PERFORMANCE FOODSERVICE

ROMA

PERFORMANCENET

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

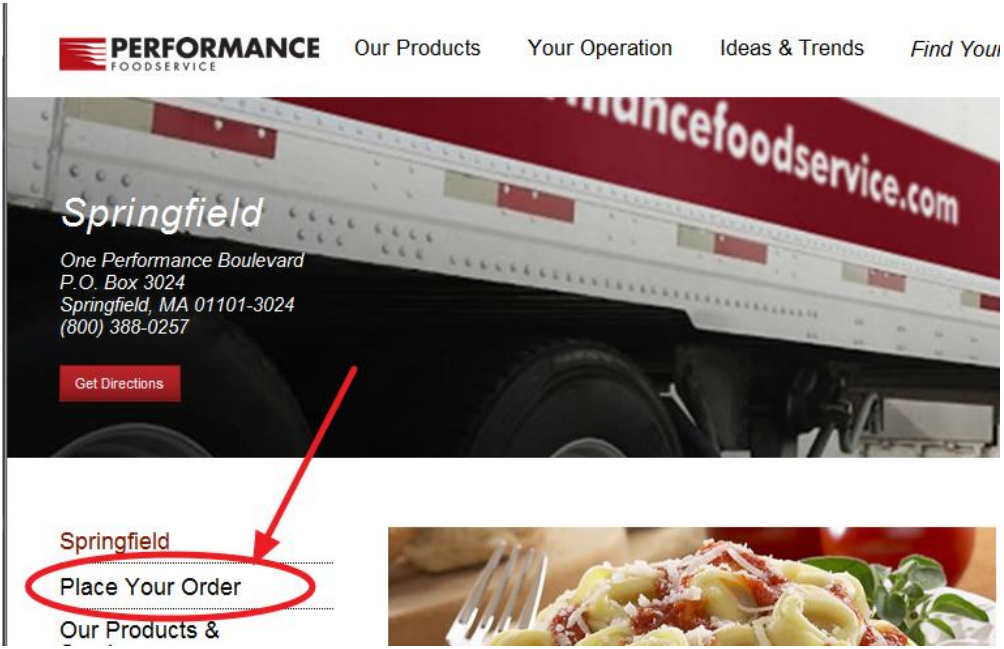
Web Address

What is the web address?

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

Can this website be added to my Favorites?

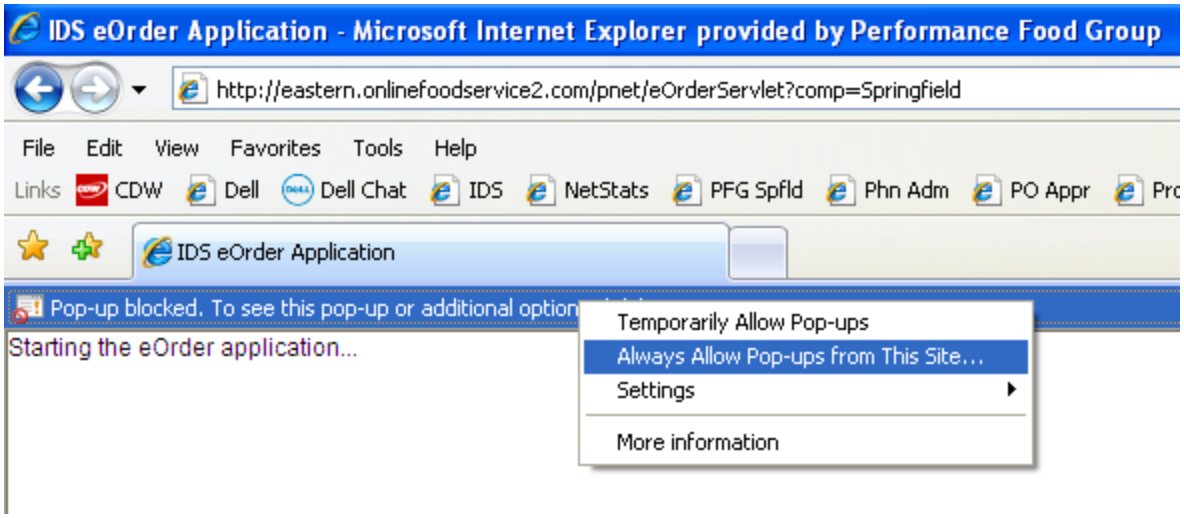
Yes, go to the web page above and click on Favorites option in your browser and click Add to Favorites



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

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

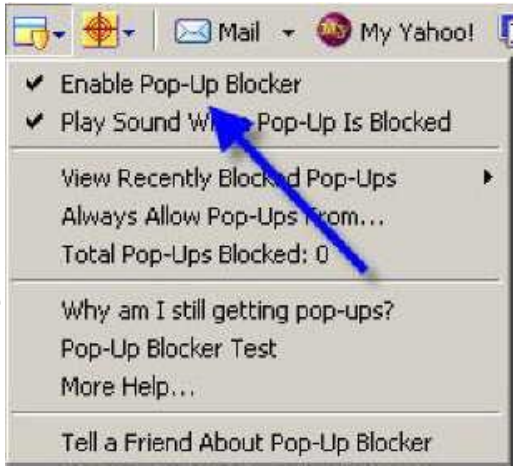
Or

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:

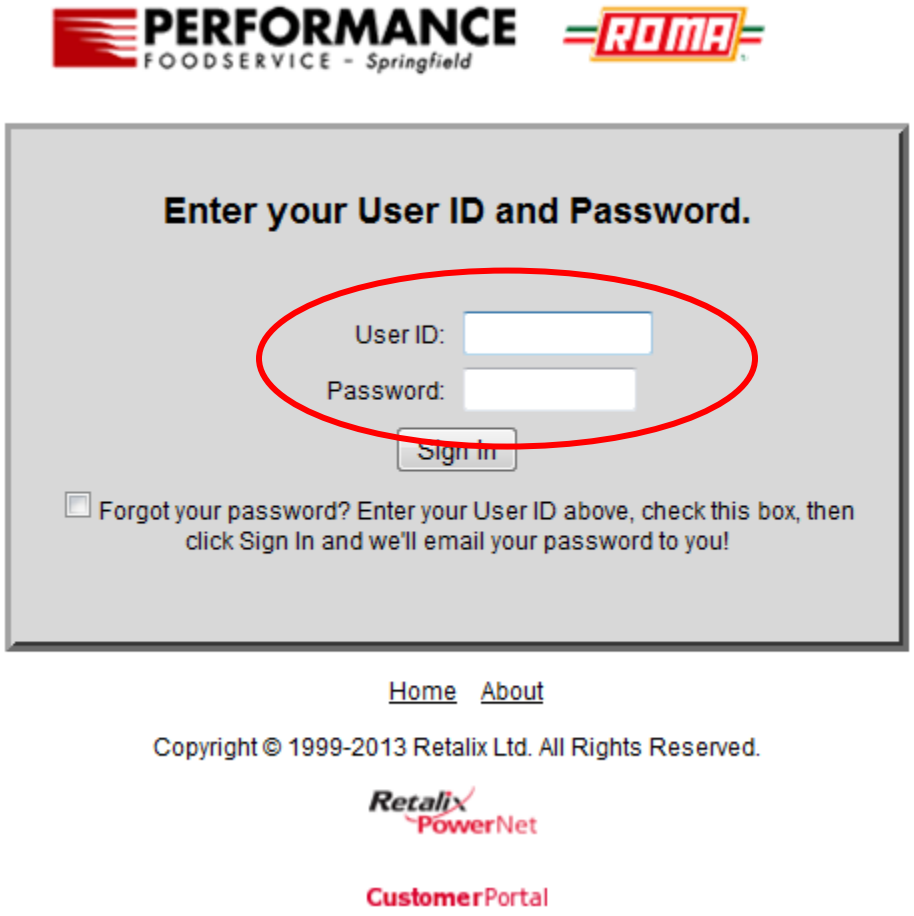
1. Click the Down arrow beside the Pop-Up Blocker icon
2. To disable the blocker, un-check "***Enable Pop-Up Blocker***" in the Drop Down menu



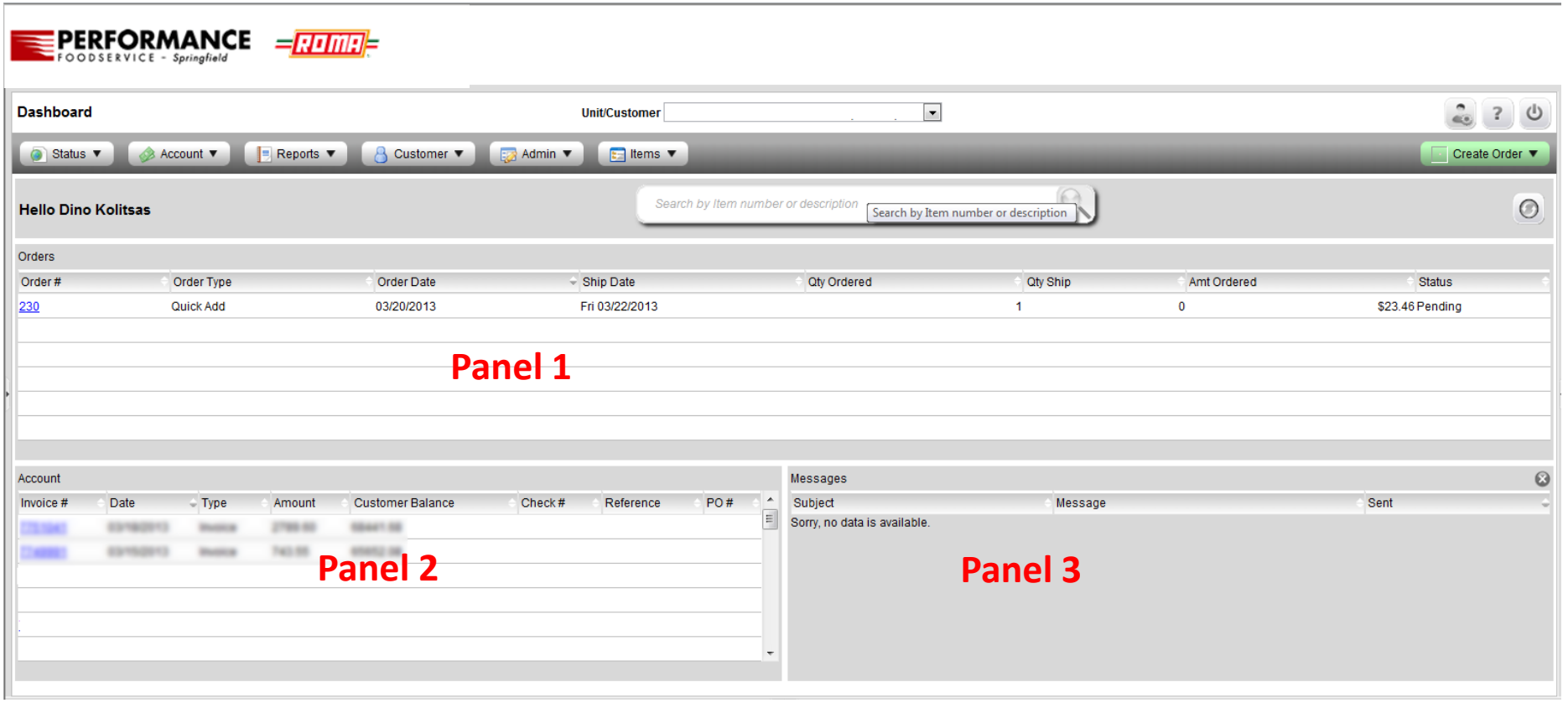
3. To configure the blocker, check "***Enable Pop-Up Blocker***" and select "***Always Allow Pop-Ups from***..." on the same Drop Down menu
4. In the Yahoo! Pop-Up Blocker dialog screen, select **ctimls.com** in the "***Sources of Recently Blocked Pop-Ups***"
5. Click the **Allow** button and then the **Close** button.

How to Sign On

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



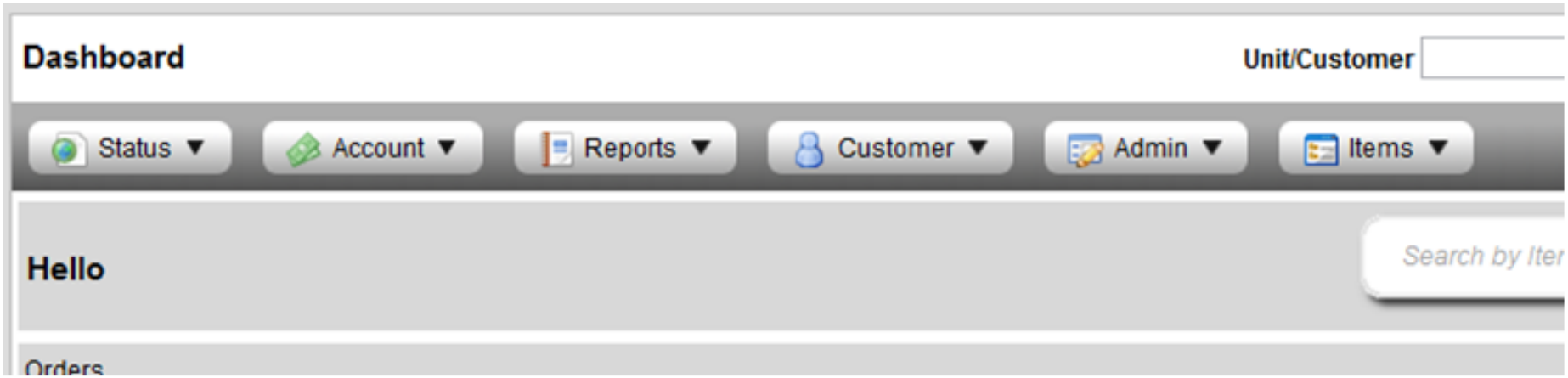
Main Page



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.

