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# Power Net 3.0

## User's Guide

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The **Power** of Integration

## Document Version History

| Change Description  | Version | Release Date |
|---|---------|--------------|
| Updated format.<br>Added SRP information.<br>Updated features.<br>New screenshots to reflect interface changes. | v3.0    | 05/17/2004   |

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# Chapter 1

## Introduction

Welcome to the Power Net User's Guide. This user's guide provides procedures and reference information necessary for completing ordering tasks using the Order Management System.

This chapter of the Order Management System User's Guide contains overview information to introduce you to the application, and reference information about how to use this user's guide.

# Introduction

The Order Management System is an electronic commerce application that enables you to place orders to your distributor using the Internet 24 hours a day, 7 days a week.

This user guide contains information to help you logon to your distributor's proprietary Web site and access their ordering system to generate and edit orders, search products, select substitute and related products.

The Order Management System provides a resource for information about your distributor so that you can place orders, check orders, view product information, and view and print reports via the Internet.

## Audience

This user guide is intended to be used by personnel responsible for ordering and managing orders to your distributor.

## User's Guide Organization

The information in this user's guide has been organized into the following chapters:

|  |   |
|--|---|
| Chapter 1<br>Introduction                        | Contains overview information about the product and how this user guide is organized.                                     |
| Chapter 2<br>Creating Orders and Pickup Requests | Contains procedures for order entry, pickup request generation, and submitting orders.                                    |
| Chapter 3<br>Viewing Order Information           | Contains procedures for viewing order information.  |
| Chapter 4<br>Order Guide Management              | Contains procedures and information about creating and using Customer Order Guides.                                       |
| Chapter 5<br>Reports                             | Contains information about reports available in the Order Management System.  |
| Chapter 6<br>Suggested Retails                   | Contains information and procedures for using the Suggested Retails feature to define pricing by item and by item groups. |
| Chapter 7<br>Customer Service and Information    | Contains basic information about additional features in the Order Management System.                                      |
| Appendix: Web Browser Tips                       | Contains information about using a Web browser.   |

## Terms

This section contains terms used throughout this user guide.

### Browser

The application used to view Web pages on the internet. Typically, this is Internet Explorer, but it may also be Netscape Navigator.

### Internet Explorer

A common browser application, typically found on most workstations installed a Windows operating system.

## Order management application

The application used to place orders to your distributor. The brand name of the application is IDS Power Net; however, Power Net is intended to be customized by distributors. Your order management Web site may use a proprietary name associated with your distributor; for example, Rocky Mountain Food Service.

## Power Net

The brand name of your distributor's order management system.

## Proprietary application

A customized software program.

## URL

Uniform Resource Locator. An address on the Internet where you go to find a specific Web page.

## Conventions Used In this User's Guide

This section describes the conventions used in this document and used throughout all IDS documentation to ensure consistent, clear delivery of information.

### Text Conventions

#### **bold**

Indicates the name of an item on a page or box, such as a button name, menu, menu option, or tab.

Example: Select **Print** from the **File** menu.

#### `courier`

Indicates the output from the system, specific text or command that you should type, or exact words from the system.

Example: Type `clr idslist` in the box.

#### *italics*

Indicates the title of a document.

Example: For more information, see the *IDS Power Enterprise Customer Service User's Guide*.

#### numbered lists

Indicates steps in a procedure.

Example:

1. Select the Windows Start button.
2. Select All Programs on the Windows Start menu.
3. Select Internet Explorer.

#### single-steps

Indicates a procedure with only one step, or a list of items.

Example:

Select the Windows Start button.

### **Note, Caution, and Warning Box Conventions**

Throughout the Power Net User Guide additional information about the procedures is provided. Additional information displays in a box with an information type label and a color.

The bold label at the top of each box indicates the type of information in the box to allow you to determine the type of information if you have printed the user guide in black and white and cannot distinguish between the colors of each box.

Additional information appears in the following categories:

Blue boxes indicate **Note** information.

**Note:**

Note boxes contain information text to provide related information.

Yellow boxes indicate **Caution** information.

**Caution:**

Caution boxes provide information about potential problems that might occur if the procedure is not performed correctly.

Red boxes indicate **Warning** information.

**Warning!**

Warning boxes contain information vital to the procedure. Failure to follow the information may lead to lose of data or damage to the database, hardware, or software.

# Product Overview

Your distributor's ordering management Web site is an Internet-based Customer Service Management application that provides online ordering and order management to your distributor.

## Ordering Management Web Site Features

Your distributor's ordering management Web Site has the following features:

\*Available 17 hours a day, seven days a week From 7 am to 11:59 pm. ( Update time 12:00am to 6:59am).

Allows you to quickly create and submit orders

Easy to use, robust item search engine makes finding products fast

Provides the ability to compare products and make substitutions to select similar items

Customized reporting tool lets you create the information you want on a report.

Keeps you up to date with account information

\*Check with your distributor for details. Typically, distributors schedule a short amount of time to run Day End processes.

## Order Management Interface

Your distributor's ordering management Web site is customized for you; therefore, each distributor's ordering management Web site is different. The instructions in this user guide contain images of Web pages that are similar, but not exactly like the Web pages you will see on your distributor's ordering management Web site. While the interface may be different, the functionality and features on your Web site are the same as described in this user guide.

This section contains basic information about using the ordering management Web site. Your menu options and page display may vary based on access assigned to your Order Management System log on.

### Home Orders Page

When you log onto the Order Management System, the Home Orders page displays a list of your Pending, Submitted, In Use, and Confirmed orders.

Access your Home Orders page from any page in the Order Management System by selecting the **Home** button on the main Order Management toolbar.



Welcome:  
SIBYL SPENCER

Customer Number:  
800800

**OLSENS BAKERY**  
2020 SO 10TH ST  
OMAHA, NE 68150

Items 1 - 3 of 3

View any order by clicking on the Order Number.

| Delete                   | Order #              | Order Type | Order Date | Qty Ordered | Total Invoice | Instructions | Status  |
|--------------------------|----------------------|------------|------------|-------------|---------------|--------------|---------|
| <input type="checkbox"/> | <a href="#">4488</a> | Order      | 05/11/2004 | 80          | \$11375.17    |              | Pending |
| <input type="checkbox"/> | <a href="#">4489</a> | Order      | 05/11/2004 | 80          | \$4552.55     |              | Pending |
| <input type="checkbox"/> | <a href="#">4490</a> | Order      | 05/11/2004 | 80          | \$4052.70     |              | Pending |

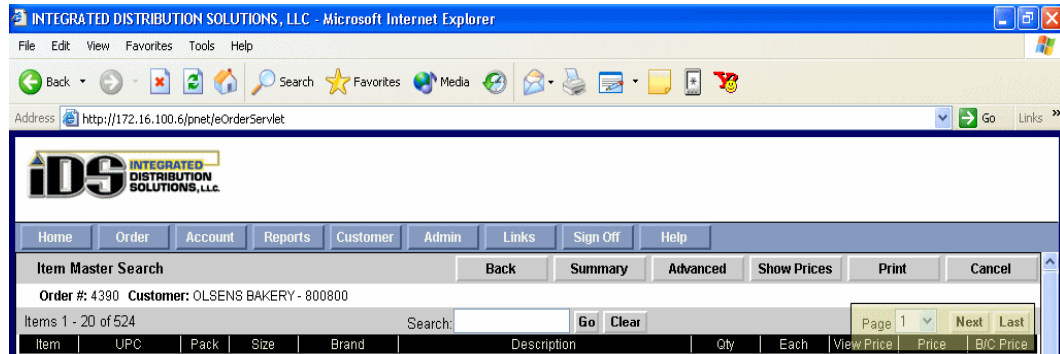


## Page Navigation

Use this topic to find out how to use the Page list to view multiple page lists of items in the Order Management System. The Page list and page navigation buttons display whenever you are on an order form, order guide, search or other page that contains items that do not fit on one page.

To change the number of lines that display per page, see "" on page .

In the Order Management System, use the Page list to move to a specific page.



1. Click the **Next** button to view the next page or items.
2. When you navigate to page 2, the set of buttons change.



Click **First** to go to the first page of items

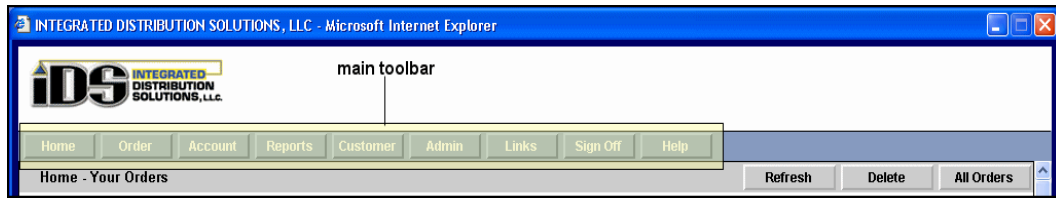
Click **Prev** to return to the previous page of items

Click **Next** to move consecutively through the pages of items

Click **last** to move to the last page of items.

## Main Order Management Toolbar

The main Order Management Toolbar is an application-wide toolbar and displays on each of the Order Management System pages. Some of the buttons contain menu items and some take you directly to another part of the Order Management System.



1. Click **Home** at any time to return to your Home Orders page that lists all of your orders.
2. Select **Order** to select an order form type. Select from **History**, **Import**, **Standard Guides**, or **Quick Add**.

**Note:**

Your options may be different based on access assigned to your Order Management System log on.

3. Select **Account** to view Statement Status and Consolidated Statement account information.
4. Select **Reports** to view the reports menu. Select from the Item Usage, Consolidated Usage, and Movement reports.
5. Select **Admin** to view a menu of administration tasks. Select User Options, Order Guides, Suggested Retail, or Item Master Search.

### Page Toolbars

In addition to the main Order Management System toolbar, each page contains its own toolbar.

Page toolbars access options for the current Web page and may change as you navigate to other sections of the Order Management System.



## Getting Started with the Order Management System

This section contains information to get you up and running with the Order Management System. The images of the application in this section are examples of a version of the Order Management System. Each distributor customizes the order management system according to their company and environment, therefore, the order management system you use will appear different than the one used as an example in this user's guide.

Before you begin using the order management system, verify the following items:

Confirm that your computer meets the minimum requirements (see Minimum System Requirements).

Get a user name and password for the Order Management System.

Connect to the Internet according to your company's procedures.

If you do not know the order management system's URL, then ask your supervisor or system administrator.

Sign on with your new user name and password.

### **Navigating to the Order Management Web Site**

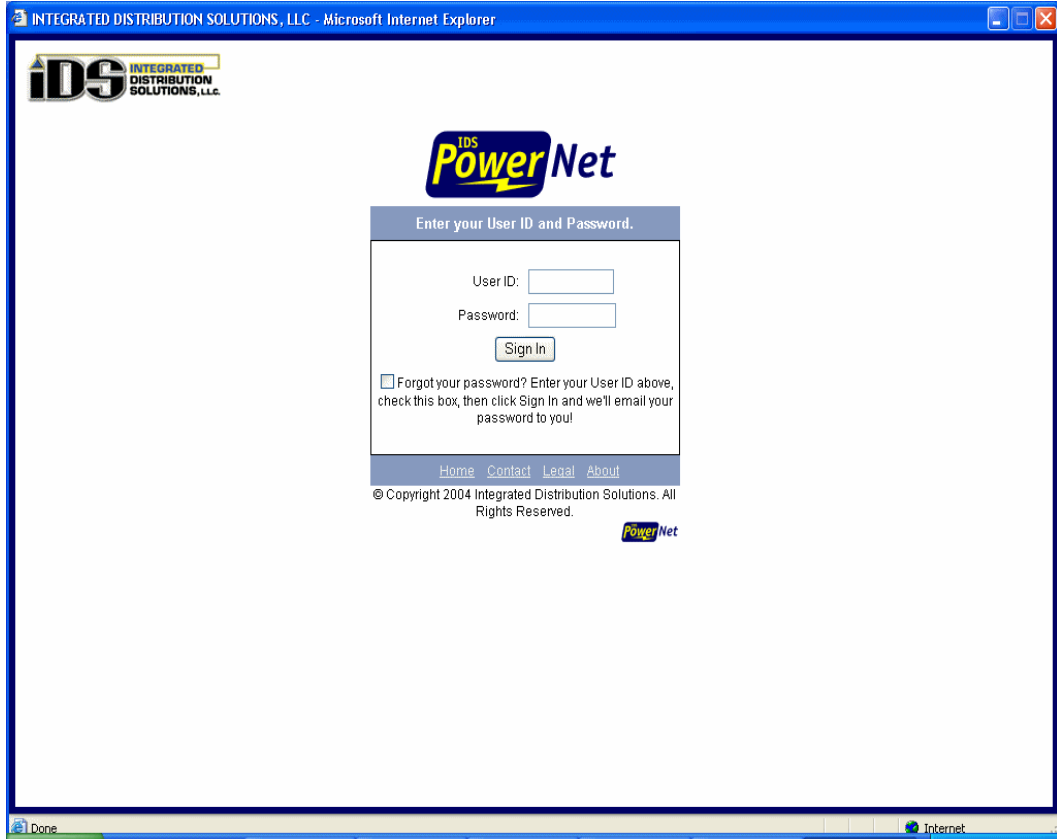
Use this procedure to access your distributor's order management Web site.

1. Turn on the power to your computer.
2. Double-click the Internet Explorer icon on your desktop to open the browser.
3. Connect to the Internet. For example, you may use a dialup connection through an Internet Service Provider to get to the Internet. You may be asked to enter the user name and password for your ISP, which is not your Order Management System password to your distributor's Web site.
4. Enter the URL to your distributor's Web site in the **Address** box on your browser.  
Example: <http://online.saladinos.com>
5. Click the **Go** button to the right of the **Address** box, or press ENTER to go to your distributor's Web site. The browser displays your distributor's Home page.

## Logging On To the Ordering Web Site

Use this procedure to log on to your distributor's Web site.

1. Browse to the logon page of your distributor's order management Web site.



2. Enter your Order Management System user name in the **User ID** box.

**Note:**

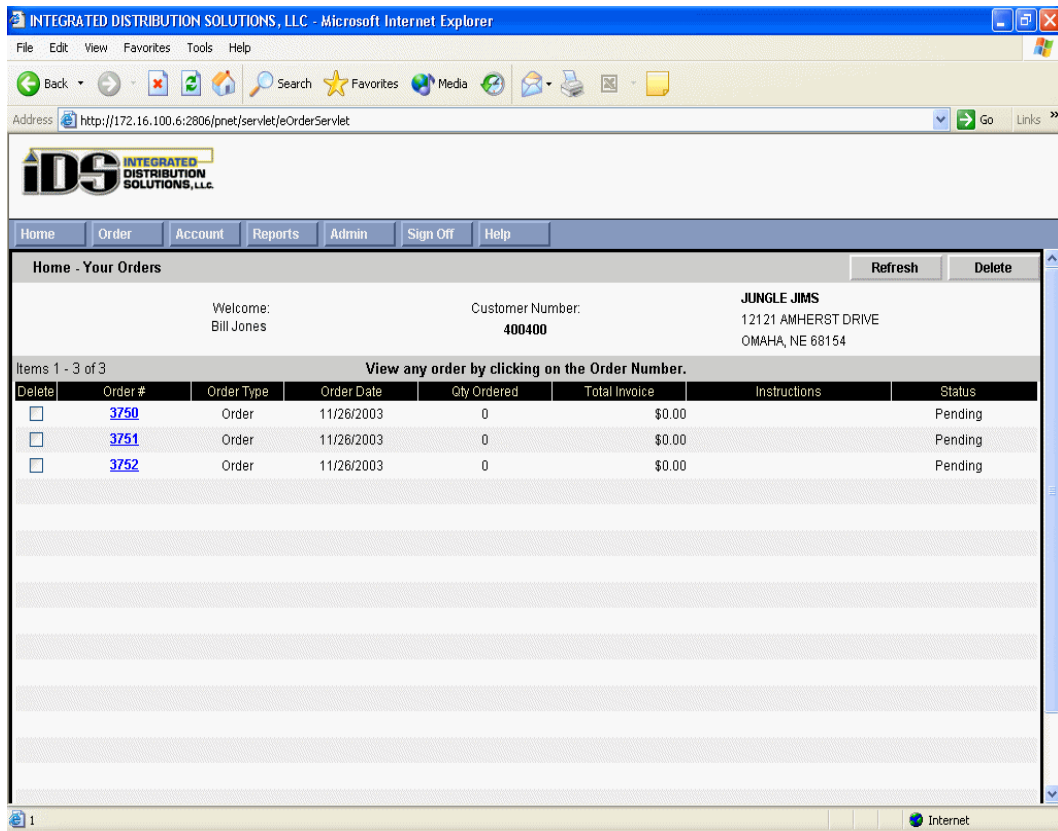
If you do not have a user name and password, contact CSR representative at Saladinos or account representative.

3. Enter the password in the **Password** box and click **Sign In**.

**Caution:**

Protect your user name and password and do not share your logon information with anyone. Anyone with your user name and password can access your order management account using any computer with access to the Internet. Do not write your user name and password on order forms or on the wall next to the computer.

