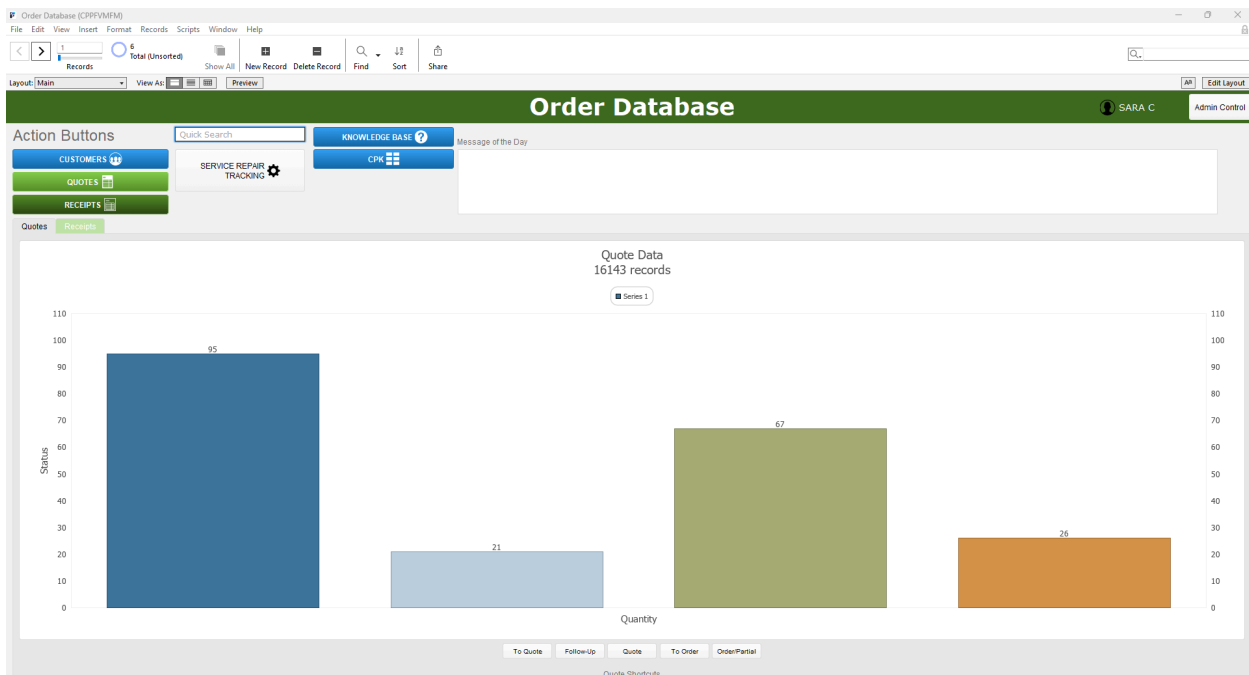


How to use FileMaker (Order Database) for looking up Products

FileMaker is used to locate product information through the **Order Database**, including customer quotes and item details.

Step 1: Log Into the Order Database

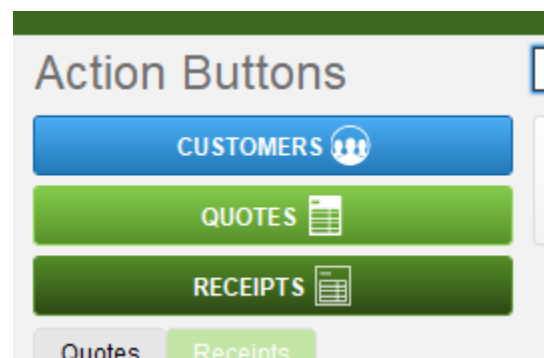
- Log into **FileMaker Pro**
- Open the **Order Database**
- You will land on the **main Order Database screen**



Step 2: Access the Customer Record

- Click the **“Customers”** action button
- Select **any customer** from the list

Note: Any random customer can be used when trying to find an item. You do not need the original customer to look up a product.



Step 3: Open the Customer Quote

- After selecting a customer, your screen will display the **customer overview**

The screenshot shows a table titled "Customer" with columns: Name, Phone, Quote Count, Receipt Total, Receipt Count, and Status. The table lists various customers with their respective data.

Name	Phone	Quote Count	Receipt Total	Receipt Count	Status
Gustavo Cirelli Santos		1	\$186.13	2	
Gustavo Guervara	626.290.9642	3	\$49.23	1	INACTIVE
H. Erkan Orkaya	x2692	1	\$165.97	1	
Haleem Ibrahim	661.470.3956	4	\$2,417.31	2	
Haiming Liu	x2840	1		0	
Haleh Golestani	818.802.2864	1		0	INACTIVE
Haley Lam		1	\$3,112.26	1	INACTIVE
Hallima El-maga	x2515	3	\$31,679.30	5	
Hamad Alkhalidi	323.975.9523	1	\$1,327.41	1	
Hamani Alqahtani	909.455.7381	1		0	
Han Pham		1		0	
Han V. Nguyen		2	\$8,774.75	1	
Hanalei Marisa Vasquez	909.274.8911	2		0	STUDENT
Hank Garcia		0		0	
Hannah Denberger	661.427.7329	1	\$363.16	1	
Hannah Saldanuna	014091376	1	\$914.82	1	STUDENT
Hannah Vito	714.930.5400	1	\$1,364.15	1	
Hao Ji		3	\$1,507.18	1	
Hareet Singh	323.500.8332	14	\$6,907.84	5	
Harrison Kenneth Wright	707.225.1438	1	\$1,921.20	1	STUDENT
Harry Nguyen	x2721	1	\$28,990.33	11	

- Locate the “New Quote” button
- Directly underneath the “New Quote” button, you will see a line showing a quote created for that customer

The screenshot shows the "Customer Details" page for Haley Lam. On the left, there are fields for Title, Email (haleyam@cpp.edu), and a dropdown menu set to "INACTIVE". On the right, under the "Quotes" tab, there is a "New Quote" button and a table with columns: #, Created, Type, Number, Assigned User, Summary, Needed By, and Status. A single quote is listed with the following details:

#	Created	Type	Number	Assigned User	Summary	Needed By	Status
CSQ11395	May 20, 2019	State Account	616002 POM01 49801 0101 00000	Samuel H	IMAC 27-INCH 19 16 GB 512 SSD		Completed

- Click that quote line

This is a close-up view of the quote table from the previous screenshot, showing the same data for the quote with ID CSQ11395.