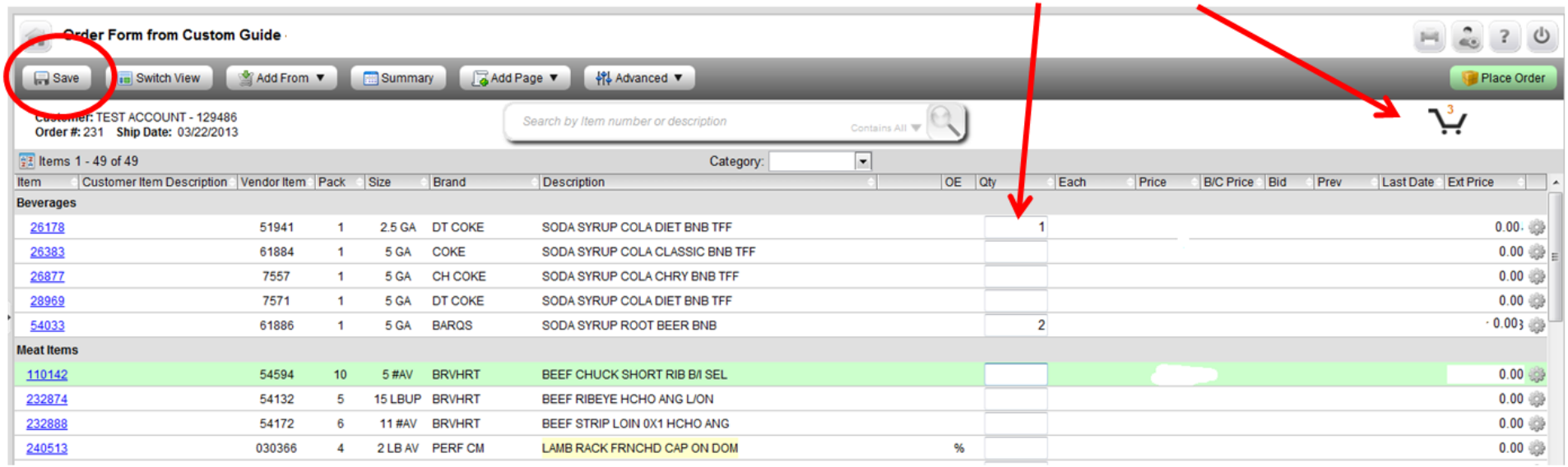
Order Guides / Placing Orders using Guides

Guides show the Item #, Pack, Size Brand, Description and your Price (not shown on this screen). It will also display the last time you ordered that item (Last Date) and extended price on the far right

To place an order, simply scroll through the item list and enter the Qty you would like to order

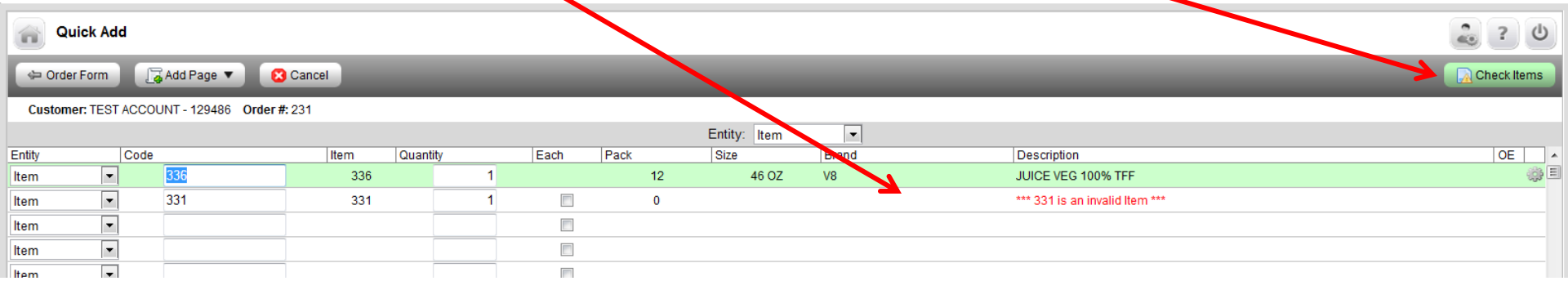
Once complete, click on Place Order. If it is taking some time to complete an order or it is a large order, remember to Save often, just in case

Click on the Cart to get an order total



Order Guides / Placing Orders using Quick Add

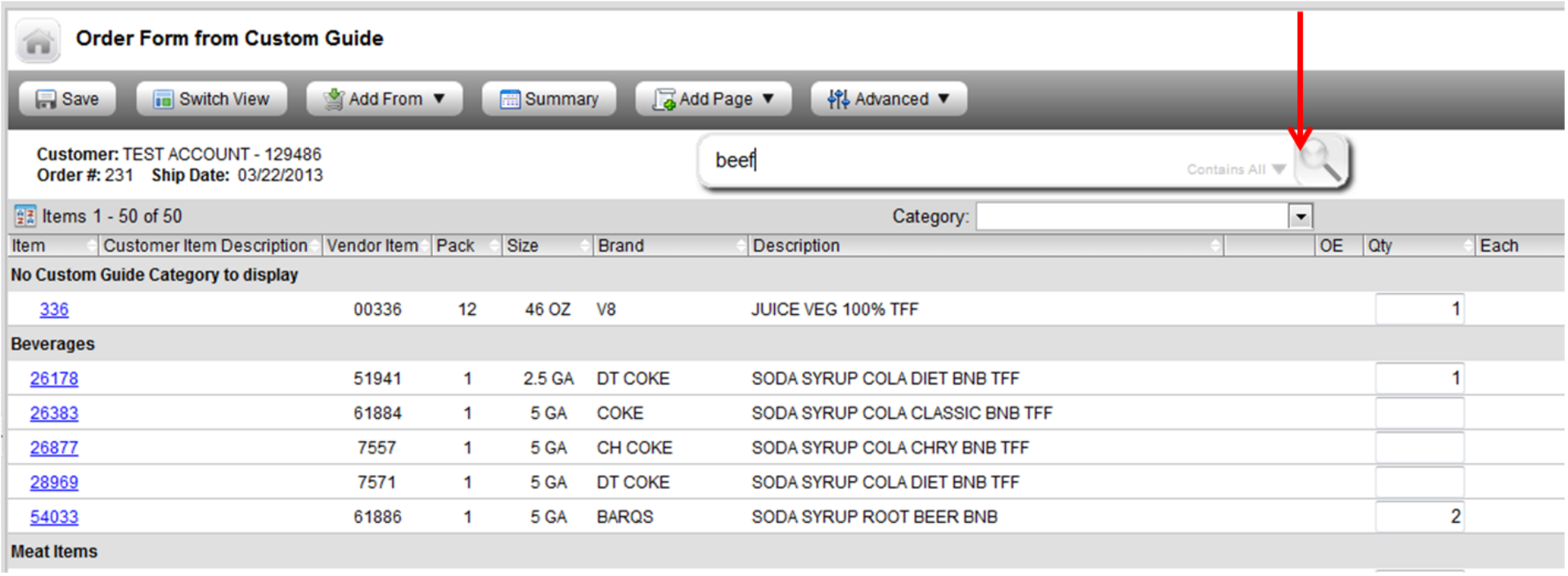
If you know the item #'s, you can use the Quick Add feature to place orders.
Type in the item # and Qty
After all items are entered, click on Check Items to
verify item #'s are valid



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

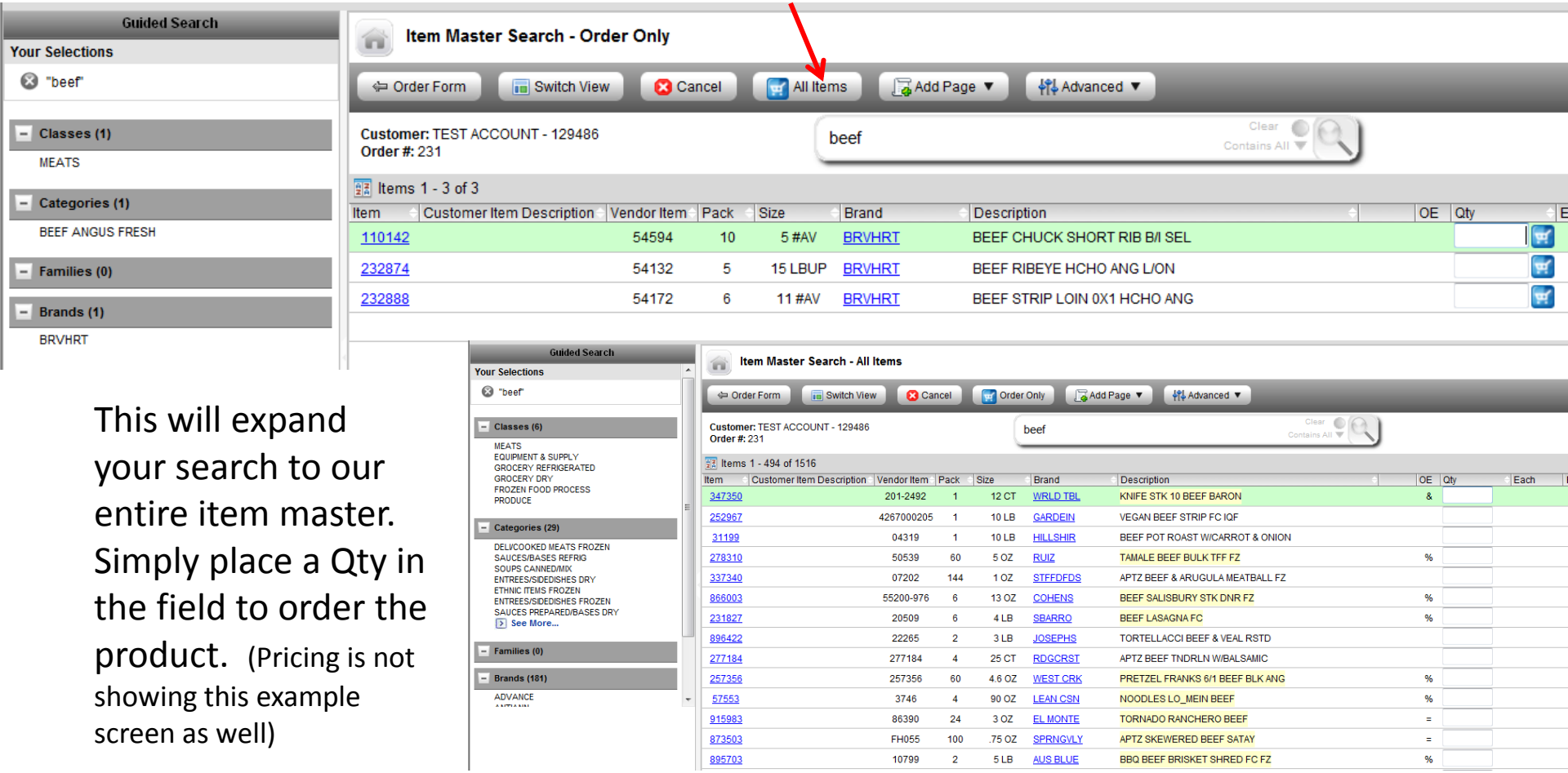
If you need an item that is not on your guide, type in a keyword in the search field and press Enter or click on the Search button



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

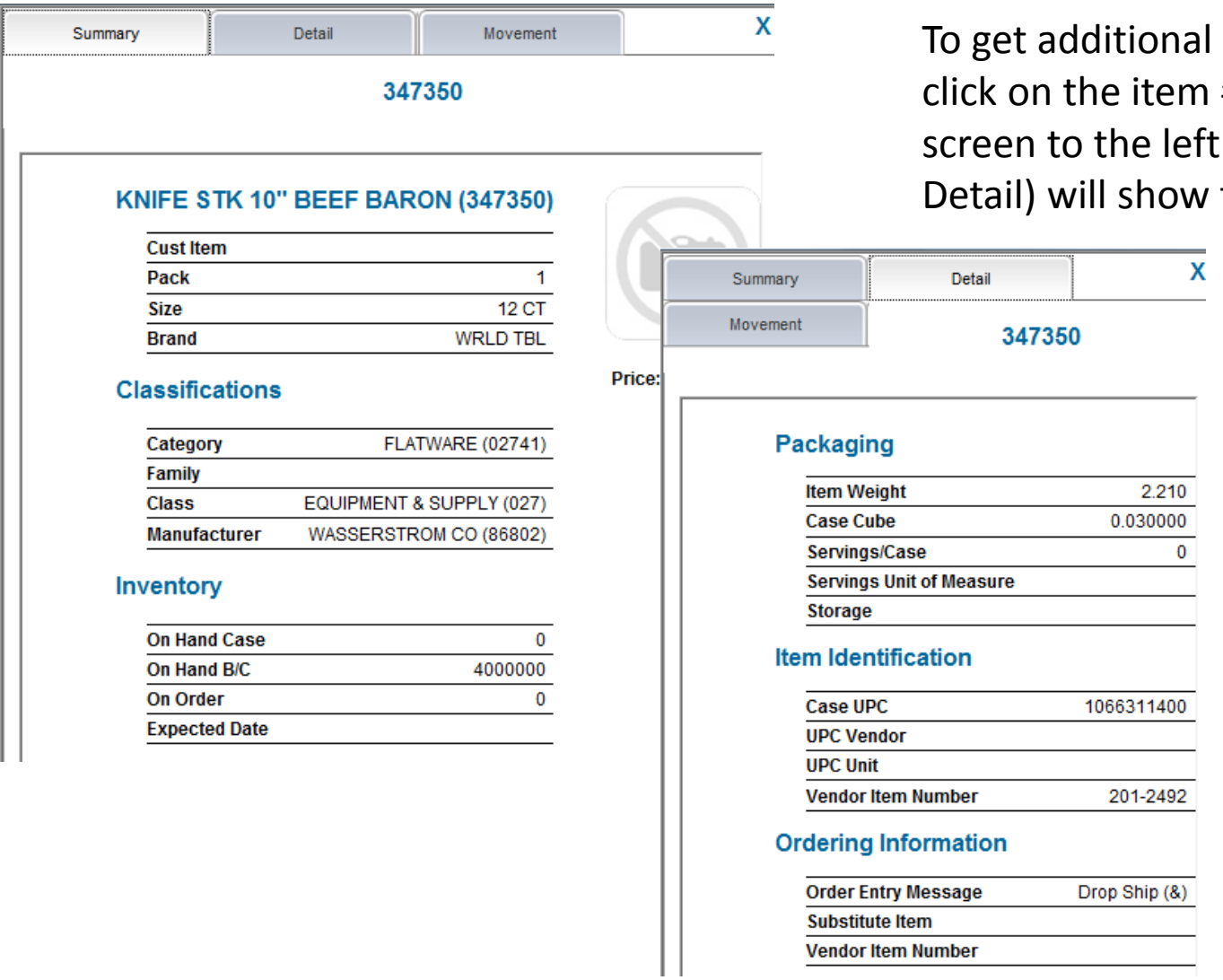
Order Guides / Placing Order – Product Search

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



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)