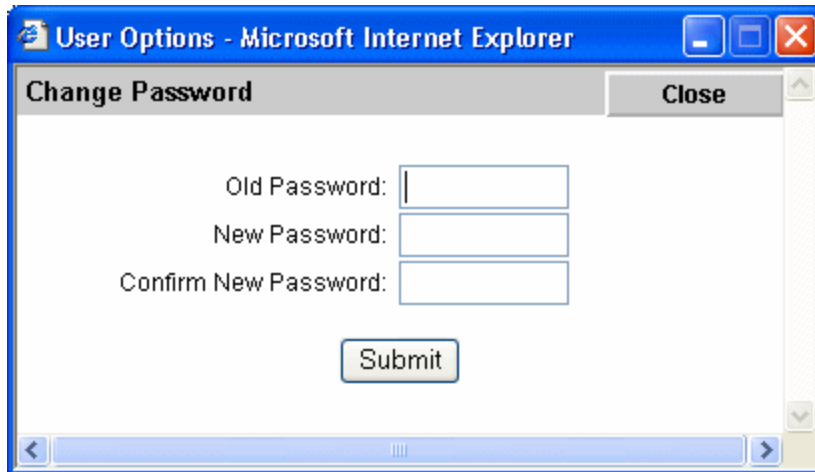
- The Order Management System validates your user name and password. After a successful logon, the Home Orders page displays with your name, your company's customer number, name, and address in the header.



### Changing Your Password

Use this procedure to change your password to the Order Management System. Depending on how the Order Management System is set up for your company, you may be required to change your password after a certain number of days. In addition, changing your password at least on a monthly basis is recommended to ensure your log on is secure.

- On any page of the Order Management System, select **Change Password** from **User Options** on the **Admin** menu on the main toolbar. The Change Password box displays.



2. Enter your existing password in the **Old Password** box.
3. Enter your new password in the **New Password** box.
4. Enter your new password again in the **Confirm New Password** box.
5. Click **Submit**.
6. Click **Close**.
7. Use your new password on the sign on page the next time you log onto the Order Management System.

### **Creating a Shortcut to the Ordering System**

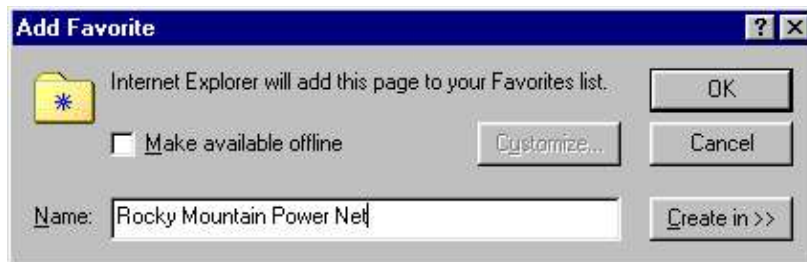
Use this procedure to save the location, or Web site address, to your distributor's order management Web site in your browser for easy access.

The ordering management Web site is compatible with Internet Explorer and Netscape Navigator. This user guide contains procedures for book marking for both browsers.

#### Internet Explorer Users

Use this procedure to add the order management Web site to your Favorites list in Internet Explorer.

1. If you are not on the Order Management System sign on page, enter the Web address to your distributor's Home page to sign on.
2. Click **Favorites** on the toolbar to display the **Favorites** list in the left pane, and select **add**. The Add Favorite box opens.



3. Enter a label for the order management Web site in the **Name** box, and click **OK**.

4. The label for the order management Web site now displays in the Favorites list in the left pane.
5. Click to access the Order Management log on page.

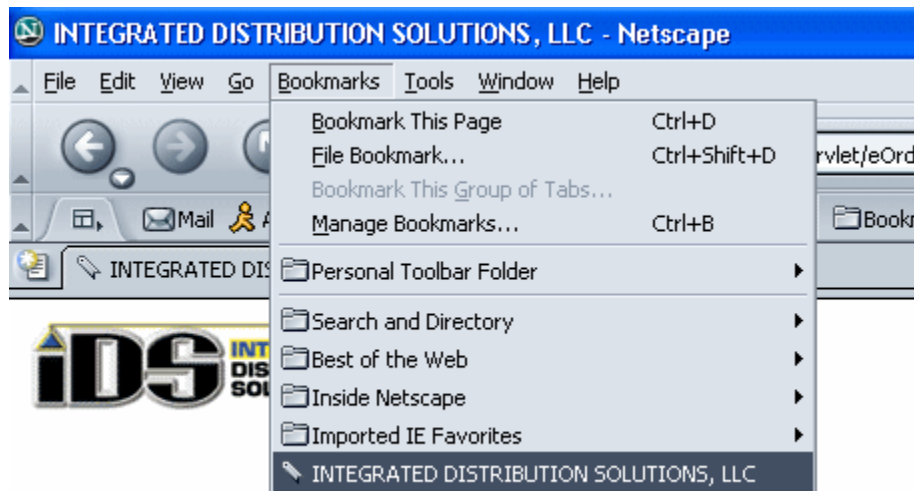
### Netscape Users

Use this procedure to add the order management URL to Bookmarks in Netscape.

1. If you are not on the order management sign on page, enter the URL to open the order management sign on page.
2. On the order management page, select **Bookmark This Page** on the **Bookmark** menu. A link to the order management sign on page displays at the end of the Bookmark menu.



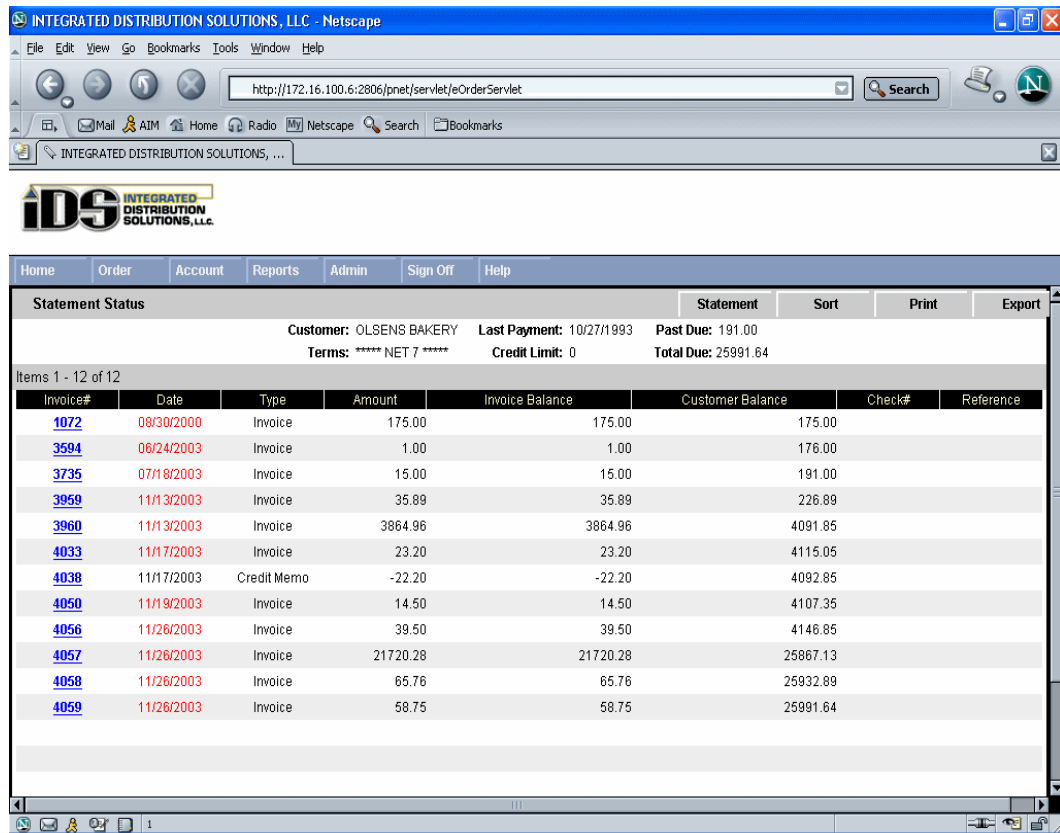
3. In the future, click the link to the order management sign on page to go to the sign on page.



### **Sign Off the Order Management System**

Use this procedure when you are done using the order management system. You do not have to sign off, but completing this procedure protects your user name from unauthorized activity.

1. Click the **Sign Off** button at the top of any of the order management pages on the main toolbar.



2. The page closes taking you back to the sign on page.
3. To access the order management system again, follow the sign on procedures.

**Note:**

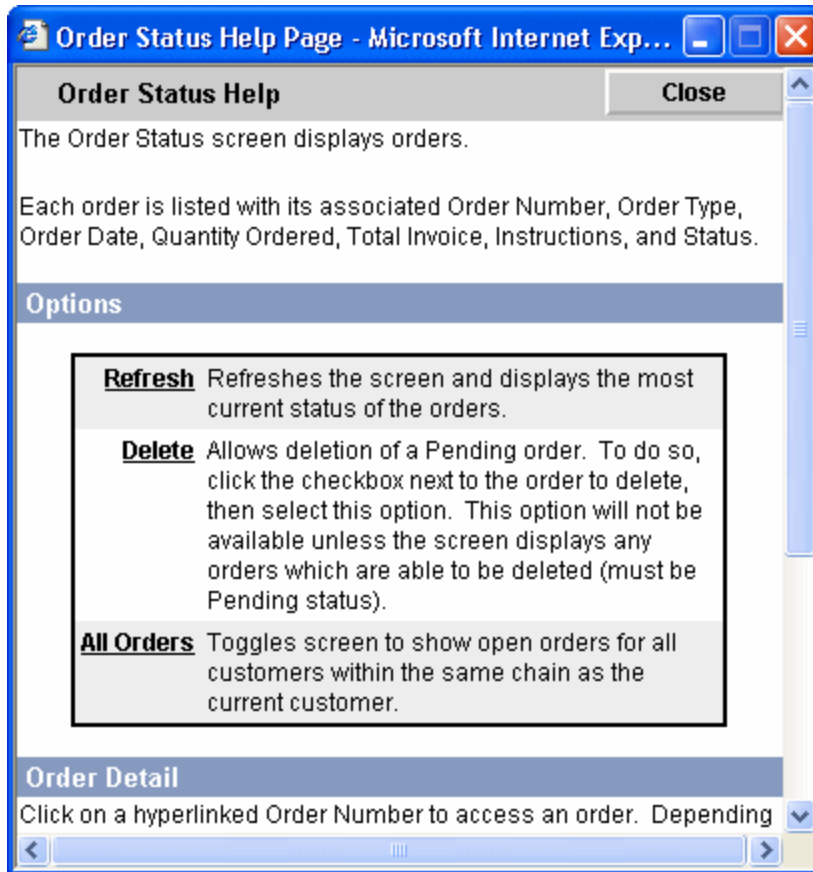
If you lose your Internet connection to the order management system while creating an order, or viewing order details, return to the sign on page and follow the sign on procedures. Orders you were working on at the time of the interruption, will be listed on the Order Status page as **In Use**.

## Using Help

The order management process contains page-level Help. Page level Help provides a description of the options and values for the current page.

### Accessing Help

1. On the page where you have a question, select **Page Help** from the **Help** option on the main toolbar.
2. The **Help** box displays information about each element on the open order management page.



3. Use the scroll box to move up and down on the **Help** box.
4. Click **Close** at the top to exit the **Help** box.

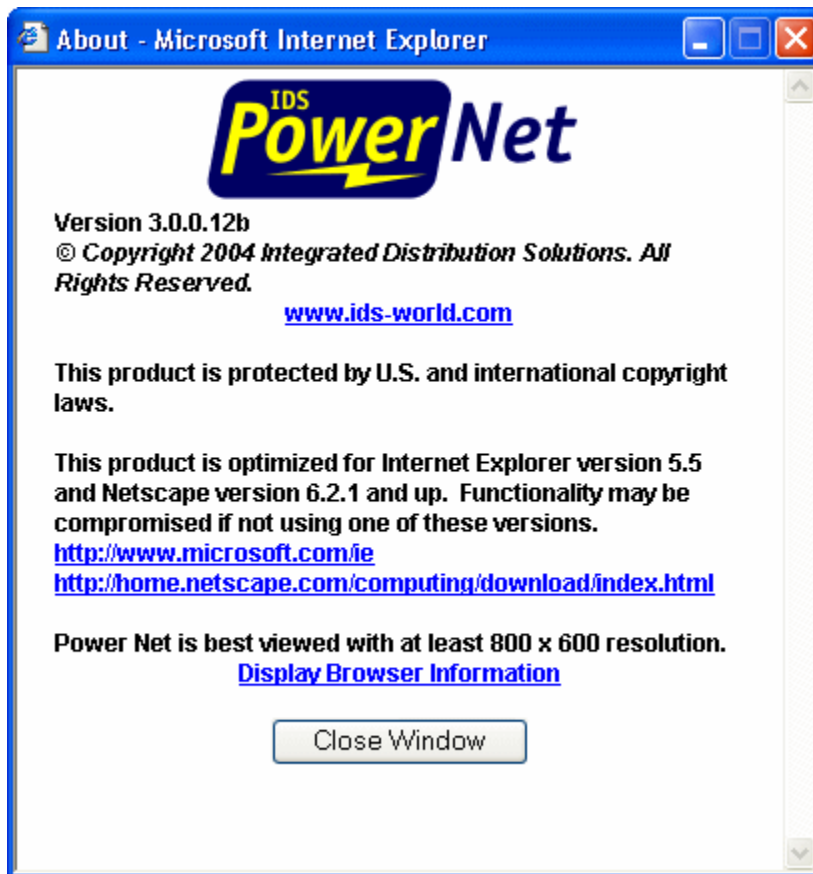
## Viewing Version Information

In the event that you need to call for support on the Order Management System, you may be asked for the version of your product, or the version of the browser you are using.

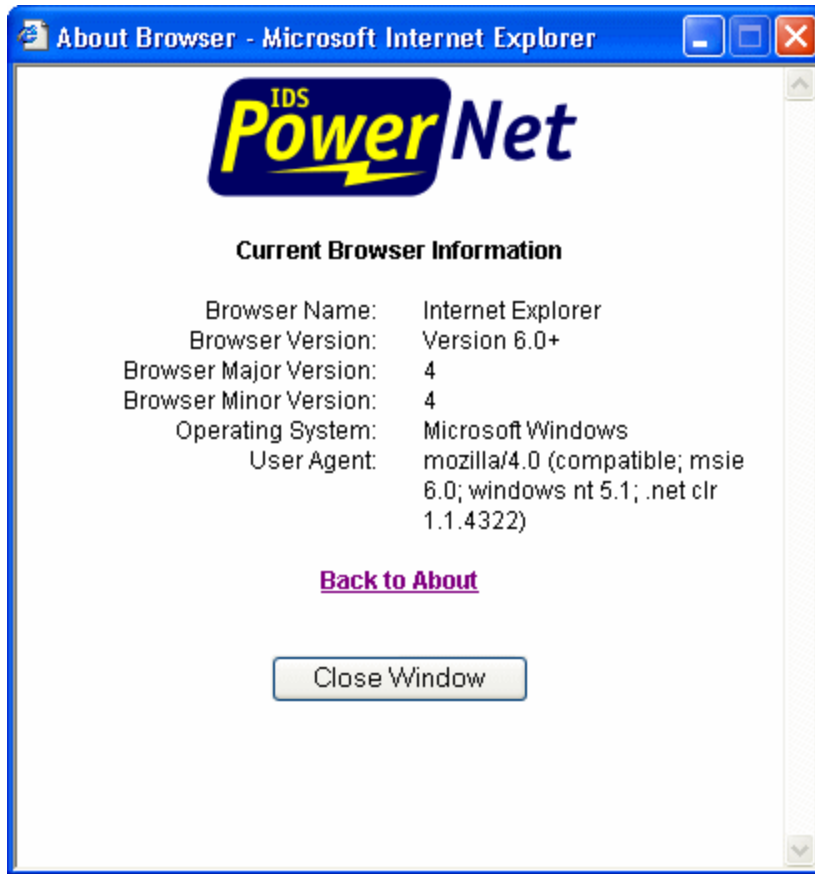
### Opening the About Box

Use this procedure to find the Order Management System's version information or to find the Internet browser version.

1. If you have the Order Management System application open, select **about** from the **Help** menu.
2. The About box displays. Version information displays in the upper left.



3. To find out what version of your browser you are running, click the **Display Browser Information** link.



4. Click **Close Window** to return to the Order Management System.

## Switch Customer Accounts

The order management system allows you to switch customer accounts if you are set up with chain access. The order management system will have a **Change Customer** option on the **Admin** menu if you are set up with chain access.

If you do not see the **Change Customer** option on the **Admin** menu, your company has not been set up with chain access. Contact Saladino's customer service department.

### Using the Change Customer

Use this procedure to open a different customer account.

1. From any page in the order management system, select **Change** from the **Customer** menu. The Change Customer page opens.

INTEGRATED DISTRIBUTION SOLUTIONS, LLC

Home Order Account Reports Admin Sign Off Help

Change Customer Reset Search

Search:

Items 1 - 5 of 5

| Number                 | Name                   | Address                  | City  | State | ZipCode |
|------------------------|------------------------|--------------------------|-------|-------|---------|
| <a href="#">100500</a> | EL BEE'S MEXICAN REST. | 15325 SOUTH 136TH STREET | OMAHA | NE    | 68137   |
| <a href="#">400400</a> | JUNGLE JIMS            | 12121 AMHERST DRIVE      | OMAHA | NE    | 68154   |
| <a href="#">400402</a> | TEST2                  | TEST3                    | OMAHA | NE    | 68444   |
| <a href="#">400403</a> | 2                      | 3                        | 5     | AL    | 7       |
| <a href="#">800800</a> | OLSENS BAKERY          | 2020 SO 10TH ST          | OMAHA | NE    | 68150   |

2. Click a customer identification number under **Number** to open the Home Orders page for the selected customer.

- OR—

Search for the customer by entering any portion of the customer's identification, name or address in the Search parameters boxes, and then select the customer's identification number under Number to open the Home Orders page for the selected customer.

