

CRANE ChemPharma & Energy

DMS - User Manual for Distributors

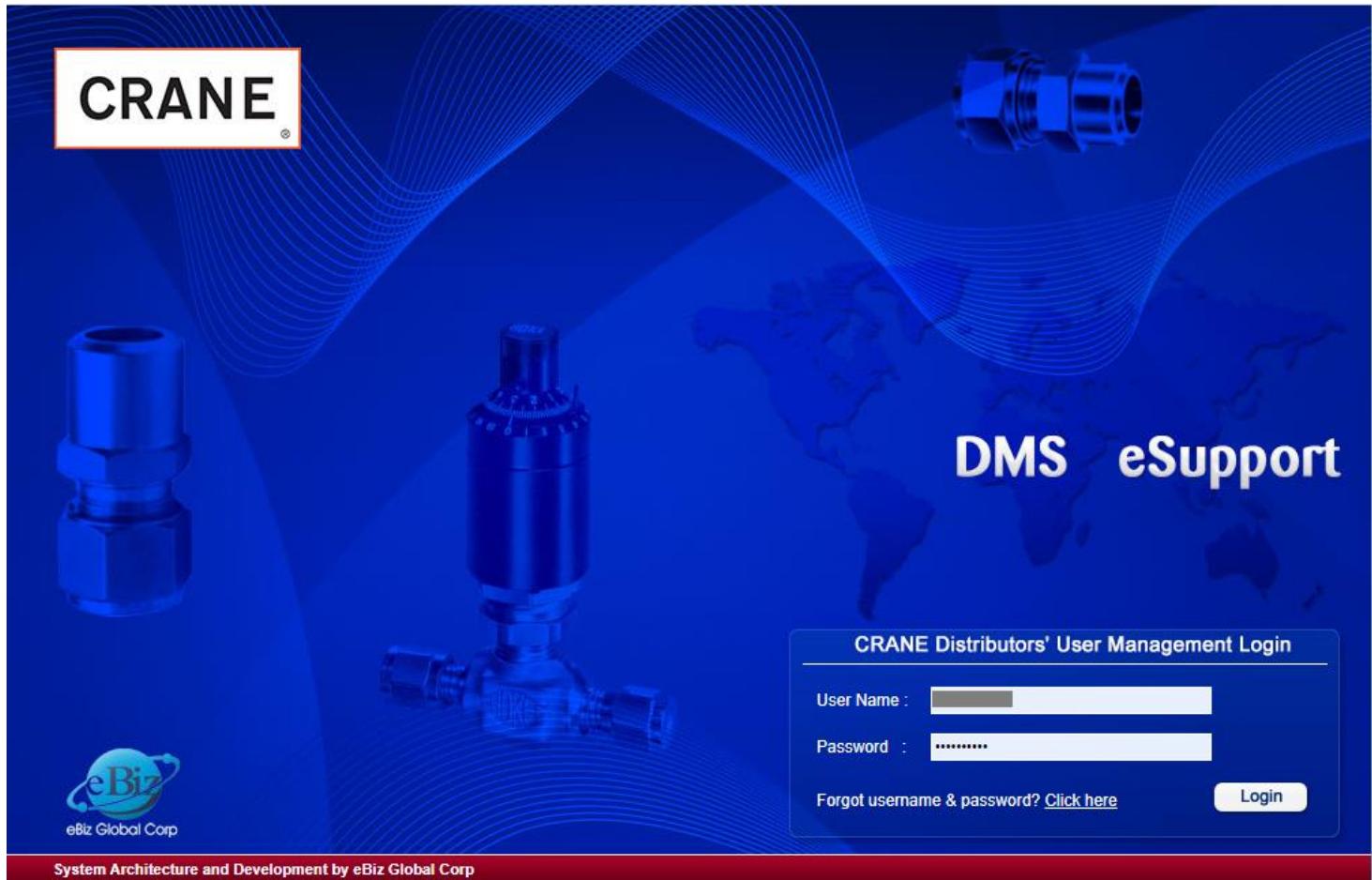
Version V2 dated 20 Oct 2016

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A. Registration and User Login Management:

1. CRANE will send you by email a URL, master key username and password to enable you to create internal users for your company.
2. If you are the company's, IT administrator, then click the URL <https://distusers.cft-dms.com> to see the below login screen:



3. Enter the master key username and password and hit the login button.
4. Now you will see the below welcome page with your company code and company name clearly mentioned at the top left corner of the page (ensure that this is correct)

Home | Distributor's User Management Console | Setup Contacts | Log off

Welcome

Welcome to CRANE Distributor's User Management Login for DMS & eSupport

5. Click the menu called 'Distributor's User Management Console'. Now you will see the below screen

Welcome R MWS0001-AWC-HOUSTON

User Management Login for DMS				
Person Name	Title	email	Phone	Username
No Records Found.				
View Inactive Users				Add New
Page: 1 of 1				

6. Click the ‘Add New’ link at bottom right corner of the table to add a new user. You will see below screen

DMS Login-AddNew User				
User Details				Permitted Logins
FirstName*	:	<input type="text"/>		<input type="checkbox"/> DMS Login
LastName*	:	<input type="text"/>		<input type="checkbox"/> eSupport Login
Title	:	<input type="text"/>		<input type="checkbox"/> HVC Login
email*	:	<input type="text"/>		<input type="checkbox"/> ce-eSupport
Phone	:	<input type="text"/>		
Forgot Password Question*	:	<input type="text"/>		
Forgot Password Answer*	:	<input type="text"/>		
UserName*	:	<input type="text"/>		
Password*	:	<input type="text"/>		
Special Password	:	<input type="text"/>		
Upload signature as image	:	<input type="button" value="Choose File"/> no file selected	<input type="button" value="Upload"/>	
<i>Only jpg or jpeg images of size 225*75 pixels or less can be uploaded</i>				
<input type="button" value="Cancel"/> <input type="button" value="Save"/>				

7. Fill in the details appropriately. Special Password may be used in certain pages of DMS, as a secondary verification credential, so it is a good idea to fill it up right now.
 8. The signature image file of size 225 pixels wide X 75 pixels high is to be uploaded, so that the user’s signature is automatically applied in certificates, where mandatorily needed (e.g., End Use Statement). The signature image file may of course be uploaded at a later time, as it is not a mandatory field.
9. Most importantly, do not forget to checkmark the portals that this user may have access to (shown under the Permitted Logins header at top right corner of page). Without this checkmark, this user will not be permitted into any of the CRANE portals.
 9B. Repeat the process for all internal users who are expected to use the CRANE portals
 10. All details in this page may be edited by the individual user at a later date from his or her own login (through the setup menu)
 11. After adding a few users, the page will look like below screen

