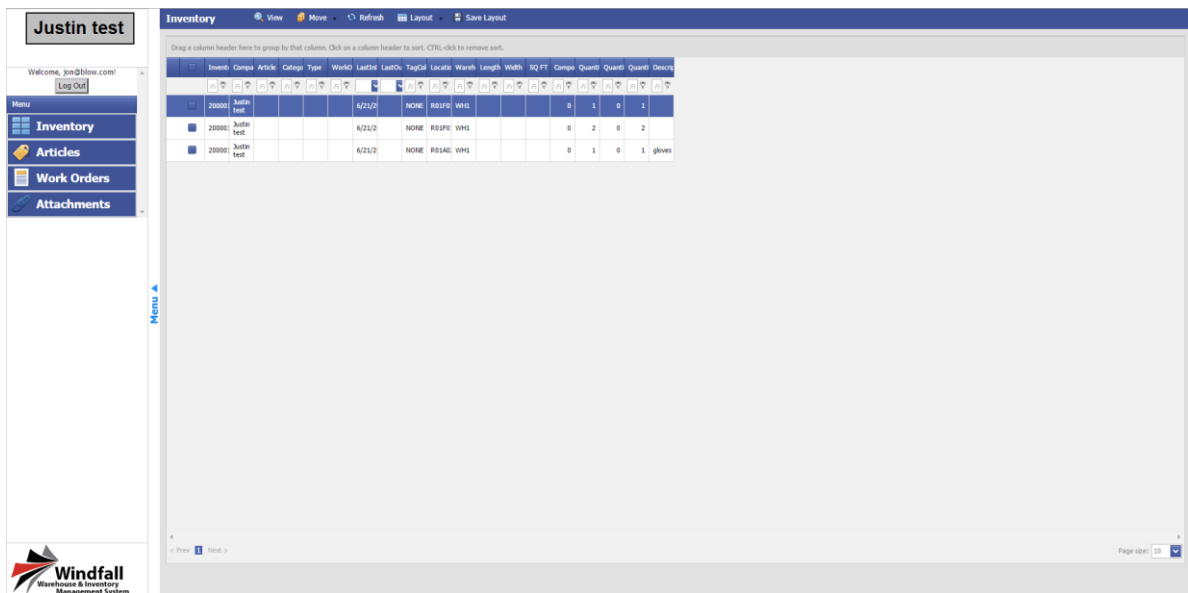


## Logging into Windfall

- Once given the credentials for the portal user, go to <https://ngwf.windfallonline.com> to log in.
- Enter the Email address and Password and click the blue arrow or hit Enter.

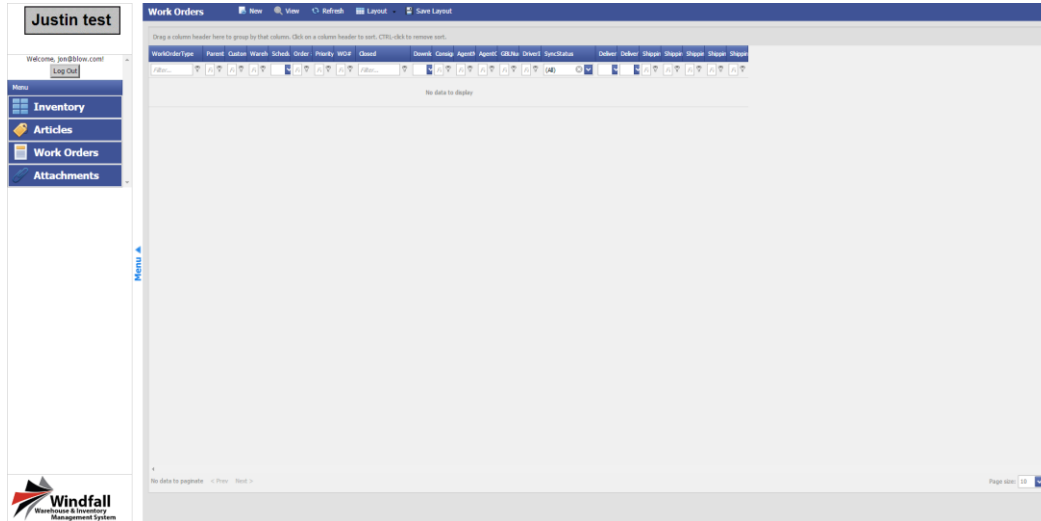


- Once logged in the Dashboard will appear.
- On the left hand side there are 4 buttons to navigate through.
- **Inventory** – View your inventory within the warehouse.
  - To view more information about an item double click on it within the list.
- **Articles**- View your articles within the warehouse.
  - To view more information about an item double click on it with the list.
- **Work Orders**- Where you view and create work orders.
- **Attachments**- Where you can view any attachments for your customer.