Order Guides / Placing Orders – Item Information



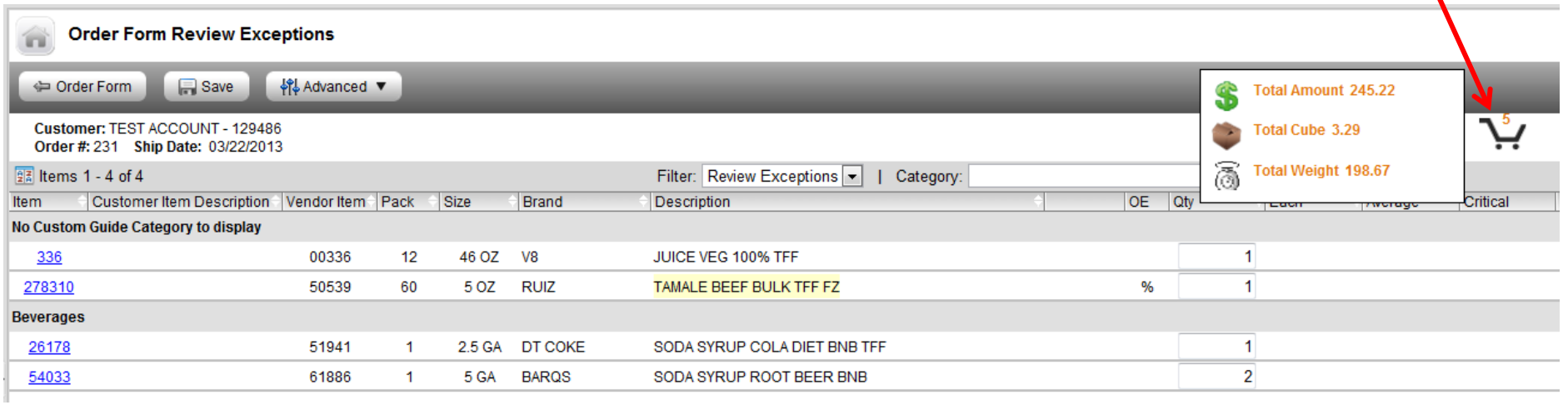
To get additional information on the item, click on the item #. This will display the screen to the left. Two tabs (Summary and Detail) will show the following:

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

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

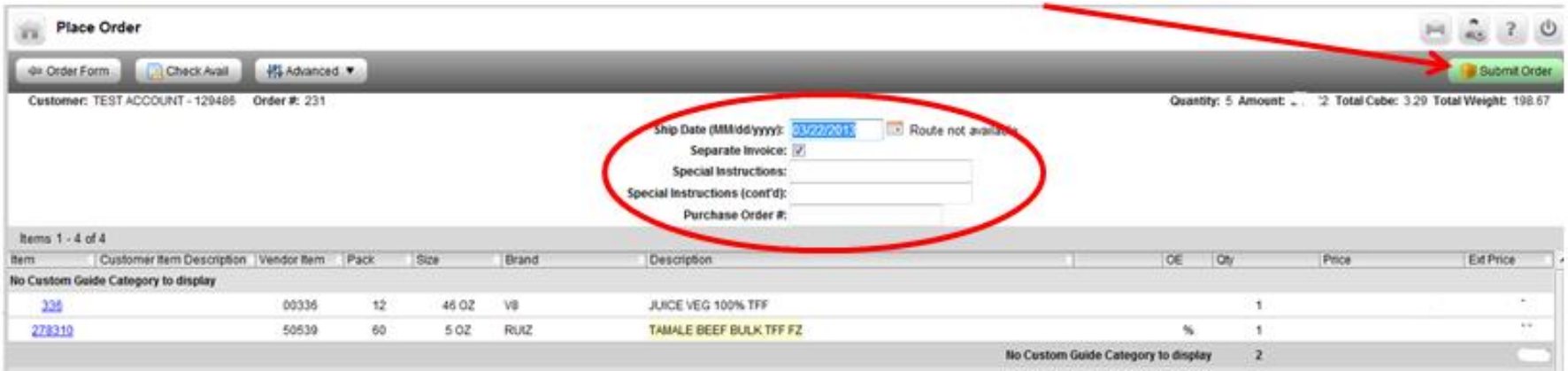


Order Guides / Placing Orders – Submit your Order

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

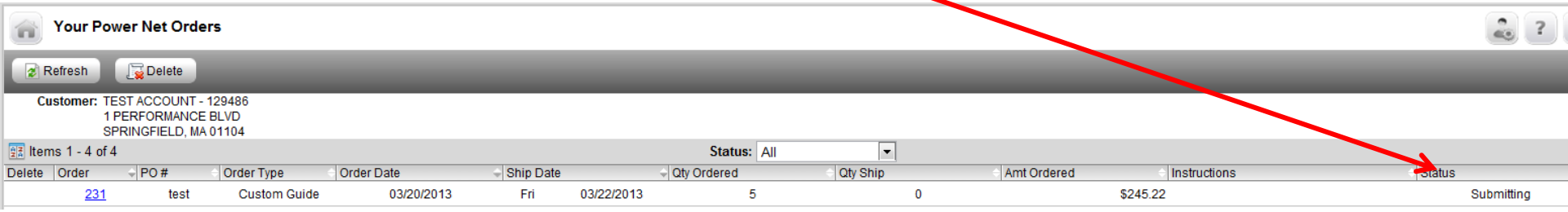
If you are not satisfied and need to add more items, you can click on Order From (top left) to go back to the guide. Make your changes, summarize again and Place Order

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

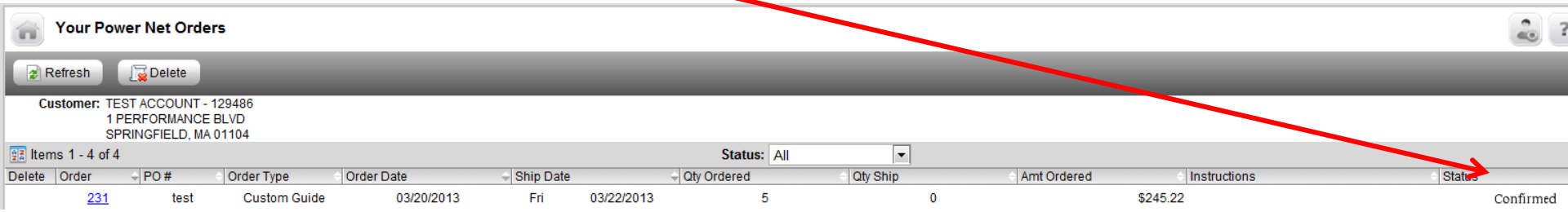


Order Guides / Placing Orders - Confirmation

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

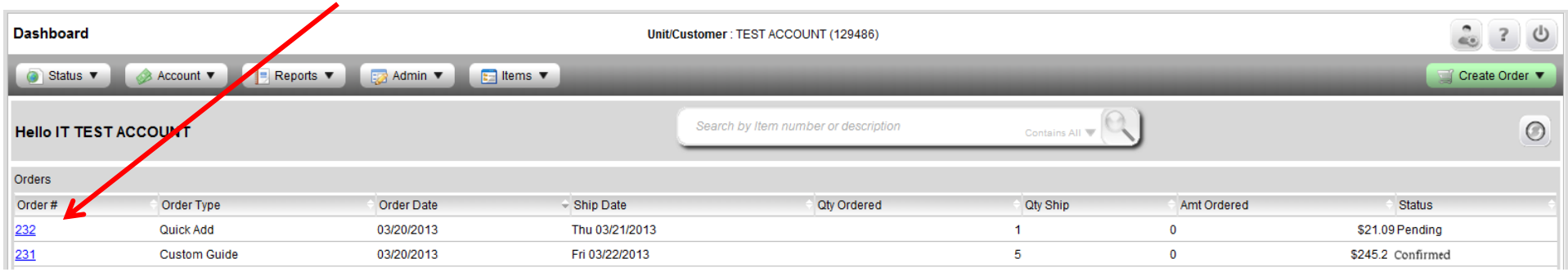


Click on Refresh button to refresh the screen and it should change to a Confirmed status, which means it is in our system.

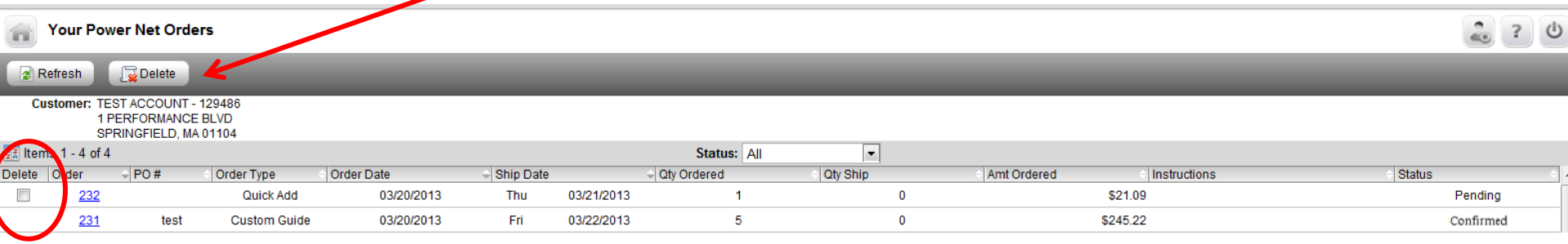


Order Guides / Placing Orders – Pending Orders

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



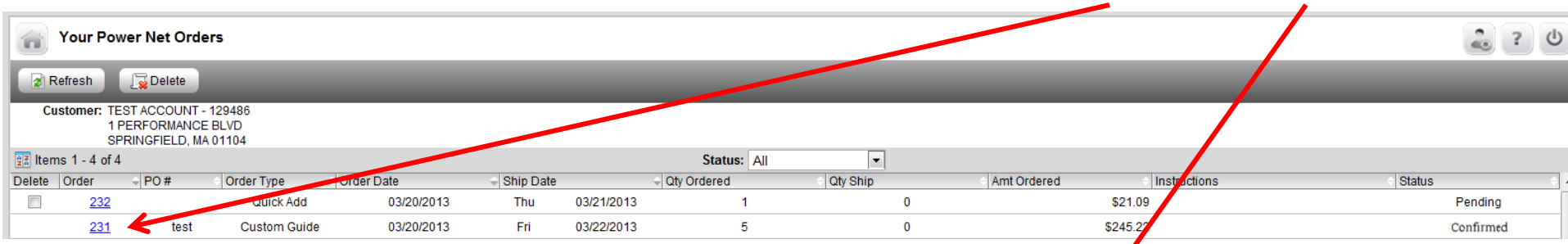
You can delete pending orders you do not want to keep by placing a check in the Delete box and then clicking Delete

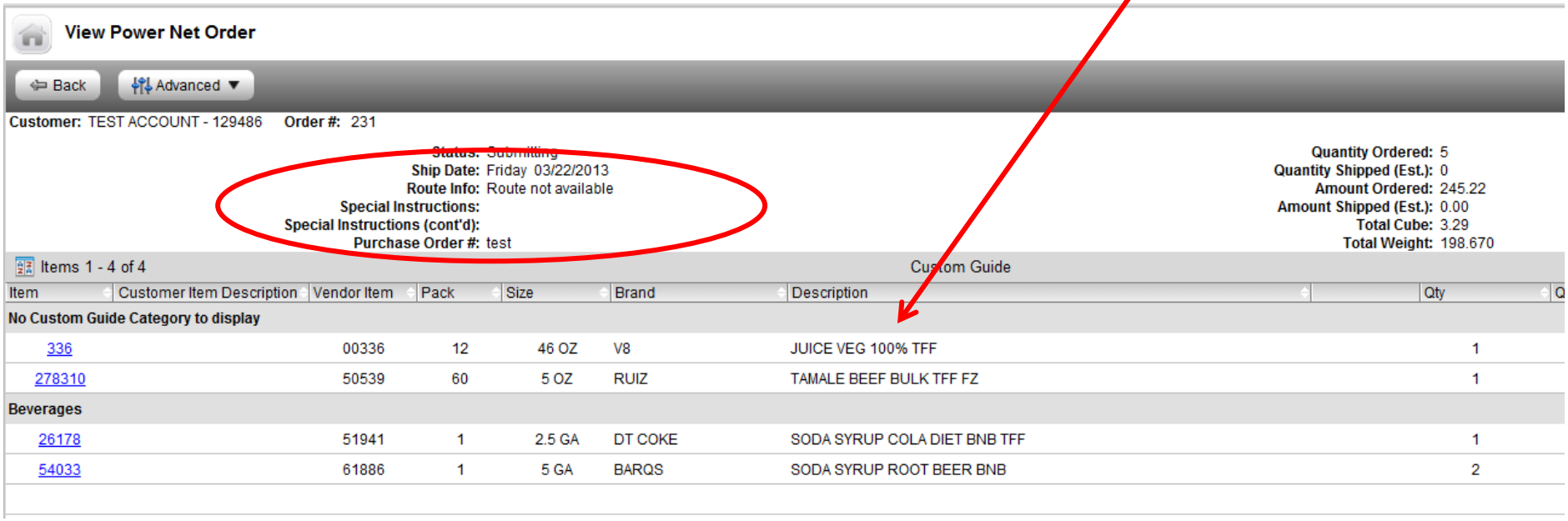


Confirmations

There are 2 ways to confirm your order;