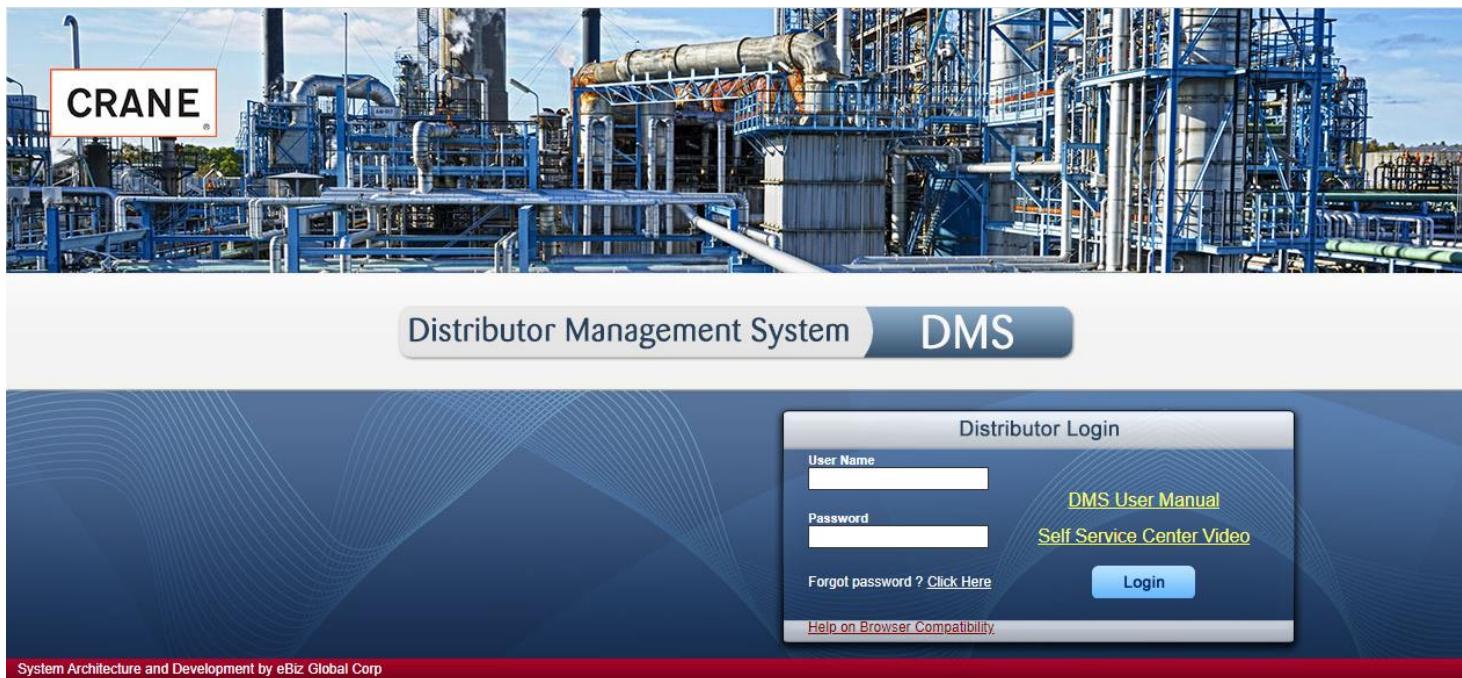
Welcome R MWS0001-AWC-HOUSTON

User Management Login for DMS					
PersonName	Title	email	Phone	Username	
John Smith	Sales Support	john.smith@abc.com	123-4567	john.smith	View/Edit InActivate
David Jones	Inside Sales	david.jones@abc.com	123-4567	david.jones	View/Edit InActivate
Sarah Johnson	Inside Sales	sarah.johnson@abc.com	123-4567	sarah.johnson	View/Edit InActivate
					AddNew
1 2 3 4					
Page: 1 of 4					

12. The View/Edit link at end of each line may be used when needed
13. If the administrator needs to deny access to a certain internal user (e.g., She left the company), then he can click the ‘Inactivate’ link found at the extreme right side of each user. The inactivated user will be moved to the ‘Inactive Users’ table that may be accessed by clicking the bottom left corner link called ‘View Inactive Users’ found just below the table
14. A user once created cannot be deleted, but only inactivated
15. If an inactivated user needs to be reactivated, simply go to ‘View Inactive Users’ table and click on the ‘Activate’ link found at the extreme right side of the specific user’s name

B. DMS Login

1. On receiving the distributor internal user login details from your IT administrator, you may now log into CRANE’s DMS portal at <https://cft-dms.com>



2. DMS prefers Google Chrome browser or Apple’s Safari Browser, for best user experience. If you need to use Microsoft Internet Explorer, then you need to use it ONLY in compatibility mode. Otherwise, several functionalities, menus and buttons will not work, or altogether not even show up.
3. If you need to know how to use IE in compatibility mode, click the red link found just below the login button in the DMS Login page (you can see the link in above image)
4. Once you successfully login, you will see the below welcome screen.

CRANE

DMS Online
Online Distributor Management and Facilitation System
 Powered by eBiz Global Corp

[Home](#) [Dashboard](#) [Web Orders](#) [AUTOPOS](#) [DocuTrak](#) [Self Service Center](#) [MailTrak](#) [StockTrak](#) [QuoTrak](#) [Reports](#) [Info Center](#) [Setup](#) [Log off](#) [Distributor](#)

Welcome [User Name]

Good Morning! Welcome to DMS's Distributor Login.



Important Note: Use only Google Chrome browser for a smooth user experience

[CRANE Covid-19 Clause](#)

[Go to my Dashboard](#)

Note: Please Enable Popups in your browser. Else you may not be able to view some pages.