## **Chapter 2**

# **Creating Orders**

This chapter describes how to create an order using the order management application. The order management system provides multiple ways to initiate an order to your distributor to make ordering easy and fast.

# Order Forms

The order management application provides a variety of ways to create an order depending on your preference and your company's ordering environment.

This section contains procedures for starting an order only, and provides instructions on where to find procedures for completing other order related tasks.

For instructions on adding items to an order, see "Adding Items to the Order" on page 26 .

For instructions on submitting an order to your distributor, see "Submit the Order" on page 32 .

For instructions on searching for items, see "Searching for an Item" on page 43.

## Using Your Order History to Order

This section contains procedures for using a list of previously ordered products as the order form.

### Creating an Order from Previous Orders

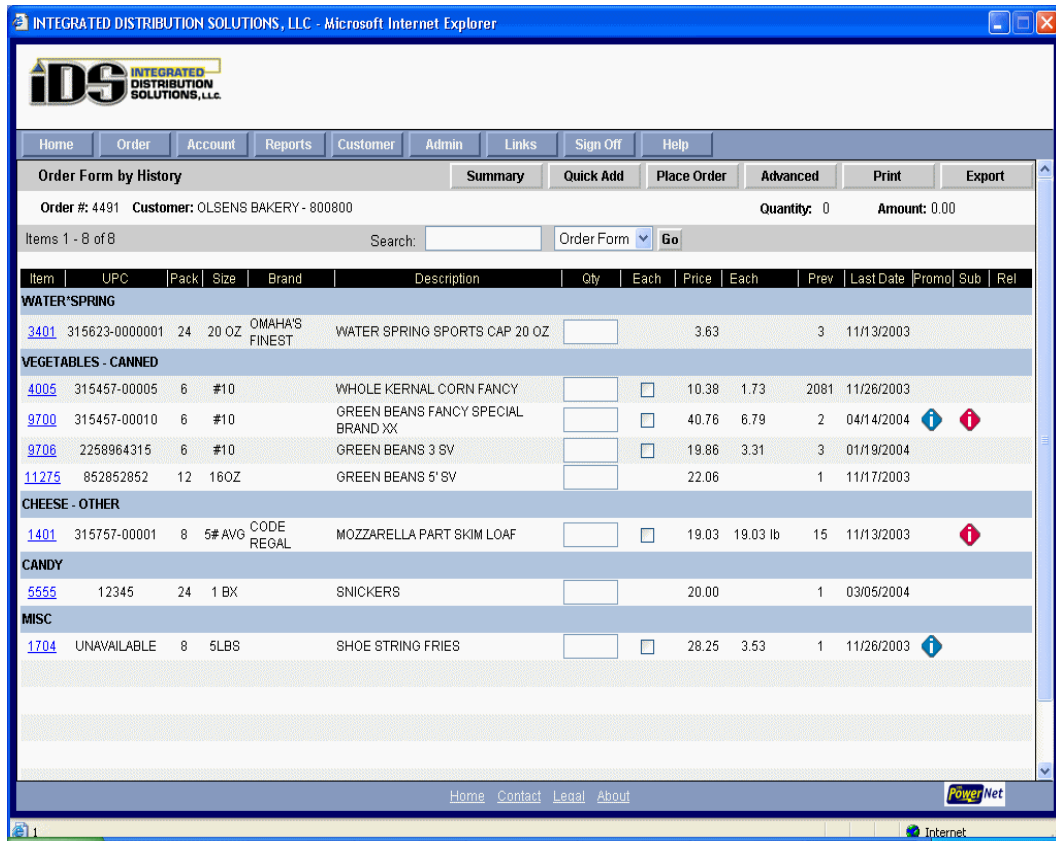
Use the Order Form by History page to start an order that contains products you order frequently. The Order Form by History page displays a cumulative list of products previously ordered from your distributor.

Typically, the Order Form by History displays more items than the Order Form by Guide, providing a more comprehensive product list.

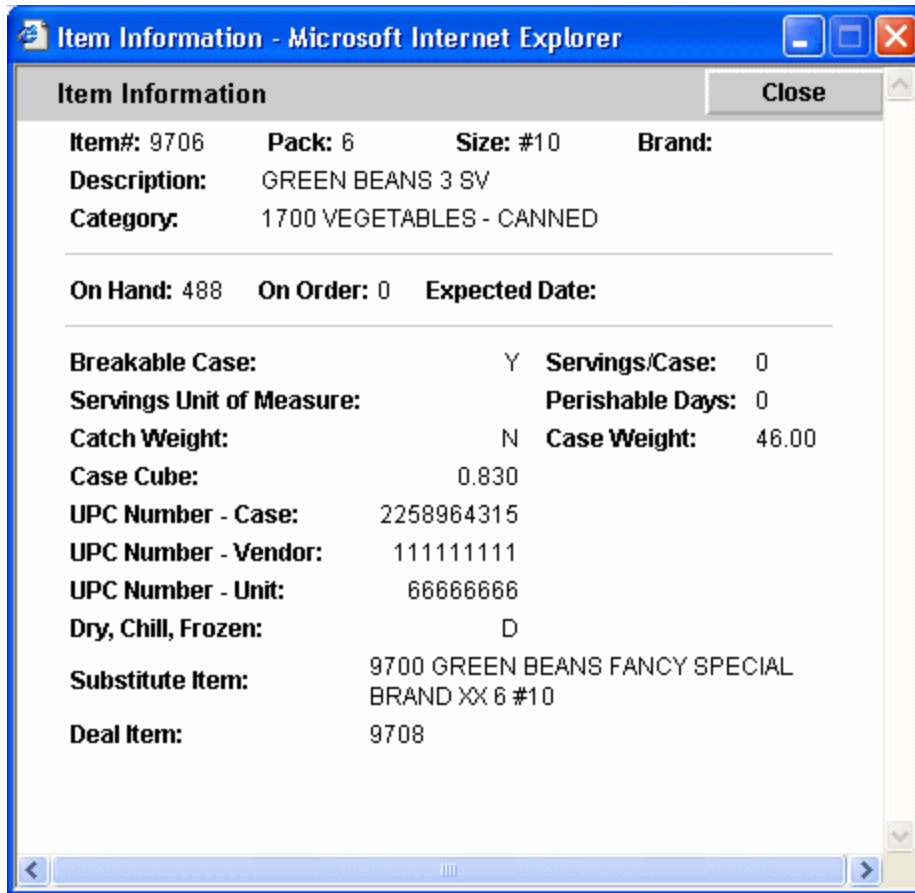
1. On the main toolbar, click **History** on the **Order** menu on the main toolbar to open the Order Form by History page.
2. The Order Form by History page displays with the order number associated with this new order in the header, and a list of all products that have you have ordered previously.

**Note:**

The product list that displays on the Order Form by History page up may change from day to day depending on settings in the order management application and your distributor's system update cycle.



1. To order an item, enter an amount in the **Qty** box next to the item description.
2. When applicable, select the **each** box to indicate the amount of the product in the **Qty** box is the number of individual product items, and is not the number of cases of the product.
3. To view details about an item on the order form, click the item number under **Item**.



### Adding Items to the Order

1. To find an item on the **Order Form by History**, enter the item number or name in the **Search** box and click **go**.
2. Verify the Order Form is selected from the Search list.
3. The Order Form Search page displays the search result. To order items from your search, enter an amount in the **Qty** box next to the item description.
4. Click **Order Form** to add the search item and return to the Order Form by History page. For more information about searches, see "Searching for an Item".
5. To add an item to the order form when you know the item number, click **Quick Add**.
6. Depending on your Order Management System settings, select the Quick Add type.
7. On the Quick Add page, enter the item's identification number, UPC, or customer item number in the **Item**, **UPC**, or **Customer Item Number** box.
8. Enter an amount of the product to order in the **Qty** box and click **Order Form** to add the quick add items to your order, and return to the Order Form by History page.

For detailed instructions about the Quick Add feature, see "Using Quick Add" on page 33.

## Ordering from an Import File

Use this procedure to import a file that identifies products by item numbers or UPC code.

**Note:**

The import feature works with text files with a .txt extension only.

### Importing Items from a File

Use this procedure to import a file to start an order.

1. Click File from **Import** on the **Order** menu. The Import page opens.
2. Click **Browse** to navigate to the location of the file to import.
3. Select the type of data in the import file from the **Item Format** list.

| Value/Format | Description or range   |
|--------------|--|
| Item Number  | Indicates products in the import file are identified by item number. |
| UPC Code     | Indicates products in the import file are identified by UPC number.  |

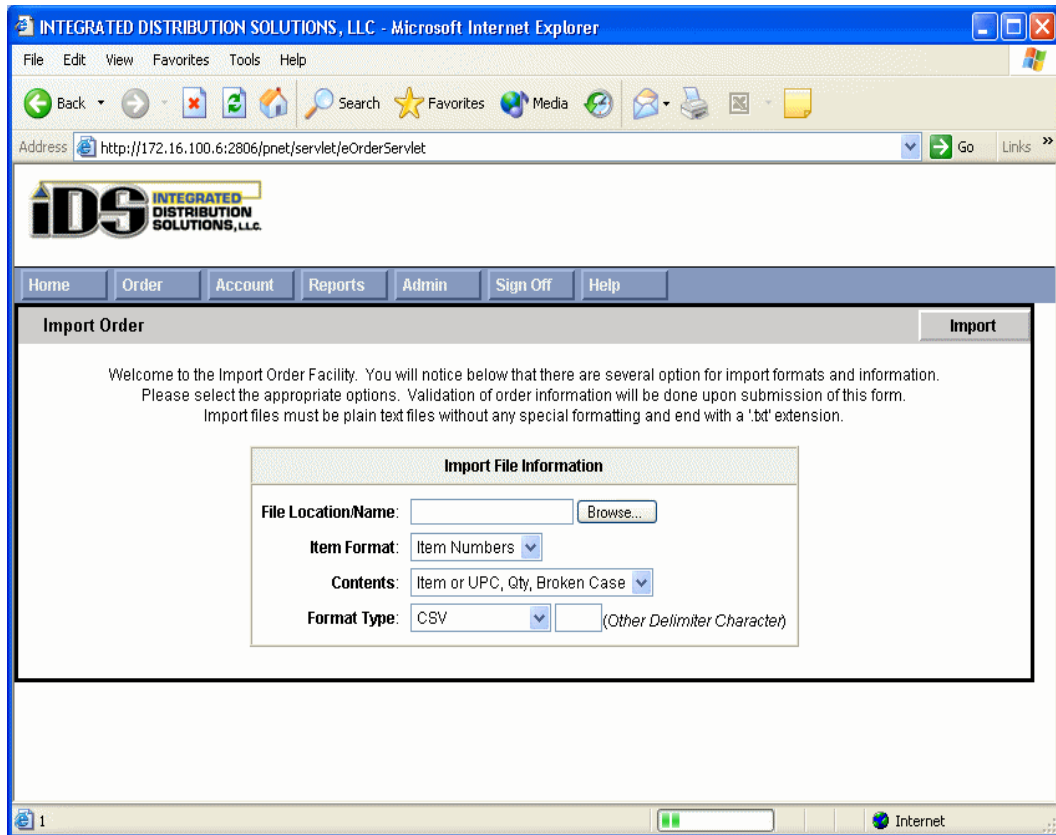
4. Select the import file's content type from the **Contents** list.

| Value/Format                  | Description or range  |
|-------------------------------|---|
| Item or UPC Only              | Indicates the import file contains only product identification information only.                                |
| Item or UPC, Qty, Broken Case | Indicates the import file contains an item or UPC number, the quantity of a product, and a broken case setting. |

5. Select the format of the import file from the **Format Type** list.

| Value/Format    | Description or range  |
|-----------------|---|
| CSV             | Comma Separated Values text file format. Select when the import file data is separated by commas. |
| Tab delimited   | Text file format that uses a tab to separate each value.  |
| Other delimited | Text file format that uses a specified character  |

6. If the file you are importing is delimited by an ASCII character other than a comma, enter the character that separates the values in the file in the **Other Delimiter Character** box.



7. Click **Import**.
8. The contents of the file is placed in an Order Form by History order, displaying a new order number in the page header, and a list of products from the data in the order section of the page.

**Note:**

If any problems occur with an item or data in the order, an error message displays. Follow the instructions on the error message to resolve the issue.

### **Adding Products to the Order**

1. To add a product to your order, enter an amount in the **Qty** box next to the item description.
2. To find an item enters the item number and name in the **Search** box and click **go**. The Order Form Search page displays the search result.
3. To order items from your search, enter an amount in the **Qty** box next to the item description.
4. Click **Back** to add the search item and return to the order form page. For more information about searches, see Searching for an Item on page 43.
5. To add an item to the order form when you know the item number, click **Quick Add**.
6. On the Quick Add page, enter the product's identification code in the **Item** box.
7. Enter an amount of the product to order in the **Qty** box and click **Back** to add the quick add items to your order and return to the Order Form page. For detailed instructions about the **Quick Add** feature, see "Using Quick Add" on page 33.

## **Ordering from an Order Guide**

This section contains procedures for placing an order from your company's Standard Order Guide, or from a Customer Order Guide.

### **About the Standard Order Guide**

A Standard Order Guide contains a list of all the products that your company typically orders from your distributor. The managers at your company determine what items are included on the Standard Order Guide. Use the Standard Order Guide to create a large order with products from many different categories.

### **About Customer Order Guides**

A Customer Order Guide contains a subset of products that are in the Standard Order Guide and/or the Item Master. Anyone can create a Customer Order Guide, depending on the access assigned to your logon. Use a customer-defined order guide to create an order based on a specific group of products. For example, if you have a Customer Order Guide that contains a basic set of products ordered weekly, then you could start ordering using that list, and then add items from the Standard Order Guide, and possibly from the Item Master.

Ordering from an order guide uses the same procedures as ordering from the item history (previous section). The advantage of a custom order guide is that it can provides a shorter, more focused list of items, depending on how you set up your order guides.

## Creating an Order from an Order Guide

Use this procedure to begin your order using either the Standard Order Guide or a Customer Order Guide.

1. On the main toolbar, select an order guide from either **Standard Guide(s)** or **Customer Guide(s)** on the **Order** menu to open an order form.
2. The Order Form by Guide page opens, displaying a new order number in the page header, and the entire list of products in the Standard Order Guide or the Customer Order Guide selected.
3. In this example, the order has been started with a Customer Order Guide called dec guide.

If you selected your company's standard order guide from the **Standard Order Guide(s)** option on the **Order** menu, the Order Form by Guide page displays.

INTEGRATED DISTRIBUTION SOLUTIONS, LLC - Microsoft Internet Explorer

Address: <http://172.16.100.6:2806/pnet/servlet/eOrderServlet>

**IDS** INTEGRATED DISTRIBUTION SOLUTIONS, LLC

Home Order Account Reports Admin More Sign Off Help

**Order Form by Guide** Summary Quick Add Delete Place Order Advanced Print Export

Order #: 3854 Quantity: 0 Amount: 0.00

Items 1 - 8 of 8 Search: Order Form Go

| Item                  | Pack | Size | Brand      | Description                            | Qty                  | Each                     | Price | Each  | Prev | Last Date  | Sub | Rel |
|-----------------------|------|------|------------|--|----------------------|--------------------------|-------|-------|------|------------|-----|-----|
| <a href="#">10438</a> | 12   | 16OZ |            | KOSHER 16 OZ DINNER FRANKS             | <input type="text"/> |                          | 30.13 |       |      |            |     |     |
| <a href="#">10442</a> | 12   | 16OZ |            | KOSHER ITALIAN SAUSAGE                 | <input type="text"/> |                          | 33.17 |       |      |            |     |     |
| <a href="#">10444</a> | 12   | 16OZ |            | KOSHER 16 OZ SMOKED SAUSAGE            | <input type="text"/> |                          | 33.28 |       |      |            |     |     |
| <a href="#">9700</a>  | 6    | #10  |            | GREEN BEANS FANCY SPECIAL BRAND XX     | <input type="text"/> | <input type="checkbox"/> | 40.76 | 6.79  | 1    | 11/26/2003 |     |     |
| <a href="#">9704</a>  | 24   | 8 OZ |            | WHOLE BABY CARROTS                     | <input type="text"/> |                          | 39.93 |       |      |            |     |     |
| <a href="#">1860</a>  | 6    | #10  | CODE REGAL | PORK & BEANS                           | <input type="text"/> | <input type="checkbox"/> | 43.60 | 7.27  |      |            |     |     |
| <a href="#">30300</a> | 10   | 6OZ  |            | ONION BAGELS                           | <input type="text"/> |                          | 13.92 |       |      |            |     |     |
| <a href="#">1670</a>  | 6    | 8 OZ | SMITH      | CREAM CHEESE - INDIVIDUAL SERVING 9702 | <input type="text"/> | <input type="checkbox"/> | 20.87 | 20.87 |      |            |     |     |

1 Internet

If you select a specific Customer Order Guide from the Customer Guide(s) **Order** menu, the Order Form by Guide: <guide name> page displays.