#	Created	Type	Number	Assigned User	Summary	Needed By	Status
CSQ11395	May 20, 2019	State Account	616002 POM01 49801 0101 00000	Samuel H	IMAC 27-INCH 19 16 GB 512 SSD		Completed

This will take you to the quote details page.



Quote Details

IT Reference	Quantity	Unit Price	Total Price	Order PO
Tax		\$2,729.00	\$2,729.00	178030M
		\$2,729.00	\$2,729.00	
	215	\$288.79	\$62,049.75	
		\$119.00	\$119.00	
		\$119.00	\$119.00	

Step 4: Use Find (CTRL + F)

- Press CTRL + F on the keyboard
- The Find screen will appear like down below

Find Prepay

Quote Details

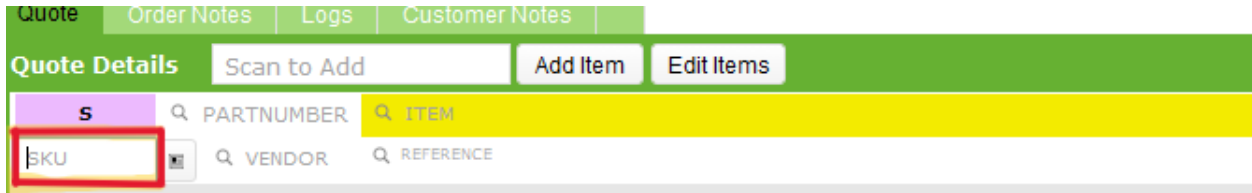
IT Reference	Quantity	Unit Price	Total Price	Order PO
Tax		\$2,729.00	\$2,729.00	178030M
		\$2,729.00	\$2,729.00	
	215	\$288.79	\$62,049.75	
		\$119.00	\$119.00	
		\$119.00	\$119.00	

Step 5: Search for the Product

Just like **Finding Products in 201**, use one of the following search methods:

Option 1: Search by SKU (Recommended)

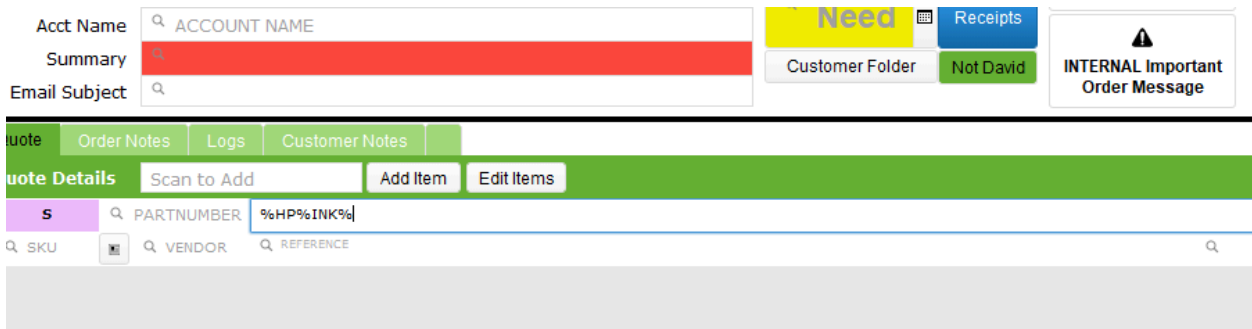
- Enter the **SKU** in the highlighted field
- This is the **most accurate** way to locate a special order item



The screenshot shows a software interface with a green header bar containing tabs for 'Quote', 'Order Notes', 'Logs', and 'Customer Notes'. Below the header is a 'Quote Details' section with a 'Scan to Add' input field and 'Add Item' and 'Edit Items' buttons. A search bar is highlighted in yellow, with a dropdown menu open showing options: 'PARTNUMBER', 'ITEM', 'VENDOR', and 'REFERENCE'. The 'ITEM' option is selected and highlighted in yellow. A red box highlights the 'SKU' text entered in the search input field.

Option 2: Search by Item Description or Name

- Use the % **symbol** before and after a keyword
 - Example: %HP INK%
- Press **Enter**
- This will return all results or special orders that match the description



The screenshot shows the same software interface as above. The search bar now contains the text '%HP%INK%'. The dropdown menu is still open, showing the same options. The 'ITEM' option is still selected. The search input field is highlighted in blue. In the background, there are buttons for 'Need', 'Receipts', 'Customer Folder', and 'Not David', and a warning icon with the text 'INTERNAL Important Order Message'.

Additional Search Notes

- The same search method works for:
 - **SKUs**
 - **PARTNUMBER** (Catalog Number)
- If too many results appear, narrow your search using more specific terms

Key Reminders

- SKU searches are the **most reliable**
- Item descriptions should be used only when SKU is unavailable
- FileMaker lookups help verify product details and order information
- When results are unclear, ask a lead or manager