



PERFORMANCENET

Online Ordering System

Quick Start Guide

Quick Start Guide

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PERFORMANCE^{NET}

Before You Get Started



Browser Requirements

Before logging into **PERFORMANCE**NET, please ensure you meet the Browser minimum requirements:

- Google Chrome 8.0 and higher
- Firefox 4.0 and higher
- Internet Explorer 8.0 and higher (but not version 10)
- Apple Safari is not supported at this time. If you are using an Apple product, you will need to download Chrome to use as an alternate browser
- iOS8

Best Practices/Need to Know

- There is a 15 minute inactivity timeout period
- Save early and often
- You can start and order then return to finish it later, just be sure to Save

PERFORMANCE NET

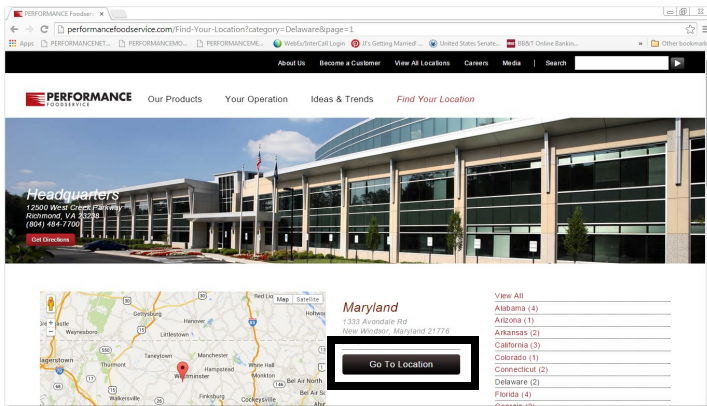
Web Address

Website Set Up

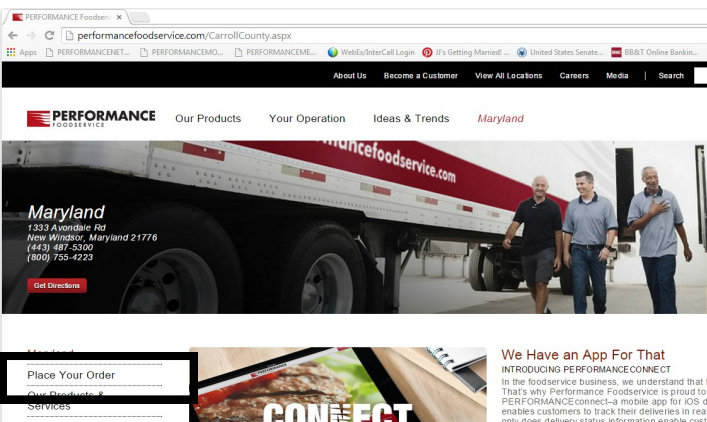
The web address to login to PerformanceNet can be found on the Performance Foodservice website:

Navigate to Performancefoodservice.com.

From the list of locations on the right, select your state. Then from the results, click the Go To Location box for your location.




On the left side of the screen, click the Place Your Order link. A new tab opens with the PerformanceNet Sign In screen. Bookmark this website, as this is your online order site.



Pop Up Blockers

You may need to make a few changes to your browser Pop-Up settings, to ensure you can sign in to PerformanceNet. Use the steps below to configure your preferred browser to allow pop-ups.

Google Chrome 8.0 and higher

1. Click on the pop up icon  then select the PerformanceNet URL.
2. Select Always show pop-ups from (site).

Firefox 4.0 and higher

1. At the top menu bar, click on Tools then select Options.
2. Select Content.
3. Ensure Block Pop Up Windows is not selected.

Internet Explorer 8.0 and higher but not version 10

1. At the top menu bar, click on Tools.
2. Point to Pop-Up Blocker, then select Turn Off Pop-Up Blocker.

www.performancefoodservice.com/foxriverr

Sign In

Using your preferred web browser, go to your online ordering site to open the PerformanceNet Customer Sign In page. Enter your supplied User ID and Password then 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!

