

PERFORMANCE NET
ONLINE ORDERING
SYSTEM
TRAINING GUIDE

Topics Covered

Web Address / Popup Blockers

How to Sign On

Main Toolbar Overview

Order Guides / Placing Orders

Confirmations

Reports

User / Admin Options

Custom Order Guides

Web Address

What is the web address?

www.pfgspringfield.com This will take you to our Home Page

Can this website be added to my Favorites?

Yes, go to the web page above and click on Favorites option in your browser and click Add to Favorites

Now click on Place Your Order to sign on to the ordering system

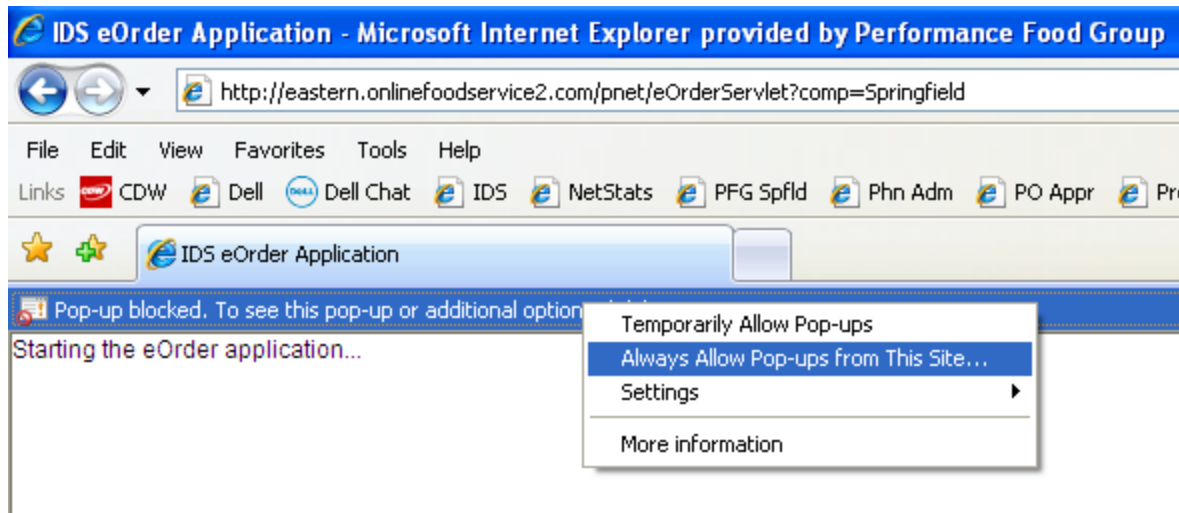


Springfield
Place Your Order
Our Products &



Pop-Up Blockers / Internet Explorer

If prompted about Pop-up Blocked, right click on the bar and select Always Allow Pop-ups From This Site .. .when prompted to confirm, click Yes



Pop-Up Blockers / Google Toolbar



To stop the Pop-Up Blocking feature in Google Toolbar, either:

1. Click on the Pop-Up Blocker icon  in the toolbar to allow pop-ups on this site 


Or

2. Right-click on the toolbar and un-check Google in the Drop Down menu to temporarily disable blocking pop-ups

Pop-Up Blockers / Yahoo Toolbar



To disable the Pop-Up Blocking feature in the Yahoo Toolbar:

1. Click the Down arrow beside the Pop-Up Blocker icon 
2. To disable the blocker, un-check "**Enable Pop-Up Blocker**" in the Drop Down menu

3. To configure the blocker, check "**Enable Pop-Up Blocker**" and select "**Always Allow Pop-Ups from...**" on the same Drop Down menu

4. In the Yahoo! Pop-Up Blocker dialog screen, select **ctimls.com** in the "**Sources of Recently Blocked Pop-Ups**"

5. Click the **Allow** button and then the **Close** button.



How to Sign On

Enter your supplied User ID and Password and click on Sign In



Enter your User ID and Password.

User ID:

Password:

Forgot your password? Enter your User ID above, check this box, then click Sign In and we'll email your password to you!

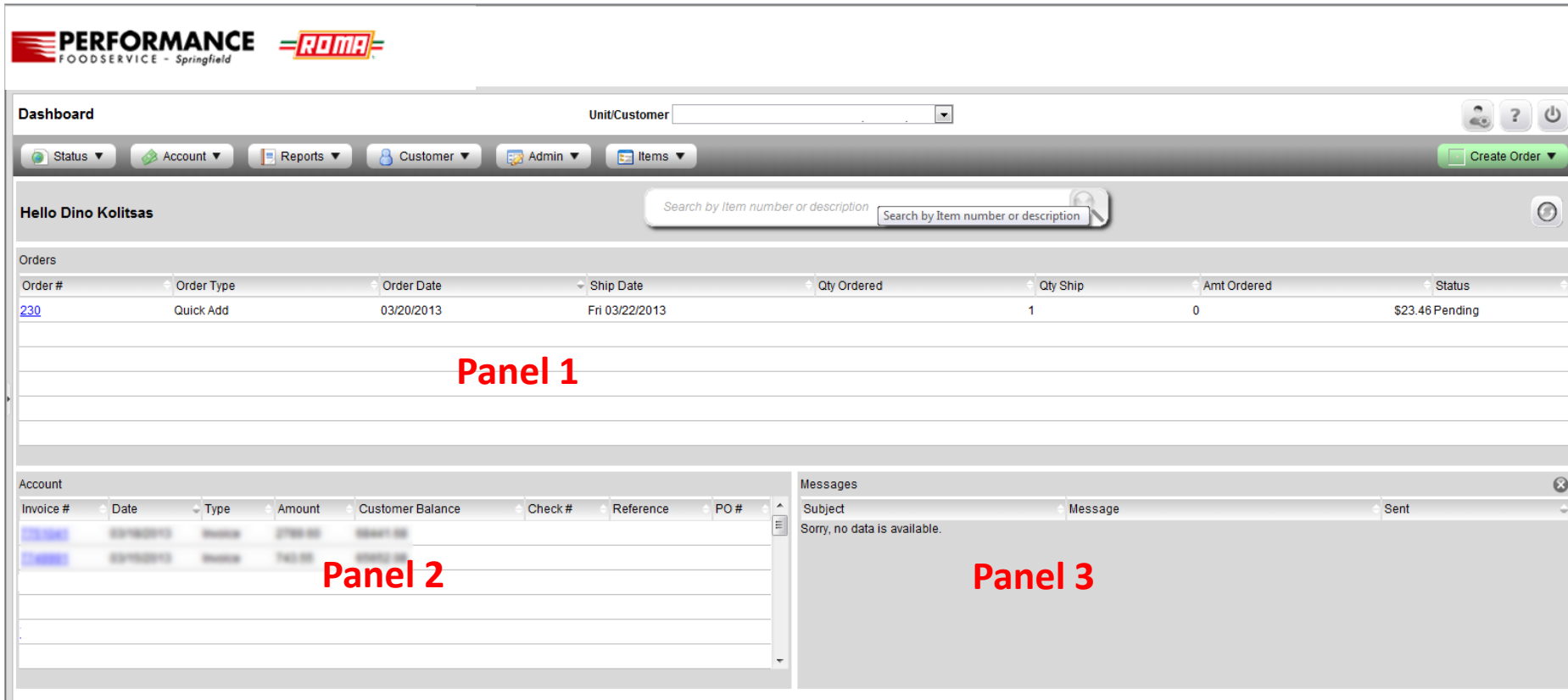
[Home](#) [About](#)

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CustomerPortal

Main Page



PERFORMANCE FOODSERVICE - Springfield **ROMA**

Unit/Customer: [dropdown]

Status Account Reports Customer Admin Items Create Order

Hello Dino Kolitsas Search by Item number or description

Orders

Order #	Order Type	Order Date	Ship Date	Qty Ordered	Qty Ship	Amt Ordered	Status
230	Quick Add	03/20/2013	Fri 03/22/2013		1	0	\$23.46 Pending

Panel 1

Account

Invoice #	Date	Type	Amount	Customer Balance	Check #	Reference	PO #
123456	03/18/2013	Invoice	2700.00	5000.00			
123457	03/18/2013	Invoice	743.00	5743.00			

Panel 2

Messages

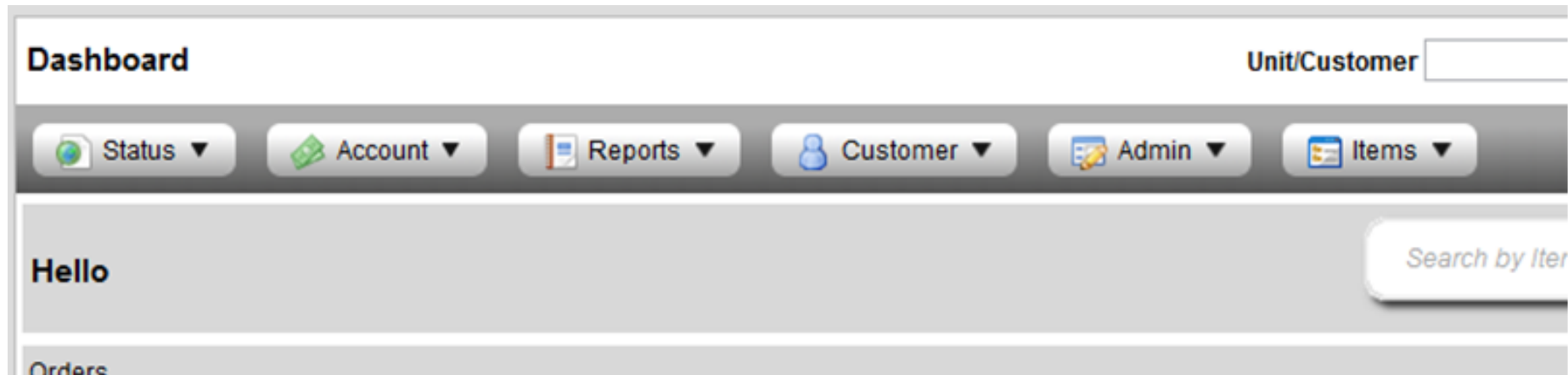
Subject	Message	Sent
Sorry, no data is available.		

Panel 3

This is a Dashboard with different Panels.

- Panel 1 displays all orders, placed and pending
- Panel 2 displays your invoice statements
- Panel 3 displays important messages from Performance Foodservice

Main Toolbar Overview



Status – this is the default screen when logging in. It shows pending orders, previously sent orders and order header status

Account – Statement Status shows invoices and credits, shows more of the Statement Panel on main page

Reports – users can view/print item usage reports and order guides

Admin - custom order guide, par and critical lists administration

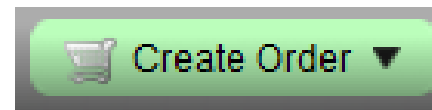
Customer – if you have the ability to place orders for multiple customers, this is where you select each customer

Items – view/print new and discontinued items and item search

Order Guides / Placing Orders

Select **Create Order** from the main page, right side

Choose your method of placing your order;



History – items purchased in the 13 weeks

Standard Guides – bids that are maintained at Performance
Foodservice

Custom Guides – Custom guides that are created and maintained by
the customer or salesrep

via Quick Add – enter item # and Qty

Previous Order – select a previously placed order

When placing orders by any guide, a list of the items in the guide will display on the screen. This allows you to view the items, descriptions and simply place qty to be ordered in the proper column.

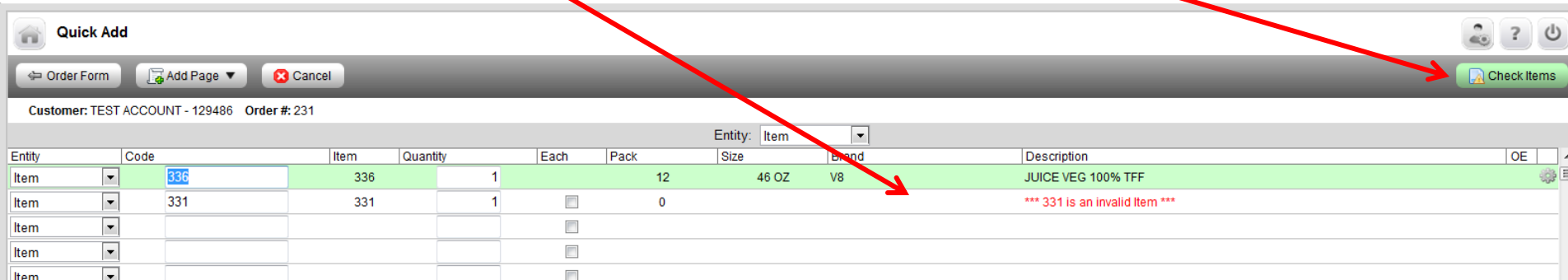
When placing orders by quick add, it is a simple entering the item # and qty. There is a “Check Items” option to ensure a proper item # is entered.

Order Guides / Placing Orders using Quick Add

If you know the item #'s, you can use the Quick Add feature to place orders.