**Order Form by Guide: dec guide**

Summary   Quick Add   Delete   Place Order   Advanced   Print   Export

Order #: 3787   Quantity: 144   Amount: 20108.81

Items 20 - 38 of 47   Search:   Order Form   Go   First   Prev   Next   Last

| Item                   | Pack | Size   | Brand | Description                    | Qty | Each                     | Price    | Each | Par | Prev | Last Date  | Sub | Rel |
|------------------------|------|--------|-------|--------------------------------|-----|--------------------------|----------|------|-----|------|------------|-----|-----|
| <a href="#">600101</a> | 6    | #10    |       | WHOLE KERNAL CREAM CORN        | 5   |                          | 23.75    |      |     |      |            |     |     |
| <a href="#">1993</a>   | 100  | 2.5OZ  |       | BLOOMFIELD CARAMEL NUT COOKIES | 5   |                          | 38.53    |      |     |      |            |     |     |
| <a href="#">1962</a>   | 6    | #10    | JENOS | JENOS PIZZA SAUCE              | 5   |                          | 36.00    |      |     |      |            |     |     |
| <a href="#">5555</a>   | 24   | 1 BX   |       | SNICKERS                       | 25  |                          | 12.83    |      |     |      |            |     |     |
| <a href="#">10400</a>  | 2    | 50LB   |       | FLOUR 50#                      | 8   | <input type="checkbox"/> | 0.59     | 0.59 |     |      |            |     |     |
| <a href="#">70000</a>  | 1    | 100LBS |       | 100LBS FLOUR                   | 5   |                          | 23.25    |      |     |      |            |     |     |
| <a href="#">70005</a>  | 1    | 50 #   |       | FLOUR WHITE ENRICHED           | 5   |                          | 11.75    |      |     |      |            |     |     |
| <a href="#">10352</a>  | 6    | #10    |       | SUGAR                          | 5   |                          | 1.12     |      |     |      |            |     |     |
| <a href="#">710000</a> | 1    | 40LBS  |       | BUNN COFFEE MAKER-6 POT        | 5   |                          | 26.00    |      |     |      |            |     |     |
| <a href="#">180090</a> | 12   | 6 OZ   |       | FILET - PETITE STEAK 6 OZ      |     |                          | 52747.58 |      |     |      |            |     |     |
| <a href="#">9703</a>   | 6    | #10    |       | STEWED TOMATOES                |     |                          | 40.00    |      |     |      |            |     |     |
| <a href="#">1704</a>   | 8    | 5LBS   |       | SHOE STRING FRIES              |     | <input type="checkbox"/> | 33.75    | 4.22 |     | 1    | 11/26/2003 |     |     |
| <a href="#">1972</a>   | 8    | 5 LB   |       | SHOE STRING FRIES              |     |                          | 52.50    |      |     |      |            |     |     |
| <a href="#">1965</a>   | 12   | 1 GAL  |       | DILL PICKLES                   |     |                          | 28.10    |      |     |      |            |     |     |
| <a href="#">2694</a>   | 20   | 6 OZ   | HIENZ | MIXED BERRIES                  |     | <input type="checkbox"/> | 18.75    | 0.94 |     |      |            |     |     |
| <a href="#">2838</a>   | 12   | 12 OZ  | HIENZ | SHEET RELISH                   |     |                          | 2.19     |      |     |      |            |     |     |
| <a href="#">4003</a>   | 6    | #10    |       | KIDNEY BEANS DARK FANCY        |     | <input type="checkbox"/> | 16.47    | 2.75 |     |      |            |     |     |
| <a href="#">4002</a>   | 24   | 16 OZ  |       | GREEN BEANS 3 SIEVE FANCY      |     | <input type="checkbox"/> | 7.25     | 0.24 |     |      |            |     |     |

- To order an item, enter the amount in the **Qty.** box. For instructions for adding items that are not in the order guide, see "Adding Items to an Order" on page 33 .
- To find an item not listed in the order guide, see "Searching for an Item" on page 43.

# Ordering Tasks

This section contains information about tasks necessary to complete an order. Use this section to find out how to add items to an order, substitute, sort, and search for items, and submit orders.

If you are new to the order management application use the information in this section to find out how to perform specific tasks.

If you are familiar with the order management application, use the information in this section to find out how to use the advanced features of the application, as well as to understand new features.

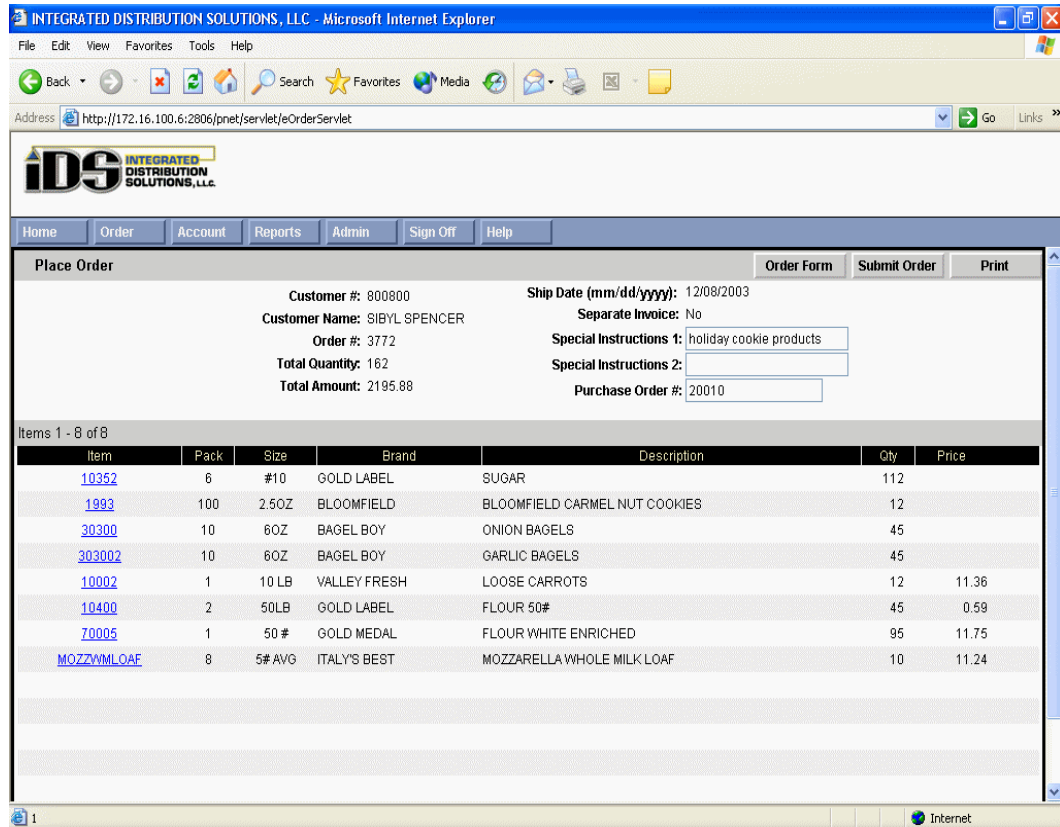
## Submitting Orders

This section contains instructions for sending a completed order to your distributor. Use this procedure with any of order forms.

### Submit the Order

Use this procedure when you are done adding items to the order, and are ready to send a completed order to your distributor.

1. When you have completed an order on the Order Form, click **Place Order** to open the Place Order page.



The screenshot shows a web browser window titled "INTEGRATED DISTRIBUTION SOLUTIONS, LLC - Microsoft Internet Explorer". The address bar shows "http://172.16.100.6:2806/pnet/servlet/eOrderServlet". The page content includes the IDS logo and a navigation menu with options: Home, Order, Account, Reports, Admin, Sign Off, Help. The main content area is titled "Place Order" and contains the following information:

**Customer #:** 800800      **Ship Date (mm/dd/yyyy):** 12/08/2003  
**Customer Name:** SIBYL SPENCER      **Separate Invoice:** No  
**Order #:** 3772      **Special Instructions 1:** holiday cookie products  
**Total Quantity:** 162      **Special Instructions 2:**   
**Total Amount:** 2195.88      **Purchase Order #:** 20010

Items 1 - 8 of 8

| Item                       | Pack | Size   | Brand        | Description                   | Qty | Price |
|----------------------------|------|--------|--------------|-------------------------------|-----|-------|
| <a href="#">10352</a>      | 6    | #10    | GOLD LABEL   | SUGAR                         | 112 |       |
| <a href="#">1993</a>       | 100  | 2.5OZ  | BLOOMFIELD   | BLOOMFIELD CARMEL NUT COOKIES | 12  |       |
| <a href="#">30300</a>      | 10   | 6OZ    | BAGEL BOY    | ONION BAGELS                  | 45  |       |
| <a href="#">303002</a>     | 10   | 6OZ    | BAGEL BOY    | GARLIC BAGELS                 | 45  |       |
| <a href="#">10002</a>      | 1    | 10 LB  | VALLEY FRESH | LOOSE CARROTS                 | 12  | 11.36 |
| <a href="#">10400</a>      | 2    | 50LB   | GOLD LABEL   | FLOUR 50#                     | 45  | 0.59  |
| <a href="#">70005</a>      | 1    | 50 #   | GOLD MEDAL   | FLOUR WHITE ENRICHED          | 95  | 11.75 |
| <a href="#">MOZZWMLQAF</a> | 8    | 5# AVG | ITALY'S BEST | MOZZARELLA WHOLE MILK LOAF    | 10  | 11.24 |

2. Enter the date when the order needs to ship in the **Ship Date** box, if it isn't already defined.

3. Select the **Separate Invoice** check box to indicate whether to your distributor to separate the invoice.
4. If you have any additional information about the order, enter the information in the **Special Instructions** box.
5. Review the order.

If you need to make any changes, click **Order Form** to return to the Order Form by History page, make changes, and click **Place Order** again.

- OR—

To print the order, click **Print**.

6. If your company is applying a purchase order to the order, enter the purchase order number in the **Purchase Order #** box.
7. When the order is complete, click **Submit Order**. The order is sent to your distributor, and the order management application returns to the Home Orders page.

### **Saving an Order to Submit Later**

Use this procedure when you have created an order but do not want to send the order yet.

1. Select **Home** on any page to return to the Home Orders page. The order you were working on displays toward the end of the order list with a **Pending** status.
2. When you are ready to finish the order, open the Home Orders page and select the order number to open the order form.
3. Complete the order.
4. Submit the order. For details about submitting orders, see **Submitting Orders** on page 32.

## **Adding Items to an Order**

The order management system provides several ways to add items to an order. This section contains instructions for adding items using the Quick Add or using an order guide. The procedures apply to all of the order types.

### **Using Quick Add**

Use this procedure to add products to an order when you know the item's identification number.

1. Begin an order using one of the methods described in the Order Forms section on page 24.
2. On the Order Form page, click **Quick Add** to open the Quick Add page. The current order form number displays in the header of the page.

#### **Note:**

In this example, the Quick Add by Item was selected. You may have the option to select Quick Add by UPC or Quick Add by Customer Item.



## Adding an Item from an Order Guide or from the Item Master

Use this procedure to select a product that isn't on the order form using the order form or the Item Master.

1. Begin an order using one of the methods described in the Order Forms section on page 24.
2. On the Order Form page, select the Order Guide or Item Master from the list in the header.

Order Guide list

| Item                   | Pack | Size  | Brand | Description                   | Qty | Each | Price | Each | P |
|------------------------|------|-------|-------|-------------------------------|-----|------|-------|------|---|
| <a href="#">600101</a> | 6    | #10   |       | WHOLE KERNAL CREAM CORN       | 5   |      | 23.75 |      |   |
| <a href="#">1993</a>   | 100  | 2.5OZ |       | BLOOMFIELD CARMEL NUT COOKIES | 5   |      | 38.53 |      |   |
| <a href="#">1062</a>   | 6    | #10   | PIZZA | PIZZA SAUCE                   | 5   |      | 26.00 |      |   |

3. Enter the item's name or a category that the item belongs to in the **Search** box.

- Click **Go** to search the Item Master for items that match your search criteria. The items that match your search display in a list in a new page.

The screenshot shows a web browser window titled "INTEGRATED DISTRIBUTION SOLUTIONS, LLC - Microsoft Internet Explorer". The address bar shows "http://172.16.100.6/pnet/eOrderServlet". The page content includes a navigation menu with "Home", "Order", "Account", "Reports", "Admin", "Links", "Sign Off", and "Help". Below the menu is the "Item Master Search" section with buttons for "Back", "Summary", "Advanced", "Show Prices", "Print", and "Cancel". The search results are displayed in a table with the following data:

| Item                    | Pack | Size   | Brand       | Description                             | Qty                  | Each                     | View Price               | Price | B/C Price |
|-------------------------|------|--------|-------------|---|----------------------|--------------------------|--------------------------|-------|-----------|
| <a href="#">10450</a>   | 8    | 5#     |             | MOZZ/AMERICAN BLEND CHEESE SHREDDED     | <input type="text"/> | <input type="checkbox"/> | <input type="checkbox"/> |       |           |
| <a href="#">15100</a>   | 280  | 1.14OZ |             | JUMBO ROUND CHEESE RAVIOLI (CN) PRE-CKD | <input type="text"/> | <input type="checkbox"/> | <input type="checkbox"/> |       |           |
| <a href="#">9140635</a> | 280  | 1      | RONTANELLIS | JUMBO ROUND CHEESE RAVIOLI (CN) PRE-CKD | <input type="text"/> | <input type="checkbox"/> | <input type="checkbox"/> |       |           |
| <a href="#">1670</a>    | 6    | 8 OZ   | SMITH       | CREAM CHEESE - INDIVIDUAL SERVING 9702  | <input type="text"/> | <input type="checkbox"/> | <input type="checkbox"/> | 20.87 | 20.87     |

- To order items from the search results page, enter the amount of the product in the **Qty** box.
- To view information about item, click the item's identification number in the left column. A box displays quantity on hand, next shipment arrival date, substitute item number (if any), and special pricing information (if any).
- To return to your order, click **back**. Any items that you added on the search results page now display in your current order.

The Search page displays the following information:

**Item** – The item's identification number. Click to view details about the item.

**Pack** – Displays the number of items in a

**Size** –

**Brand** -

**Description** – Provides the description of the item. When hyperlinked, click to view additional information in a separate page.

**Qty** – Field for you to enter the quantity (cases) you want of this item (unless each box is checked, see below).

**Each** – If a box shows here, you may click the box to “break” a case. If each is checked, the amount in the Qty field is units of the item, *not* cases.

**Price** – The price for the item. If you click each, the price changes to the per-unit price, which is usually different from the per-case price for the item.

**Par** – Reserved for future release enhancement.

**Prev** – Shows the quantity of your company’s last order.

**Sub** – A green arrow means that the item is unavailable (current inventory = 0) and you have rights to view substitute items. Click the arrow to view substitute items you can order, as described below in the section **Substitute Items**.

**Rel** – A blue arrow indicates that there are related items you might want to order in addition to this item and that you have rights to view related items. Click the arrow to view the related items, as described below in the section **Related Items**.

## Substitute and Related Items

This section contains information about how to find substitute products when the item you are ordering is not available from your distributor.

### Adding a Substitute Item to an Order

A red I on an order form indicates the distributor cannot provide the product. Use this procedure to find out how to view and order substitute products. This procedure is the same for all order form types.



1. On the order form, double-click the substitute item indicator in the **Sub** column next to the product you are ordering.