Your landing page is the **Dashboard**, this is your homepage and is made up with 3 panels:

- The **Orders Panel** displays orders you have placed and orders in pending status
- The **Account Panel** displays invoice statements
- The **Messages Panel** displays messages sent from Performance Foodservice

The screenshot shows the PerformanceNet Dashboard for user JESSICA JUDD. The top navigation bar includes tabs for Status, Account, Reports, Customer, Admin, and Items, along with a 'Create Order' button. The main content area is divided into three panels:

- Orders Panel:** A table listing orders with columns for Customer #, Customer, Order #, Order Type, Confirmed Date - Time, Order Date, Ship Date, Lines, Qty Ordered, Qty Ship, Amt Ordered, and Status. An arrow points to the 'Previous' link in the last row.
- Account Panel:** A table listing invoices with columns for Invoice #, Date, Type, Amount, Customer Balance, Check #, Reference, and PO #. An arrow points to the '4705215' invoice.
- Messages Panel:** A list of messages with columns for Subject and Message. A message is visible: 'New version of PerformanceNet will be released at 11:25PM on November This is to inform you that a ne'.

Below the screenshot, the text reads: **Click on a hyperlink to view more information**

As you begin to navigate through the website, use the Home



button any time to return back to the Dashboard.

General Screen Layout

The PerformanceNet Dashboard is made up of the follow areas:

The screenshot shows the PerformanceNet dashboard interface. At the top, there is a navigation bar with a 'Tool Bar' containing menu items: Status, Account, Reports, Customer, Admin, and Items. A 'Customer' dropdown menu is set to 'Ship Name-170112 (Test Company - 170112)'. On the right, there are 'User Settings' (represented by a person icon), 'Sign Off' (represented by a power icon), and a 'Place an Order' button with a 'Create Order' dropdown. Below the navigation bar is the 'Orders Panel' with a search bar and a table of orders. Below the orders panel is the 'Account Panel' with a table of invoices. On the right side, there is a 'Messages Panel' displaying a message about a new version of PerformanceNet.

Customer #	Customer	Order #	Order Type	Confirmed Date - Time	Order Date	Ship Date	Lines	Qty Ordered	Qty Ship	Amt Ordered	Status
170112	Ship Name-170112	4095	Standard Guide		12/09/2014	Thu 12/11/2014	4	17	0	\$548.92	In Use
170112	Ship Name-170112	2463	Dashboard		12/08/2014	Wed 12/10/2014	1	1	0	\$0.00	Pending
170112	Ship Name-170112	3910	Standard Guide		11/25/2014	Thu 11/27/2014	0	0	0	\$0.00	In Use
170112	Ship Name-170112	3874	Standard Guide		11/25/2014	Thu 11/27/2014	1	1	0	\$45.73	Pending
1008	Ship Name-1008	3891	Standard Guide		11/24/2014	Wed 11/26/2014	1	1	0	\$23.97	Pending
1008	Ship Name-1008	3890	Previous		11/24/2014	Wed 11/26/2014	1	2	0	\$87.86	Pending

Invoice #	Date	Type	Amount	Customer Balance	Check #	Reference	PO #
4732688	05/14/2014	Invoice	551.45	61544.33			EOR0001594
4732687	05/14/2014	Invoice	688.70	60992.88			EOR0001597
4705215	05/11/2013	Adj	-44.71	60304.18		4706529	
4705885	05/10/2013	Invoice	83.14	60348.89			
4705215	05/10/2013	Invoice	3925.66	60265.75			
4699247	05/08/2013	Adj	-39.85	56340.09		4701569	

Tool Bar - navigate to the different areas of the website

Customer - your customer name and customer#, if you are responsible for multiple customers/locations, you may see additional customers in this drop down