Type in the item # and Qty

After all items are entered, click on Check Items to verify item #'s are valid



Quick Add

Order Form Add Page Cancel

Customer: TEST ACCOUNT - 129486 Order #: 231

Entity: Item

Entity	Code	Item	Quantity	Each	Pack	Size	Brand	Description	OE
Item	336	336	1		12	46 OZ	V8	JUICE VEG 100% TFF	
Item	331	331	1	<input type="checkbox"/>	0			*** 331 is an invalid Item ***	
Item				<input type="checkbox"/>					
Item				<input type="checkbox"/>					
Item				<input type="checkbox"/>					

Check Items

Once all items are confirmed valid, you will have a Save option (will appear next to Check items) to save these items to your order. Then click on Order Form (upper left) to return to your order. If there are invalid items, you will need to remove the invalid item #'s before re-entering the order.


Order Guides / Placing Order – Product Search

If you need an item that is not on your guide, type in a keyword in the search field and press Enter or click on the Search button

Order Form from Custom Guide

Save Switch View Add From Summary Add Page Advanced

Customer: TEST ACCOUNT - 129486
Order #: 231 Ship Date: 03/22/2013

beef Contains All 

Items 1 - 50 of 50 Category:

Item	Customer Item Description	Vendor Item	Pack	Size	Brand	Description	OE	Qty	Each
No Custom Guide Category to display									
336		00336	12	46 OZ	V8	JUICE VEG 100% TFF		<input type="text" value="1"/>	
Beverages									
26178		51941	1	2.5 GA	DT COKE	SODA SYRUP COLA DIET BNB TFF		<input type="text" value="1"/>	
26383		61884	1	5 GA	COKE	SODA SYRUP COLA CLASSIC BNB TFF		<input type="text"/>	
26877		7557	1	5 GA	CH COKE	SODA SYRUP COLA CHRY BNB TFF		<input type="text"/>	
28969		7571	1	5 GA	DT COKE	SODA SYRUP COLA DIET BNB TFF		<input type="text"/>	
54033		61886	1	5 GA	BARQS	SODA SYRUP ROOT BEER BNB		<input type="text" value="2"/>	
Meat Items									

This will initiate a search for that item in the order guide and give search options (next page)

Order Guides / Placing Order – Product Search

Initial search is in your current order guide. To expand your search to the item master, click on All Items

Guided Search

Your Selections

✕ "beef"

Classes (1)

MEATS

Categories (1)

BEEF ANGUS FRESH

Families (0)

Brands (1)

BRVHRT

Item Master Search - Order Only

Order Form Switch View Cancel **All Items** Add Page Advanced

Customer: TEST ACCOUNT - 129486
Order #: 231

beef Clear Contains All

Items 1 - 3 of 3

Item	Customer Item Description	Vendor Item	Pack	Size	Brand	Description	OE	Qty
110142		54594	10	5 #AV	BRVHRT	BEEF CHUCK SHORT RIB B/I SEL		
232874		54132	5	15 LBUP	BRVHRT	BEEF RIBEYE HCHO ANG L/ON		
232888		54172	6	11 #AV	BRVHRT	BEEF STRIP LOIN 0X1 HCHO ANG		

This will expand your search to our entire item master. Simply place a Qty in the field to order the product. (Pricing is not showing this example screen as well)

Guided Search

Your Selections

✕ "beef"

Classes (6)

MEATS
EQUIPMENT & SUPPLY
GROCERY REFRIGERATED
GROCERY DRY
FROZEN FOOD PROCESS
PRODUCE

Categories (29)

DELICIOUS MEATS FROZEN
SAUCES/BASES REFRIG
SOUPS CANNED/MIX
ENTREES/SIDISHERS DRY
ETHNIC ITEMS FROZEN
ENTREES/SIDISHERS FROZEN
SAUCES PREPARED/BASES DRY
[See More...](#)

Families (0)

Brands (181)

ADVANCE

Item Master Search - All Items

Order Form Switch View Cancel Order Only Add Page Advanced

Customer: TEST ACCOUNT - 129486
Order #: 231

beef Clear Contains All

Items 1 - 494 of 1516

Item	Customer Item Description	Vendor Item	Pack	Size	Brand	Description	OE	Qty	Each
347350		201-2492	1	12 CT	WRLD TBL	KNIFE STK 10 BEEF BARON			
252987		4267000205	1	10 LB	GARDEIN	VEGAN BEEF STRIP FC IOF			
31199		04319	1	10 LB	HILL SHIR	BEEF POT ROAST W/CARROT & ONION			
278310		50539	60	5 OZ	RUIJZ	TAMALE BEEF BULK TFF FZ	%		
337340		07202	144	1 OZ	STFFDFDS	APTZ BEEF & ARUGULA MEATBALL FZ			
866003		55200-976	6	13 OZ	COHENS	BEEF SALISBURY STK DNR FZ	%		
231827		20509	6	4 LB	SBARRO	BEEF LASAGNA FC	%		
896422		22265	2	3 LB	JOSEPHS	TORTELLACCI BEEF & VEAL RSTD			
277184		277184	4	25 CT	ROGCRST	APTZ BEEF TNDRLN W/BALSAMIC			
257356		257356	60	4.6 OZ	WEST CRK	PRETZEL FRANKS 6/1 BEEF BLK ANG	%		
57553		3746	4	90 OZ	LEAN CSN	NOODLES LO_MEIN BEEF			
915983		86390	24	3 OZ	EL MONTE	TORNADO RANCHERO BEEF	=		
873503		FH055	100	.75 OZ	SPRNGVLY	APTZ SKEWERED BEEF SATAY	=		
895703		10799	2	5 LB	AUS BLUE	BBQ BEEF BRISKET SHRED FC FZ	%		

Order Guides / Placing Orders – Item Information

To get additional information on the item, click on the item #. This will display the screen to the left. Two tabs (Summary and Detail) will show the following:

- Manufacturer
- On Hand Qty
- On Order Qty / Due Date
- Serving Information
- Vendor Item #
- Substitute Item Information

Summary Detail Movement X

347350

KNIFE STK 10" BEEF BARON (347350)

Cust Item	
Pack	1
Size	12 CT
Brand	WRLD TBL

Classifications

Category	FLATWARE (02741)
Family	
Class	EQUIPMENT & SUPPLY (027)
Manufacturer	WASSERSTROM CO (86802)

Inventory

On Hand Case	0
On Hand B/C	4000000
On Order	0
Expected Date	

Summary Detail X

Movement **347350**

Price:

Packaging

Item Weight	2.210
Case Cube	0.030000
Servings/Case	0
Servings Unit of Measure	
Storage	

Item Identification

Case UPC	1066311400
UPC Vendor	
UPC Unit	
Vendor Item Number	201-2492

Ordering Information

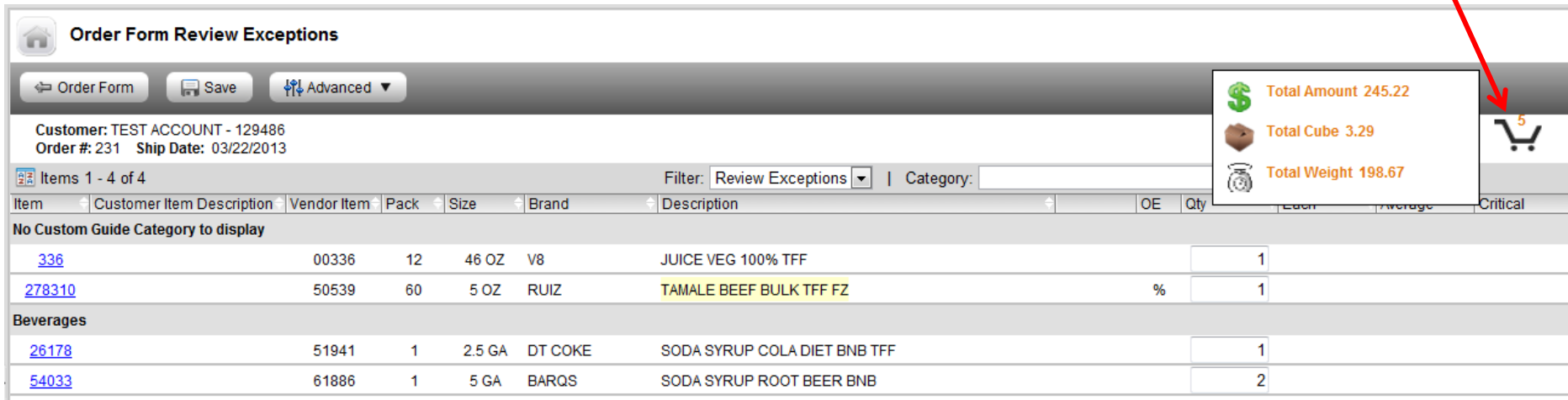
Order Entry Message	Drop Ship (&)
Substitute Item	
Vendor Item Number	

Order Guides / Placing Orders – Order Summary



Once you are satisfied with your order, you should review the order by clicking on Summary

This will show a summary of your order, with qty and price. Also, by clicking on the cart, it will display the order totals



Order Form Review Exceptions

Customer: TEST ACCOUNT - 129486
Order #: 231 Ship Date: 03/22/2013

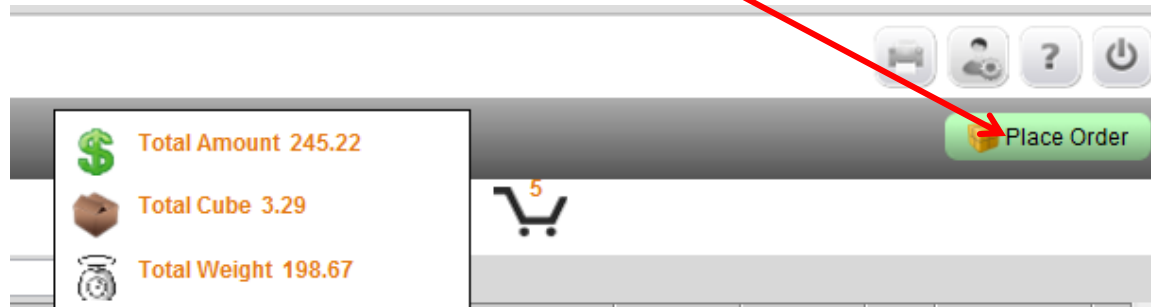
Items 1 - 4 of 4 Filter: Review Exceptions | Category:

Item	Customer Item Description	Vendor Item	Pack	Size	Brand	Description	OE	Qty	Critical
No Custom Guide Category to display									
336		00336	12	46 OZ	V8	JUICE VEG 100% TFF		1	
278310		50539	60	5 OZ	RUIZ	TAMALE BEEF BULK TFF FZ	%	1	
Beverages									
26178		51941	1	2.5 GA	DT COKE	SODA SYRUP COLA DIET BNB TFF		1	
54033		61886	1	5 GA	BARQS	SODA SYRUP ROOT BEER BNB		2	

Order Totals:
 Total Amount 245.22
 Total Cube 3.29
 Total Weight 198.67

Order Guides / Placing Orders – Submit your Order

If you are satisfied, you can click on Place Order to submit the order for processing



If you are not satisfied and need to add more items, you can click on Order From (top left) to go back to the guide. Make your changes, summarize again and Place Order

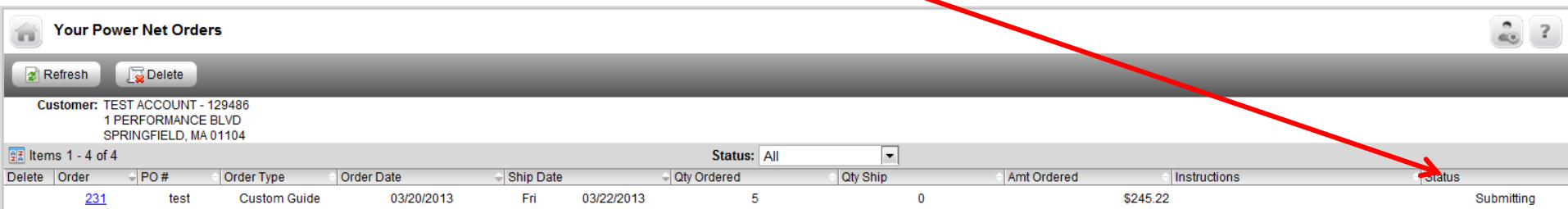
When you select Place Order, one more screen appears to confirm delivery date and allow a PO to be entered (if needed). Click on **Submit Order** to place the order

A screenshot of the 'Place Order' confirmation screen. At the top, there is a navigation bar with 'Place Order' and several icons. Below this, there are buttons for 'Order Form', 'Check Avail', and 'Advanced'. The main content area shows 'Customer: TEST ACCOUNT - 129495 Order #: 231' and 'Quantity: 5 Amount: ... Total Cube: 3.29 Total Weight: 198.67'. A red circle highlights a section containing 'Ship Date (MM/dd/yyyy): 03/22/2015', 'Separate Invoice: ', 'Special Instructions:', 'Special Instructions (cont'd):', and 'Purchase Order #:'. A red arrow points from the text 'Submit Order' in the paragraph above to a green button labeled 'Submit Order' in the top right corner.