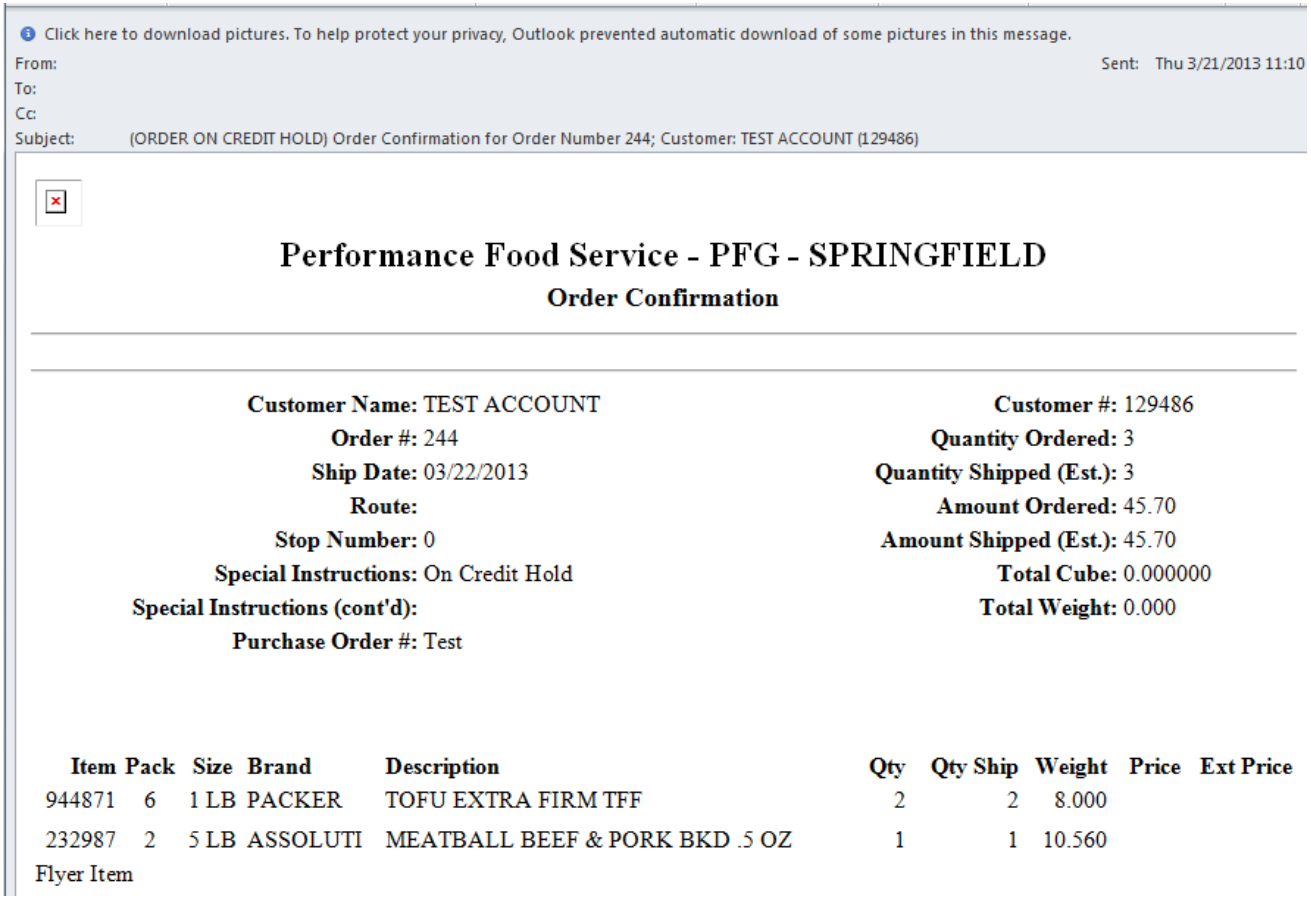
1. On the main Status Screen, click on the Confirmed Order # to view the order





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



Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

From:
To:
Cc:
Subject: (ORDER ON CREDIT HOLD) Order Confirmation for Order Number 244; Customer: TEST ACCOUNT (129486)

Sent: Thu 3/21/2013 11:10

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

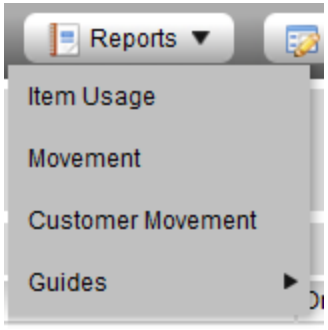
Customer #: 129486
Quantity Ordered: 3
Quantity Shipped (Est.): 3
Amount Ordered: 45.70
Amount Shipped (Est.): 45.70
Total Cube: 0.000000
Total Weight: 0.000

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		

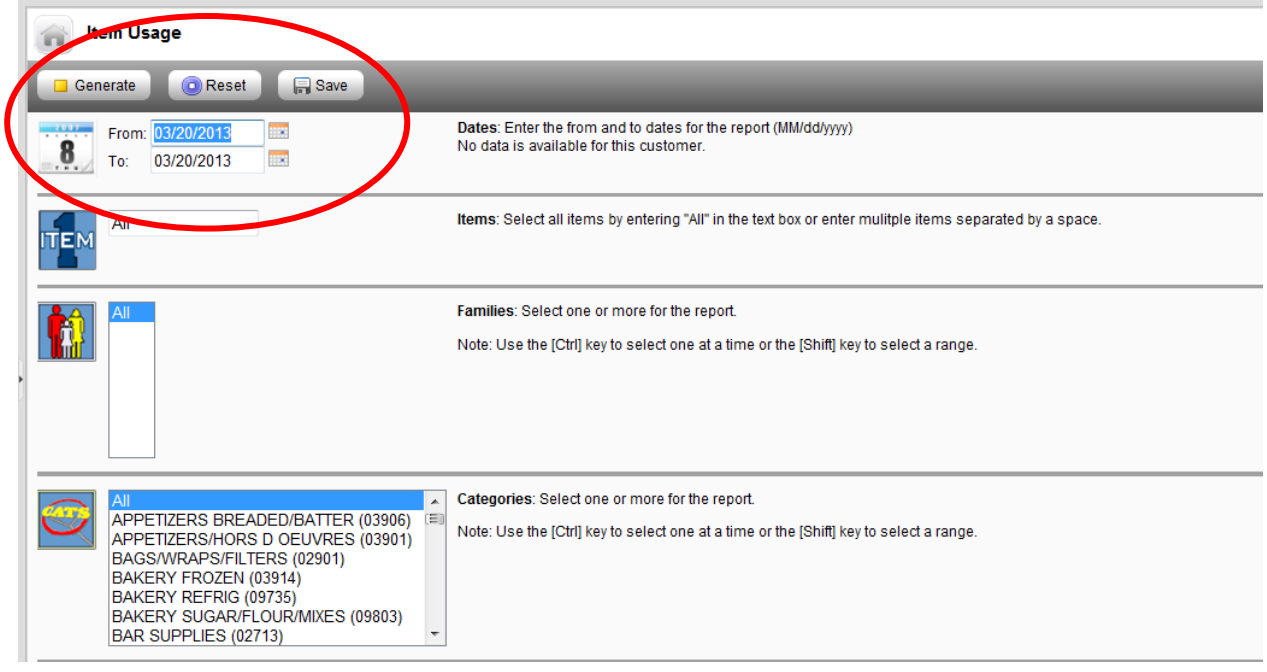
Flyer Item

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)



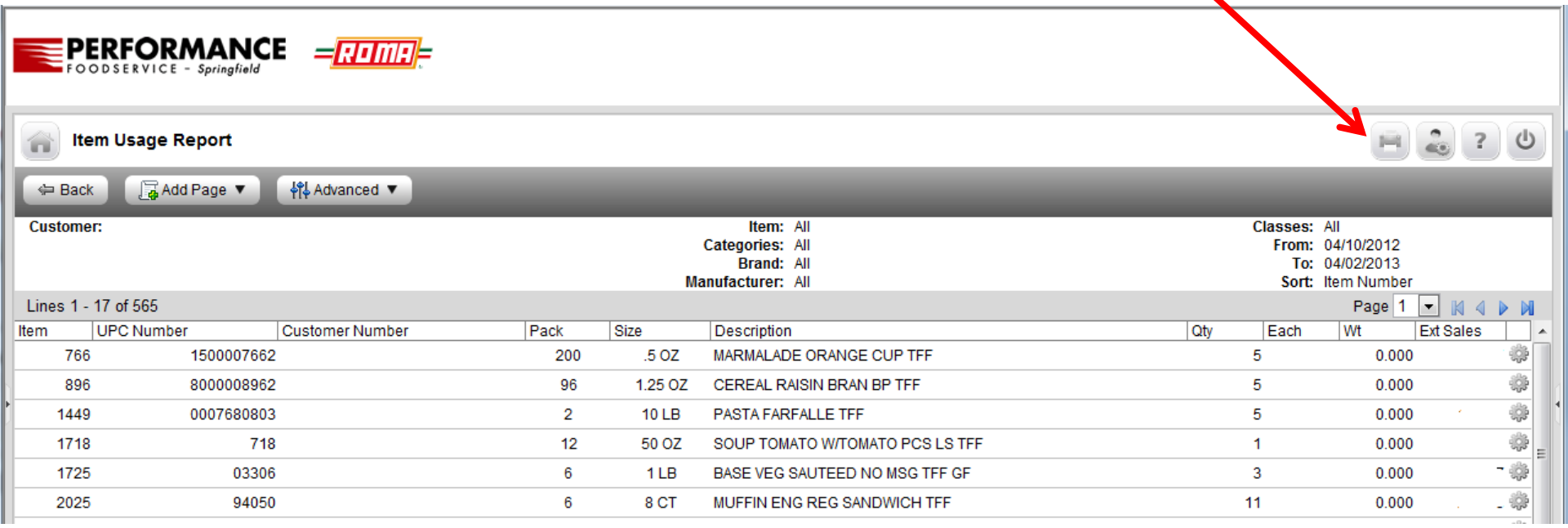
<u>Item Usage report</u>
Enter the date range for the usage report, select the various parameters (if you want to). Once the options are set, click on <u>Generate</u> to view the report



Reports

Item Usage report

Report shows Items, description, Qty and Sales. Click here to print



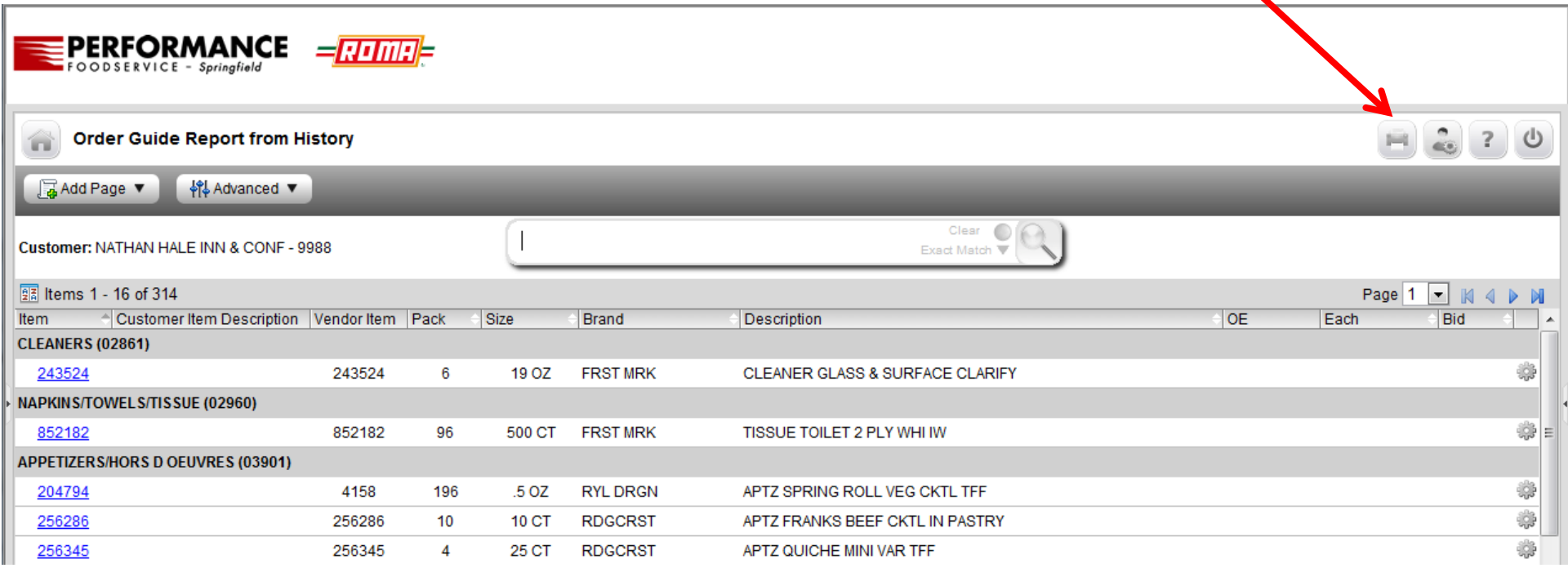
Item	UPC Number	Customer Number	Pack	Size	Description	Qty	Each	Wt	Ext Sales
766	1500007662		200	.5 OZ	MARMALADE ORANGE CUP TFF	5		0.000	
896	8000008962		96	1.25 OZ	CEREAL RAISIN BRAN BP TFF	5		0.000	
1449	0007680803		2	10 LB	PASTA FARFALLE TFF	5		0.000	
1718	718		12	50 OZ	SOUP TOMATO W/TOMATO PCS LS 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

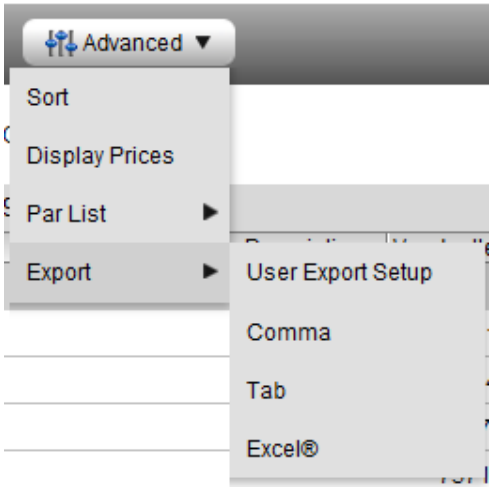
Select which Guide you want to review / print: History, Bid, Standard or Custom

Click here to Print

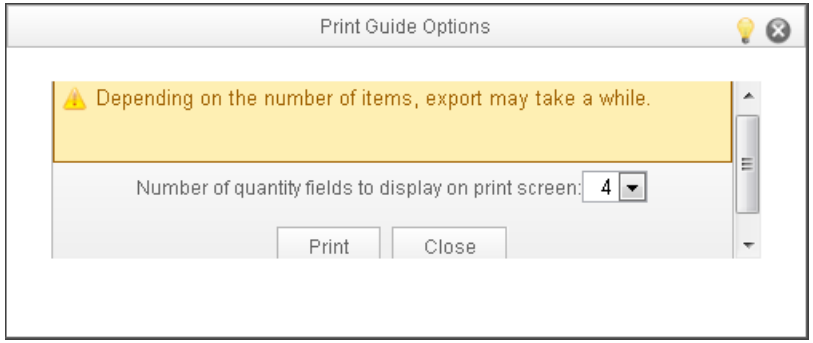


Reports

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

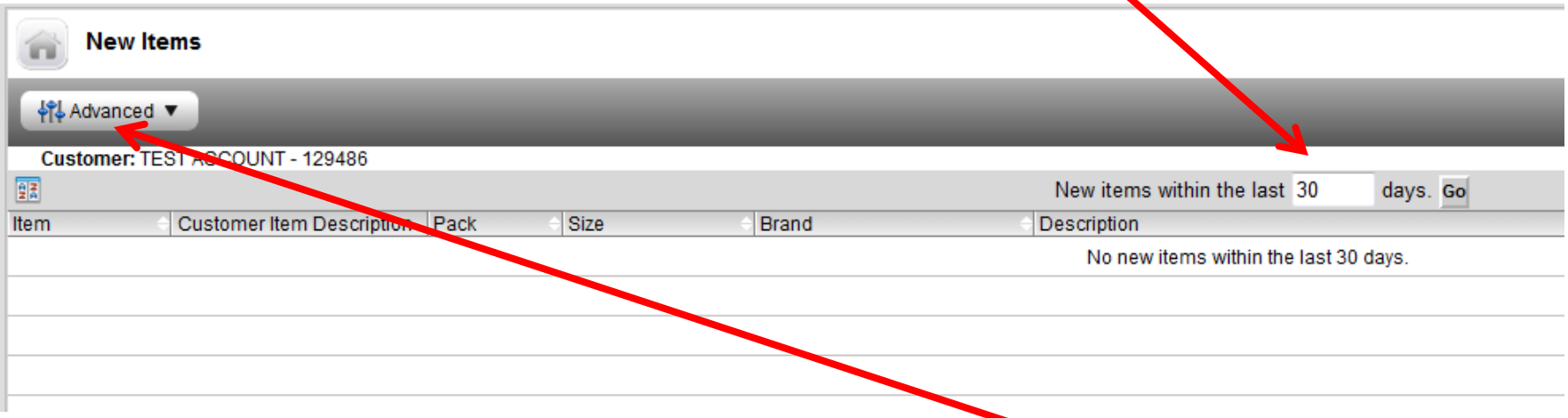
Customer: TEST ACCOUNT - 129486

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/I 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