User Settings - add an email address or update your password

Sign Off - sign out of **PERFORMANCENET**

Create Order - create a new order

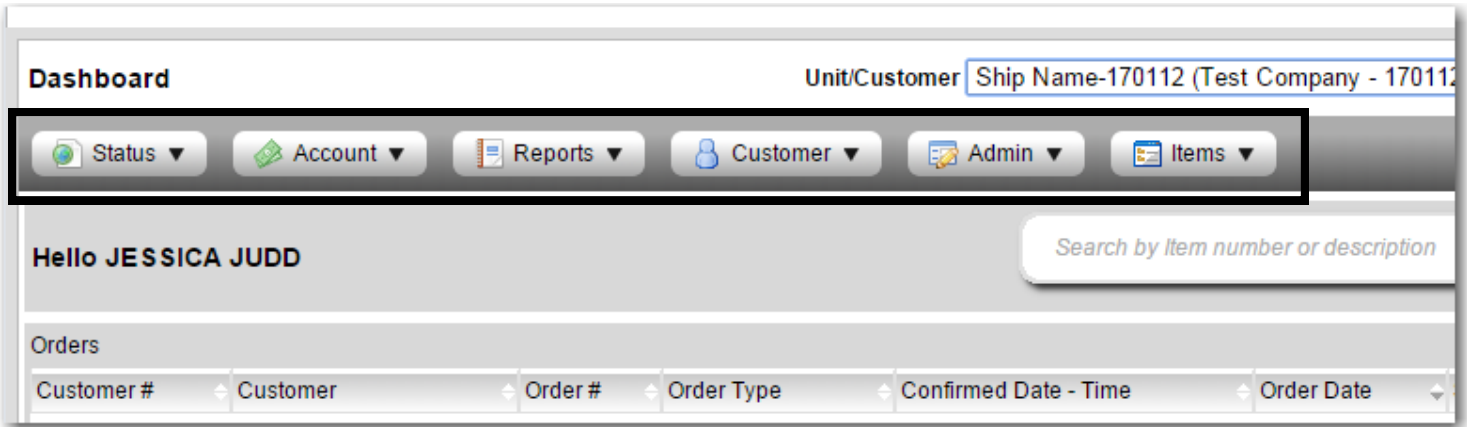
Orders Panel - view 13 weeks of confirmed orders and orders in pending status

Account Panel - view 13 weeks of invoice statements

Messages Panel - view important messages from Performance Foodservice

Tool Bar Overview

The **Tool Bar** is used to navigate to the different areas of the website and is made up of the following items:



Status - view and print orders you've placed or are in pending status, this is an extended view of the Orders Panel on your Dashboard


Account - view and print invoices and credits, this is an extended view of the Account Panel on your Dashboard

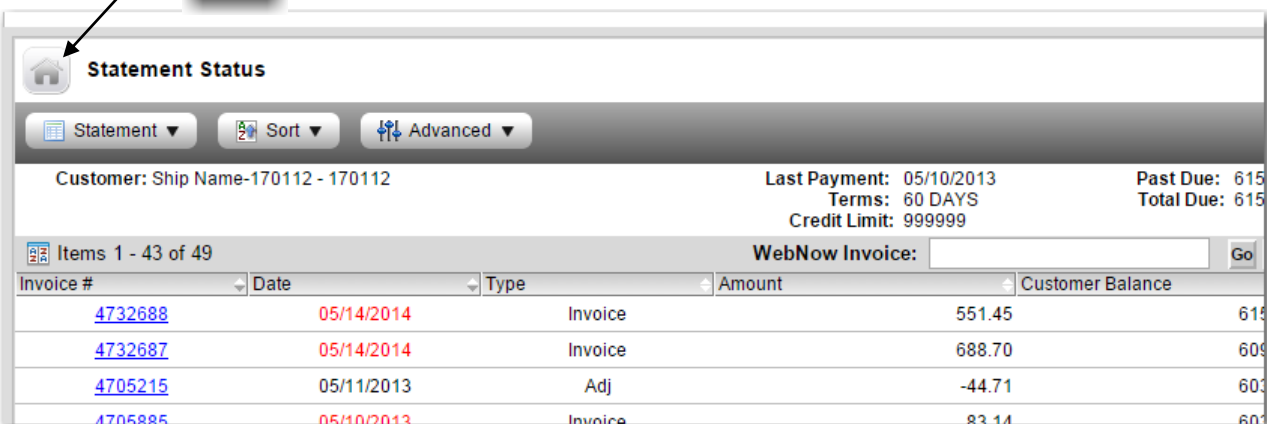
Reports - view and print item usage and item movement reports, as well view and print order guides

Customer - if you are responsible for multiple customers/locations, you can use this button to change customers

Admin - view, edit and/or create custom order guides, part lists and critical items list; as well, view messages

Items - view and print new and discontinued items

As you navigate to the different areas of the website, use the **Home**  **button** to return to the Dashboard:



Placing Orders

Overview

In PerformanceNet, you have the following options available for placing orders using an Order Guide:

Placing Orders/Order Guides - order guides show you item information such as Item#, Pack, Size, Description, Price, Extended Price and Last Purchase Date. You can order items from the order guide, or you can search the entire Item Master (when applicable).