Item	Customer Item Description	Vendor Item	Pack	Size	Brand	Description	OE	Qty	Price	Ext Price
338		00336	12	46 OZ	VB	JUICE VEG 100% TFF		1		
278310		50539	60	5 OZ	RUIZ	TAMALE BEEF BULK TFF FZ	%	1		**
						No Custom Guide Category to display		2		

Order Guides / Placing Orders - Confirmation

Once you click on Submit Order, it will place you back at the main Status page, showing your order in a Submitting Status

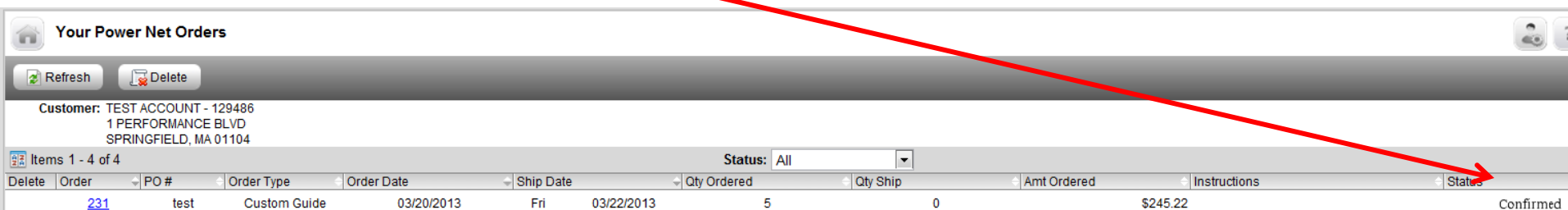


Customer: TEST ACCOUNT - 129486
1 PERFORMANCE BLVD
SPRINGFIELD, MA 01104

Items 1 - 4 of 4 Status: All

Delete	Order	PO #	Order Type	Order Date	Ship Date	Qty Ordered	Qty Ship	Amt Ordered	Instructions	Status
	231	test	Custom Guide	03/20/2013	Fri 03/22/2013	5	0	\$245.22		Submitting

Click on Refresh button to refresh the screen and it should change to a Confirmed status, which means it is in our system.



Customer: TEST ACCOUNT - 129486
1 PERFORMANCE BLVD
SPRINGFIELD, MA 01104

Items 1 - 4 of 4 Status: All

Delete	Order	PO #	Order Type	Order Date	Ship Date	Qty Ordered	Qty Ship	Amt Ordered	Instructions	Status
	231	test	Custom Guide	03/20/2013	Fri 03/22/2013	5	0	\$245.22		Confirmed

Order Guides / Placing Orders – Pending Orders

Once you start an order, it is saved in the main Status screen. To Edit the order, click on the Order # or if you want to Delete it, Click on Status to display just the orders

Dashboard Unit/Customer: TEST ACCOUNT (129486)

Status Account Reports Admin Items Create Order

Hello IT TEST ACCOUNT Search by Item number or description Contains All

Orders

Order #	Order Type	Order Date	Ship Date	Qty Ordered	Qty Ship	Amt Ordered	Status
232	Quick Add	03/20/2013	Thu 03/21/2013	1	0	\$21.09	Pending
231	Custom Guide	03/20/2013	Fri 03/22/2013	5	0	\$245.2	Confirmed

You can delete pending orders you do not want to keep by placing a check in the Delete box and then clicking Delete

Your Power Net Orders Refresh Delete

Customer: TEST ACCOUNT - 129486
1 PERFORMANCE BLVD
SPRINGFIELD, MA 01104

Item: 1 - 4 of 4 Status: All

Delete	Order	PO #	Order Type	Order Date	Ship Date	Qty Ordered	Qty Ship	Amt Ordered	Instructions	Status
<input type="checkbox"/>	232		Quick Add	03/20/2013	Thu 03/21/2013	1	0	\$21.09		Pending
<input type="checkbox"/>	231	test	Custom Guide	03/20/2013	Fri 03/22/2013	5	0	\$245.22		Confirmed

Confirmations

There are 2 ways to confirm your order;

1. On the main Status Screen, click on the Confirmed Order # to view the order

Your Power Net Orders

Customer: TEST ACCOUNT - 129486
1 PERFORMANCE BLVD
SPRINGFIELD, MA 01104

Items 1 - 4 of 4 Status: All

Delete	Order	PO #	Order Type	Order Date	Ship Date	Qty Ordered	Qty Ship	Amt Ordered	Instructions	Status
232			Quick Add	03/20/2013	Thu 03/21/2013	1	0	\$21.09		Pending
231	test		Custom Guide	03/20/2013	Fri 03/22/2013	5	0	\$245.27		Confirmed

View Power Net Order

Customer: TEST ACCOUNT - 129486 Order #: 231

Status: Submitting
 Ship Date: Friday 03/22/2013
 Route Info: Route not available
 Special Instructions:
 Special Instructions (cont'd):
 Purchase Order #: test

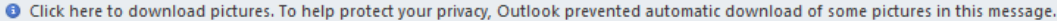
Quantity Ordered: 5
 Quantity Shipped (Est.): 0
 Amount Ordered: 245.22
 Amount Shipped (Est.): 0.00
 Total Cube: 3.29
 Total Weight: 198.670

Items 1 - 4 of 4 Custom Guide


Item	Customer Item Description	Vendor Item	Pack	Size	Brand	Description	Qty
No Custom Guide Category to display							
336		00336	12	46 OZ	V8	JUICE VEG 100% TFF	1
278310		50539	60	5 OZ	RUIZ	TAMALE BEEF BULK TFF FZ	1
Beverages							
26178		51941	1	2.5 GA	DT COKE	SODA SYRUP COLA DIET BNB TFF	1
54033		61886	1	5 GA	BARQS	SODA SYRUP ROOT BEER BNB	2

Confirmations

2. Receiving your order confirmations via email, which shows the same information as on screen. This is based on the email/emails entered into user settings discussed in the User Settings section



From: Sent: Thu 3/21/2013 11:10
 To:
 Cc:
 Subject: (ORDER ON CREDIT HOLD) Order Confirmation for Order Number 244; Customer: TEST ACCOUNT (129486)



Performance Food Service - PFG - SPRINGFIELD

Order Confirmation

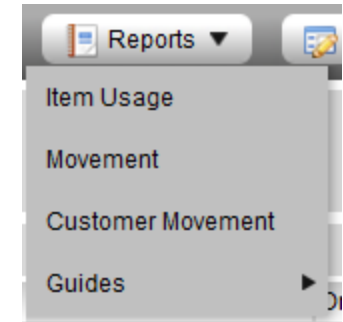
Customer Name: TEST ACCOUNT Order #: 244 Ship Date: 03/22/2013 Route: Stop Number: 0 Special Instructions: On Credit Hold Special Instructions (cont'd): Purchase Order #: Test	Customer #: 129486 Quantity Ordered: 3 Quantity Shipped (Est.): 3 Amount Ordered: 45.70 Amount Shipped (Est.): 45.70 Total Cube: 0.000000 Total Weight: 0.000
--	--

Item Pack	Size	Brand	Description	Qty	Qty Ship	Weight	Price	Ext Price
944871	6	1 LB PACKER	TOFU EXTRA FIRM TFF	2	2	8.000		
232987	2	5 LB ASSOLUTI	MEATBALL BEEF & PORK BKD .5 OZ	1	1	10.560		

Flyer Item

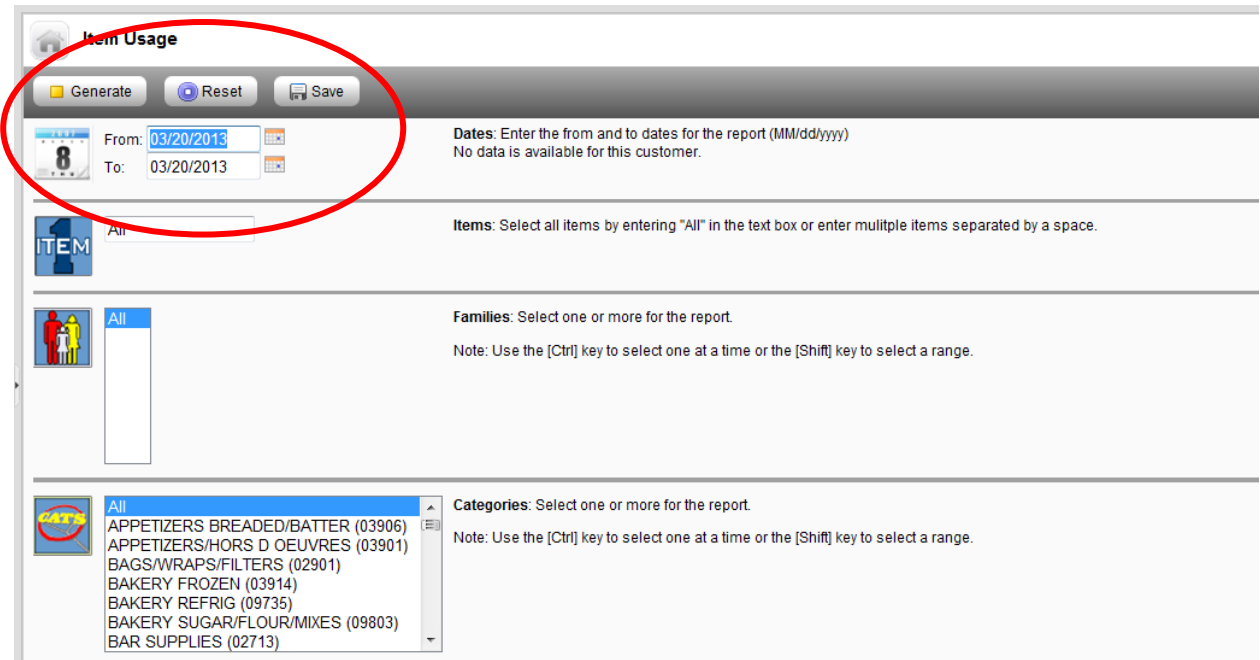
Reports

Reports consist of Usage / Movement and Item reports. To access to the reports, simply click on the Reports button from the main page
The drop down shows 4 options (shown right)



Item Usage report

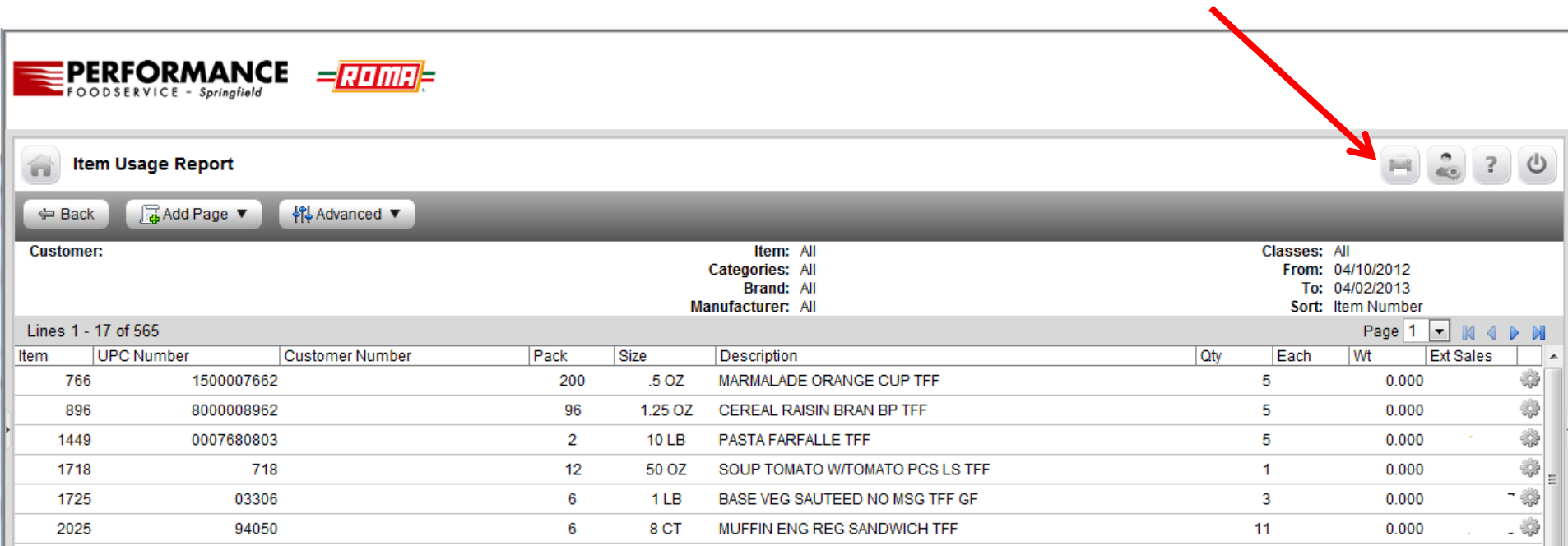
Enter the date range for the usage report, select the various parameters (if you want to). Once the options are set, click on Generate to view the report


A screenshot of the 'Item Usage' report generation form. The form has a header with 'Item Usage' and three buttons: 'Generate', 'Reset', and 'Save'. Below the buttons are date selection fields for 'From' (03/20/2013) and 'To' (03/20/2013), which are circled in red. To the right of the date fields is a note: 'Dates: Enter the from and to dates for the report (MM/dd/yyyy) No data is available for this customer.' Below the date fields is an 'ITEM' selection field with a note: 'Items: Select all items by entering "All" in the text box or enter multiple items separated by a space.' Below that is a 'Families' selection field with a note: 'Families: Select one or more for the report. Note: Use the [Ctrl] key to select one at a time or the [Shift] key to select a range.' At the bottom is a 'Categories' selection field with a list of categories: 'All', 'APPETIZERS BREADED/BATTER (03906)', 'APPETIZERS/HORS D OEUVRES (03901)', 'BAGS/WRAP/FILTERS (02901)', 'BAKERY FROZEN (03914)', 'BAKERY REFRIG (09735)', 'BAKERY SUGAR/FLOUR/MIXES (09803)', and 'BAR SUPPLIES (02713)'. To the right of the categories is a note: 'Categories: Select one or more for the report. Note: Use the [Ctrl] key to select one at a time or the [Shift] key to select a range.'

