Order Update All

Order/Invoice Total: \$0.00

If you discover that you have selected the wrong Ship To #, click on Clear Order and Deselect Customer at the top right. This will allow you to begin a new order.

If you wish to keep the Ship To #, but start over on the order, you can click on the Clear Order button.

Grid Entry Form (continued)

If you want to add header notes to your order, click on Edit Order Note (below). This will provide a pop-up box right allowing you to either type in the note(s) or cut and paste information into the box. When done, click on Save Note.

Write a note:

THIS IS AN ORDER NOTE

Save Note

Order Info

Request Date: 6/14/20

Edit Order Note

Shipping Address Override Address

BOOTH ELECTRIC SUPPLY-AD
101 E SECOND ST,
ELMIRA NY 14901

Note that there is a small box next to Override Address. Clicking in the box will open a form (next slide) allowing you to override the shipping address.

Grid Entry Form (continued)

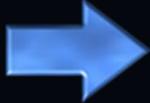
Clicking the small box next to Override Address will opens a form (to the right) allowing you to override the shipping address.



When you're done, click on the Update All button. This will return the Branch Plant and Pricing.

Mailing Name:	<input type="text" value="BRUCE THOMPSON"/> *
Address Line 1:	<input type="text" value="9740 PEACH ST"/> *
Address Line 2:	<input type="text"/>
Address Line 3:	<input type="text"/>
Address Line 4:	<input type="text"/>
City:	<input type="text" value="FORT WORTH"/> *
State:	<input type="text" value="Texas(TX)"/> *
Postal Code:	<input type="text" value="76244"/> *
Country:	<input type="text"/>
County:	<input type="text"/>
Phone:	<input type="text"/>

Branch Plant and Pricing



+ 1 Row + 5 Rows + 10 Rows

Total 2 line(s) and total quantity of 20
2 line items updated.

Job Site	Branch Plant	Item #	Qty	Description	Sub Class	Price Override	Unit Price	Ext. Price	Requested Date	
No	101	5133823	10	1/2 LIL40 90 BND STD R 1 PL = 108 CA / 1 CA = 50 EA	MTS	0	\$24.1000	\$2.41	6/14/2018	Remove
No	101	E2205N	10	20 CU IN SINGLE GANG WINAILS 1 PL = 32 CA / 1 CA = 100 E	MTS	0	\$22.7300	\$2.27	6/14/2018	Remove
No						0	\$0.0000	\$0.00	6/14/2018	Remove
No						0	\$0.0000	\$0.00	6/14/2018	Remove
No						0	\$0.0000	\$0.00	6/14/2018	Remove
No						0	\$0.0000	\$0.00	6/14/2018	Remove
No						0	\$0.0000	\$0.00	6/14/2018	Remove
No						0	\$0.0000	\$0.00	6/14/2018	Remove
No						0	\$0.0000	\$0.00	6/14/2018	Remove
No						0	\$0.0000	\$0.00	6/14/2018	Remove

Order/Invoice Total: **\$4.68**

- Note the yellow flag (above). Hovering over this will tell you that the quantity entered is not in the full package quantity. This is a warning, not a hard error, just a soft warning. You can change the quantity or submit the order as is.
- When complete with the order, click the Submit Order button.

Submit Order

Important Notes about Agent Shipping Orders

- The header selections of Ship To #, PO Number, Shipping Method, Job Site flag, and Request Date is identical to the standard Agent Order (type SA).
- Agent Shipping Orders will create an order with order type SG.
- The Grid Entry form is also identical to the standard Agent Order. **The only difference is that you will need to enter your Branch Plant on each line.**
- After you complete the order, click the Submit Order button. 
- In the Portal, you will see a message telling you that the submission was complete. It will provide you with an order number. You will also automatically get an order confirmation in your email with a PDF attachment of the order **and a Pick Slip PDF attachment.**

Transfer Order Entry

- This application is to be used to enter a transfer order (ST) for non-Lowes branch plants. Note the slightly different header requirements from a standard or shipping order.
- In this form, you enter the From Branch and the To Branch.
- You can enter a PO Number if desired, but it's not mandatory for this type of order.
- The Grid Entry form is the same as for a standard or shipping order. However, the Branch Plant is secured. There is no pricing displayed, and there is no Override Address ability. When complete, click on Submit Order.
- You will see a message telling you that the submission was complete, and the portal will provide you with an order number. You will also get an order confirmation in your email with an automatically generated PDF attachment of the order.



Agent Transfer Order - CANTEX Portal

From Branch:	<input type="text"/>	Customer PO	<input type="text"/>
To Branch:	<input type="text"/>	Requested Date:	<input type="text"/>
Shipping Method:	<input type="text" value="Freight Prepaid"/>		

Next

Transfer Order Entry

Lowes Only Transfer Order Entry

- This application is to be used to enter a transfer order (ST) for Lowes only branch plants.
- Order entry and submission is identical to the regular Transfer Order Entry.

Agent Inquire/Receive Transfer Order

- As you are probably aware, the ST Transfer Orders all have an associated OT Purchase Order.
- Clicking on this application opens up a form that displays all open OT orders.
- Clicking on this application opens up a form that displays all open OT orders.

Open Transfer Orders

OT Order #:

ST Order #:

OT Order #	Line #	ST Order #	Item #	Description	Quantity Open	Supplier	Ship To	Order Date	
270099	1.000	02627007	A52BA12	1 PVC TC-40 10'BE	21600	103	127	6/11/2018	Receive
270093	1.000	02627001	5133765	1 UL40 45 BND STD R	140	100	127	6/11/2018	Receive

- Clicking on this application opens up a form that displays all open OT orders for the appropriate Branch assigned to your user. See next slide. ID

Open Transfer Orders (continued)

- Note that you can filter the selection of OT Order # or ST Order # and click the Find button.
- To receive the OT order, click on Receive in far right column.
- Note that you can select a line at a time or you can click the box next to Select All.
- You can let the Quantity to Receive stay the Quantity Open, or you can change the Quantity Receive and enter a Location if desired.
- When done, click on Receive Lines at the bottom right of the screen.

Back to Open Transfer Orders

Receive OT

OT Order #: 270093
Supplier: 100
Ship To: 127

Select All

<input type="checkbox"/> 1,000	Quantity Open: 140 Quantity to Receive: 140 Location: N0.43 . . .	Item #: 5133765 Description 1: 1 UL40 45 BND STD R Description 2: 1 PL = 200 CA / 1 CA = 20 EA UOM: EA
<input type="checkbox"/> 2,000	Quantity Open: 2160 Quantity to Receive: 2160 Location: 00.09 . . .	Item #: 5133825 Description 1: 1 UL40 90 BND STD R Description 2: 1 PL = 108 CA / 1 CA = 20 EA UOM: EA



Receive Lines