INTEGRATED DISTRIBUTION SOLUTIONS, LLC - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Home Search Favorites Media Print Mail

Address http://172.16.100.6:2806/pnet/servlet/eOrderServlet

**IDS** INTEGRATED DISTRIBUTION SOLUTIONS, LLC

Home Order Account Reports Admin More Sign Off Help

Order Form by Guide: [dec guide](#) Summary Quick Add Delete Place Order Advanced Print Export

Order #: 3855 Quantity: 82 Amount: 12294.44

Items 1 - 19 of 47 Search: Order Form Go Next Last

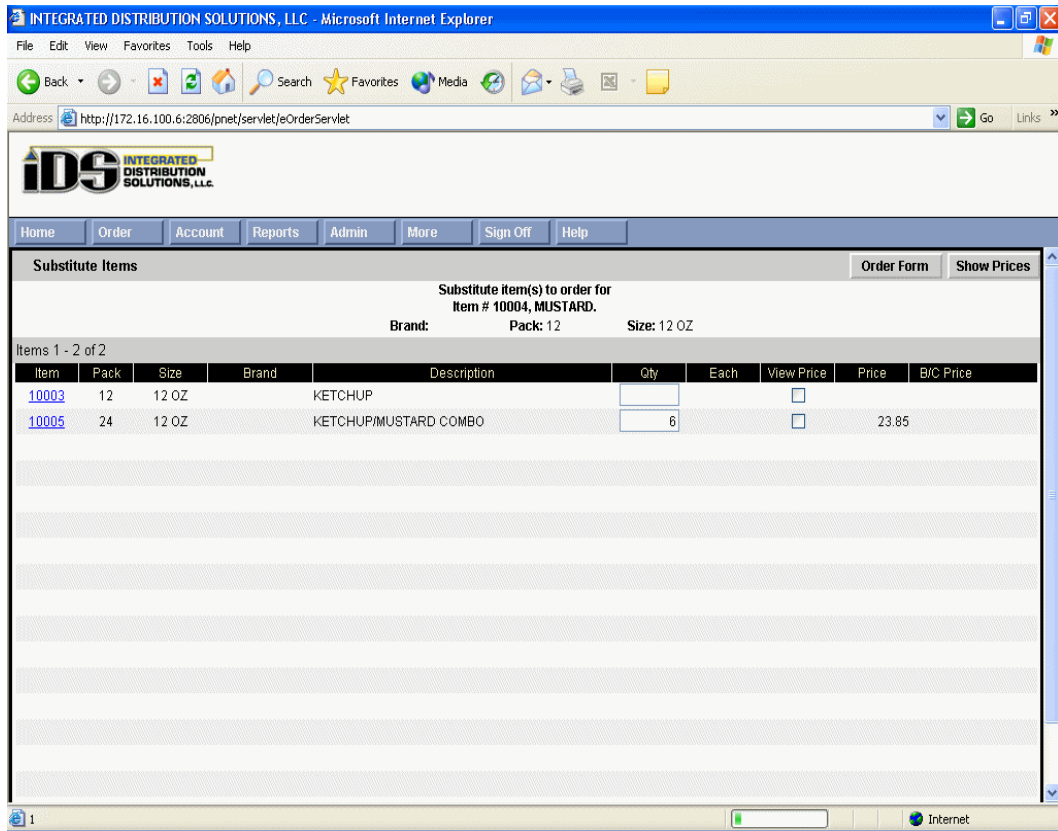
| Item                         | Pack | Size    | Brand          | Description                             | Qty                             | Each                     | Price | Each  | Par | Prev | Last Date  | Sub | Rel |
|------------------------------|------|---------|----------------|---|---------------------------------|--------------------------|-------|-------|-----|------|------------|-----|-----|
| <a href="#">10336</a>        | 1    | 30EA    |                | BREAD - 30 SLICE                        | <input type="text" value="5"/>  |                          | 1.47  |       |     |      |            |     |     |
| <a href="#">10425</a>        | 1    | 40EA    |                | BREAD - 40 SLICE                        | <input type="text" value="20"/> | <input type="checkbox"/> | 2.88  | 2.88  |     |      |            |     |     |
| <a href="#">3401</a>         | 24   | 20 OZ   | OMAHA'S FINEST | WATER SPRING SPORTS CAP 20 OZ           | <input type="text" value="15"/> |                          | 3.63  |       |     | 3    | 11/13/2003 |     |     |
| <a href="#">10415</a>        | 1    | 1GL     |                | WATER                                   | <input type="text" value="10"/> | <input type="checkbox"/> | 7.37  | 7.37  |     |      |            |     |     |
| <a href="#">10004</a>        | 12   | 12 OZ   |                | MUSTARD                                 | <input type="text" value="6"/>  |                          | 12.10 |       |     |      |            |     |     |
| <a href="#">10005</a>        | 24   | 12 OZ   |                | KETCHUP/MUSTARD COMBO                   | <input type="text" value="6"/>  |                          | 23.85 |       |     |      |            |     |     |
| <a href="#">180099</a>       | 10   | 8LB AVG |                | BEEF TENDERLOIN PISMO CHOICE            | <input type="text" value="10"/> | <input type="checkbox"/> | 8.32  | 8.32  |     |      |            |     |     |
| <a href="#">212001</a>       | 10   | 8.23 AV | OMAHA'S FINEST | BEEF PISMO TENDER                       | <input type="text" value="5"/>  |                          | 8.70  |       |     |      |            |     |     |
| <a href="#">180100</a>       | 10   | 8 OZ    |                | BEEF FILLET BACON WRAPPED               | <input type="text" value="5"/>  |                          | 3.91  |       |     |      |            |     |     |
| <a href="#">1005</a>         | 4    | 4-6#    | SMITH          | BACON CANADIAN                          | <input type="text"/>            |                          | 1.54  |       |     |      |            |     |     |
| <a href="#">DA10010</a>      | 10   | 5 LB    |                | GRANDE WHOLE MILK MAZZARELLA            | <input type="text"/>            | <input type="checkbox"/> | 2.15  | 2.15  |     |      |            |     |     |
| <a href="#">1402</a>         | 8    | 5# AVG  | CODE REGAL     | MOZZARELLA WHOLE MILK LOAF              | <input type="text"/>            | <input type="checkbox"/> | 11.26 | 11.26 |     |      |            |     |     |
| <a href="#">MOZZVWMLLOAF</a> | 8    | 5# AVG  |                | MOZZARELLA WHOLE MILK LOAF              | <input type="text"/>            | <input type="checkbox"/> | 11.24 | 11.24 |     |      |            |     |     |
| <a href="#">5557</a>         | 24   | 1 BX    |                | MILKY WAY                               | <input type="text"/>            |                          | 13.32 |       |     |      |            |     |     |
| <a href="#">10427</a>        | 24   | 2.5#    | SMITH          | AMERICAN CHEESE SLICED                  | <input type="text"/>            | <input type="checkbox"/> | 1.63  | 1.63  |     |      |            |     |     |
| <a href="#">10450</a>        | 8    | 5#      |                | MOZZ/AMERICAN BLEND CHEESE SHREDDED     | <input type="text"/>            |                          | 2.32  |       |     |      |            |     |     |
| <a href="#">15100</a>        | 280  | 1.14OZ  |                | JUMBO ROUND CHEESE RAVIOLI (CN) PRE-CKD | <input type="text"/>            |                          | 35.50 |       |     |      |            |     |     |

1 Internet

- The Substitute Items page opens with a list of products that your distributor suggests as a replacement item for your order.
- If you entered an amount of product in the **Qty** box on the order form, the amount of product is entered in the product best suited as a replacement.

**Note:**

Only one item may be substituted for a product. Depending on how your distributor has the order management system configured, you may be prompted if you try to enter more than one substitute product.



4. Enter the amount of the substitute product that you want to order in the **Qty** box.
5. On the Substitute Items page, click **Order Form** to return to the open order. The substitute item indicator next to the product you just selected is cleared and the new item displays with the amount of product you entered on the Substitute Order page.

### Ordering Related Items

Your distributor may group related products together to provide extra help when placing an order. A green indicator displays on the right of an order form in the Rel column to Items that are commonly used together, and items with similar special offers, are denoted by a blue arrow and link in the **Rel** (relationship) column.



1. On the order form, click the green related items indicator in the **Rel** column next to the product you are ordering.

INTEGRATED DISTRIBUTION SOLUTIONS, LLC - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Refresh Home Search Favorites Media Print Mail

Address http://172.16.100.6:2806/pnet/servlet/eOrderServlet Go Links

**IDS** INTEGRATED DISTRIBUTION SOLUTIONS, LLC

Home Order Account Reports Admin More Sign Off Help

Order Form by Guide: [dec guide](#) Summary Quick Add Delete Place Order Advanced Print Export

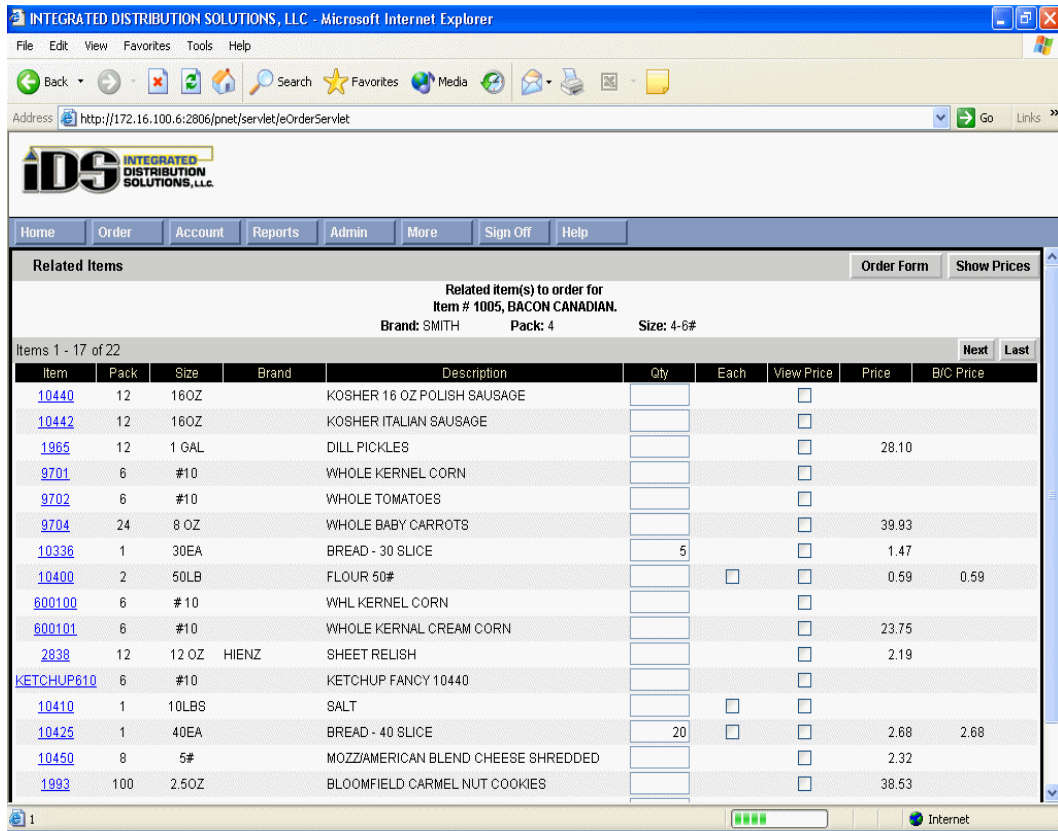
Order #: 3855 Quantity: 82 Amount: 12294.44

Items 1 - 19 of 47 Search: Order Form Go Next Last

| Item                        | Pack | Size    | Brand          | Description                            | Qty                             | Each                     | Price | Each  | Par | Prev | Last Date  | Sub | Rel |
|-----------------------------|------|---------|----------------|--|---------------------------------|--------------------------|-------|-------|-----|------|------------|-----|-----|
| <a href="#">10336</a>       | 1    | 30EA    |                | BREAD - 30 SLICE                       | <input type="text" value="5"/>  |                          | 1.47  |       |     |      |            |     |     |
| <a href="#">10425</a>       | 1    | 40EA    |                | BREAD - 40 SLICE                       | <input type="text" value="20"/> | <input type="checkbox"/> | 2.88  | 2.88  |     |      |            |     |     |
| <a href="#">3401</a>        | 24   | 20 OZ   | OMAHA'S FINEST | WATER SPRING SPORTS CAP 20 OZ          | <input type="text" value="15"/> |                          | 3.63  |       |     | 3    | 11/13/2003 |     |     |
| <a href="#">10415</a>       | 1    | 1GL     |                | WATER                                  | <input type="text" value="10"/> | <input type="checkbox"/> | 7.37  | 7.37  |     |      |            |     |     |
| <a href="#">10004</a>       | 12   | 12 OZ   |                | MUSTARD                                | <input type="text" value="6"/>  |                          | 12.10 |       |     |      |            |     |     |
| <a href="#">10005</a>       | 24   | 12 OZ   |                | KETCHUP/MUSTARD COMBO                  | <input type="text" value="6"/>  |                          | 23.85 |       |     |      |            |     |     |
| <a href="#">180099</a>      | 10   | 8LB AVG |                | BEEF TENDERLOIN PISMO CHOICE           | <input type="text" value="10"/> | <input type="checkbox"/> | 8.32  | 8.32  |     |      |            |     |     |
| <a href="#">212001</a>      | 10   | 8.23 AV | OMAHA'S FINEST | BEEF PISMO TENDER                      | <input type="text" value="5"/>  |                          | 8.70  |       |     |      |            |     |     |
| <a href="#">180100</a>      | 10   | 8 OZ    |                | BEEF FILLET BACON WRAPPED              | <input type="text" value="5"/>  |                          | 3.91  |       |     |      |            |     |     |
| <a href="#">1005</a>        | 4    | 4-6#    | SMITH          | BACON CANADIAN                         | <input type="text"/>            |                          | 1.54  |       |     |      |            |     |     |
| <a href="#">DAI0010</a>     | 10   | 5 LB    |                | GRANDE WHOLE MILK MAZZARELLA           | <input type="text"/>            | <input type="checkbox"/> | 2.15  | 2.15  |     |      |            |     |     |
| <a href="#">1402</a>        | 8    | 5# AVG  | CODE REGAL     | MOZZARELLA WHOLE MILK LOAF             | <input type="text"/>            | <input type="checkbox"/> | 11.26 | 11.26 |     |      |            |     |     |
| <a href="#">MOZZWMLLOAF</a> | 8    | 5# AVG  |                | MOZZARELLA WHOLE MILK LOAF             | <input type="text"/>            | <input type="checkbox"/> | 11.24 | 11.24 |     |      |            |     |     |
| <a href="#">5557</a>        | 24   | 1 BX    |                | MILKY WAY                              | <input type="text"/>            |                          | 13.32 |       |     |      |            |     |     |
| <a href="#">10427</a>       | 24   | 2.5#    | SMITH          | AMERICAN CHEESE SLICED                 | <input type="text"/>            | <input type="checkbox"/> | 1.63  | 1.63  |     |      |            |     |     |
| <a href="#">10450</a>       | 8    | 5#      |                | MOZZ/AMERICAN BLEND CHEESE SHREDDED    | <input type="text"/>            |                          | 2.32  |       |     |      |            |     |     |
| <a href="#">15100</a>       | 280  | 1.14OZ  |                | JUMBO ROUND CHEESE RAMOLI (CN) PRE-CKD | <input type="text"/>            |                          | 35.50 |       |     |      |            |     |     |

1 Internet

- The Related Item page opens with a list of suggested products you might want to order.



- To order an item, enter the amount of the product in the **Qty** box.
- Click **Order Form** to return to the order form. Any related items you ordered on the Related Items page now display on your order form.

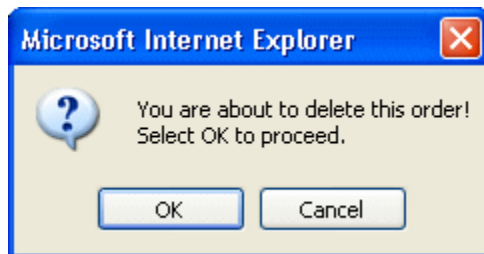
## Deleting Orders

Use this procedure to remove any open orders that you do not need to keep the orders list uncluttered. It is a good idea to delete any orders that you do not plan on submitting to prevent confusion.

### Delete an Order

Use this procedure if you decide to cancel an order when you are on the order form before you submit the order.

- On any order form, click **Delete Order**.
- A prompt display to ensure this is what you want to do.



- Click **OK** to continue with the delete procedures.

- OR—

Click **Cancel** to stop the delete procedure.

**Caution:**

A deleted order cannot be retrieved. If you delete an order, you will have to start a new order.

### Deleting In Use Orders

Use this procedure to delete orders that display **In Use** under Status on your Home Order page. Orders with an **In Use** status do not have a delete box on the Home Orders page.

An order with the status **In Use**,

**Caution:**

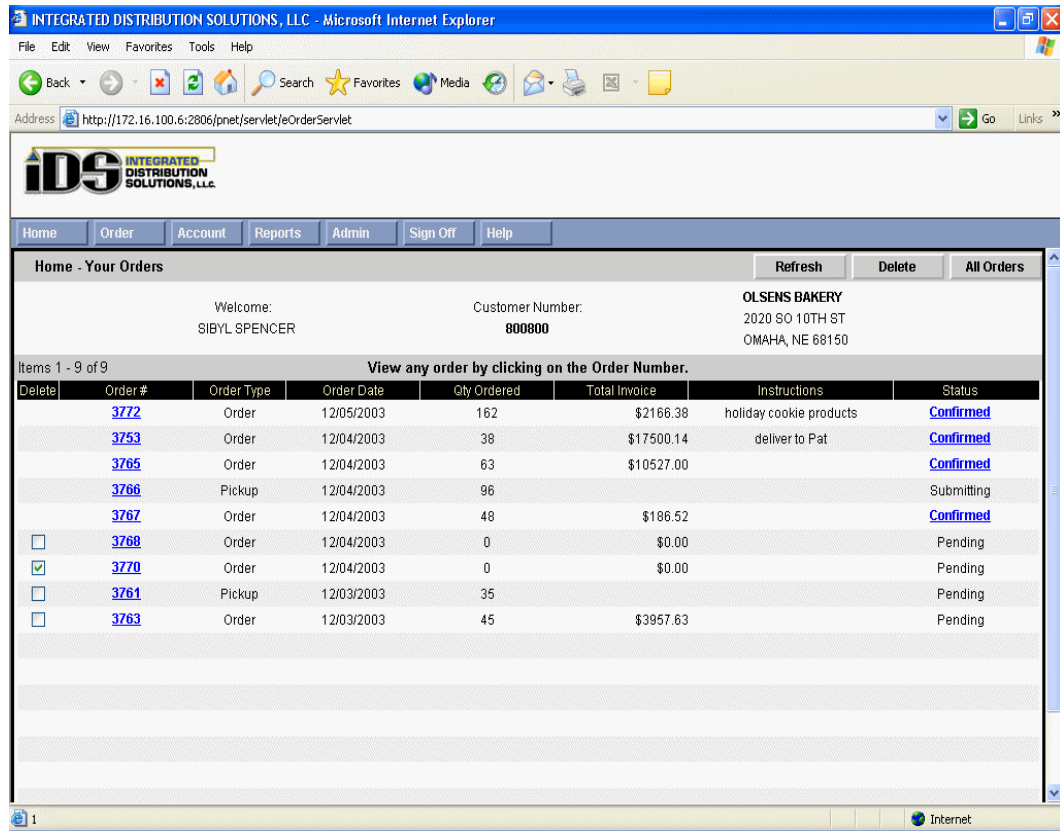
If you share your Order Management System account with another employee, and an order displays the status **In Use**,

1. Select the **Home** button from any page of the Order Management System to go to the Home Orders page.
2. On the Home Orders page, select the order number of the **In Use** order you want to delete. The order page opens.
3. The order page opens. Select **Delete** from the **advanced** menu.
4. A prompt displays a message to confirm that you really want to delete the order. If you intend to delete the order, select **OK**. If you do not want to delete the order, select **cancel**.
5. If you selected **OK**, the order management system removes the order from the list, and returns to the Home Order page.