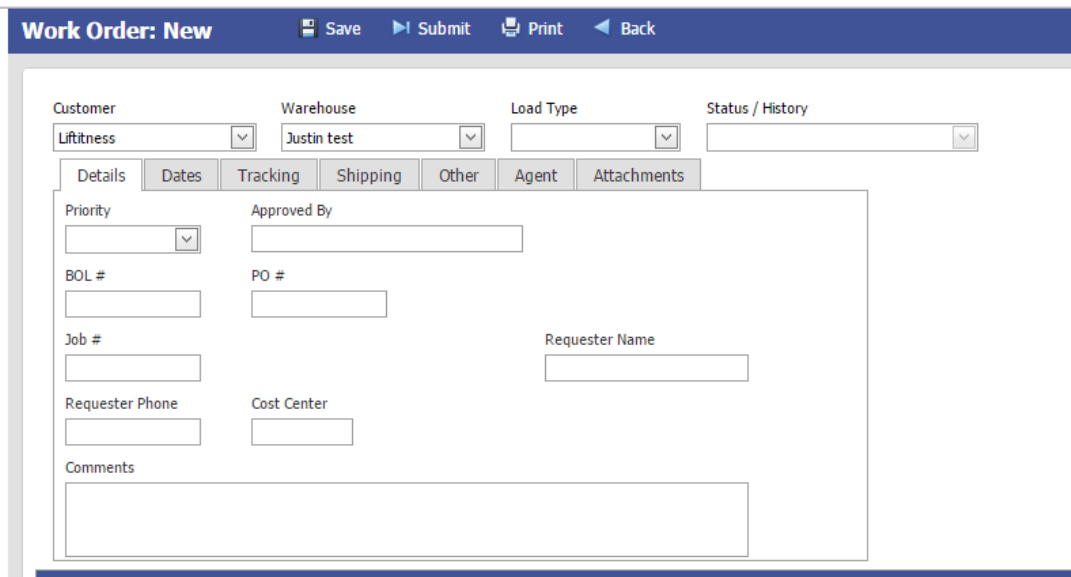


## Creating Work Orders

- Click on the Work Order button in the menu on the left-hand side.

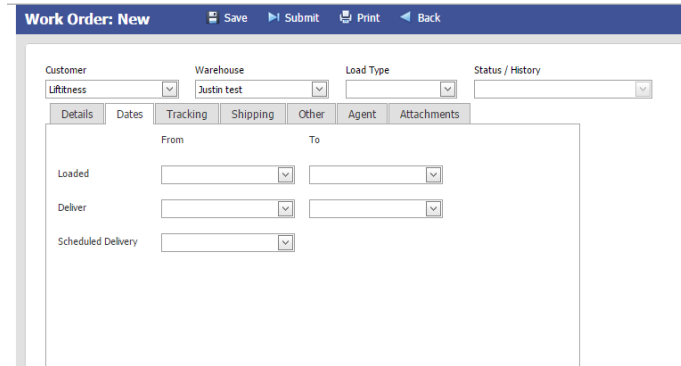


- Click the New button.
- The New Work Order screen will appear.
- If applicable select the BOL #, Enter the PO # and Job #.
- Enter requestors name and any necessary comments if necessary.



The screenshot shows the 'Work Order: New' form. At the top, there are buttons for 'Save', 'Submit', 'Print', and 'Back'. Below these are four dropdown menus: 'Customer' (Lifitness), 'Warehouse' (Justin test), 'Load Type', and 'Status / History'. There are also tabs for 'Details', 'Dates', 'Tracking', 'Shipping', 'Other', 'Agent', and 'Attachments'. The 'Details' tab is active, showing fields for 'Priority', 'Approved By', 'BOL #', 'PO #', 'Job #', 'Requester Name', 'Requester Phone', and 'Cost Center'. At the bottom, there is a large text area for 'Comments'.

- Click the Dates tab.
- Select the necessary dates for this outbound work order.



**Work Order: New** Save Submit Print Back

Customer: Liftfitness Warehouse: Justin test Load Type: Status / History:

Details Dates **Tracking** Shipping Other Agent Attachments

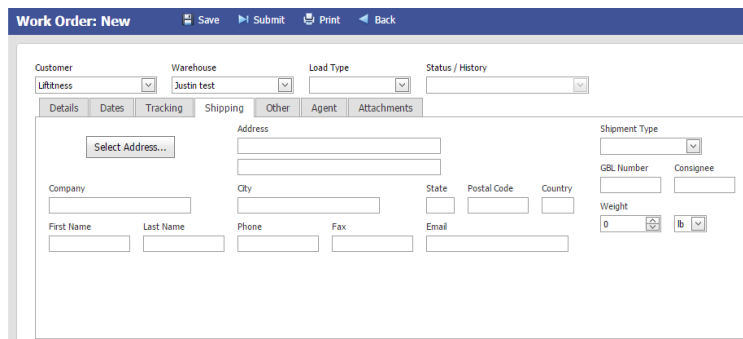
From To

Loaded: [ ] [ ]

Deliver: [ ] [ ]

Scheduled Delivery: [ ]

- Click the Shipping tab
- If an address was entered in Windfall when the portal user was created it will populate in the address fields.
- Enter a Contact and Phone Number if necessary.