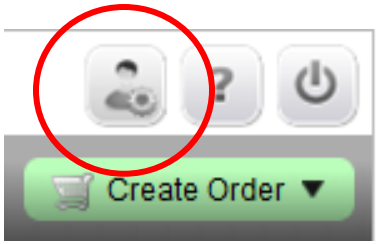


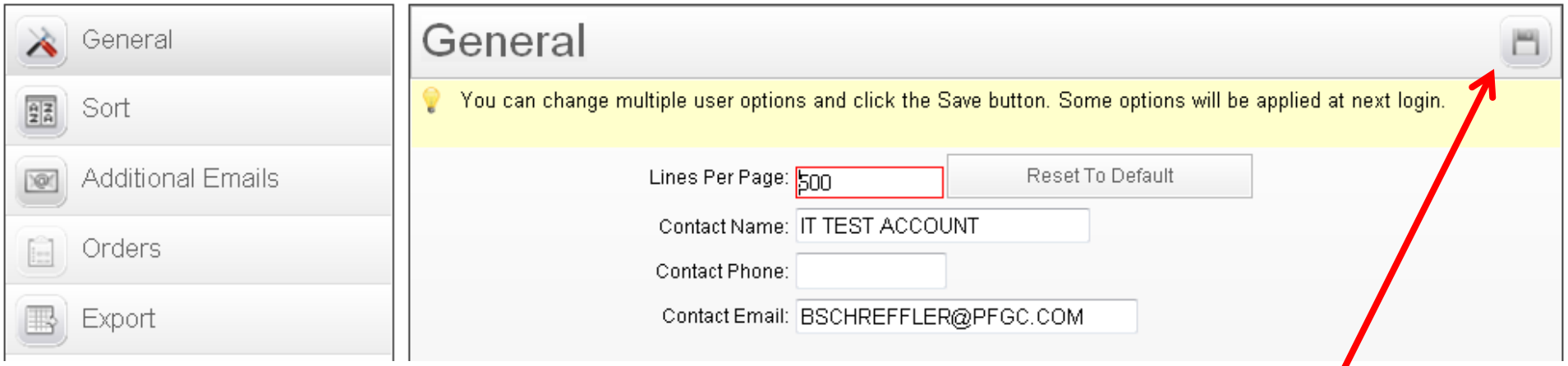
You also have the option to show your pricing on these items. Click on the Advanced option to select whether or not to show prices

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



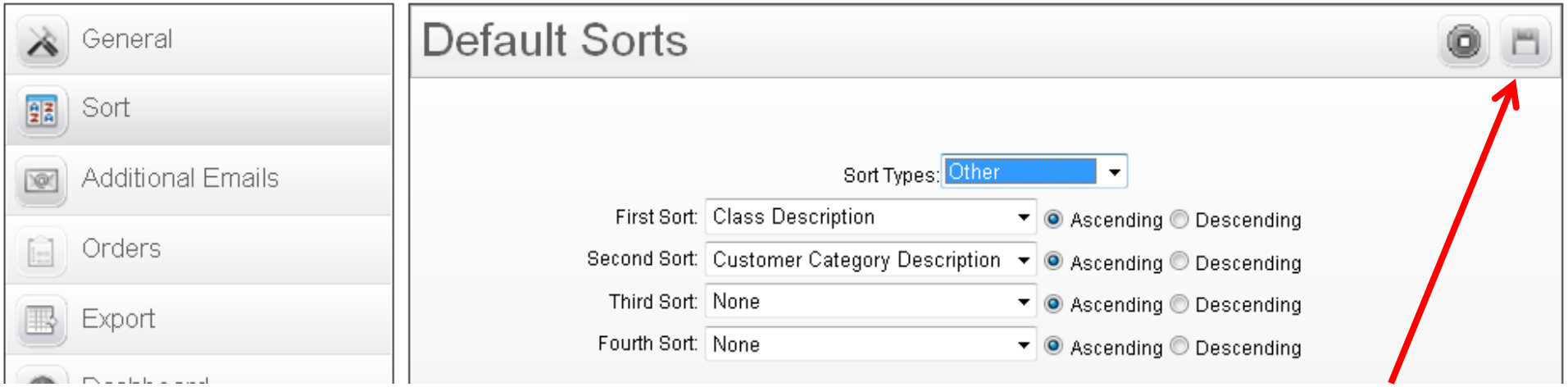


General tab is where you can change Lines per Page and Contact information. The email address entered here is where the order confirmations will be sent.

After changes are made, make sure you click **Save**

User Options

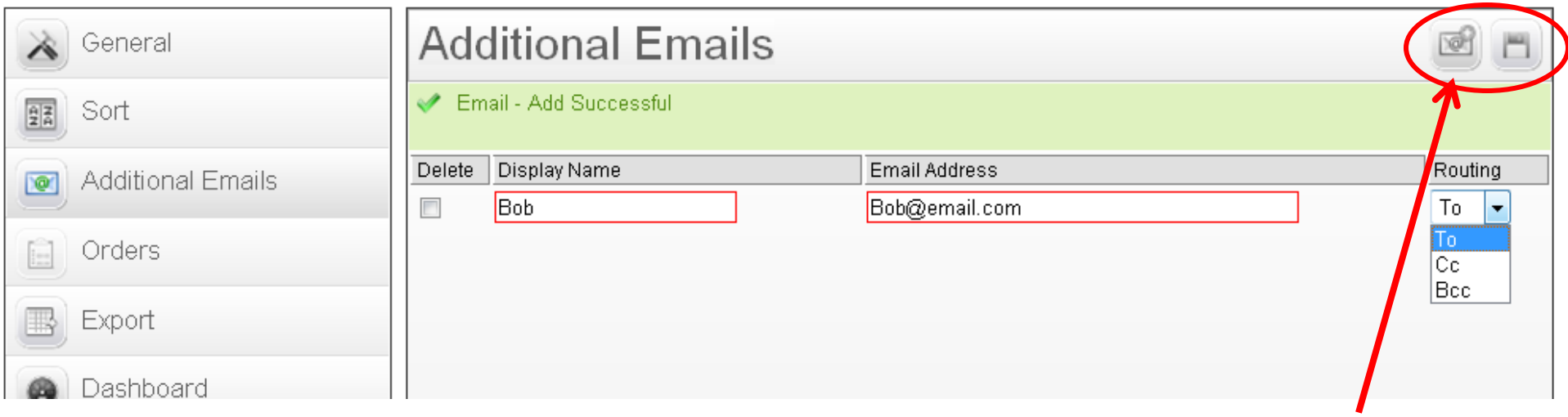
There are some basic User Options for you to maintain system settings



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

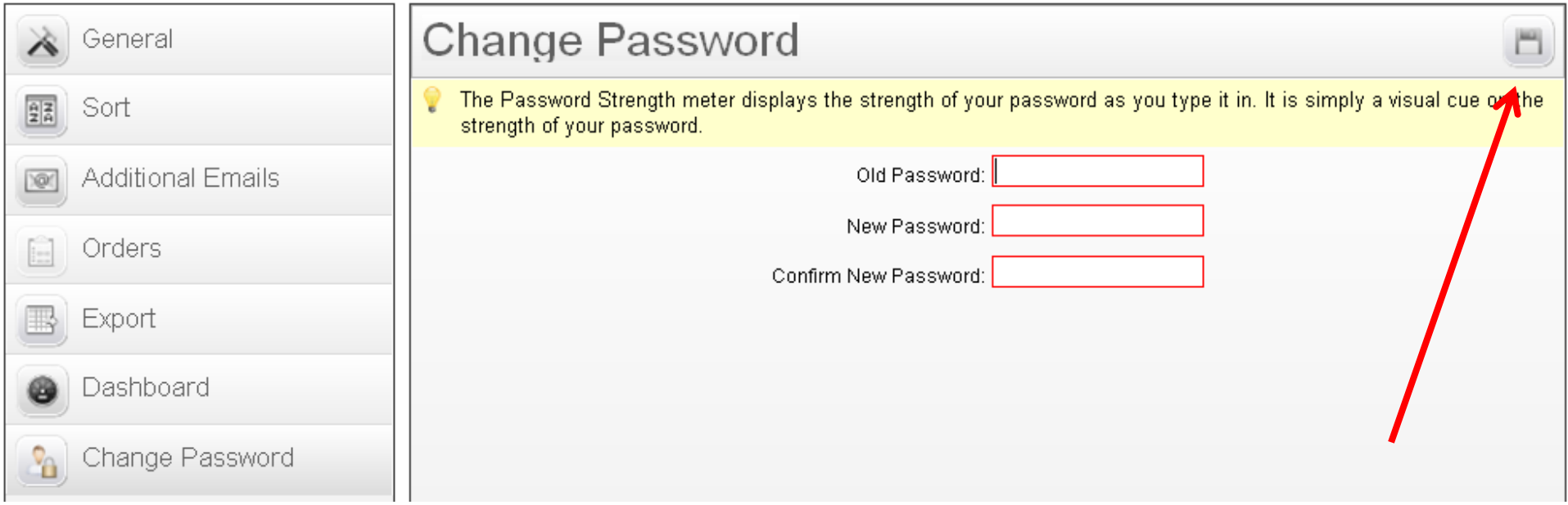
There are some basic User Options for you to maintain system settings



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

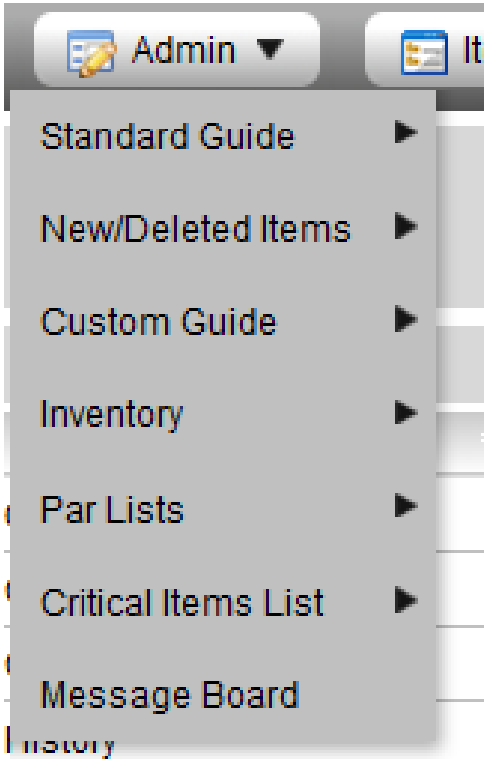
There are some basic User Options for you to maintain system settings



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

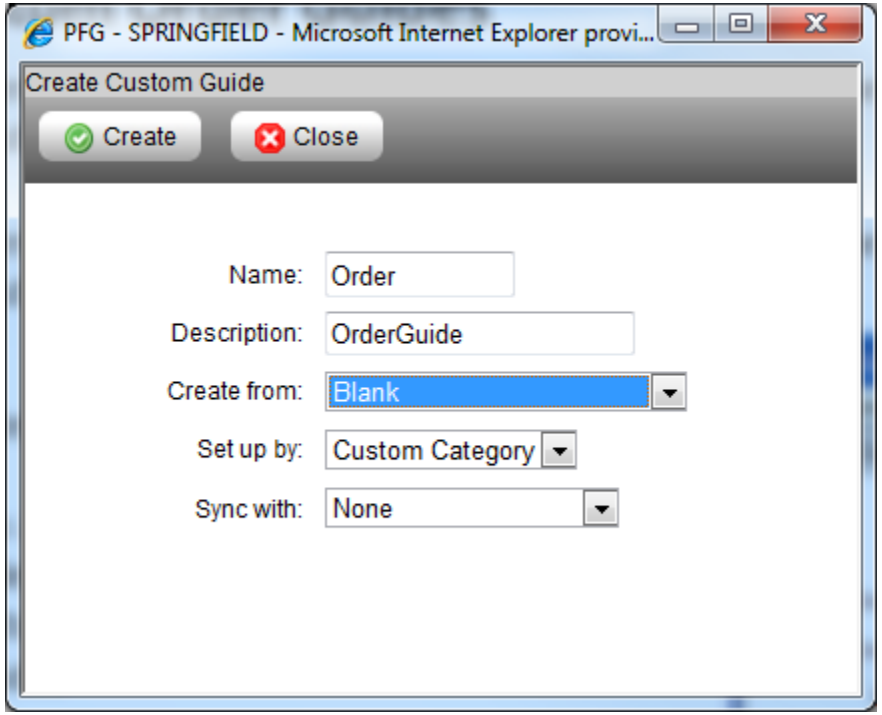
Users can create their own custom order guides, in the sequence you want
To start, click on Admin, Custom Guide and Create