5. Now click on 'Go to my Dashboard' button to view the below dashboard

CRANE

DMS Online
Online Distributor Management and Facilitation System
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[Home](#) [Dashboard](#) [Web Orders](#) [AUTOPOS](#) [DocuTrak](#) [Self Service Center](#) [MailTrak](#) [StockTrak](#) [QuoTrak](#) [Reports](#) [Info Center](#) [Setup](#) [Log off](#) [Distributor](#)

Welcome [User Name]

Quick Access Dashboard

Document_Type	21-Oct-21	20-Oct-21	19-Oct-21	18-Oct-21	15-Oct-21	14-Oct-21	13-Oct-21	
CRANE Sales Orders	0	0	0	0	0	0	0	View all
Invoices	0	0	0	0	0	0	0	View all
Shippers	0	0	0	0	0	0	0	View all
Payment Acknowledgements	0	0	0	0	0	0	0	View all
Credit Memos	0	0	0	0	0	0	0	View all

QuikChek

Sales Order # :	<input type="text" value="Ajax Pull"/>	GO	All SOs
Invoice # :	<input type="text" value="Ajax Pull"/>	GO	All Invoices
Shipper # :	<input type="text" value="Ajax Pull"/>	GO	All Shippers

Web Orders

View Uploaded POS : [42](#) [Search](#)

[Enter Dist.PO #](#) [Search](#) [Enter Web PO #](#) [Search](#)

QuoTrak - Web Quotes

WQs Approved : [1299](#) [Search](#)

[Enter WQ #](#) [Search](#)

QuoTrak - Price Requests

Pending Approval : [10](#)

Approved PRs : [1657](#) [Search](#)

[Enter QPR#](#) [Search](#)

QuoTrak - Sales Quote Requests

View SQRs : [154](#) [Search](#)

[Enter QR#](#) [Search](#)

QuikChek Tools

[View CRANE Stock](#) [Price Check](#)

[Open Orders Report](#) [Self Service Center](#)

MailTrak

[Inbox](#) [Sent Mails](#)

Go Configurator

[GO Configurator](#)

6. The links and buttons in the dashboard are self-explanatory. Feel free to use the powerful search buttons to get to your specific document quickly

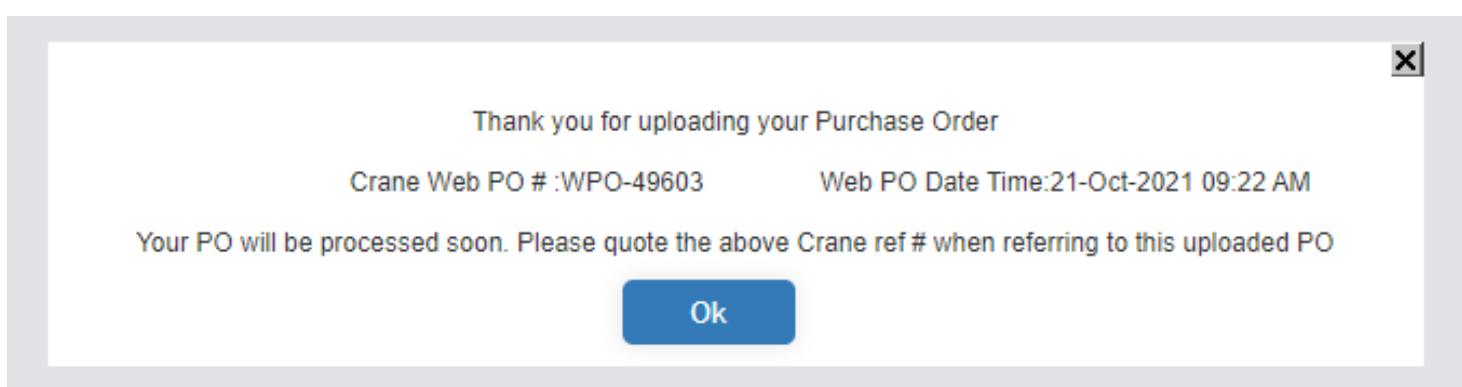
C. Upload and View Web Purchase Orders (POs):

1. To upload a new PO, go to the menu Web Orders > Upload New PO. You will see the below screen:

Upload New PO

Distributor PO Number :	<input type="text"/>	PO Value \$:	<input type="text"/>
Upload PO Doc :	<input type="button" value="Choose File"/> no file selected	<input checked="" type="radio"/> Hoke/Go Order <input type="radio"/> Texas Sampling Order	
Upload Support Docs, If any :			
File	File Notes		
<input type="button" value="Choose File"/> no file selected	<input type="text"/>		
<input type="button" value="Choose File"/> no file selected	<input type="text"/>		
Distributor Notes:			
<input type="text"/>			
<input type="button" value="Cancel"/>		<input type="button" value="Save"/>	<input type="button" value="SpellCheck"/>

2. The support docs and distributor notes are non-mandatory fields. All other details need to be entered before you attempt to save the PO.
3. Once you hit the Save button, you will see the below popup window that shows the Web PO # and date and time of acceptance of the PO.