**Work Order: New** Save Submit Print Back

Customer: Liftfitness Warehouse: Justin test Load Type: Status / History:

Details Dates Tracking **Shipping** Other Agent Attachments

Select Address... Address: [ ] [ ] [ ] [ ] [ ] [ ]

Shipment Type: [ ]

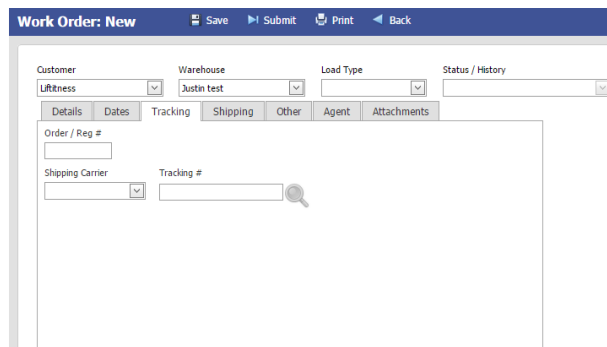
GBL Number: [ ] Consignee: [ ]

Weight: 0 [ ] [ ]

Company: [ ] City: [ ] State: [ ] Postal Code: [ ] Country: [ ]

First Name: [ ] Last Name: [ ] Phone: [ ] Fax: [ ] Email: [ ]

- Click on the Tracking tab.
- If necessary, select the Shipping Carrier details.



**Work Order: New** Save Submit Print Back

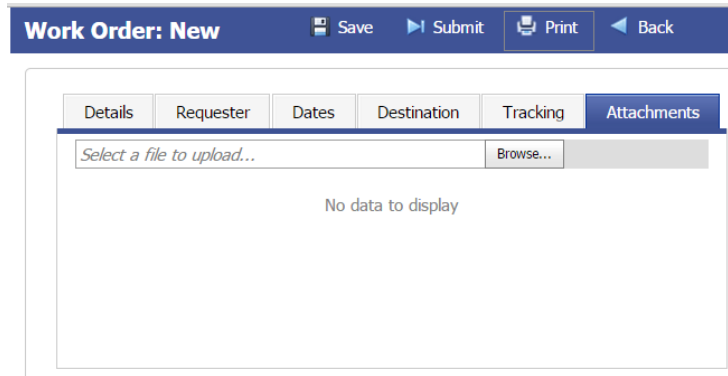
Customer: Liftfitness Warehouse: Justin test Load Type: Status / History:

Details Dates Tracking **Shipping** Other Agent Attachments

Order / Reg #: [ ]

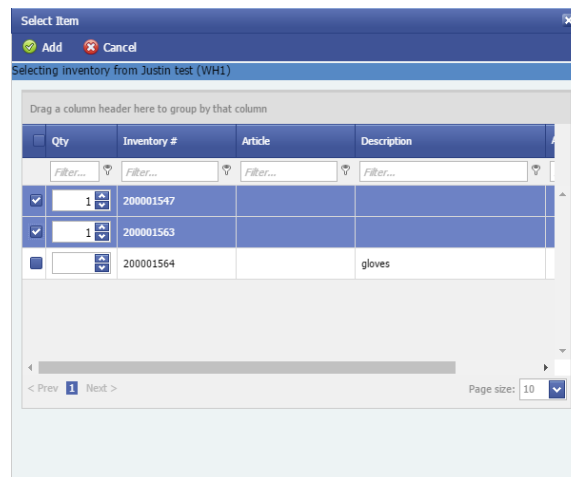
Shipping Carrier: [ ] Tracking #: [ ]

- Click the Attachments tab.
- If any documents, PDF's, or images need to be attached, that can be done by clicking the browse button.



## Adding items to the Work Order

- Click the Add button on the toolbar below the Customer Details.
- The option to add items by inventory number or by article appear in the menu. Based on you inventory within the warehouse this will determine your selection.
- Click the check box next to the items to be added to the work order.
- If applicable, select the quantity.
- Click the Add button at the top of the window.
- The item will be added to the work order. Repeat this process until all desired items have been added.



- Once finished, click the Submit button at the top of the work order screen.
- The work order will submit and the work orders screen will appear
- An email will be sent to the warehouse alerting them that a work order is waiting.

WORK ORDER NUMBER: 15WO0003

WAREHOUSE CODE: wh1

CUSTOMER NAME: TEST CUSTOMER

USER NAME: [PORTALUSERTEST@ACI.COM](mailto:PORTALUSERTEST@ACI.COM)

# OF LINE ITEMS: 1

DELIVERY CONTACT:

3460 Hollenberg

DELIVERY ADDRESS: APT 6F  
SAINT LOUIS, MO 63103

DELIVER BY: N/A

TAG #	QTY	ARTICLE #	CATEGORY	TYPE	DESCRIPTION
	2	56456698754	CHAIR	CHAIR	4-WHEEL TASK CHAIR