## Deleting Pending Order

Use this procedure to delete orders that display **Pending** under **Status** on the Home Orders page.

1. On any page in the order management system, click **Home** to open the Home Orders page.
2. Select the check box next to any orders that display **Pending** under **Status**.



The screenshot shows a web browser window with the URL <http://172.16.100.6:2806/pnet/servlet/eOrderServlet>. The page title is "INTEGRATED DISTRIBUTION SOLUTIONS, LLC - Microsoft Internet Explorer". The main content area is titled "Home - Your Orders" and displays a table of orders. The table has columns for "Delete", "Order #", "Order Type", "Order Date", "Qty Ordered", "Total Invoice", "Instructions", and "Status". The "Status" column shows "Confirmed" and "Pending" orders. The "Delete" button is visible in the top right corner of the table area.

| Delete                              | Order #              | Order Type | Order Date | Qty Ordered | Total Invoice | Instructions            | Status     |
|-------------------------------------|----------------------|------------|------------|-------------|---------------|-------------------------|------------|
|                                     | <a href="#">3772</a> | Order      | 12/05/2003 | 162         | \$2166.38     | holiday cookie products | Confirmed  |
|                                     | <a href="#">3753</a> | Order      | 12/04/2003 | 38          | \$17500.14    | deliver to Pat          | Confirmed  |
|                                     | <a href="#">3765</a> | Order      | 12/04/2003 | 63          | \$10527.00    |                         | Confirmed  |
|                                     | <a href="#">3766</a> | Pickup     | 12/04/2003 | 96          |               |                         | Submitting |
|                                     | <a href="#">3767</a> | Order      | 12/04/2003 | 48          | \$186.52      |                         | Confirmed  |
| <input type="checkbox"/>            | <a href="#">3768</a> | Order      | 12/04/2003 | 0           | \$0.00        |                         | Pending    |
| <input checked="" type="checkbox"/> | <a href="#">3770</a> | Order      | 12/04/2003 | 0           | \$0.00        |                         | Pending    |
| <input type="checkbox"/>            | <a href="#">3761</a> | Pickup     | 12/03/2003 | 35          |               |                         | Pending    |
| <input type="checkbox"/>            | <a href="#">3763</a> | Order      | 12/03/2003 | 45          | \$3957.63     |                         | Pending    |

3. Select **Delete** to remove the selected **Pending** orders from the order management system.

## Searching for an Item

Use this procedure to find an item that you want to add to an order or to an order guide. Search is available on the order forms, customer order guides, SRPs, and the Item Master.

### Using Basic Search in an Order

Use this procedure to find an item within an order form or item master list. And add it to your order.

1. On an order form, enter any information related to the product in the **Search** box.

All or part of the product's identification number

All or part of the product's name

2. Select the group of information where you want to search from the list next to the **Search** box.
3. Click **Go** to begin the search.

#### **Notes about Searches**

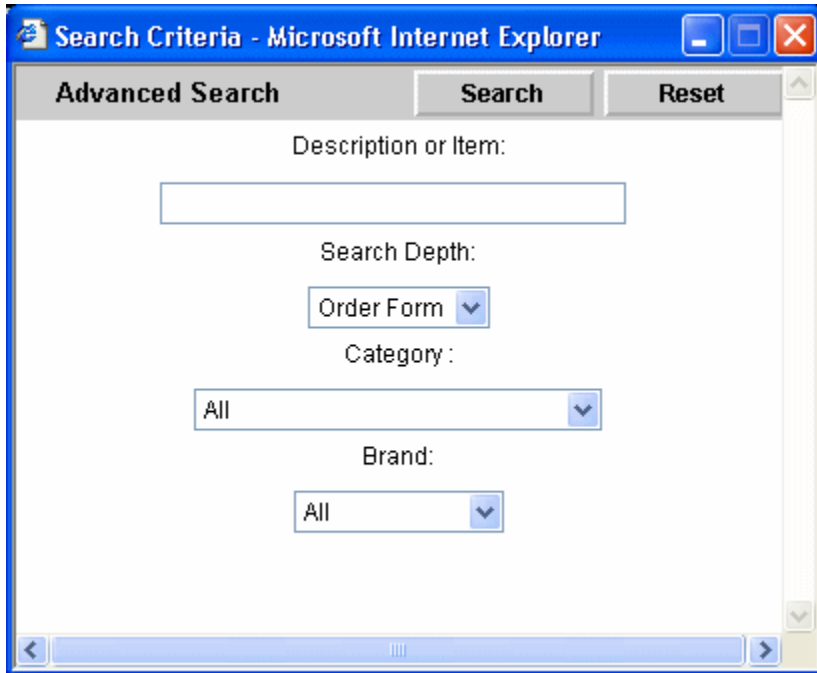
If you are not sure how the product is listed in the order guide or master item list, enter a general category that the product might belong to using Advanced Search. For example, if you are looking for a specific coffee creamer, and are not sure whether it is listed as "creamer", "coffee mate, or something else, does not enter either of these terms in the **Search** box. If you guess wrong, the system returns no results. Instead, use Advanced Search and select PAPER GOODS on the drop-down list as explained below.

## Using Advanced Search in an Order

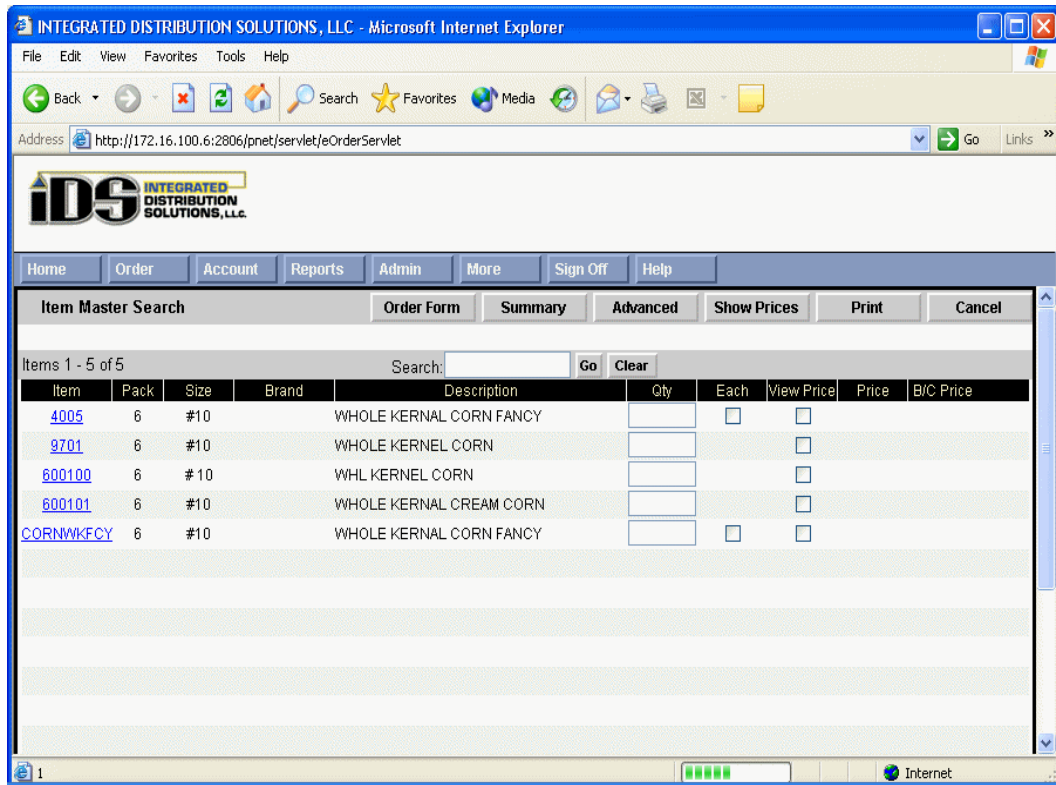
Use this procedure to narrow your search parameters to find an item and add it to your order.

Complete the Search criteria based on the information that you know. For example, if you know the product is cheese and the brand is Farmer Bill's, then you would select the brand from the list and enter cheese in the Description or Item box.

1. Select **Search** from the **advanced** menu to open the Advanced Search box.

The image shows a screenshot of a web browser window titled "Search Criteria - Microsoft Internet Explorer". The browser window contains a form titled "Advanced Search". At the top of the form are two buttons: "Search" and "Reset". Below the buttons is a text input field labeled "Description or Item:". Underneath that is a "Search Depth:" label followed by a dropdown menu currently set to "Order Form". Below the dropdown is a "Category:" label followed by a dropdown menu currently set to "All". At the bottom of the form is a "Brand:" label followed by a dropdown menu currently set to "All". The browser's address bar and navigation buttons are visible at the bottom of the window.

2. If you know the product's name or part of the product's description, enter it in the **Description or Item** box. If you are not sure about the product's name or description, leave this box empty.
3. Select **Order Form** or **Item Master** from the **Search Depth** list on the order form or item master.
4. If you know the price book heading for the item, select it from the **Category** list.
5. Select the item's brand from the **Brand** list.
6. Click **Search** to find items that match the criteria defined on the Advanced Search box.
7. The search results page displays.



- To order an item from the search results, enter the amount in the **Qty** box and click Order Form to return to the current order form.

## Sorting Information

This section contains procedures for using the sort options to make viewing order guides easier to view.

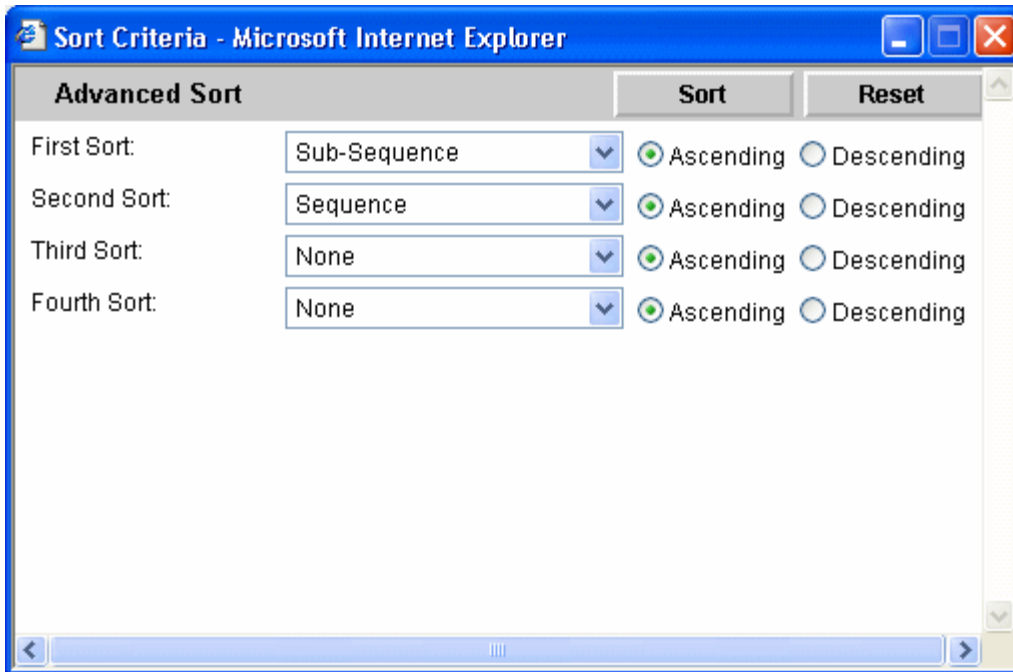
### Sorting Items on the Order Form

You can define the easiest way to view information on your order form using the order management application's Sort feature. This procedure applies to all three types of order forms.

#### Note:

When you define sort criteria on an order form, the order management system uses the sort for the current order form. It does not retain the settings from one order to the next.

- On the order form, select **Sort** from the **advanced** menu on the main toolbar to open the Sort Criteria page.



2. Select the first level sort value from the **First Sort** list.

| Value              | Description | Value                | Description |
|--------------------|-------------|----------------------|-------------|
| Item #             |             | Previous             |             |
| Price Book Heading |             | Last Date            |             |
| Pack               |             | Sub-sequence         |             |
| Size               |             | Sequence             |             |
| Brand              |             | Order Guide Line #   |             |
| Description        |             | Order Guide Category |             |
| Qty                |             |                      |             |
| Each               |             |                      |             |
| Par                |             |                      |             |

3. Select either **Ascending** or **Descending** to define the sort's direction.

**Note:**

An ascending alpha sort displays values alphabetically. A descending alpha sort displays values in reverse alphabetical order.

An ascending numeric sort displays values from smallest to largest. A descending numeric sort displays values starting with the greatest number and going to the smallest number.

4. To further refine the way you view your order form, continue to select sort options and the sort direction.
5. Select **Sort** to apply the selected filters and return to the order form.
6. To clear your sort choices so you can start over, click **Reset**.

When you use more than one sort, such as price book header for first and item number for second, the result is to "group" items under price book headers, which themselves are in either ascending or descending order, as you specified. For example, BAKING INGREDIENTS might be first, with items 10, 24, and 140, followed by BEEF FROZEN, with items 1, 23, 41, and 50, and so on for the entire order form.

|  |  |
|--|--|
|  |  |
|  |  |
|  |  |
|  |  |

1. Enter any messages or notes about the pickup in the **Special Instructions 1** and **Special Instructions 2** boxes. Each box holds 20 characters.
2. When applicable, enter a purchase order number in the **Purchase Order #** box.
3. To make any last minute changes, click **Order Form** to return to the Order Form Pickup Request page.
4. To send the final pickup request to the printer, click **Print**.
5. When the pickup request is complete, click **Submit Order**. The order management application sends the pickup request to your distributor, and returns you to the Home Order page.

### Chapter 3 Viewing Order Information

This chapter contains information about the order information on the Home Orders, Summary, and Account pages in the order management Web site.



2. On the order form, click **Summary** to open the Order Form Summary page.

**Order Form Summary** Order Form Place Order Print

Order #: 3855    Quantity: 222    Amount: 21924.82

Items 1 - 16 of 16

| Item                    | Pack | Size    | Brand          | Description                             | Qty | Each | Price | Each | Par | Prev | Last Date  |
|-------------------------|------|---------|----------------|---|-----|------|-------|------|-----|------|------------|
| <a href="#">1005</a>    | 4    | 4-6#    | SMITH          | BACON CANADIAN                          | 16  | N    | 1.54  |      |     |      |            |
| <a href="#">1962</a>    | 6    | #10     | JENOS          | JENOS PIZZA SAUCE                       | 5   | N    | 36.00 |      |     |      |            |
| <a href="#">3401</a>    | 24   | 20 OZ   | OMAHA'S FINEST | WATER SPRING SPORTS CAP 20 OZ           | 15  | N    | 3.63  |      |     | 3    | 11/13/2003 |
| <a href="#">5555</a>    | 24   | 1 BX    |                | SNICKERS                                | 25  | N    | 12.83 |      |     |      |            |
| <a href="#">10003</a>   | 12   | 12 OZ   |                | KETCHUP                                 | 6   | N    | 10.10 |      |     |      |            |
| <a href="#">10336</a>   | 1    | 30EA    |                | BREAD - 30 SLICE                        | 5   | N    | 1.47  |      |     |      |            |
| <a href="#">10415</a>   | 1    | 10L     |                | WATER                                   | 10  | N    | 7.37  | 7.37 |     |      |            |
| <a href="#">10425</a>   | 1    | 40EA    |                | BREAD - 40 SLICE                        | 20  | N    | 2.68  | 2.68 |     |      |            |
| <a href="#">10427</a>   | 24   | 2.5#    | SMITH          | AMERICAN CHEESE SLICED                  | 20  | N    | 1.63  | 1.63 |     |      |            |
| <a href="#">10450</a>   | 8    | 5#      |                | MOZZ/AMERICAN BLEND CHEESE SHREDDED     | 5   | N    | 2.32  |      |     |      |            |
| <a href="#">15100</a>   | 280  | 1.14OZ  |                | JUMBO ROUND CHEESE RAVIOLI (CN) PRE-CKD | 15  | N    | 35.50 |      |     |      |            |
| <a href="#">180099</a>  | 10   | 8LB AVG |                | BEEF TENDERLOIN PISMO CHOICE            | 10  | N    | 8.32  | 8.32 |     |      |            |
| <a href="#">180100</a>  | 10   | 8 OZ    |                | BEEF FILLET BACON WRAPPED               | 5   | N    | 3.91  |      |     |      |            |
| <a href="#">212001</a>  | 10   | 8.23 AV | OMAHA'S FINEST | BEEF PISMO TENDER                       | 5   | N    | 8.70  |      |     |      |            |
| <a href="#">DAI0010</a> | 10   | 5 LB    |                | GRANDE WHOLE MILK MAZZARELLA            | 45  | N    | 2.15  | 2.15 |     |      |            |
| <a href="#">9140635</a> | 280  | 1       | RONTANELLIS    | JUMBO ROUND CHEESE RAVIOLI (CN) PRE-CKD | 15  | N    | 18.90 |      |     |      |            |

3. The Summary page displays a list of the items selected on the order form, and the amount ordered.
4. To print the order summary, click **Print**. If you are done ordering and ready to send the order to your distributor, click **Place Order** and follow procedures in the Submitting Orders section on page 32.