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

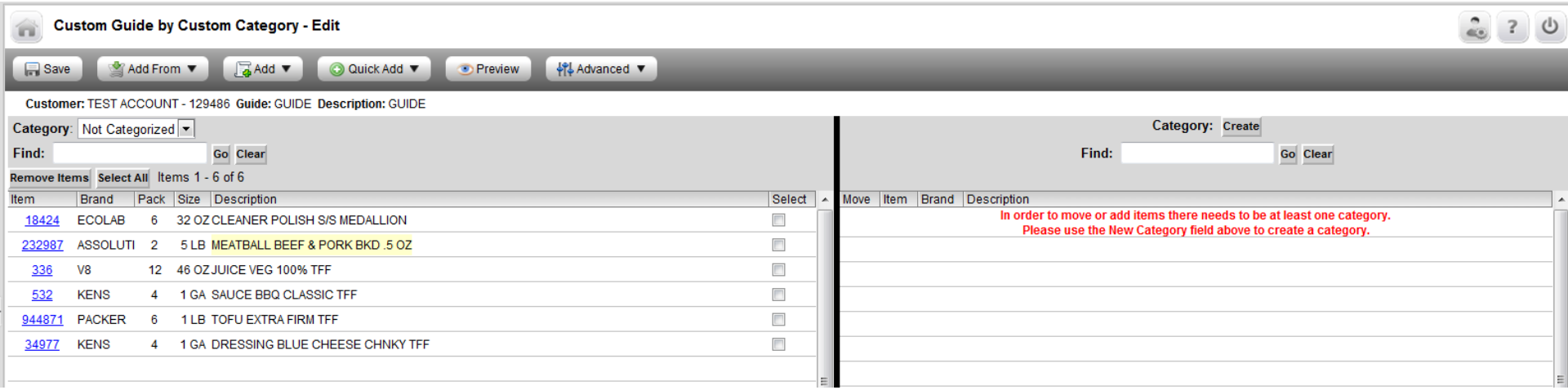
Click Create to create your new Guide



Custom Order Guides

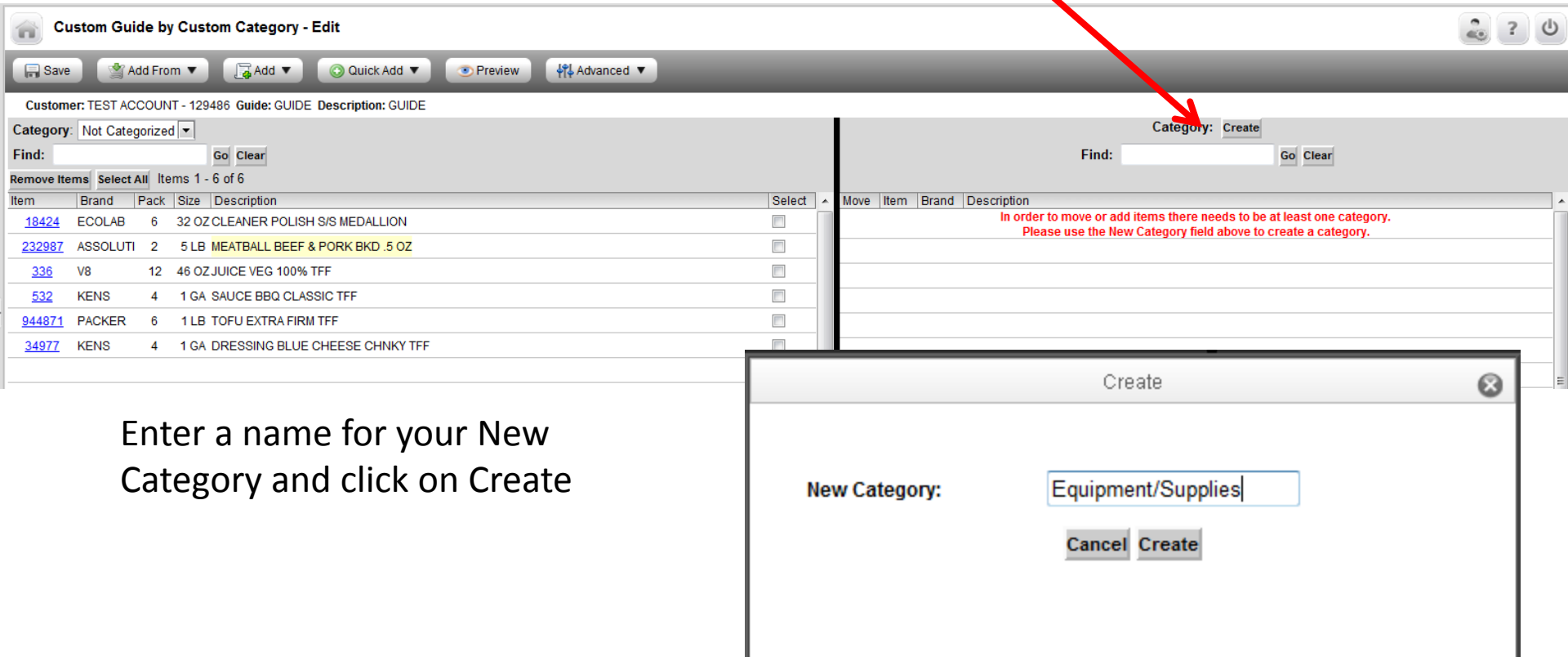
To Edit your new guide, click on Admin, Custom Guide and Edit
Find your new guide and click on it

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



Custom 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.



Enter a name for your New Category and click on Create

Custom Order Guides

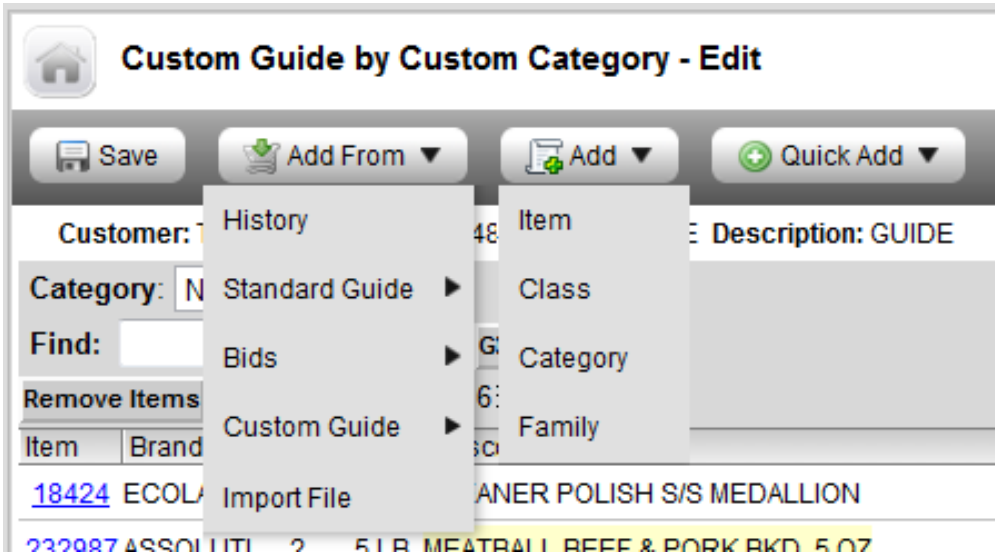
To add items to your guide, select the method of adding.

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*

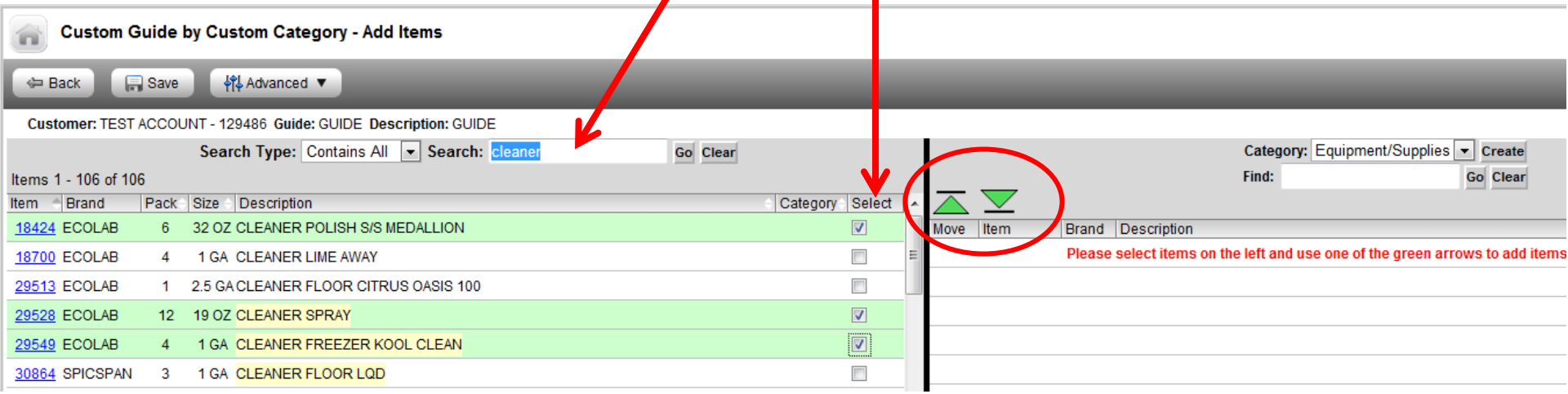
Quick Add – enter item #’s



Custom Order Guides – adding items

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

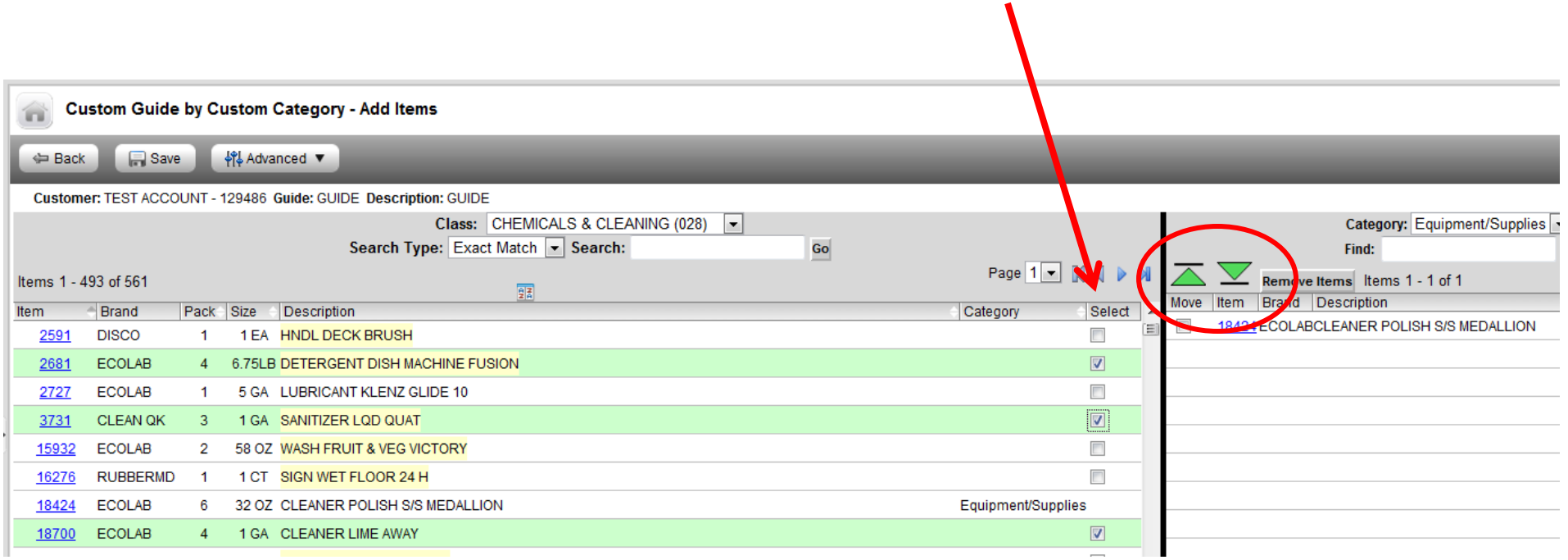
To select the items to add to your guide, click on the Select box and then click on either the Green Up or Down arrow to move it to your guide, into the selected Category.



Custom Order Guides – adding items

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

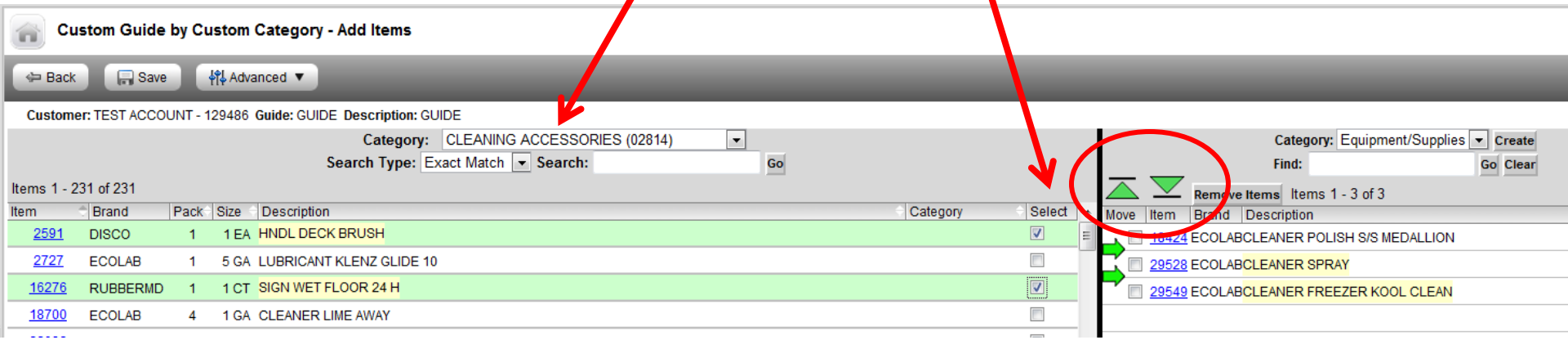
To select the items to add to your guide, click on the Select box and then click on either the Green Up or Down arrow to move it to your guide, into the selected Category.



Custom Order Guides – adding items

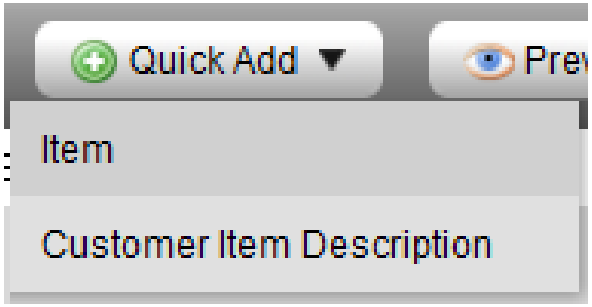
When you select any above mentioned methods, this screen will appear. For **Category**, select the Category you would like to view items for.