Reports

Item Usage report

Report shows Items, description, Qty and Sales. [Click here to print](#)



PERFORMANCE FOODSERVICE - Springfield 

Item Usage Report

[Back](#) | [Add Page](#) | [Advanced](#)

Customer: **Item:** All **Classes:** All
Categories: All **From:** 04/10/2012
Brand: All **To:** 04/02/2013
Manufacturer: All **Sort:** Item Number

Lines 1 - 17 of 565 Page 1

Item	UPC Number	Customer Number	Pack	Size	Description	Qty	Each	Wt	Ext Sales
766	1500007662		200	.5 OZ	MARMALADE ORANGE CUP TFF	5		0.000	
896	8000008962		96	1.25 OZ	CEREAL RAISIN BRAN BP TFF	5		0.000	
1449	0007680803		2	10 LB	PASTA FARFALLE TFF	5		0.000	
1718	718		12	50 OZ	SOUP TOMATO W/TOMATO PCS LS TFF	1		0.000	
1725	03306		6	1 LB	BASE VEG SAUTEED NO MSG TFF GF	3		0.000	
2025	94050		6	8 CT	MUFFIN ENG REG SANDWICH TFF	11		0.000	

Reports

Guides

Select which Guide you want to review / print: History, Bid, Standard or Custom
Click here to Print



PERFORMANCE FOODSERVICE - Springfield **ROMA**

Order Guide Report from History

Add Page Advanced

Customer: NATHAN HALE INN & CONF - 9988

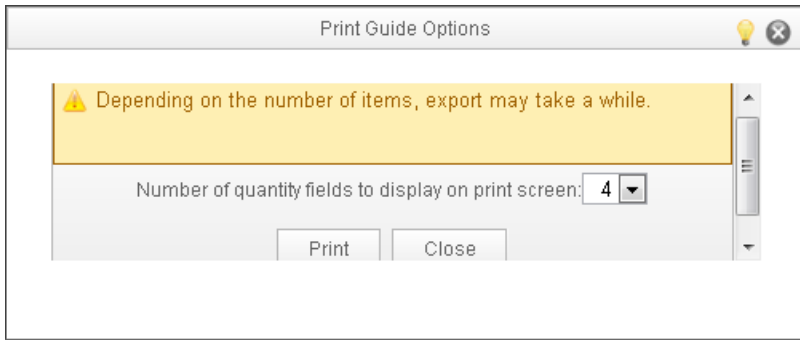
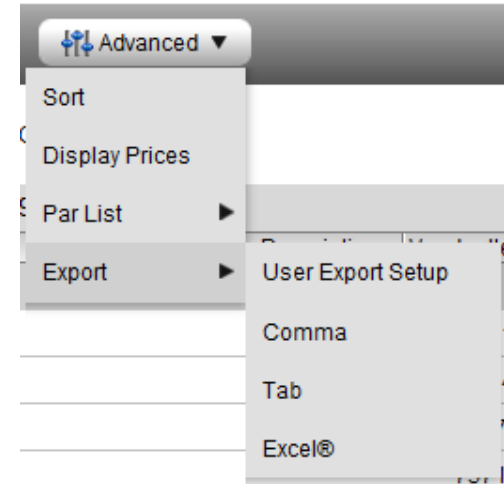
Items 1 - 16 of 314 Page 1

Item	Customer Item Description	Vendor Item	Pack	Size	Brand	Description	OE	Each	Bid
CLEANERS (02861)									
243524		243524	6	19 OZ	FRST MRK	CLEANER GLASS & SURFACE CLARIFY			
NAPKINS/TOWELS/TISSUE (02960)									
852182		852182	96	500 CT	FRST MRK	TISSUE TOILET 2 PLY WHI IW			
APPETIZERS/HORS D OEUVRES (03901)									
204794		4158	196	.5 OZ	RYL DRGN	APTZ SPRING ROLL VEG CKTL TFF			
256286		256286	10	10 CT	RDGCRST	APTZ FRANKS BEEF CKTL IN PASTRY			
256345		256345	4	25 CT	RDGCRST	APTZ QUICHE MINI VAR TFF			

Reports

For all of the reports, to Print or Export, click on the Advanced option and select Print or Export to Excel or text file.

When printing an order guide, it will prompt you to enter the # of fields to display on the printout



The Guide report shows fields to enter qty's for placing orders

PFG - SPRINGFIELD

Order Guide Report from Custom Guide - RonTest Og

Customer: TEST ACCOUNT - 129486

Par List: None

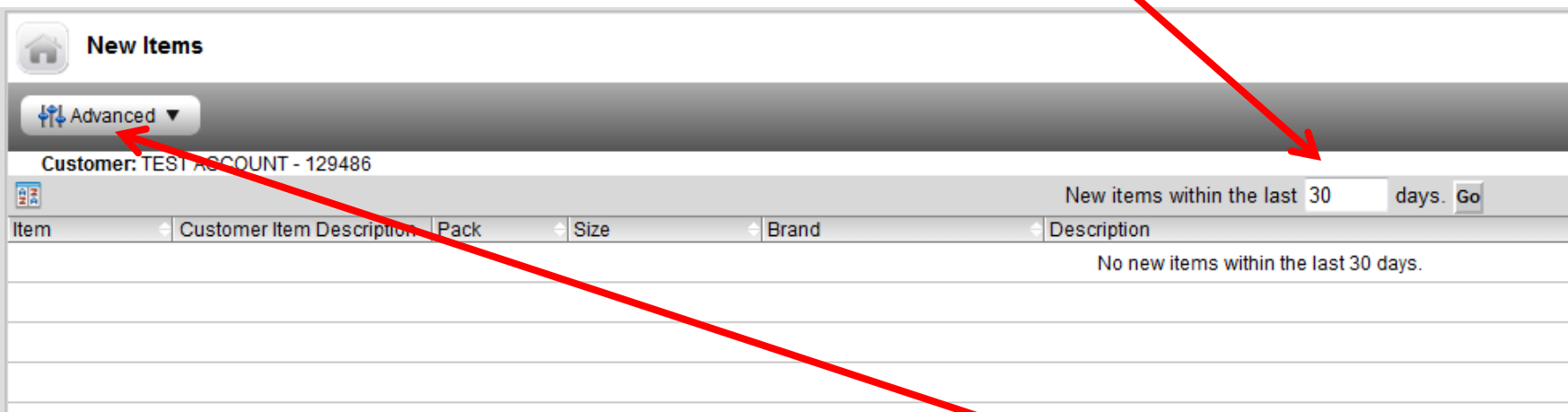
Item	Customer Item Description	Vendor Item	Pack	Size	Brand	Description	OE	Each	Bid	Inv/Ord 1	Inv/Ord 2	Inv/Ord 3	Inv/Ord 4
Beverages													
26178		51941	1	2.5 GA	DT COKE	SODA SYRUP COLA DIET BNB TFF							
26383		61884	1	5 GA	COKE	SODA SYRUP COLA CLASSIC BNB TFF							
26877		7557	1	5 GA	CH COKE	SODA SYRUP COLA CHRY BNB TFF							
28969		7571	1	5 GA	DT COKE	SODA SYRUP COLA DIET BNB TFF							
54033		61886	1	5 GA	BARQS	SODA SYRUP ROOT BEER BNB							
Meat Items													
110142		54594	10	5 #AV	BRVHRT	BEEF CHUCK SHORT RIB B/1 SEL							

Items

There are 2 Item reports available: New or Discontinued

Click on the Item button from the main page

When you select either, you have the option to change the # of days to look either for added items or removed items



New Items

Advanced ▾

Customer: TEST ACCOUNT - 129486

New items within the last 30 days. Go

Item	Customer Item Description	Pack	Size	Brand	Description
No new items within the last 30 days.					

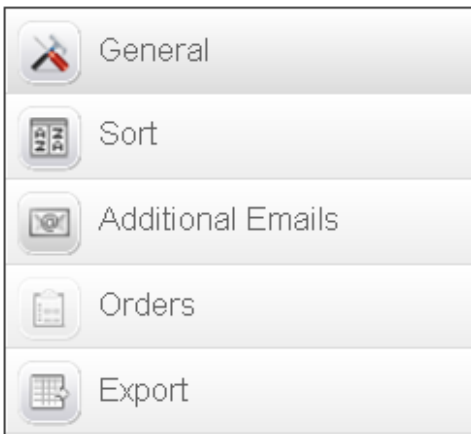
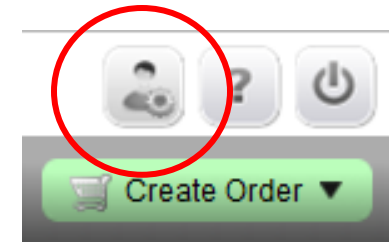
You also have the option to show your pricing on these items. Click on the Advanced option to select whether or not to show prices

You also have the option to print these item lists, using the Print button




User Options

There are some basic User Options for you to maintain system settings



General

 You can change multiple user options and click the Save button. Some options will be applied at next login.

Lines Per Page:

Contact Name:

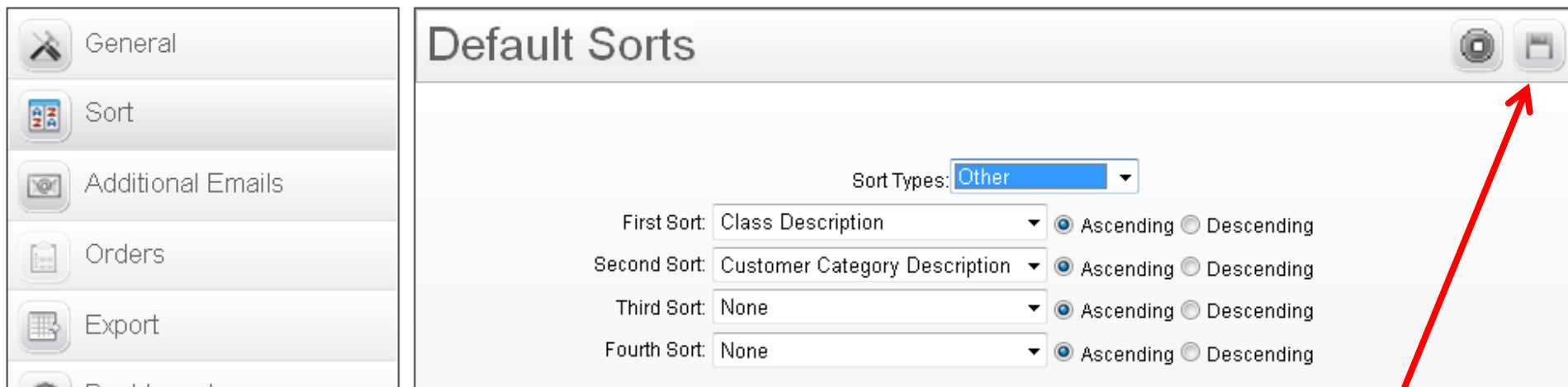
Contact Phone:

Contact Email:

General tab is where you can change Lines per Page and Contact information. The email address entered here is where the order confirmations will be sent. After changes are made, make sure you click **Save**

User Options

There are some basic User Options for you to maintain system settings



General

Sort

Additional Emails

Orders

Export

Dashboard

Default Sorts

Sort Types: **Other**

First Sort: **Class Description** Ascending Descending

Second Sort: **Customer Category Description** Ascending Descending

Third Sort: **None** Ascending Descending

Fourth Sort: **None** Ascending Descending

Save

Sort tab is where you can change your default sort options when entering your orders. Change Sort type to select the type of order guide sort to be changed. After changes are made, make sure you click **Save**