There are three types of order guides in PerformanceNet:

History Guide - items purchased in the last 13 weeks

Standard Guides/Bids - bids that are maintained by Performance Foodservice

Custom Guides - order guides created and maintained by the customer or the area manager

The screenshot shows the 'Order Form from Bid - 5289' interface. Annotations include:

- Save Early/Often**: Points to the 'Save' button in the top toolbar.
- Check Item Availability**: Points to the 'Check Avail' button in the top toolbar.
- Search Items**: Points to the search input field.
- Enter Quantity**: Points to the 'Qty' column in the item list.
- View Item**: Points to the 'View Item' link in the item list.
- Substitutes**: Points to the 'Substitutes' link in the item list.
- View Product Card for Item**: Points to the 'View Product Card' link in the item list.
- View Item Information for Item**: Points to the 'View Item Information' link in the item list.
- View Total Order Amount**: Points to the 'View Total Order Amount' link in the item list.

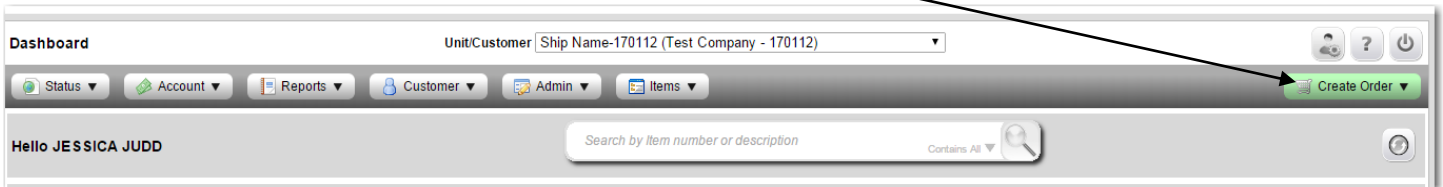
Item	Pack	Size	Brand	Description	Qty	Price	Prev	Last Date
56022	6	#10	7/11	TOMATO GRND IN XHVV PUREE		22.59		
56797	24	5 OZ	A1	SAUCE STK TFF		45.73		
229654	1	35 LB	ADMIRATN	OIL CANOLA SALAD TFF		33.77		
899738	1	100 CT	AEP	COVER 0175019 RACK BUN 52X80		66.85		
964441	1	1 LB	AFI	BASIL LEAF		3.33		
964475	1	1 LB	AFI	CELERY SALT		2.72		
966498	1	1 LB	AFI	CHILLPWDR		3.68		
963867	1	1 GA	AFI	CIDER APPLE TFF		33.68		

As you begin placing your order, it is very important that you Save early often.

Order Guide Selection

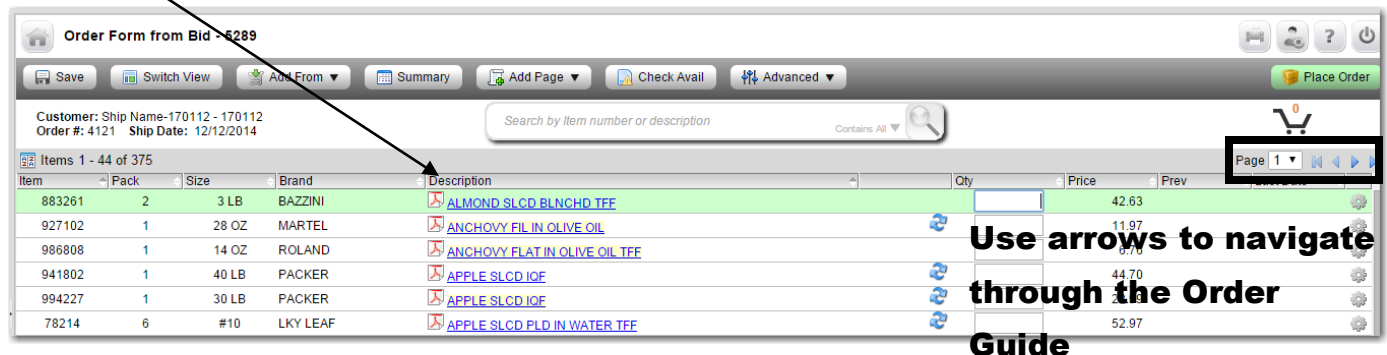
Select the Order Guide

From the Dashboard, click on the green Create Order button. Then, from the dropdown, select the order guide you want to use (i.e. History, Standard Guide, Bid, Custom Guide). If selecting a Custom Guide, you will be presented with a pop-up to select the desired guide.