4. On clicking OK, you will be taken to the next screen with contents as shown below.
5. If this material is being sold and shipped to an end user outside the USA, you are expected to fill in the electronic End Use Statement by clicking the link shown in this page. This is a fairly simple and quick process because most of the information is pre-filled for you.

Thank you for uploading your Purchase Order.

CRANE Web PO # : WPO-49603

Web PO Date Time : 21-Oct-2021 09:22 AM

Your PO will be processed soon. Please quote the above CRANE ref# when referring to this uploaded PO.

Please note that if your PO contains export controlled items, you are required to fill in the Online End Use Statement by [clicking here](#).

6. The top portion of EUS is shown below:

CRANE

DMS Online
Online Distributor Management and Facilitation System
 Powered by eBiz Global Corp

Welcome James Hunt- AWC - HOUSTON

End Use Statement

In accordance with U.S. export law, it is the policy of CRANE to verify the end-use and end-users for all exports involving CRANE products. Please provide the information requested below. Failure to fully complete this form may result in a delay.

Sold-To

Company Name*	:	
Program/Project	:	
Vessel Name Country of Registry Flag Owner	:	
Address 1*	:	
Address 2	:	
City*	:	
Country*	:	
State	:	
Postal Code*	:	
Website	:	

Ship To

Company Name*	:	
Program/Project	:	
Vessel Name Country of Registry Flag Owner	:	
Address 1*	:	
Address 2	:	
City*	:	
Country*	:	--Select--
State	:	
Postal Code*	:	
Website	:	

End-User

Company Name*	:	
Program/Project	:	
Vessel Name Country o	:	
Registry Flag Owner	:	
Address 1*	:	
Address 2	:	
City*	:	
Country*	:	--Select--
State	:	
Postal Code*	:	
Website	:	

1) Are any of the parties on the order Military End Users?
 Yes No
 2) Are any of the parties on the order Government End Users?
 Yes No
 3) Is the End-User involved in nuclear end uses?
 Yes No

7. The Ship to address may be chosen from the list box items as shown above. The list of addresses is coming from the Setup menu of your login. The setup menu page is shown below

Setup

1. **ShipTo Master**
2. **End User Master**
3. **Password and Signature Management**

8. You may click the Ship To Master or End User Master to add new entries, edit existing ones, or delete any of them

9. All items stored in these masters only are shown as dropdown options in the 2 blue panels (Ship to and end user address panels)

10. Once you choose a ship to name or end user name, the full address is filled in the light blue panel, but you are free to edit the same here again.

11. After filling the radio buttons and other test entries in the form, fill up the bottom blue panels, if needed. If you have correctly uploaded your signature file, it will appear in the location shown below.

Foreign Consignee Company Name: <input type="text"/> Address 1 : <input type="text"/> Address 2 : <input type="text"/> City : <input type="text"/> Country : <input type="text" value="--Select--"/> State : <input type="text"/> Postal Code : <input type="text"/>	Intermediate Consignee Company Name: <input type="text"/> Address 1 : <input type="text"/> Address 2 : <input type="text"/> City : <input type="text"/> Country : <input type="text" value="--Select--"/> State : <input type="text"/> Postal Code : <input type="text"/>	U.S. Consignor and/or Freight Forwarder Company Name : <input type="text"/> Address 1 : <input type="text"/> Address 2 : <input type="text"/> City : <input type="text"/> Country : <input type="text" value="--Select--"/> State : <input type="text"/> Postal Code : <input type="text"/>
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By signing below, I certify that, to the best of my knowledge that these CRANE products will not be exported or re-exported in violation of any export control laws or regulations of the the United States and shall solely be used for the purposes described in this End-Use Statement. I certify that the information given above is accurate and complete, and that I am duly authorized to provide the certifications.