# Viewing Account Information

This section contains procedures for viewing order information.

## Account Inquiry

The Order Management System provides online access to your company's account information. Use this information to track invoices, manage accounts payable, and view and print item usage reports.

**Note:**

Depending on the settings in the Order Management System, access to account information may be restricted.

This section contains information for viewing Statement Status and Consolidated Status information.

### Viewing Statement Status

The Statement Status screen lists your company's invoiced orders invoiced, but not pending orders.

1. On any page of the Order Management System, select Statement Status from Account on the main toolbar.
2. The Statement Status page displays with a list of all unpaid invoices and current balance.

INTEGRATED DISTRIBUTION SOLUTIONS, LLC - Microsoft Internet Explorer

**IDS** INTEGRATED DISTRIBUTION SOLUTIONS, LLC

Home Order Account Reports Customer Admin Links Sign Off Help

**Statement Status** Statement Sort Print Export

Customer: OLSSENS BAKERY Last Payment: 10/27/1993 Past Due: 26048.30  
Terms: \*\*\*\*\* NET 7 \*\*\*\*\* Credit Limit: 0 Total Due: 26154.82

Items 1 - 16 of 16

| Invoice#             | Date       | Type        | Amount   | Invoice Balance | Customer Balance | Check# | Reference |
|----------------------|------------|-------------|----------|-----------------|------------------|--------|-----------|
| <a href="#">5051</a> | 04/14/2004 | Invoice     | 106.52   | 106.52          | 106.52           |        |           |
| <a href="#">5004</a> | 03/05/2004 | Invoice     | 13.33    | 13.33           | 119.85           |        |           |
| <a href="#">5003</a> | 03/05/2004 | Invoice     | 13.33    | 13.33           | 133.18           |        |           |
| <a href="#">4100</a> | 01/19/2004 | Invoice     | 30.00    | 30.00           | 163.18           |        |           |
| <a href="#">4059</a> | 11/26/2003 | Invoice     | 58.75    | 58.75           | 221.93           |        |           |
| <a href="#">4058</a> | 11/26/2003 | Invoice     | 65.76    | 65.76           | 287.69           |        |           |
| <a href="#">4057</a> | 11/26/2003 | Invoice     | 21720.28 | 21720.28        | 22007.97         |        |           |
| <a href="#">4056</a> | 11/26/2003 | Invoice     | 39.50    | 39.50           | 22047.47         |        |           |
| <a href="#">4050</a> | 11/19/2003 | Invoice     | 14.50    | 14.50           | 22061.97         |        |           |
| <a href="#">4038</a> | 11/17/2003 | Credit Memo | -22.20   | -22.20          | 22039.77         |        |           |
| <a href="#">4033</a> | 11/17/2003 | Invoice     | 23.20    | 23.20           | 22062.97         |        |           |
| <a href="#">3960</a> | 11/13/2003 | Invoice     | 3864.96  | 3864.96         | 25927.93         |        |           |
| <a href="#">3959</a> | 11/13/2003 | Invoice     | 35.89    | 35.89           | 25963.82         |        |           |
| <a href="#">3735</a> | 07/18/2003 | Invoice     | 15.00    | 15.00           | 25978.82         |        |           |
| <a href="#">3594</a> | 06/24/2003 | Invoice     | 1.00     | 1.00            | 25979.82         |        |           |
| <a href="#">1072</a> | 08/30/2000 | Invoice     | 175.00   | 175.00          | 26154.82         |        |           |

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- To view an invoice, click an Invoice number to open the invoice in another window. For details about the Invoice Report, see “Viewing an Invoice Report” on page 53.

| Invoice Report           |              |      |                          |                                    |         |                       |        |           |                       |       |       | Close | Print |
|--------------------------|--------------|------|--------------------------|------------------------------------|---------|-----------------------|--------|-----------|-----------------------|-------|-------|-------|-------|
| Customer: OLSSENS BAKERY |              |      | Order Date: 04/13/2004   |                                    |         | Route / Stop: MER / 0 |        |           | Invoice Total: 106.52 |       |       |       |       |
| Invoice #: 5051          |              |      | Invoice Date: 04/14/2004 |                                    |         |                       |        |           |                       |       |       |       |       |
| Items 1 - 1 of 1         |              |      |                          |                                    |         |                       |        |           |                       |       |       |       |       |
| Item#                    | UPC          | Pack | Size                     | Description                        | Ordered | Shipped               | Weight | SRP Price | SRP Total             | Price | Total |       |       |
| 9700                     | 315457-00010 | 6    | #10                      | GREEN BEANS FANCY SPECIAL BRAND XX | 2       | 2                     |        | 7.35      | 88.20                 | 40.76 | 81.52 |       |       |

- To print the invoice, click **Print**.
- To return to the Statement Status page, click **Close**.

The Statement Status report page displays the following information:

**Invoice #** - Displays the invoice number for each unpaid invoice to your distributor

**Date** - Displays the order date.

**Type** - Indicates the type of transaction.

**Amount** - Displays the dollar amount of the invoice.

**Invoice Balance** - Displays the total current balance on the invoice.

**Customer Balance** - Displays the amount you need to pay on the invoice.

**Check #** - Indicates the check number associated with any payments made on the invoice.

Reference -

### Viewing an Invoice Report

Use this topic to find out how to use the invoice report and

To view an Invoice Report, you must first access the Statement Status report.

- On any page of the Order Management System, select Statement Status from Account on the main toolbar.

- The Statement Status page displays with a list of all unpaid invoices and current balance.

INTEGRATED DISTRIBUTION SOLUTIONS, LLC - Microsoft Internet Explorer

**IDS** INTEGRATED DISTRIBUTION SOLUTIONS, LLC

Home Order Account Reports Customer Admin Links Sign Off Help

**Statement Status** Statement Sort Print Export

Customer: OLSSENS BAKERY Last Payment: 10/27/1993 Past Due: 26048.30  
 Terms: \*\*\*\*\* NET 7 \*\*\*\*\* Credit Limit: 0 Total Due: 26154.82

Items 1 - 16 of 16

| Invoice#             | Date       | Type        | Amount   | Invoice Balance | Customer Balance | Check# | Reference |
|----------------------|------------|-------------|----------|-----------------|------------------|--------|-----------|
| <a href="#">5051</a> | 04/14/2004 | Invoice     | 106.52   | 106.52          | 106.52           |        |           |
| <a href="#">5004</a> | 03/05/2004 | Invoice     | 13.33    | 13.33           | 119.85           |        |           |
| <a href="#">5003</a> | 03/05/2004 | Invoice     | 13.33    | 13.33           | 133.18           |        |           |
| <a href="#">4100</a> | 01/19/2004 | Invoice     | 30.00    | 30.00           | 163.18           |        |           |
| <a href="#">4059</a> | 11/26/2003 | Invoice     | 58.75    | 58.75           | 221.93           |        |           |
| <a href="#">4058</a> | 11/26/2003 | Invoice     | 65.76    | 65.76           | 287.69           |        |           |
| <a href="#">4057</a> | 11/26/2003 | Invoice     | 21720.28 | 21720.28        | 22007.97         |        |           |
| <a href="#">4056</a> | 11/26/2003 | Invoice     | 39.50    | 39.50           | 22047.47         |        |           |
| <a href="#">4050</a> | 11/19/2003 | Invoice     | 14.50    | 14.50           | 22061.97         |        |           |
| <a href="#">4038</a> | 11/17/2003 | Credit Memo | -22.20   | -22.20          | 22039.77         |        |           |
| <a href="#">4033</a> | 11/17/2003 | Invoice     | 23.20    | 23.20           | 22062.97         |        |           |
| <a href="#">3960</a> | 11/13/2003 | Invoice     | 3864.96  | 3864.96         | 25927.93         |        |           |
| <a href="#">3959</a> | 11/13/2003 | Invoice     | 35.89    | 35.89           | 25963.82         |        |           |
| <a href="#">3735</a> | 07/18/2003 | Invoice     | 15.00    | 15.00           | 25978.82         |        |           |
| <a href="#">3594</a> | 06/24/2003 | Invoice     | 1.00     | 1.00            | 25979.82         |        |           |
| <a href="#">1072</a> | 08/30/2000 | Invoice     | 175.00   | 175.00          | 26154.82         |        |           |

Home Contact Legal About PowerNet

- To view an invoice, click an Invoice number to open the invoice in another window.



### **Order Status and Statement History**

In addition to the hyperlink on Invoice #, the Statement Status screen has two tabs. The Order Status tab returns you to the Order Status screen, where you can select a pending order, delete an order, or begin a new order. The **Statement History** tab displays the Statement Status by History screen, which shows invoices and payments arranged adjacent to each other.

You can use this screen to reconcile invoices and payments. If you believe it would make your task easier, click **Sort by Date** to change the order of the listed items. This option toggles to **Sort by Invoice** when you use it; click Sort by Invoice to return to the initial screen display.

# **Chapter 4**

## **Order Guide Management**

This chapter of the user guide contains procedures for creating and updating your order guides in the order management application.

The Order Guide Search page displays.

1. Enter a product name or product category in the Search box and click Go. The search results display in the left section of the Order Guide Search page. The items (if any) in the new order guide display in the right section of the Order Guide Search page.

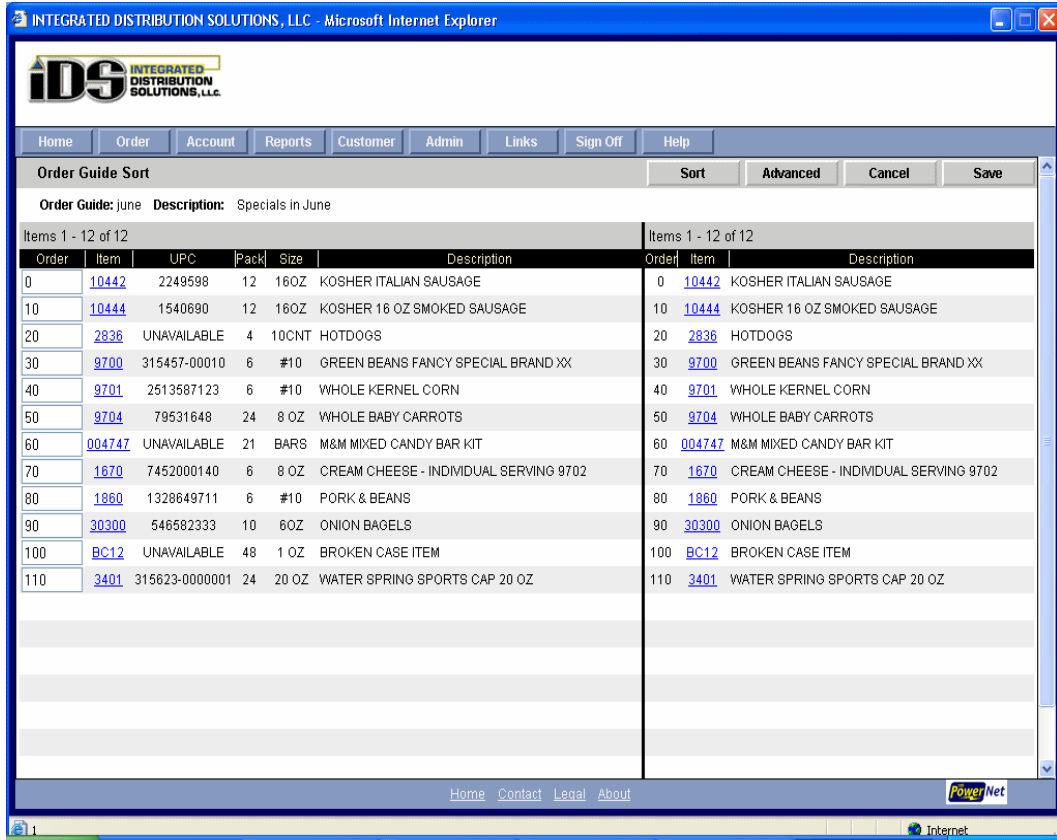
The screenshot shows a web browser window titled "INTEGRATED DISTRIBUTION SOLUTIONS, LLC - Microsoft Internet Explorer". The address bar shows "http://172.16.100.6:2806/pnet/servlet/eOrderServlet". The page header includes the IDS logo and navigation tabs: Home, Order, Account, Reports, Admin, More, Sign Off, Help. The main content area is titled "Order Guide Search" and includes buttons for "Process", "Add All", "Advanced", and "Save". Below this, there are fields for "Current Guide Name: jan" and "Description: january items", and a search box with "Go" and "Clear" buttons. The search results are displayed in a table with columns: Add, Item, Pack, Size, Brand, Description, Remove, Item, and Description. The table contains five rows of search results.

| Add                      | Item                    | Pack | Size   | Brand      | Description                             | Remove | Item | Description |
|--------------------------|-------------------------|------|--------|------------|---|--------|------|-------------|
| <input type="checkbox"/> | <a href="#">10427</a>   | 24   | 2.5#   | SMITH      | AMERICAN CHEESE SLICED                  |        |      |             |
| <input type="checkbox"/> | <a href="#">10450</a>   | 8    | 5#     |            | MOZZ/AMERICAN BLEND CHEESE SHREDDED     |        |      |             |
| <input type="checkbox"/> | <a href="#">15100</a>   | 280  | 1.14OZ |            | JUMBO ROUND CHEESE RAVIOLI (CN) PRE-CKD |        |      |             |
| <input type="checkbox"/> | <a href="#">9140635</a> | 280  | 1      | FONTANELLI | JUMBO ROUND CHEESE RAVIOLI (CN) PRE-CKD |        |      |             |
| <input type="checkbox"/> | <a href="#">1670</a>    | 6    | 8 OZ   | SMITH      | CREAM CHEESE - INDIVIDUAL SERVING 9702  |        |      |             |

## Sorting in Order Guides

This section contains procedures for sorting the information in your order guides to make viewing information easier.

When you click **Sort** on the Order Guide page, the Order Guide Customization screen is displayed.



This screen has two panes. The left-hand pane shows the items from the order guide in their current order. The right-hand pane is used for setting up a new sorting. These screens are used with the four commands at the top of the screen.

**Sort** – This command is used in conjunction with the **Order** field to arrange items in any order you want. For example, if the order guide is for a particular menu or seasonal event, you could arrange the items in order of importance in the recipe, or you could arrange them to match the way your stock room is organized. To use the Sort command, do the following:

- 1 In the Order field, replace the existing numbers for the items you want to move with new numbers that position them in the desired location. For example, to move item 20 after item 50 change its number from 20 to 51.
- 2 Click the Sort tab command. The system sorts the items to the positions you want, and then renumbers them by intervals of 10.

**Sort by Item** – Sort the items by item number, which overrides the existing sort.

**Sort by Category** – Sort the items by category, which overrides the existing sort.

**Save Sort** – Returns you to the order guide, which will now be sorted in the manner of the last sort you performed on the Order Guide Customization screen.

# Chapter 5

## Reports

The order management application contains a report tool that allows you to create customized reports to view information in the most a way useful way for your company.

# Running Reports

The order management reports tool allows you to select a variety of information to view and print. In addition, once you establish a report setting appropriate for your needs, you can save the report settings to use each time you run the report.

**Note:**

This section contains procedures for printing reports to a default printer. If you plan on printing paper copies of reports, verify you have a default printer assigned to your workstation. If you do not have a printer assigned to your workstation, see your system administrator.

## Selecting a Report

Use this procedure to view and select report options.

1. On any Order Management page, select **Reports** on the main toolbar.
2. Select a report from the **Reports** menu. Report options include:

Usage

Consolidated Usage

Movement

## Item Usage Report

An Item Usage report shows how much of an item your company has ordered during a date range.

### Item Usage Report Contents

The Item Usage report contains the information listed below.