User Options

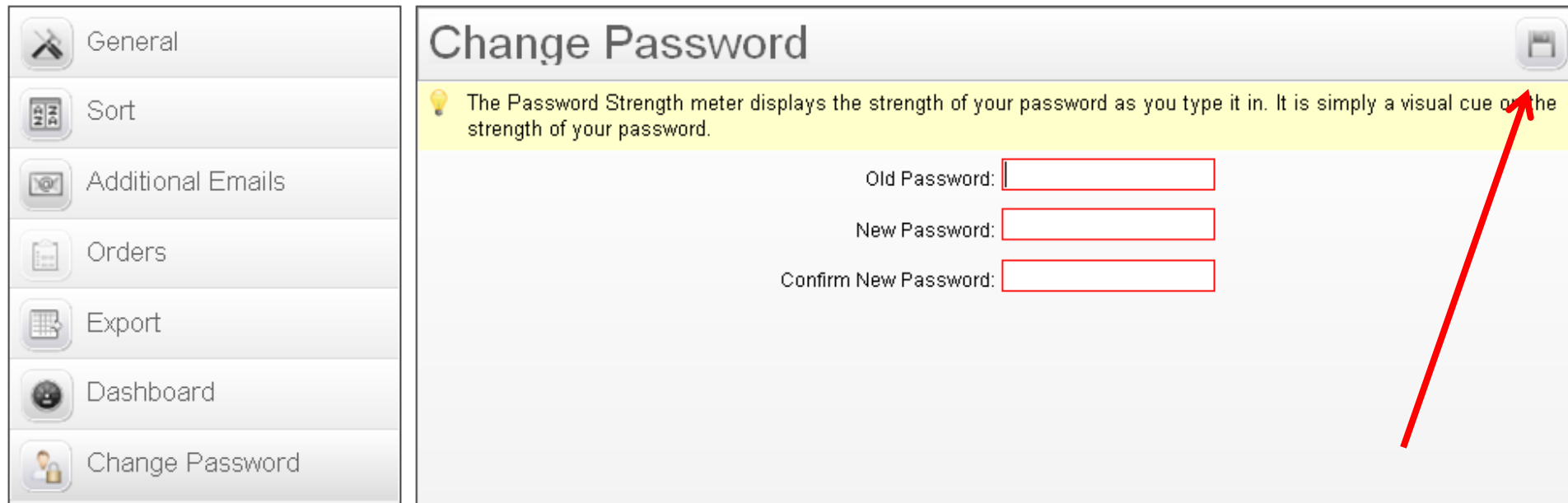
There are some basic User Options for you to maintain system settings

Delete	Display Name	Email Address	Routing
<input type="checkbox"/>	Bob	Bob@email.com	To To Cc Bcc

Additional Emails tab is where you can add additional email addresses to receive the order confirmations. To **Add** a new email address, click on the first icon in the upper right corner. After changes are made, make sure you click **Save**

User Options

There are some basic User Options for you to maintain system settings



The screenshot shows a user interface with a sidebar on the left and a main content area on the right. The sidebar contains several menu items: General, Sort, Additional Emails, Orders, Export, Dashboard, and Change Password. The 'Change Password' item is highlighted. The main content area is titled 'Change Password' and contains a yellow informational box with a lightbulb icon. Below this box are three input fields labeled 'Old Password:', 'New Password:', and 'Confirm New Password:'. A red arrow points from the bottom right towards the 'Save' button in the top right corner of the main content area.

Change Password

The Password Strength meter displays the strength of your password as you type it in. It is simply a visual cue of the strength of your password.

Old Password:

New Password:

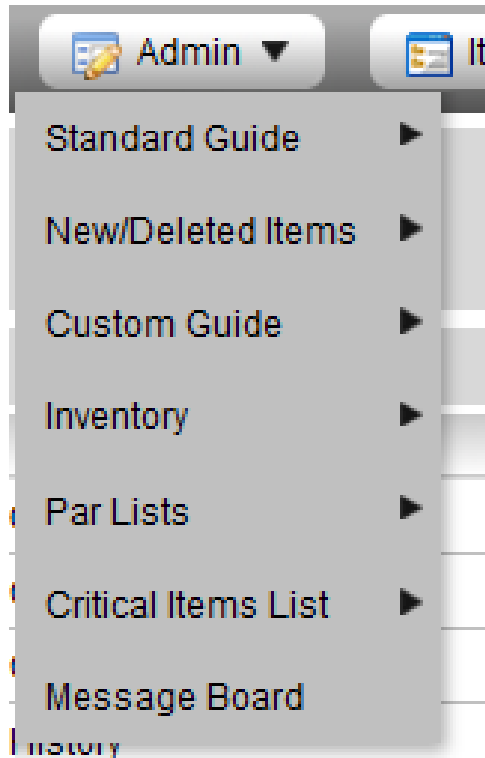
Confirm New Password:

Save

Change Password tab is where you can change your password. Enter your current (Old) password and enter your new one twice. After changes are made, make sure you click **Save**

Admin Functions

There are some basic functions for you to maintain system settings



Order Guide Maintenance

Inventory Options

Create/Edit Par lists

Create/Edit Critical Item lists

If you manage multiple accounts,
you can create messages to these
accounts

Custom Order Guides

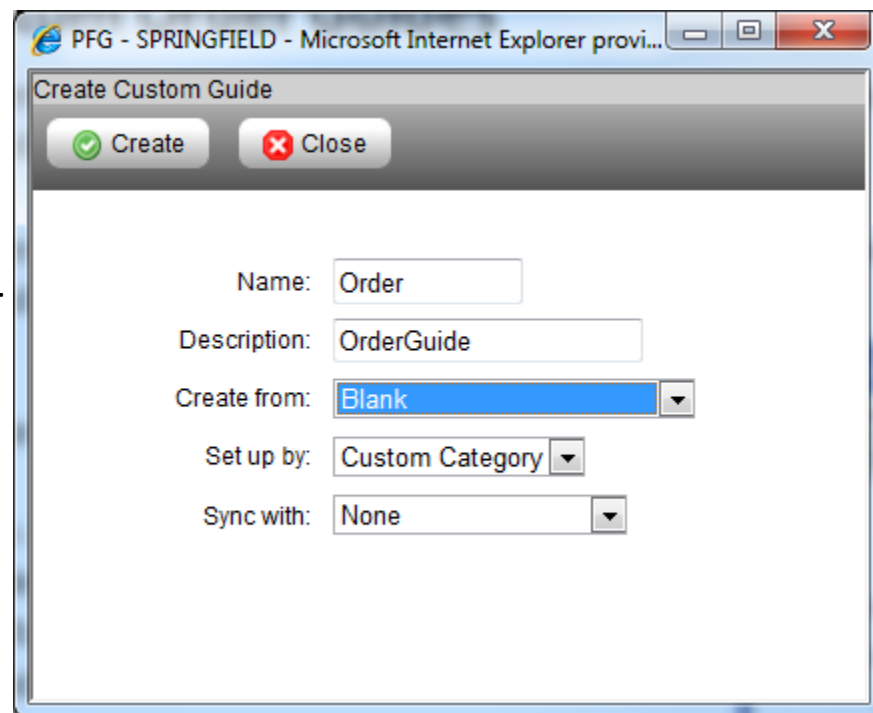
Users can create their own custom order guides, in the sequence you want
To start, click on Admin, Custom Guide and Create

Users can create their own custom order guides, in the sequence you want
To start, click on Admin, Custom Guide and Create

Enter a Name and Description

You also have the option to create this new order guide, based on another order guide – History, Standard Guides, other Custom Guides

Click Create to create your new Guide

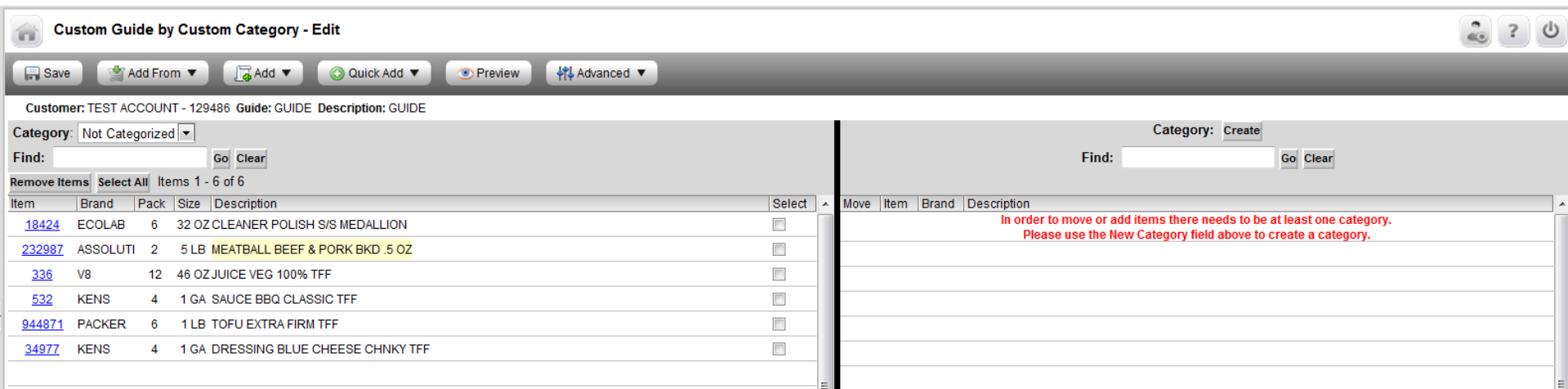
A screenshot of a web browser window showing a form titled "Create Custom Guide". The browser title bar reads "PFG - SPRINGFIELD - Microsoft Internet Explorer provi...". The form has a header with "Create" and "Close" buttons. Below the header are five input fields: "Name" with the value "Order", "Description" with the value "OrderGuide", "Create from" with a dropdown menu showing "Blank", "Set up by" with a dropdown menu showing "Custom Category", and "Sync with" with a dropdown menu showing "None".

Field	Value
Name	Order
Description	OrderGuide
Create from	Blank
Set up by	Custom Category
Sync with	None

Custom Order Guides

To Edit your new guide, click on Admin, Custom Guide and Edit
Find your new guide and click on it

This brings up the Edit Order Guide screen – blank if you did not create from another guide



Custom Guide by Custom Category - Edit

Customer: TEST ACCOUNT - 129486 Guide: GUIDE Description: GUIDE

Category: Not Categorized

Find: Go Clear

Remove Items Select All Items 1 - 6 of 6

Item	Brand	Pack	Size	Description	Select
18424	ECOLAB	6	32 OZ	CLEANER POLISH S/S MEDALLION	<input type="checkbox"/>
232987	ASSOLUTI	2	5 LB	MEATBALL BEEF & PORK BKD .5 OZ	<input type="checkbox"/>
336	V8	12	46 OZ	JUICE VEG 100% TFF	<input type="checkbox"/>
532	KENS	4	1 GA	SAUCE BBQ CLASSIC TFF	<input type="checkbox"/>
944871	PACKER	6	1 LB	TOFU EXTRA FIRM TFF	<input type="checkbox"/>
34977	KENS	4	1 GA	DRESSING BLUE CHEESE CHNKY TFF	<input type="checkbox"/>

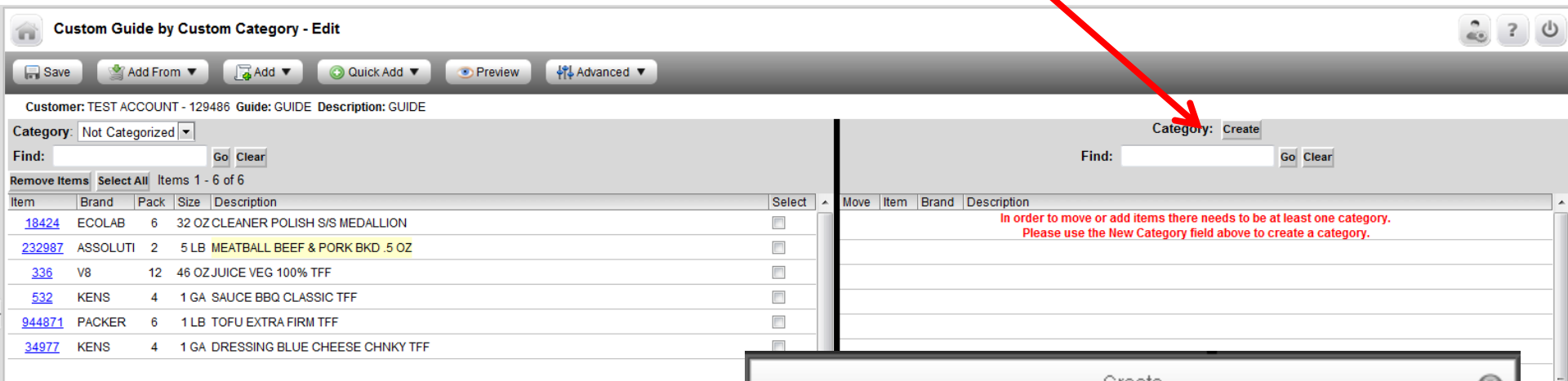
Category: Create

Find: Go Clear

**In order to move or add items there needs to be at least one category.
Please use the New Category field above to create a category.**

Custom Order Guides

To start, you need to create at least one Category to place your items in. If you do not want to sort by custom categories, click Create a generic category or create categories as you wish to sort your order guide.