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 Order Guides – adding items

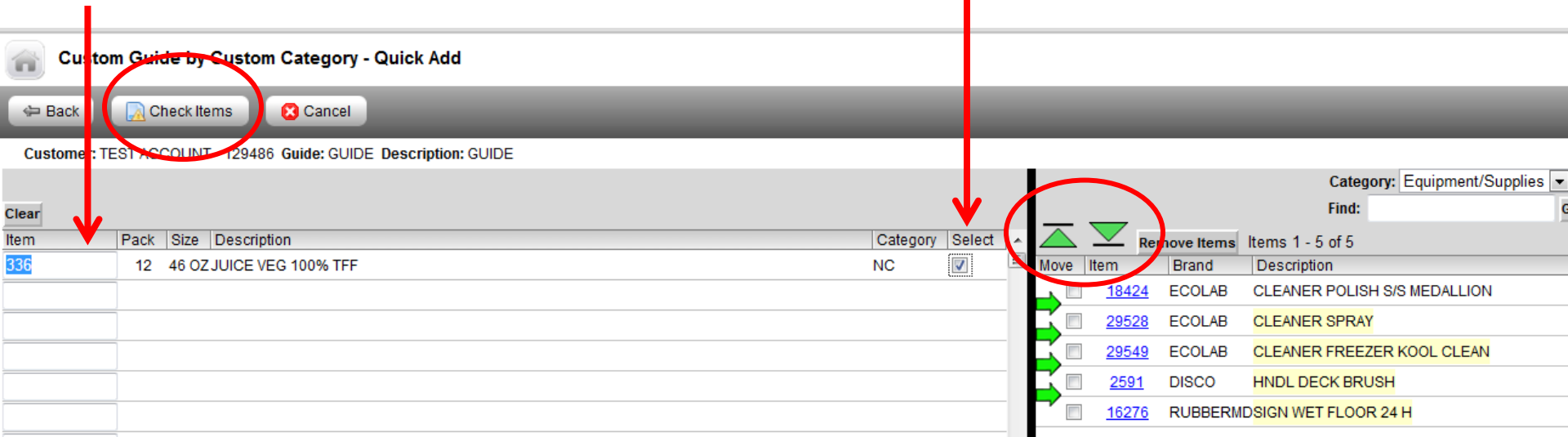
To add items to your guide, select the method of adding.



Quick Add – by Item or Customer Item

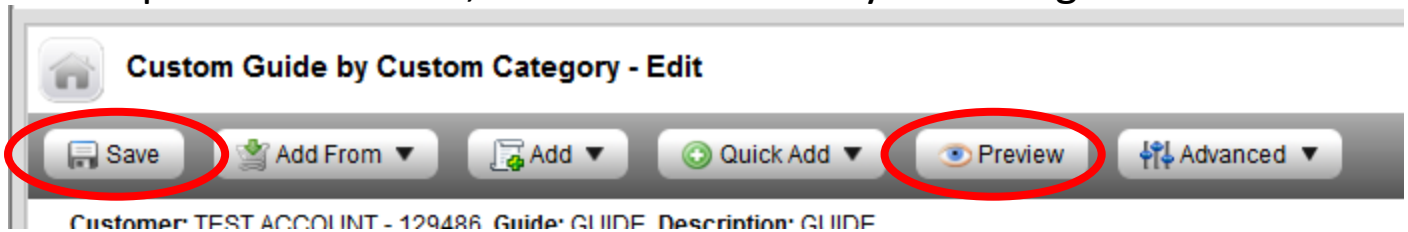
If you know the item #'s, use this method to enter the item #'s and then verify them

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

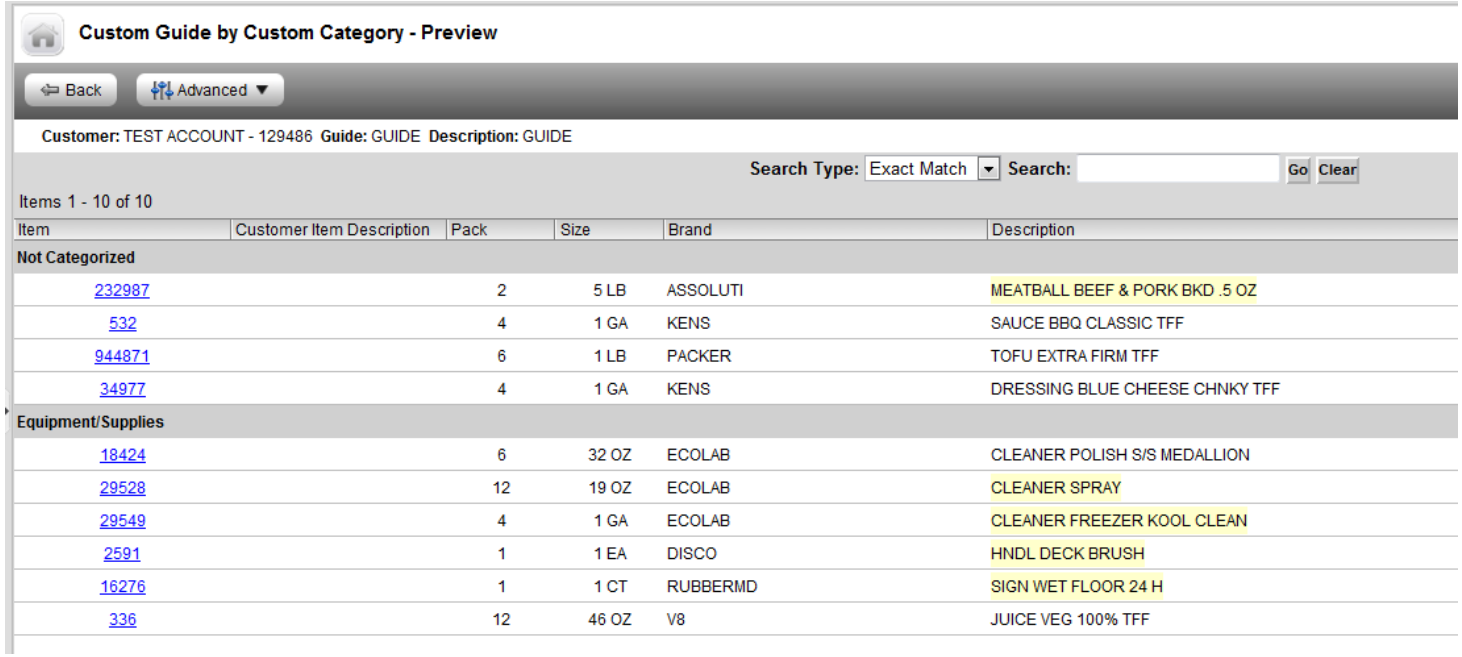


Custom Order Guides – Viewing Guide

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



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

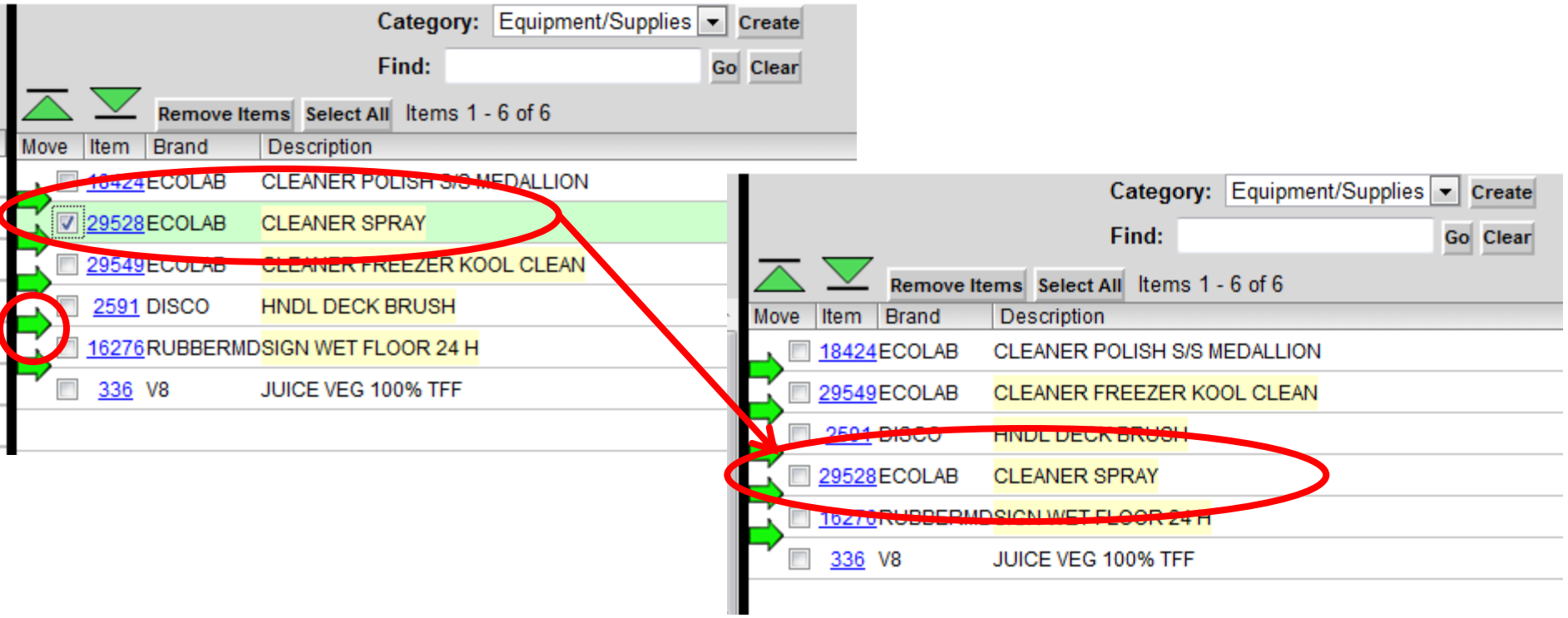


Item	Customer Item Description	Pack	Size	Brand	Description
Not Categorized					
232987		2	5 LB	ASSOLUTI	MEATBALL BEEF & PORK BKD .5 OZ
532		4	1 GA	KENS	SAUCE BBQ CLASSIC TFF
944871		6	1 LB	PACKER	TOFU EXTRA FIRM TFF
34977		4	1 GA	KENS	DRESSING BLUE CHEESE CHNKY TFF
Equipment/Supplies					
18424		6	32 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.

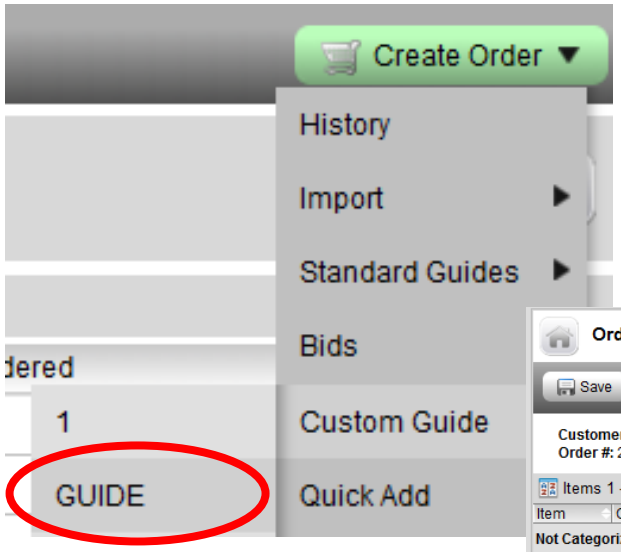
Click on the box next to the item to move, then click on the green arrow pointing right between the 2 items you want to place this item