Item Usage Report

Customer: OLSSENS BAKERY - 800800  
 Address: 2020 SO 10TH ST  
 City, State & Zip: OMAHA, NE, 68150  
 Date From: 07/18/2003  
 Date To: 04/14/2004

Item: All  
 Category: Multiple  
 Brand: All  
 Manufacturer: All

Sorted By: itemnumber  
 Report Format: Detail

| Item                          | Inv # | Pack | Size | Description                        | UPC Number   | Date       | Qty  | Ea | Wt |
|-------------------------------|-------|------|------|------------------------------------|--------------|------------|------|----|----|
| 4005                          | 4057  | 6    | #10  | WHOLE KERNAL CORN FANCY            | 315457-00005 | 11/26/2003 | 2081 |    |    |
| Summary for Item Number: 4005 |       |      |      |                                    |              |            | 2081 |    |    |
| 9700                          | 4058  | 6    | #10  | GREEN BEANS FANCY SPECIAL BRAND XX | 315457-00010 | 11/26/2003 | 1    |    |    |
| 9700                          | 5051  | 6    | #10  | GREEN BEANS FANCY SPECIAL BRAND XX | 315457-00010 | 04/14/2004 | 2    |    |    |
| Summary for Item Number: 9700 |       |      |      |                                    |              |            | 3    |    |    |
| 9706                          | 3735  | 6    | #10  | GREEN BEANS 3 SV                   | 2258964315   | 07/18/2003 | 1    |    |    |
| 9706                          | 4050  | 6    | #10  | GREEN BEANS 3 SV                   | 2258964315   | 11/19/2003 | 1    |    |    |
| 9706                          | 4057  | 6    | #10  | GREEN BEANS 3 SV                   | 2258964315   | 11/26/2003 | 11   |    |    |
| 9706                          | 4056  | 6    | #10  | GREEN BEANS 3 SV                   | 2258964315   | 11/26/2003 | 1    |    |    |
| 9706                          | 4100  | 6    | #10  | GREEN BEANS 3 SV                   | 2258964315   | 01/19/2004 | 3    |    |    |
| Summary for Item Number: 9706 |       |      |      |                                    |              |            | 17   |    |    |
| 11275                         | 4038  | 12   | 16OZ | GREEN BEANS 5 SV                   | 852852852    | 11/17/2003 | -1   |    |    |
| 11275                         | 4037  | 12   | 16OZ | GREEN BEANS 5 SV                   | 852852852    | 11/17/2003 | -1   |    |    |

Item - Displays the item's identification number

Inv # - Displays the invoice number associated with the item

Pack - Displays the number of items in a pack

Size - Displays the size of a pack of the item

Description - Displays a text description associated with the item number

UPC Number - Displays the UPC number for the item

Date - Displays the date last ordered

Qty - Displays the number of items ordered in the defined date range

Ea - Indicates whether you can buy the item from a broken case

Wt - If the item is sold by weight, displays the item's weight

**Note:**

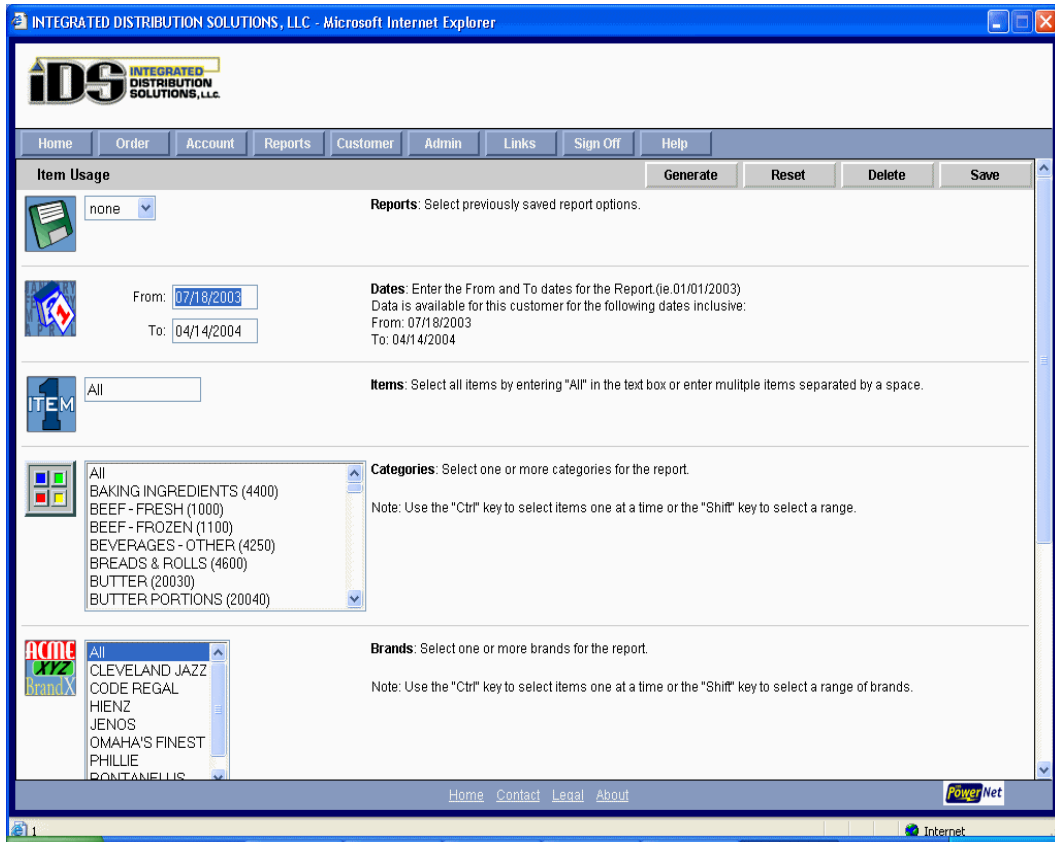
This page may also display prices.

**Running an Item Usage Report**

This procedure contains basic instructions for defining a report.

The only requirement for the reports option is that you must enter a date range. Select any of the other options based on the information you need to gather.

1. Select **Item** from the **Reports** menu on the main toolbar to open the Item Usage page.



2. Enter a date range in the **from** and **to** boxes.

**Note:**

If you select a date range that is beyond the data defined on the Order Management System, a message displays:  
 'From' date must be within the date range from which data is available.

The amount of data available for reports depends on the amount of data stored by your distributor.

| Value/Format | Description or range  |
|--------------|---|
| Mm/dd/yy     | Any valid date within the data range for the Order Management System. |
| Blank        |   |

3. To identify specific items on the Item Usage report, enter the item identification numbers in the **Items** box separated by commas

- OR –

Enter **all** in the **Items** box to include all items on the report.

- Select the categories that you want to see on the report from the **Category** list. Hold the CTL key down to select multiple categories.
- To narrow the report to items in specific categories and that belong to specific brands, select the brand names from the **Brand** list. Hold the CTL key down to select multiple brand names.
- To narrow the report to items from a specific manufacturer, select the manufacturer name from the **Manufacturers** list. Hold the CTL key down to select multiple manufacturers.
- Select the sort level for the report from the Sort Order list to define the way you want the items listed on the Item Usage report.

| Sort type    | Description of Sort   |
|--------------|---|
| Item #       | List items on report from lowest item number to highest items number.                 |
| Category     | List items on report grouped by categories. Categories display in alphabetical order. |
| Brand        | List items on report grouped by brand names of the items.                             |
| Manufacturer | List items on report grouped by the item manufacturer.                                |

- Select to create a detailed report or a summary report from the **Format** list.
- Click **Generate** at the top of the page. The report displays on the page.

#### Saving an Item Usage Report

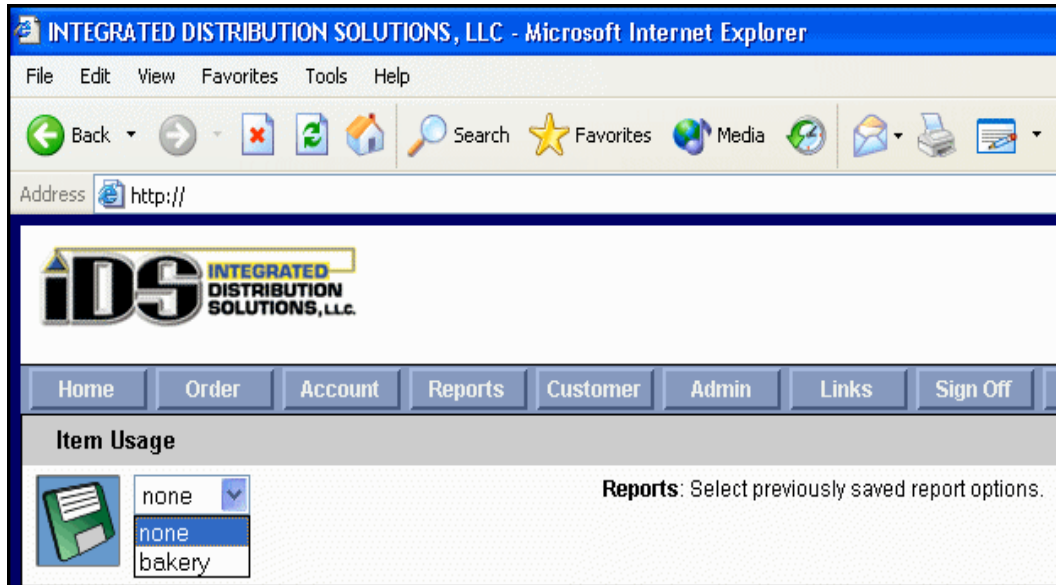
Use this procedure to save report settings.

- Follow the instruction in "Running an Item Usage Report" on page 63 to define the Item Usage report settings.
- To save the report settings, click **Save**.

The screenshot shows a web browser window titled "Usage Inquiry - Microsoft Internet Explorer". A "Report Save" dialog box is open, featuring a title bar with standard window controls (minimize, maximize, close) and three buttons: "Save", "Reset", and "Cancel". The dialog contains two text input fields: "Report Name:" and "Report Description:", both of which are currently empty.

- Enter a file name in the **Report Name** box.
- Enter a useful label to describe the report settings in the **Report Description** box. The Report Description displays on the saved reports list. The **Reports** list displays only after you have saved a report definition.

- When you have saved report settings, a **Reports** section displays at the top of the Item Usage page with a list of report settings.



- To use saved settings, select the saved report name from the list and click **Generate** to run the report.

## Consolidated Item Usage Report

The Consolidated Status command on the Account Inquiry menu shows invoice details for all customers who share a common bill-to address, such as individual stores or restaurants in a chain. If your company has multiple locations, use this function to view invoices, payments, and item history for all of them.

### Consolidated Item Usage Report Contents

The Consolidated Item Usage report contains the information listed below. For each item, the report shows the pack, size, description, and UPC number for each item, the date ordered, and the quantity shipped. Item-by-item subtotals are provided and a total for all items is given at the end of the report.

Item - Displays the item's identification number

Inv # - Displays the invoice number associated with the item

Pack - Displays the number of items in a pack

Size - Displays the size of a pack of the item

Description - Displays a text description associated with the item number

UPC Number - Displays the UPC number for the item

Date - Displays the

Qty - Displays the number of items ordered in the defined date range

Ea - Indicates whether you can buy the item from a broken case

Wt - If the item is sold by weight displays the weight of the product.

## Running a Consolidated Item Usage Report

This procedure contains basic instructions for defining a report.

The only requirement is that you must enter a date range. Select any of the other options based on the information you need to collect. If you do not select any other parameters, the default setting is to include all.

1. Select **Consolidated Usage** from the **Reports** menu on the main toolbar to open the Consolidated Item Usage page.

The screenshot shows a web browser window titled "INTEGRATED DISTRIBUTION SOLUTIONS, LLC - Microsoft Internet Explorer". The browser's address bar shows "http://". The web application has a navigation menu with "Home", "Order", "Account", "Reports", "Customer", "Admin", "Links", "Sign Off", and "Help". The "Reports" menu is selected, and the "Consolidated Item Usage" page is displayed. The page has a "Generate", "Reset", and "Save" button. The "From" date is set to "03/07/2001" and the "To" date is "04/14/2004". The "Customers" section shows a list with "All", "EL BEE'S MEXICAN REST.", and "OLSENS BAKERY". The "Items" section shows a list with "All". The "Categories" section shows a list with "All", "BAKING INGREDIENTS (4400)", "BEEF - FRESH (1000)", "BEEF - FROZEN (1100)", "BEVERAGES - OTHER (4250)", "BREADS & ROLLS (4600)", and "BITTER (20030)".

2. Enter a date range in the **from** and **to** boxes.

### Note:

If you select a date range that is beyond the data defined on the Order Management System, a message displays:  
'From' date must be within the date range from which data is available.

The amount of data available for reports depends on the amount of data stored by your distributor.

| Value/Format | Description or range  |
|--------------|---|
| Mm/dd/yy     | Any valid date within the data range for the Order Management System. |
| Blank        |   |

3. To identify specific items on the Consolidated Item Usage report, enter the item identification numbers in the **Items** box separated by commas
  - OR—

Enter `all` in the **Items** box to include all items on the report.
4. Select the categories that you want to see on the report from the **Category** list. Hold the **CTL** key and click to select multiple categories.
5. To narrow the report to items in specific categories and that belong to specific brands, select the brand names from the **Brand** list. Hold the **CTL** key and click to select multiple brand names.
6. To narrow the report to items from a specific manufacturer, select the manufacturer name from the **Manufacturers** list. Hold the **CTL** key down to select multiple manufacturers.
7. Select the sort level for the report from the Sort Order list to define the way you want the items listed on the Consolidated Item Usage report.

| Sort type    | Description of Sort   |
|--------------|---|
| Item #       | List items on report from lowest item number to highest items number.                 |
| Category     | List items on report grouped by categories. Categories display in alphabetical order. |
| Brand        | List items on report grouped by brand names of the items.                             |
| Manufacturer | List items on report grouped by the item manufacturer.                                |

8. Select to create a detailed report or a summary report from the **Format** list.
9. Click **Generate** at the top of the page. The report displays on the page.

### Printing a Consolidated Item Usage Report

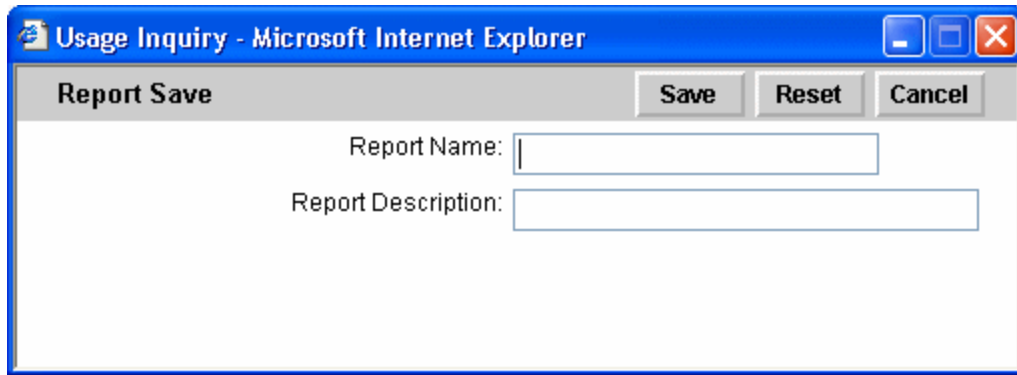
Use this procedure to print an Item Usage report to your default printer.

1. Use the above procedure to define the Consolidated Item Usage report.
2. Click **Generate** at the top of the page. The report displays on the page.
3. Click **Print** to send the information to your printer.
4. A print preview displays the report and the Pages **Print** box displays.

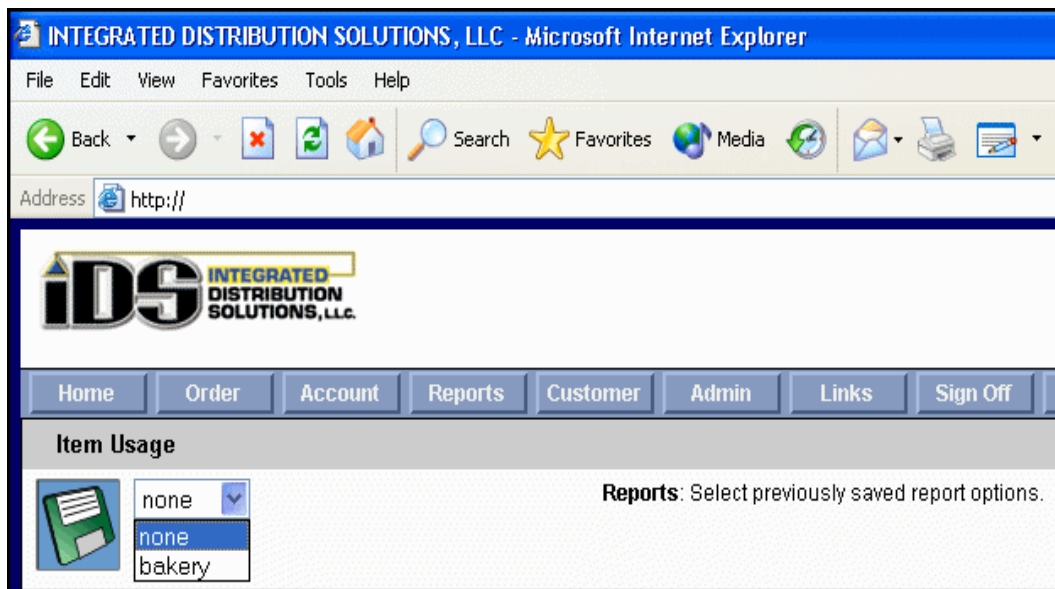
### Saving a Consolidated Item Usage Report

Use this procedure to save report settings.

1. Follow the instruction in “Running an Item Usage Report” on page 63 to define the Item Usage report settings.
2. To save the report settings, click **Save**.



3. Enter a file name in the **Report Name** box.
4. Enter a useful label to describe the report settings in the **Report Description** box. The Report Description displays on the saved reports list. The **Reports** list displays only after you have saved a report definition.
5. When you have saved report settings, a **Reports** section displays at the top of the Consolidated Item Usage page with a list of report settings.



6. To use saved settings, select the saved report name from the list and click **Generate** to run the report.

## Movement Report

The Movement report helps identify items that are in high demand and items that lack demand.

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