Printed Name: James Hunt
 Signature: 

Your signature image file is inserted here

Title: eBiz Test User
 Date: 21-Oct-2021

Buttons:    

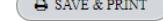
12. If you did not upload a good signature image file, system will alert you and inform that your signature file is missing. See screenshot below of an EUS with missing signature

Foreign Consignee Company Name: <input type="text"/> Address 1 : <input type="text"/> Address 2 : <input type="text"/> City : <input type="text"/> Country : <input type="text" value="--Select--"/> State : <input type="text"/> Postal Code : <input type="text"/>	Intermediate Consignee Company Name: <input type="text"/> Address 1 : <input type="text"/> Address 2 : <input type="text"/> City : <input type="text"/> Country : <input type="text" value="--Select--"/> State : <input type="text"/> Postal Code : <input type="text"/>	U.S. Consignor and/or Freight Forwarder Company Name : <input type="text"/> Address 1 : <input type="text"/> Address 2 : <input type="text"/> City : <input type="text"/> Country : <input type="text" value="--Select--"/> State : <input type="text"/> Postal Code : <input type="text"/>
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By signing below, I certify that, to the best of my knowledge that these CRANE products will not be exported or re-exported in violation of any export control laws or regulations of the the United States and shall solely be used for the purposes described in this End-Use Statement. I certify that the information given above is accurate and complete, and that I am duly authorized to provide the certifications.

Printed Name: James Hunt
 Signature: 

Title: eBiz Test User
 Date: 21-Oct-2021

Buttons:    

13. Once a PO is uploaded by you in DMS, it is ready for viewing and further processing by CRANE customer service. They will process your PO as a confirmed Sales Order, which you can view under DocuTrak > Crane Sales Orders

14. If for some reason, CRANE decides to cancel your PO, it would go into Rejected POs list, which you can view by clicking the top right-side link in below screenshot

15. All POs that are processed by CRANE will be shown in the menu Web Orders > View Uploaded POs, whose screenshot is shown below

16. As can be seen in the screenshot, DMS shows the date & time when the PO was taken up for processing

17. You can get to a specific PO by using the powerful search facility provided on top of the table.



Enter Distributor SO No :

→ Go

 Reset

Enter Dist. PO Number :

CRANE

Enter Dist.PO Number #

▶ Go

 Reset

Enter CRANE Web PO Ref : Enter CRANE WebPO No #

▶ Go

 Reset

Enter CRANE Web PO Ref : Go Reset

[View Uploaded POs](#)

[View Rejected POs](#)

CRANE Web PO#	Web PO Date Time	Taken for processing	Distributor PO Ref.	PO Value \$	PO File Name	Distributor Notes
WPO-60413	30-Mar-2021 06:54 AM	30-Mar-2021 08:43 AM	HOHOM291KW	18,540.50	HOHOM291KW.pdf	If freight ship vi...
WPO-59676	26-Feb-2021 07:24 AM	26-Feb-2021 01:47 PM	HO113816KW	9,800.00	HO113816KW.pdf	QUOTE_SQR-21-3299
WPO-59372	12-Feb-2021 04:10 PM	16-Feb-2021 09:06 AM	HO105296KW	39,050.00	HO105296KW.pdf	Customer is needing...
WPO-58541	05-Jan-2021 05:21 PM	06-Jan-2021 12:07 PM	HOHOJ05111	27,480.01	HOHOJ05111.pdf	---
WPO-58540	05-Jan-2021 05:20 PM	06-Jan-2021 11:29 AM	HOHOJ05105	1,850.52	HOHOJ05105.pdf	---
WPO-58539	05-Jan-2021 05:12 PM	06-Jan-2021 10:41 AM	HOHOJ05101	7,026.82	HOHOJ05101.pdf	---

18. On clicking a line item in the above table, you will be taken to a PO detail page as shown below

[View Uploaded PO & Documents](#)

View Uploaded PO	Distributor Documents	CRANE Documents	
CRANE Web PO # :	WPO-49603	Dist. email :	[REDACTED]
Web PO Date Time :	21-Oct-2021 09:22 AM	Dist. PO Number :	PO045021
		PO Value \$:	20272.0400
		PO Doc :	LR_spacers.jpg
Support Docs, if any:			
File	Notes		
Distributor Notes		Crane/Go Order	
<input type="text"/>		End Use Statement :	View Uploaded EUS :
		View EUS - 21-Oct-2021 09:43 AM	
		Fill another EUS	
CRANE Notes to Distributor			
<input type="text"/>			