Custom Order Guides - Ordering

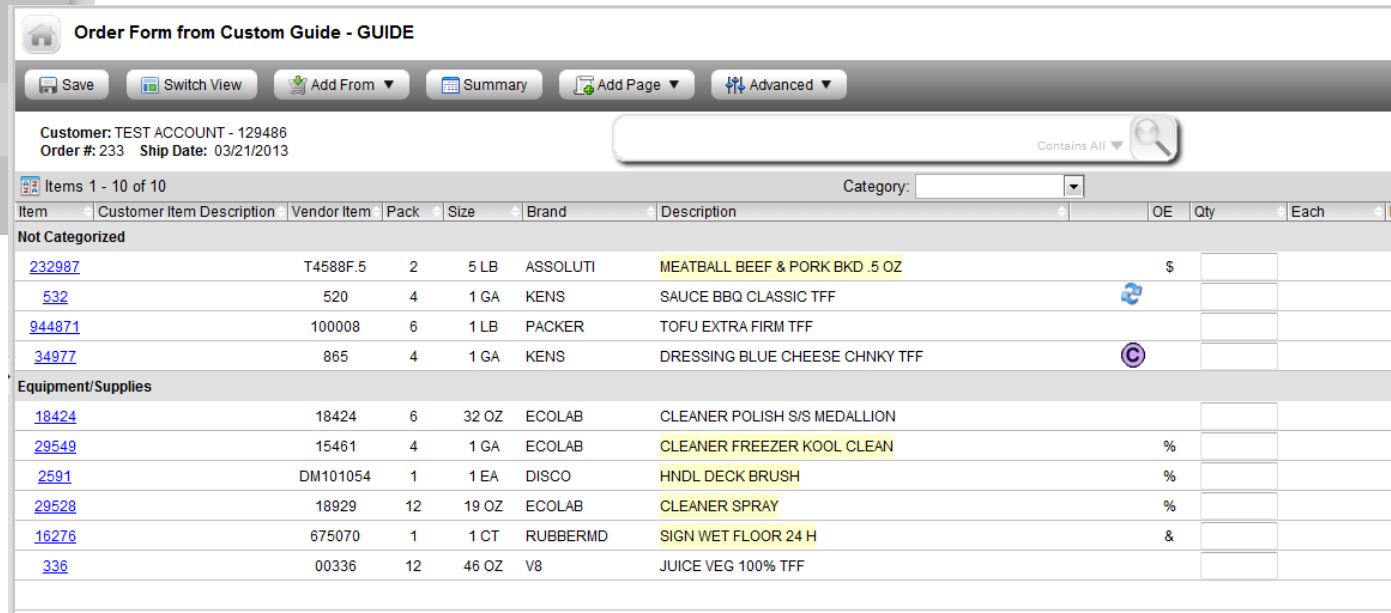
Always remember to save your changes

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

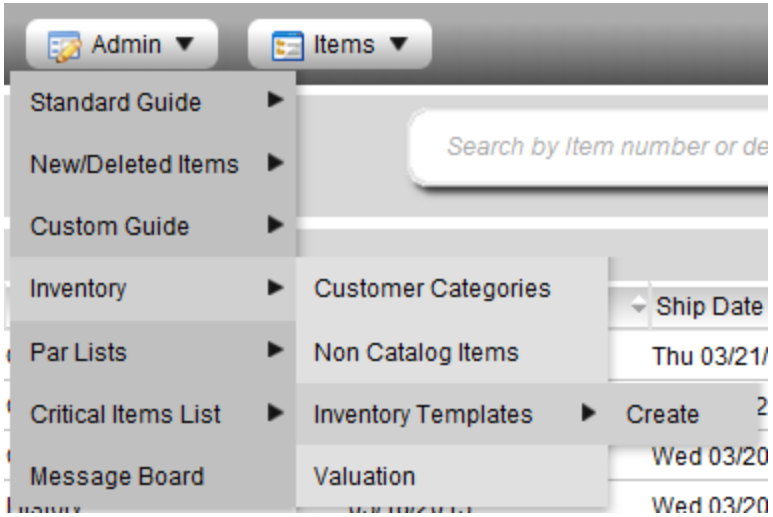
The order form is now your new guide

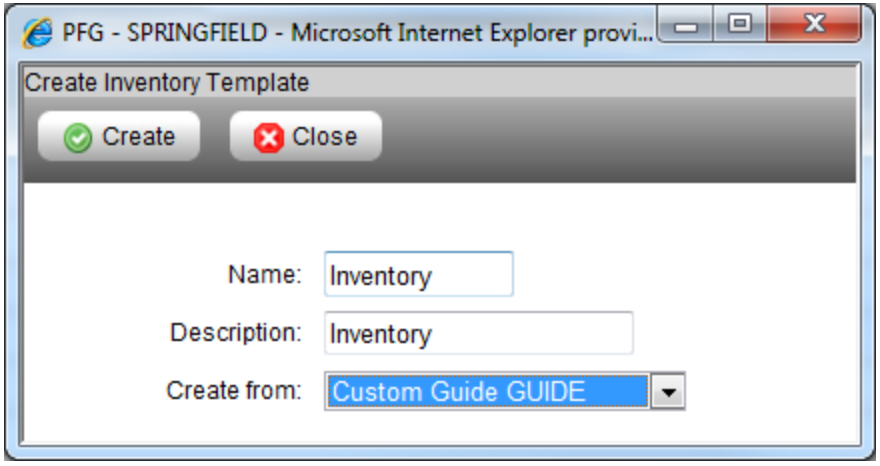


Inventory

Works similar to Custom Order Guides

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

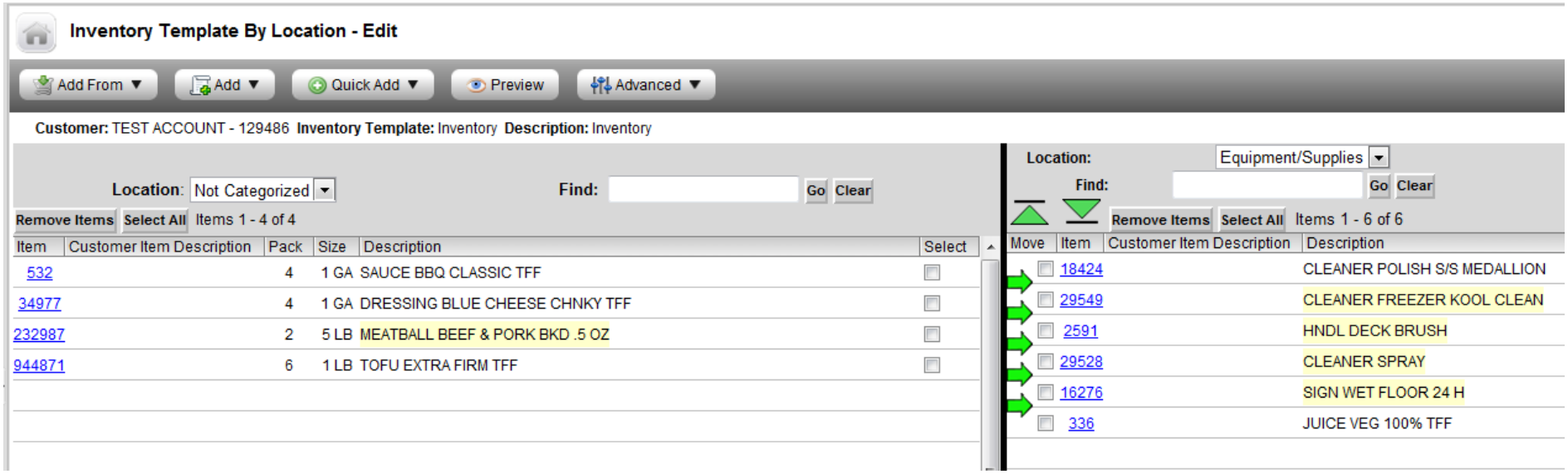




It will prompt you for a Name, Description and if you want to create it from an existing order guide, select that order guide. Click **Create**

Inventory

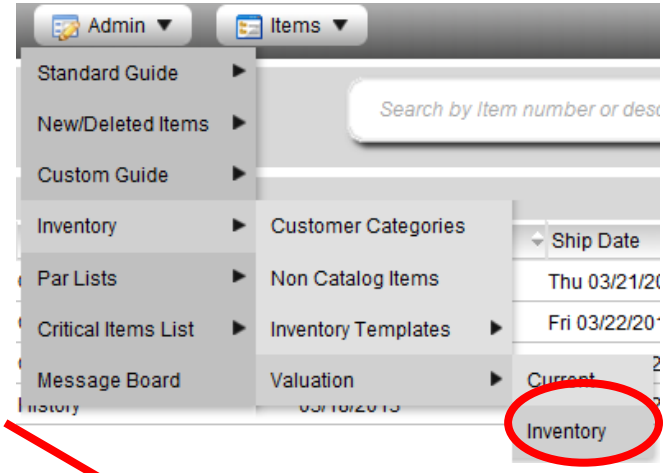
Edit your inventory template to make changes. This screen works the same way as the Custom Order Guide options for adding items

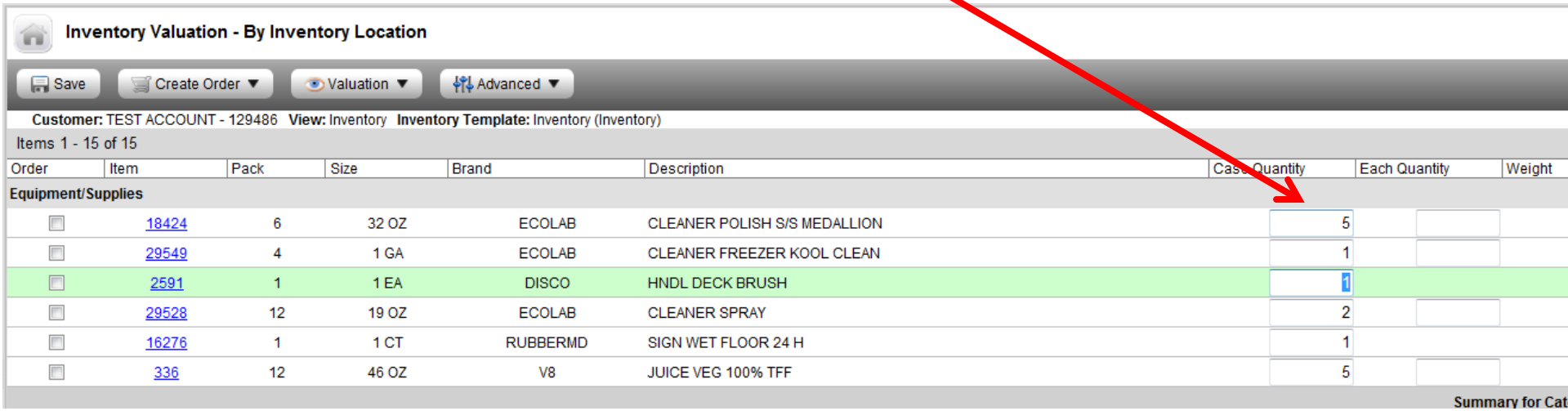


Inventory

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

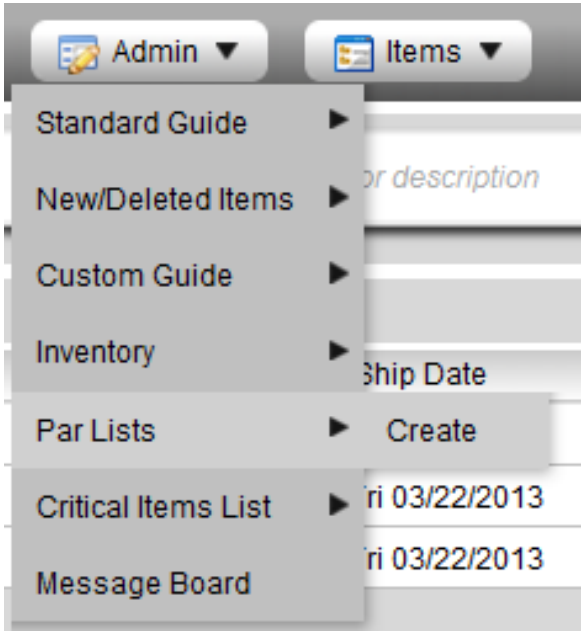


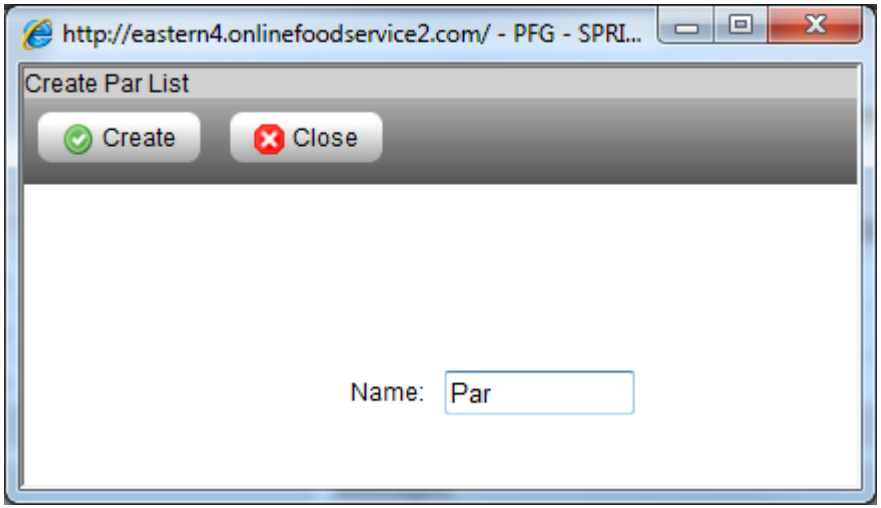


Par Lists

Works in conjunction with your Inventory

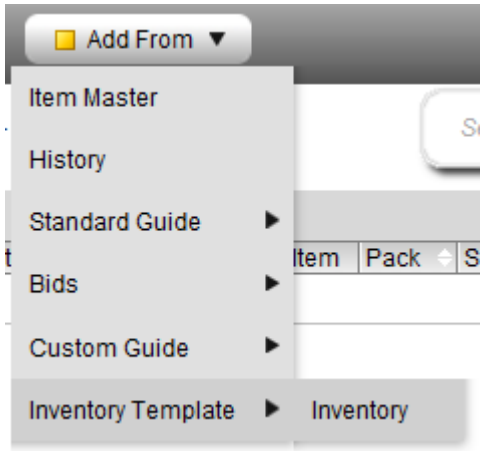
Need to create a new Par List. Click Par Lists, and Create





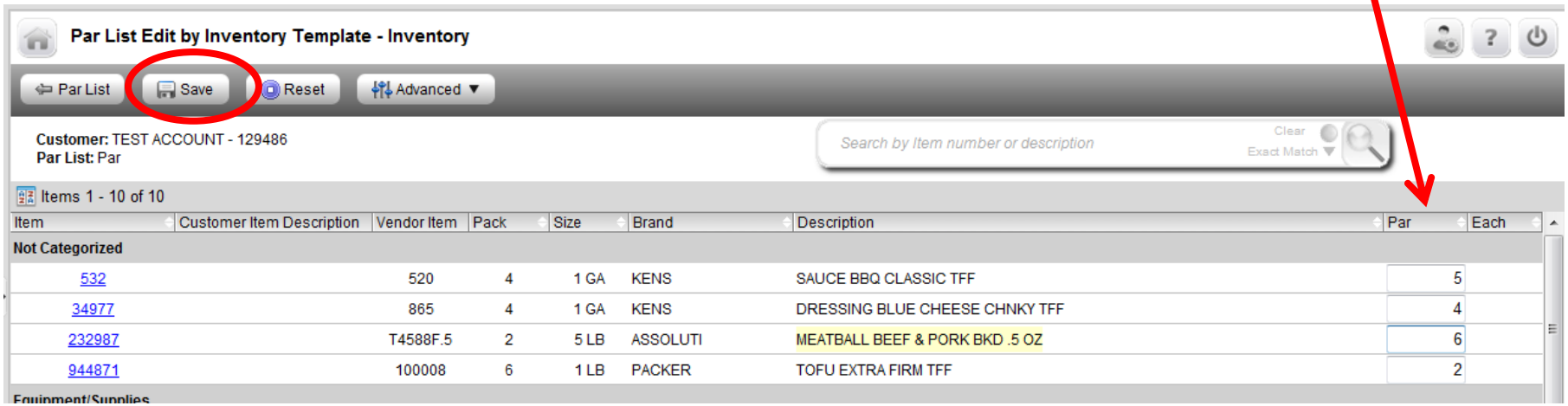
It will prompt you for a Name. Enter a name and click **Create** and then select **Edit**

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

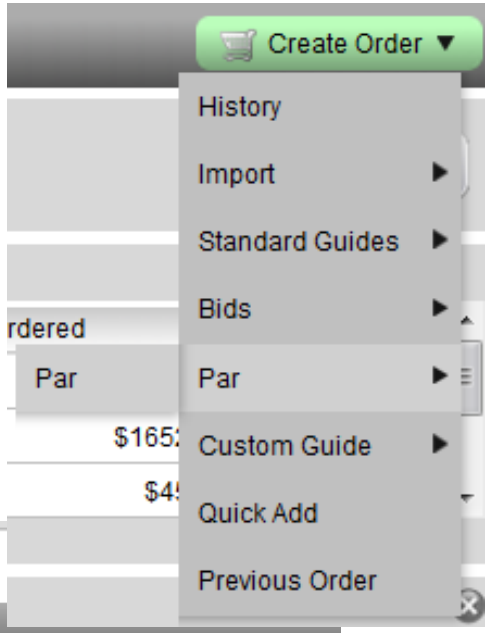
It will load the items from guide or inventory sheet. Then place the Par level in the proper column. Par is what you always need to have on hand. Once complete, click **Save**



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

Save | Switch View | Add From | Summary | Add Page | Advanced

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		

PERFORMANCE FOODSERVICE

ROMA

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