Customer: TEST ACCOUNT - 129486 Guide: GUIDE Description: GUIDE

Category: Not Categorized

Find: Go Clear

Remove Items Select All Items 1 - 6 of 6

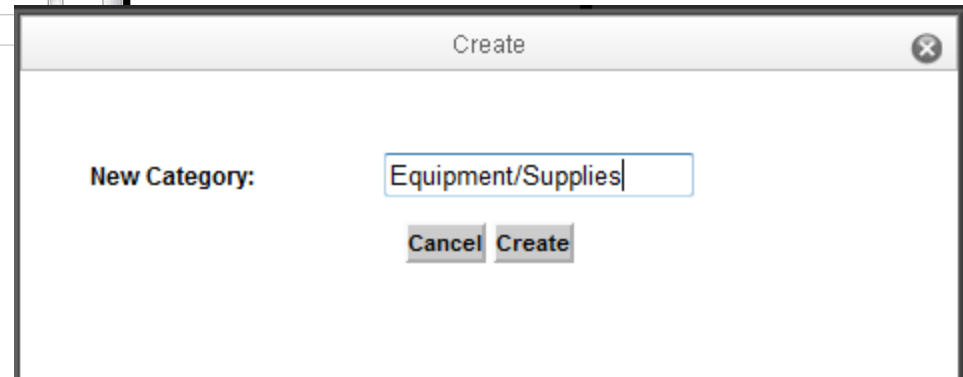
Item	Brand	Pack	Size	Description	Select
18424	ECOLAB	6	32 OZ	CLEANER POLISH S/S MEDALLION	<input type="checkbox"/>
232987	ASSOLUTI	2	5 LB	MEATBALL BEEF & PORK BKD .5 OZ	<input type="checkbox"/>
336	V8	12	46 OZ	JUICE VEG 100% TFF	<input type="checkbox"/>
532	KENS	4	1 GA	SAUCE BBQ CLASSIC TFF	<input type="checkbox"/>
944871	PACKER	6	1 LB	TOFU EXTRA FIRM TFF	<input type="checkbox"/>
34977	KENS	4	1 GA	DRESSING BLUE CHEESE CHNKY TFF	<input type="checkbox"/>

Category: Create

Find: Go Clear

In order to move or add items there needs to be at least one category.
Please use the New Category field above to create a category.

Enter a name for your New Category and click on Create



Create

New Category:

Cancel Create

Custom Order Guides

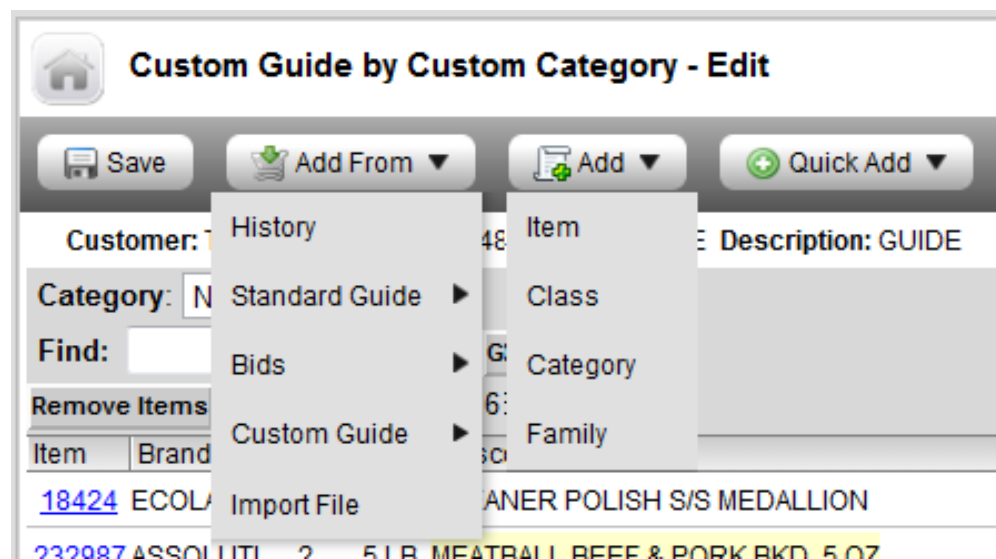
To add items to your guide, select the method of adding.

Add From – existing order guides

Add – by item, class, category or family searches

- Items: you can search by keywords to find the items
- Class: Items can be viewed by item classes
- Category: Items can be viewed by item categories
- *Family: not used*

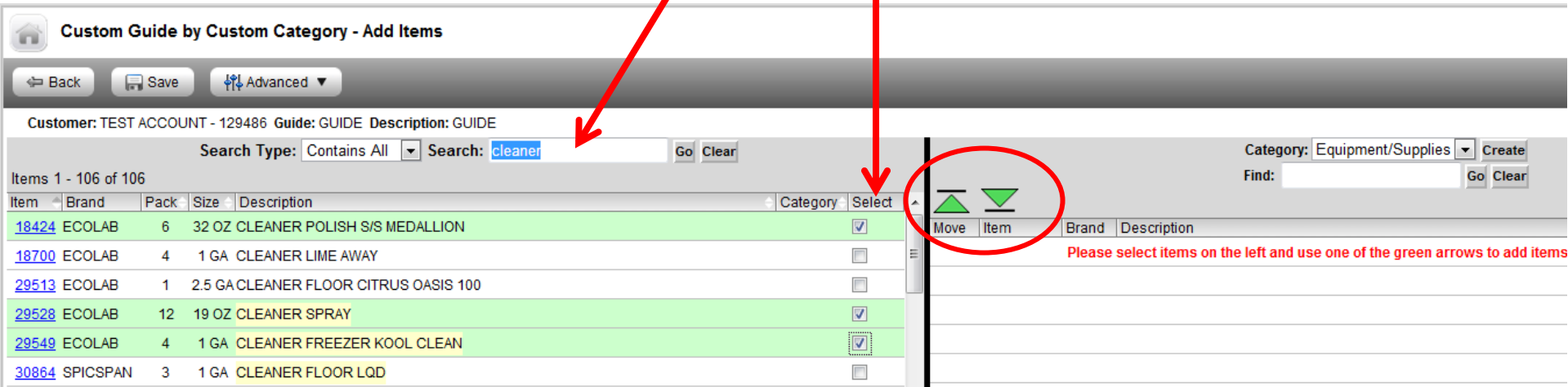
Quick Add – enter item #'s



Custom Order Guides – adding items

Selecting by **Item** will show all items based on your search word entered.

To select the items to add to your guide, click on the Select box and then click on either the Green Up or Down arrow to move it to your guide, into the selected Category.



Customer: TEST ACCOUNT - 129486 Guide: GUIDE Description: GUIDE

Search Type: Contains All Search: cleaner Go Clear

Items 1 - 106 of 106

Item	Brand	Pack	Size	Description	Category	Select
18424	ECOLAB	6	32 OZ	CLEANER POLISH S/S MEDALLION		<input checked="" type="checkbox"/>
18700	ECOLAB	4	1 GA	CLEANER LIME AWAY		<input type="checkbox"/>
29513	ECOLAB	1	2.5 GA	CLEANER FLOOR CITRUS OASIS 100		<input type="checkbox"/>
29528	ECOLAB	12	19 OZ	CLEANER SPRAY		<input checked="" type="checkbox"/>
29549	ECOLAB	4	1 GA	CLEANER FREEZER KOOL CLEAN		<input checked="" type="checkbox"/>
30864	SPICSPAN	3	1 GA	CLEANER FLOOR LQD		<input type="checkbox"/>

Category: Equipment/Supplies Create

Find: Go Clear

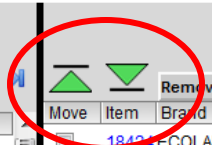
Move Item

Please select items on the left and use one of the green arrows to add items

Custom Order Guides – adding items

Selecting by **Class** will show all items under that class.

To select the items to add to your guide, click on the Select box and then click on either the Green Up or Down arrow to move it to your guide, into the selected Category.



Custom Guide by Custom Category - Add Items

Customer: TEST ACCOUNT - 129486 Guide: GUIDE Description: GUIDE

Class: CHEMICALS & CLEANING (028) Search Type: Exact Match Search: [] Go

Page 1 of 1

Item	Brand	Pack	Size	Description	Category	Select
2591	DISCO	1	1 EA	HNDL DECK BRUSH		<input type="checkbox"/>
2681	ECOLAB	4	6.75LB	DETERGENT DISH MACHINE FUSION		<input checked="" type="checkbox"/>
2727	ECOLAB	1	5 GA	LUBRICANT KLENZ GLIDE 10		<input type="checkbox"/>
3731	CLEAN QK	3	1 GA	SANITIZER LQD QUAT		<input checked="" type="checkbox"/>
15932	ECOLAB	2	58 OZ	WASH FRUIT & VEG VICTORY		<input type="checkbox"/>
16276	RUBBERMD	1	1 CT	SIGN WET FLOOR 24 H		<input type="checkbox"/>
18424	ECOLAB	6	32 OZ	CLEANER POLISH S/S MEDALLION	Equipment/Supplies	<input type="checkbox"/>
18700	ECOLAB	4	1 GA	CLEANER LIME AWAY		<input checked="" type="checkbox"/>

Category: Equipment/Supplies Find: []

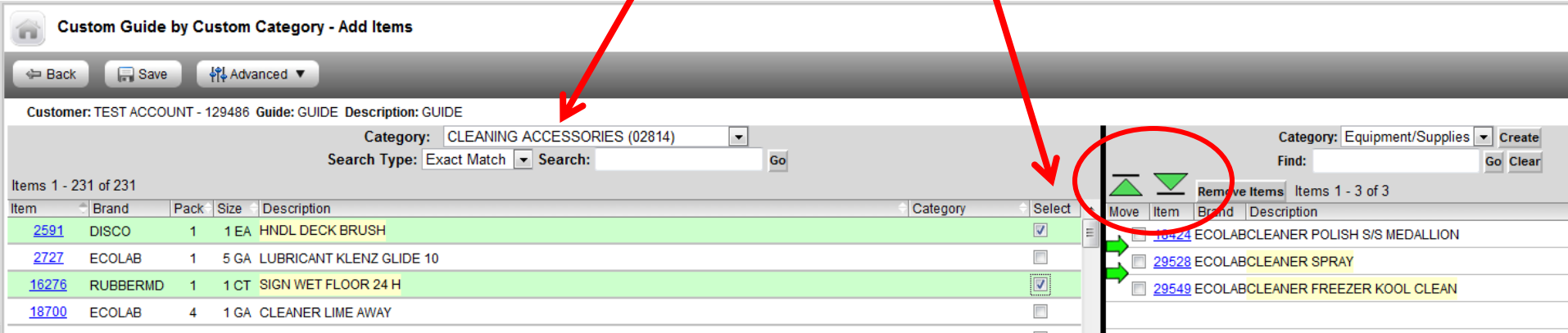
Items 1 - 1 of 1

Move Item Brand Description

Custom Order Guides – adding items

When you select any above mentioned methods, this screen will appear. For **Category**, select the Category you would like to view items for.

To select the items to add to your guide, click on the Select box and then click on either the Green Up or Down arrow to move it to your guide.



Custom Guide by Custom Category - Add Items

Customer: TEST ACCOUNT - 129486 Guide: GUIDE Description: GUIDE

Category: CLEANING ACCESSORIES (02814) Search Type: Exact Match Search: Go

Items 1 - 231 of 231

Item	Brand	Pack	Size	Description	Category	Select
2591	DISCO	1	1 EA	HNDL DECK BRUSH		<input checked="" type="checkbox"/>
2727	ECOLAB	1	5 GA	LUBRICANT KLENZ GLIDE 10		<input type="checkbox"/>
16276	RUBBERMD	1	1 CT	SIGN WET FLOOR 24 H		<input checked="" type="checkbox"/>
18700	ECOLAB	4	1 GA	CLEANER LIME AWAY		<input type="checkbox"/>

Category: Equipment/Supplies Create

Find: Go Clear

Remove Items Items 1 - 3 of 3

Move	Item	Brand	Description
<input checked="" type="checkbox"/>	16276	RUBBERMD	SIGN WET FLOOR 24 H
<input checked="" type="checkbox"/>	16424	ECOLAB	ECOLABCLEANER POLISH S/S MEDALLION
<input checked="" type="checkbox"/>	29528	ECOLAB	ECOLABCLEANER SPRAY
<input type="checkbox"/>	29549	ECOLAB	ECOLABCLEANER FREEZER KOOL CLEAN

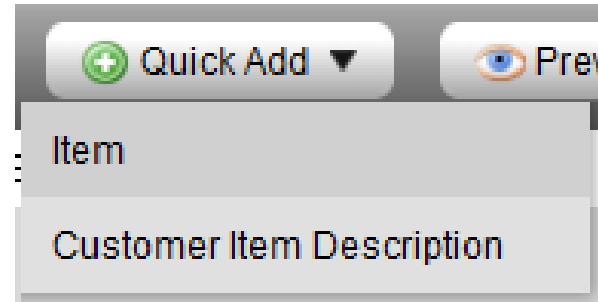
Custom Order Guides – adding items

To add items to your guide, select the method of adding.