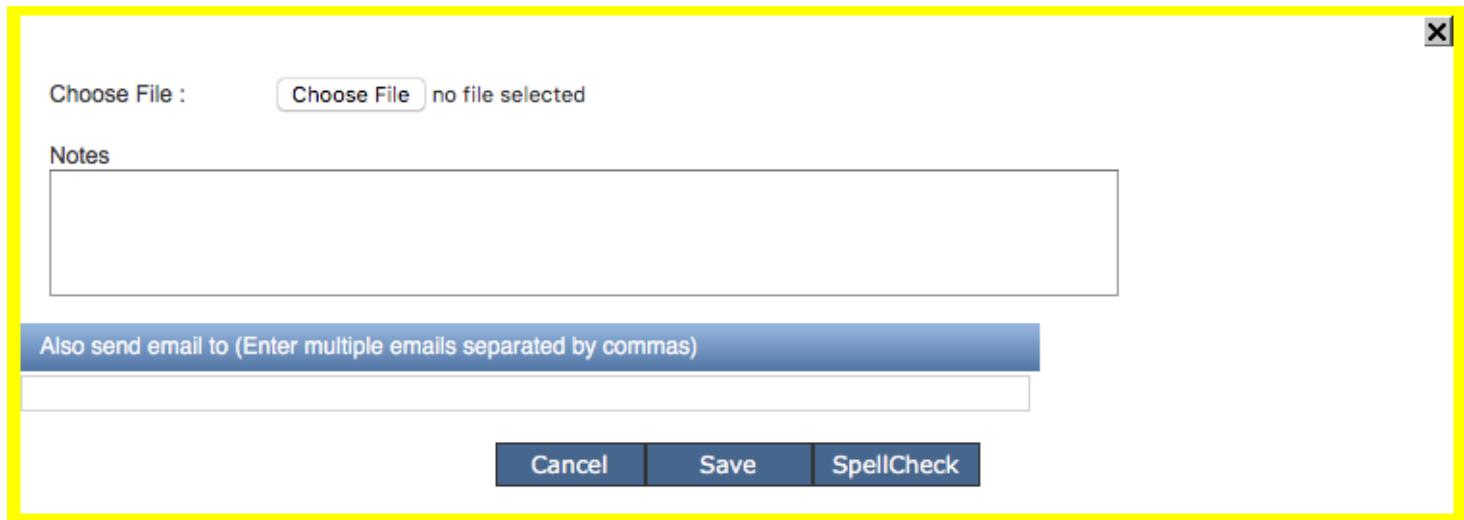
19. Note that you can fill as many End Use Statements as needed, from this page, by simply clicking the 'Fill another EUS' link found in the right side of page.

20. If you need to send a document or send a comment to CRANE on this specific PO, then go to the next tab as shown below and click on Add New link found at bottom right corner

[View Uploaded PO & Documents](#)

View Uploaded PO	Distributor Documents	CRANE Documents		
Date Time	Notes	File Name	email Sent to	email CC To
No Records Found				
				Add New

21. You will see the below popup page, where you can upload a file or simply enter a comment or question in the Notes textarea and hit the Save button. This message will go as an email to CRANE customer service automatically.
22. You are also free to enter one or more email IDs (separated by commas) in the CC section textbox found at bottom



A screenshot of a file upload and notes input dialog box. The dialog has a yellow border and a close button in the top right corner. Inside, there's a 'Choose File' button with a tooltip 'no file selected'. Below it is a 'Notes' label with a large text area. At the bottom, there's a blue bar with the text 'Also send email to (Enter multiple emails separated by commas)' followed by an empty input field. At the very bottom are three buttons: 'Cancel', 'Save', and 'SpellCheck'.

23. Any comment or correspondence from CRANE will be shown in the next tab as shown below

[View Uploaded PO & Documents](#)

View Uploaded PO	Distributor Documents	CRANE Documents		
<hr/>				
Date Time	Notes	File Name	email Sent to	email CC To
18-Sep-2015 07:08 AM	test	sampletest.txt	[REDACTED]	[REDACTED]

24. You may click on the notes link to view the whole message as below



A screenshot of a message dialog box with a yellow border and a close button in the top right corner. The message content is: 'Mike, please forward quote 160919MT02. Thanks, Shellie'. At the bottom is a 'Close' button.

25. All CRANE messages may be viewed from MailTrak > Inbox as well. Irrespective of from which PO, a certain comment or file was sent by CRANE, they can all be viewed in the Inbox, and also directly replied to from there

26. All replies sent from Inbox by you will go to CRANE customer service staff's email boxes, besides sitting inside the Distributor Comments tab of the specific PO. Your replies can also be viewed from MailTrak > Sent Mails menu table

End of Document