Quick Add – by Item or Customer Item

If you know the item #'s, use this method to enter the item #'s and then verify them

Enter the item # and click Check Items. This will show if the item # entered is valid. If so, you can Select it to add to your Guide. Once the item is selected, click on the Green Up or Down arrows to add them to the guide



Custom Guide by Custom Category - Quick Add

Back Check Items Cancel

Customer: TEST ACCOUNT 129486 Guide: GUIDE Description: GUIDE

Item	Pack	Size	Description	Category	Select
336	12	46 OZ	JUICE VEG 100% TFF	NC	<input checked="" type="checkbox"/>

Category: Equipment/Supplies Find:

Move	Item	Brand	Description
	18424	ECOLAB	CLEANER POLISH S/S MEDALLION
	29528	ECOLAB	CLEANER SPRAY
	29549	ECOLAB	CLEANER FREEZER KOOL CLEAN
	2591	DISCO	HNDL DECK BRUSH
	16276	RUBBERMDSIGN	WET FLOOR 24 H

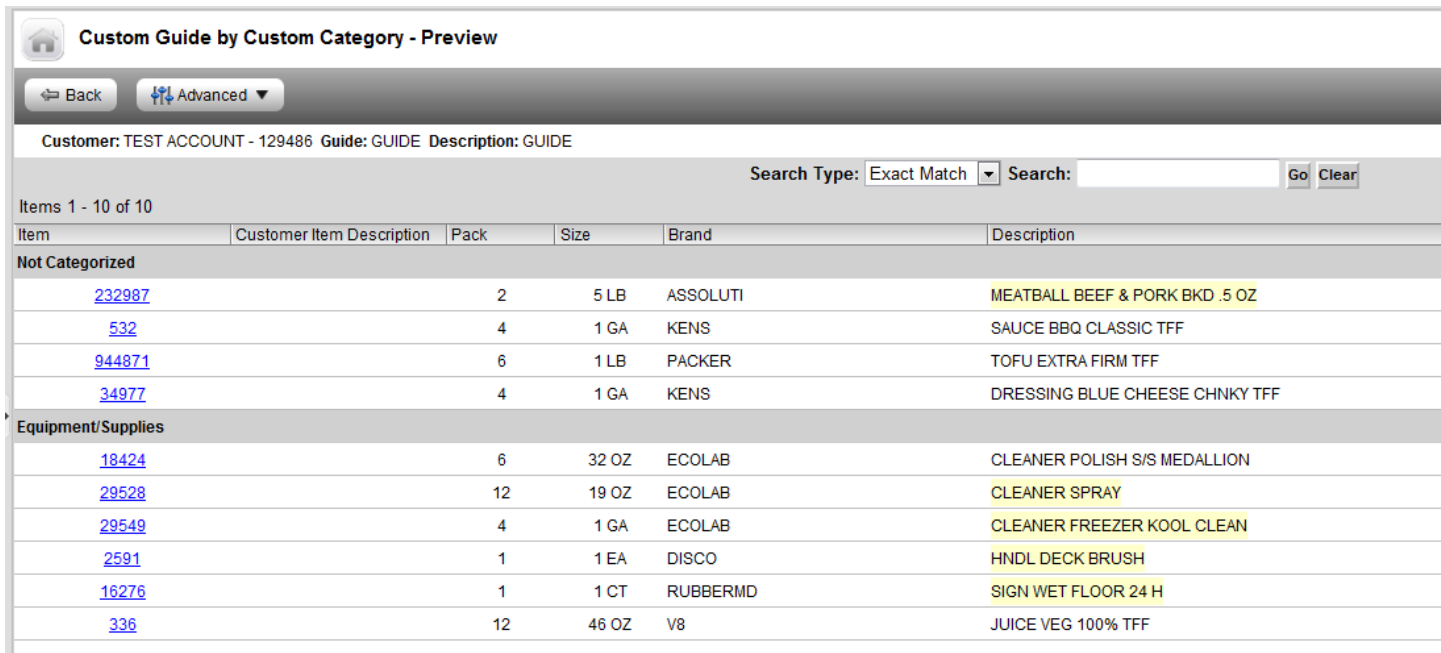
Custom Order Guides – Viewing Guide

For all previous screens, remember to **Save** your changes.



Customer: TEST ACCOUNT - 129486 Guide: GUIDE Description: GUIDE

To view your guide, click on **Preview**. To get back to your Guide, click on **Back**



Customer: TEST ACCOUNT - 129486 Guide: GUIDE Description: GUIDE

Search Type: Search:

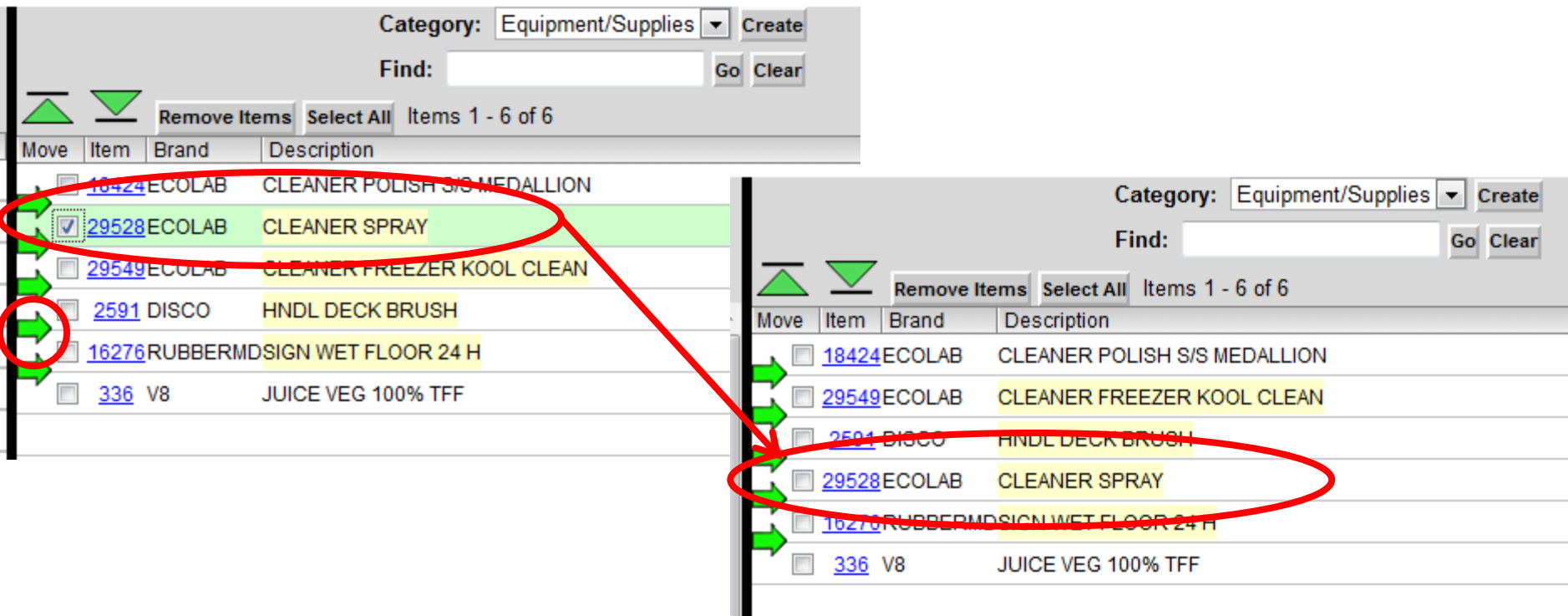
Items 1 - 10 of 10

Item	Customer Item Description	Pack	Size	Brand	Description
Not Categorized					
232987		2	5 LB	ASSOLUTI	MEATBALL BEEF & PORK BKD .5 OZ
532		4	1 GA	KENS	SAUCE BBQ CLASSIC TFF
944871		6	1 LB	PACKER	TOFU EXTRA FIRM TFF
34977		4	1 GA	KENS	DRESSING BLUE CHEESE CHNKY TFF
Equipment/Supplies					
18424		6	32 OZ	ECOLAB	CLEANER POLISH S/S MEDALLION
29528		12	19 OZ	ECOLAB	CLEANER SPRAY
29549		4	1 GA	ECOLAB	CLEANER FREEZER KOOL CLEAN
2591		1	1 EA	DISCO	HNDL DECK BRUSH
16276		1	1 CT	RUBBERMD	SIGN WET FLOOR 24 H
336		12	46 OZ	V8	JUICE VEG 100% TFF

Custom Order Guides - Sequencing

Now that you have the items you want to see in your custom guide, you can place them in the sequence you want to.

Click on the box next to the item to move, then click on the green arrow pointing right between the 2 items you want to place this item



Category: Equipment/Supplies Create

Find: Go Clear

Remove Items Select All Items 1 - 6 of 6

Move	Item	Brand	Description
<input type="checkbox"/>	18424	ECOLAB	CLEANER POLISH S/S MEDALLION
<input checked="" type="checkbox"/>	29528	ECOLAB	CLEANER SPRAY
<input type="checkbox"/>	29549	ECOLAB	CLEANER FREEZER KOOL CLEAN
<input type="checkbox"/>	2591	DISCO	HNDL DECK BRUSH
<input type="checkbox"/>	16276	RUBBERMDSIGN	WET FLOOR 24 H
<input type="checkbox"/>	336	V8	JUICE VEG 100% TFF

Category: Equipment/Supplies Create

Find: Go Clear

Remove Items Select All Items 1 - 6 of 6

Move	Item	Brand	Description
<input type="checkbox"/>	18424	ECOLAB	CLEANER POLISH S/S MEDALLION
<input type="checkbox"/>	29549	ECOLAB	CLEANER FREEZER KOOL CLEAN
<input type="checkbox"/>	2591	DISCO	HNDL DECK BRUSH
<input checked="" type="checkbox"/>	29528	ECOLAB	CLEANER SPRAY
<input type="checkbox"/>	16276	RUBBERMDSIGN	WET FLOOR 24 H
<input type="checkbox"/>	336	V8	JUICE VEG 100% TFF

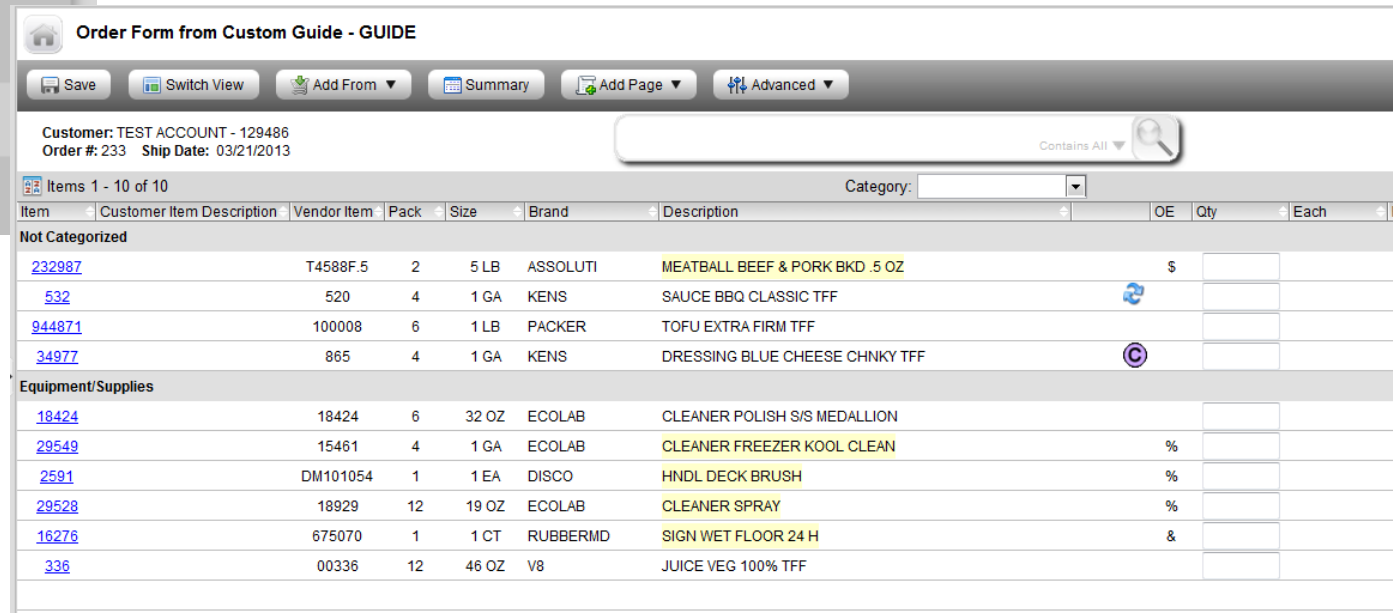
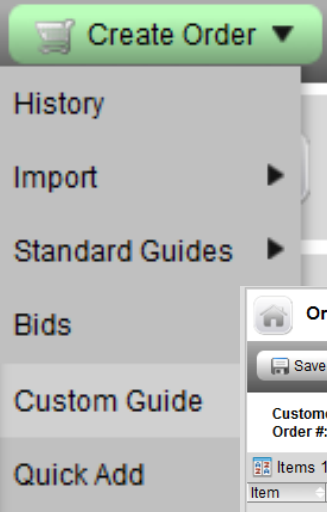
Custom Order Guides - Ordering

Always remember to save your changes

Now, when placing orders, you have this new guide to order from

Click on Order, Custom Guide and find your newly create Guide in the list

The order form is now your new guide



Order Form from Custom Guide - GUIDE

Customer: TEST ACCOUNT - 129486
Order #: 233 Ship Date: 03/21/2013

Items 1 - 10 of 10

Item	Customer Item Description	Vendor Item	Pack	Size	Brand	Description	OE	Qty	Each
Not Categorized									
232987		T4588F.5	2	5 LB	ASSOLUTI	MEATBALL BEEF & PORK BKD .5 OZ			
532		520	4	1 GA	KENS	SAUCE BBQ CLASSIC TFF			
944871		100008	6	1 LB	PACKER	TOFU EXTRA FIRM TFF			
34977		865	4	1 GA	KENS	DRESSING BLUE CHEESE CHNKY TFF			
Equipment/Supplies									
18424		18424	6	32 OZ	ECOLAB	CLEANER POLISH S/S MEDALLION			
29549		15461	4	1 GA	ECOLAB	CLEANER FREEZER KOOL CLEAN		%	
2591		DM101054	1	1 EA	DISCO	HNDL DECK BRUSH		%	
29528		18929	12	19 OZ	ECOLAB	CLEANER SPRAY		%	
16276		675070	1	1 CT	RUBBERMD	SIGN WET FLOOR 24 H		&	
336		00336	12	46 OZ	V8	JUICE VEG 100% TFF			

Inventory

Works similar to Custom Order Guides

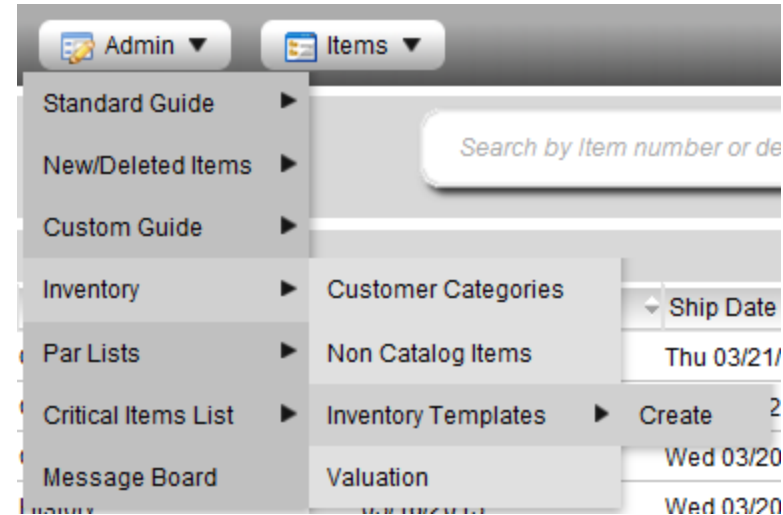
Need to create a new Inventory Template to start. Click Inventory, Inventory Templates and Create

Create Inventory Template

Name:

Description:

Create from:



It will prompt you for a Name, Description and if you want to create it from an existing order guide, select that order guide. Click **Create**

Inventory

Edit your inventory template to make changes. This screen works the same way as the Custom Order Guide options for adding items

Inventory Template By Location - Edit

Add From Add Quick Add Preview Advanced

Customer: TEST ACCOUNT - 129486 Inventory Template: Inventory Description: Inventory

Location:

Find:

Items 1 - 4 of 4

Item	Customer Item Description	Pack	Size	Description	Select
532		4	1 GA	SAUCE BBQ CLASSIC TFF	<input type="checkbox"/>
34977		4	1 GA	DRESSING BLUE CHEESE CHNKY TFF	<input type="checkbox"/>
232987		2	5 LB	MEATBALL BEEF & PORK BKD .5 OZ	<input type="checkbox"/>
944871		6	1 LB	TOFU EXTRA FIRM TFF	<input type="checkbox"/>

Location:

Find:

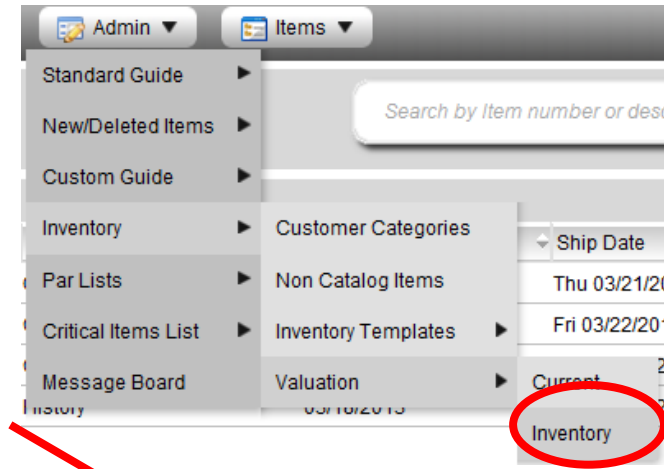
Items 1 - 6 of 6

Move	Item	Customer Item Description	Description
<input type="checkbox"/>	18424		CLEANER POLISH S/S MEDALLION
<input checked="" type="checkbox"/>	29549		CLEANER FREEZER KOOL CLEAN
<input checked="" type="checkbox"/>	2591		HNDL DECK BRUSH
<input checked="" type="checkbox"/>	29528		CLEANER SPRAY
<input checked="" type="checkbox"/>	16276		SIGN WET FLOOR 24 H
<input type="checkbox"/>	336		JUICE VEG 100% TFF

Inventory

To enter inventory values into your new template, click on Valuation, Inventory

Your Inventory Template created earlier will appear with your items. Enter the Cases and Each quantity on hand and click Save to save your inventory



Inventory Valuation - By Inventory Location

Save Create Order Valuation Advanced

Customer: TEST ACCOUNT - 129486 View: Inventory Inventory Template: Inventory (Inventory)

Items 1 - 15 of 15

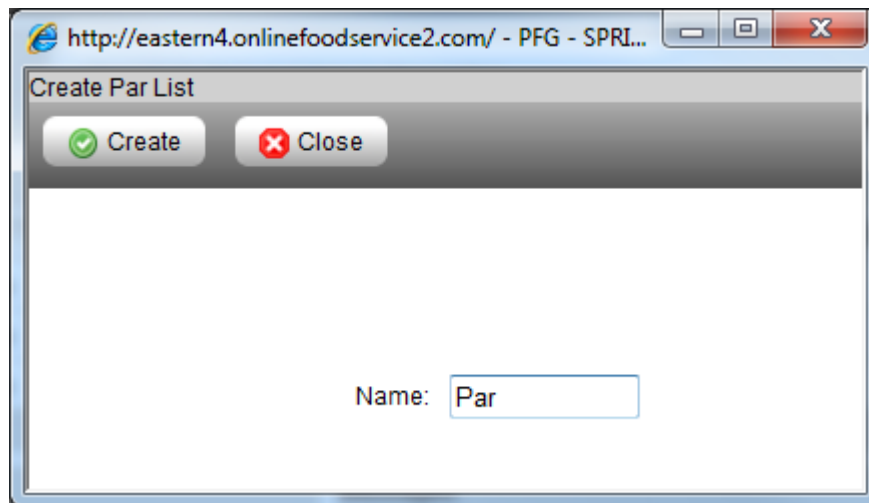
Order	Item	Pack	Size	Brand	Description	Case Quantity	Each Quantity	Weight	
Equipment/Supplies									
<input type="checkbox"/>	18424	6	32 OZ	ECOLAB	CLEANER POLISH S/S MEDALLION	5			
<input type="checkbox"/>	29549	4	1 GA	ECOLAB	CLEANER FREEZER KOOL CLEAN	1			
<input type="checkbox"/>	2591	1	1 EA	DISCO	HNDL DECK BRUSH	1			
<input type="checkbox"/>	29528	12	19 OZ	ECOLAB	CLEANER SPRAY	2			
<input type="checkbox"/>	16276	1	1 CT	RUBBERMD	SIGN WET FLOOR 24 H	1			
<input type="checkbox"/>	336	12	46 OZ	V8	JUICE VEG 100% TFF	5			

Summary for Cat

Par Lists

Works in conjunction with your Inventory

Need to create a new Par List. Click Par Lists, and Create

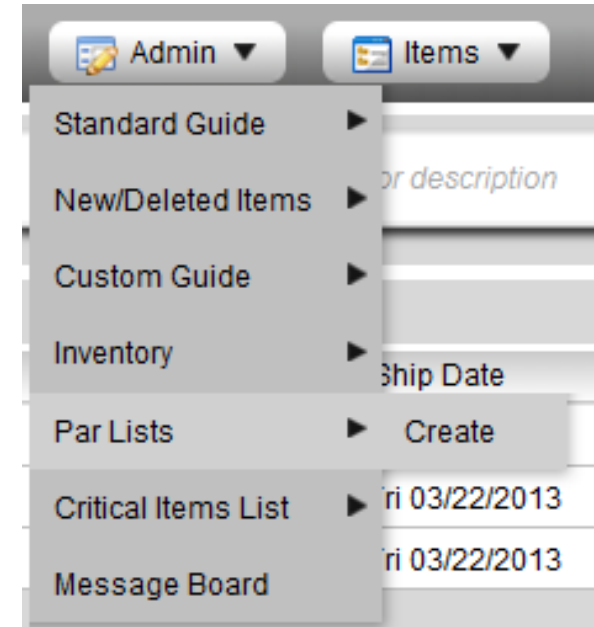


http://eastern4.onlinefoodservice2.com/ - PFG - SPRI...

Create Par List

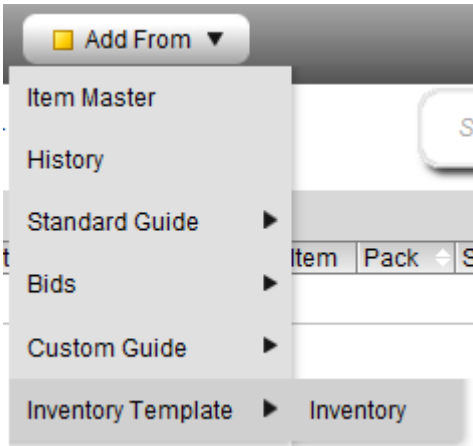
Create Close

Name: Par



It will prompt you for a Name. Enter a name and click **Create** and then select **Edit**

Par Lists



Click Add From and select what you want to create your Par List based on. You can choose an Order Guide or an Inventory Sheet

It will load the items from guide or inventory sheet. Then place the Par level in the proper column. Par is what you always need to have on hand. Once complete, click **Save**

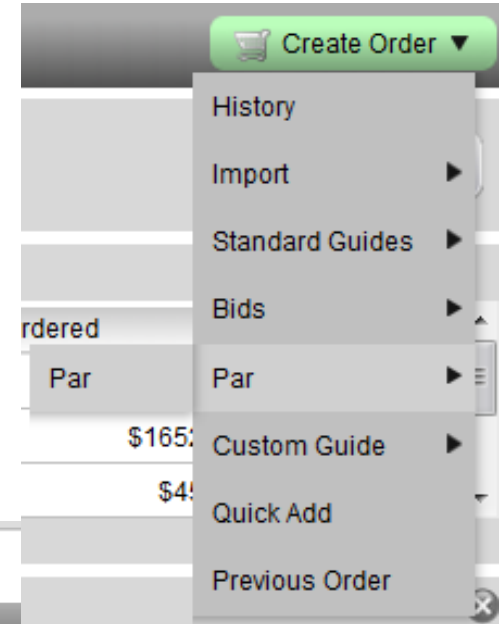
The screenshot shows the 'Par List Edit by Inventory Template - Inventory' screen. At the top, there are navigation buttons: 'Par List', 'Save' (circled in red), 'Reset', and 'Advanced'. Below the buttons, the customer information is displayed: 'Customer: TEST ACCOUNT - 129486' and 'Par List: Par'. A search bar is present with the text 'Search by Item number or description' and a magnifying glass icon. Below the search bar, there is a table with the following columns: Item, Customer Item Description, Vendor Item, Pack, Size, Brand, Description, Par, and Each. The table contains four rows of data under the 'Not Categorized' section. A red arrow points to the 'Par' column header.

Item	Customer Item Description	Vendor Item	Pack	Size	Brand	Description	Par	Each
532		520	4	1 GA	KENS	SAUCE BBQ CLASSIC TFF		5
34977		865	4	1 GA	KENS	DRESSING BLUE CHEESE CHNKY TFF		4
232987		T4588F.5	2	5 LB	ASSOLUTI	MEATBALL BEEF & PORK BKD .5 OZ		6
944871		100008	6	1 LB	PACKER	TOFU EXTRA FIRM TFF		2

Par Lists

Now when Creating Orders, you will have a new option - Par

This will load your Par sheet and all you need to do here is enter your current inventory on hand and based on the Par you entered, it will create the order quantity



Order Form from Par List - Par

Customer: TEST ACCOUNT - 129486
 Order #: 246 Ship Date: 03/22/2013
 Par: Par

Search by Item number or description Contains All

Items 1 - 4 of 4 Class: ▼

Item	Customer Item Description	Vendor Item	Pack	Size	Brand	Description	OE	Inventory	Par	Qty	Each
FROZEN FOOD PROCESS (039)											
232987		T4588F.5	2	5 LB	ASSOLUTI	MEATBALL BEEF & PORK BKD .5 OZ	\$	2	6	4	
GROCERY REFRIGERATED (097)											
34977		865	4	1 GA	KENS	DRESSING BLUE CHEESE CHNKY TFF		3	4	1	
532		520	4	1 GA	KENS	SAUCE BBQ CLASSIC TFF		0	5	5	
PRODUCE (086)											
944871		100008	6	1 LB	PACKER	TOFU EXTRA FIRM TFF			2		



**Any Questions or Issues
pertaining to the online
ordering system, feel free
to call our Help Desk at
413-846-5480**