Sort the Order Guide

Order guide items appear and are listed by item number. To view items in alphabetical order, you can click on the Description heading.



Search Products within the Order Guide

Within Order Form product entry there are many methods to search for items. The search field by default is a "Contains All" search and you can search by item number or description.

Type all or part of the item you are searching for then hit Enter.

Item Master Search - Order Only

Customer: Ship Name-170112 - 170112
Order #: 4613

Search: sauce

Item	Pack	Size	Brand	Description	Qty	Price
26079	24	5 OZ	L&P	SAUCE WORCESTERSHIRE TFF	<input type="text"/>	34.37
26417	4	2 LB	KNORR	SAUCE MIX DEMI GLACE TFF	<input type="text"/>	57.18
27287	4	1 GA	KENS	SAUCE BBQ HCKRY SMKD GF TFF	<input type="text"/>	41.81
33832	6	4 LB	KIKKOMAN	SAUCE SWEET & SOUR TFF	<input type="text"/>	39.27
52355	6	5 GA	KIKKOMAN	SAUCE SOY LITE LS TFF	<input type="text"/>	38.47

The search results yield items within the Order Guide (as indicated by the shopping cart icon). You can continue to filter down and narrow your search by typing the next search criteria.

Item Master Search - Order Only

Customer: Ship Name-170112 - 170112
Order #: 4613

Search: bbq

Item	Pack	Size	Brand	Description	Qty	Price
27287	4	1 GA	KENS	SAUCE BBQ HCKRY SMKD GF TFF	<input type="text"/>	41.81

View Item Information

You can click on an item description hyperlink to view more information such as manufacturer, inventory; serving information; and substitute item information.

Item Master Search - Order Only

157189	36	1 LB	WEST CRK	BUTTER SOLID UNSLTD AA TFF	<input type="text"/>	75.81
158718	4	5 LB	WEST CRK	CHEESE AMER YLW 120 SL TFF	<input type="text"/>	44.19
158816	1	10#AV	WEST CRK	CHEESE CHED MIL D YLW BL OCK	<input type="text"/>	

Click on the Summary or Details tab to view more information or to close out click on the X.

Item: 158718

CHEESE AMER YLW 120 SL TFF (158718)

Easy Pick Price: \$44.19

Summary

Class Item: CHEESE AMER YLW 120 SL TFF (158718)

Pack: 4
Size: 5 LB
Brand: WEST CRK

Classifications

Category: CHEESE (04822)
Class: DAIRY PROD & SUBS (048)
Manufacturer: Remit Name-3922 (3922)

Inventory

On Hand Case: 0
On Hand B/C: 0
On Order: 350
Expected Date: 05/22/2013

PERFORMANCE

Placing Orders



Item Nutrition Designations

You may notice icons next to items:

397361	200	2 OZ	RCHLNDHL	APPLE SLCD IN BAG
228627	6	#10	SLVR SRC	APPLE SLCD IN WATER
377517	6	#10	PACKER	APRICOT HLVS L/S
377542	6	#10	PACKER	APRICOT HLVS UNPLD

Heart = kosher designation. Hover over a heart to see the kosher designation.

Smile = has child nutrition label. Hover over a smile to see it's designation (BG = buyers guide, PFS = product formulation statement; USDA = USDA compliant).

View Item Product Card

Next to each item description is a PDF icon you can click on to view the product card.

Items 1 - 44 of 375				
157189	36	1 LB	WEST CRK	BUTTER SOLIDS UNSLTD AA TFF
157432	1	30 DZ	WEST CRK	EGG WHI XL GRD AA LOOSE
158718	4	5 LB	WEST CRK	CHEESE AMER YLW 120 SL TFF
158753	4	10 LB	WEST CRK	CHICKEN BRST RAND JUMBO B/S CVP
158816	1	10#AV	WEST CRK	CHEESE CHED MILD YLW BLOCK

The product card displays information such as nutrition, kosher information, school equivalent, serving size and product image.

CHEESE AMER YLW 120 SL TFF

WEST CRK This quality line of Process American cheese slices is perfect for burgers, sandwiches, entrees, and deli platters. These slices are REAL American cheese, not cheese product, not an imitation product. They offer consistent true cheese.

Item # 158718

Nutrition Facts		Product Specifications:	
Serving Size: 120		UPC: 158718	UPC: 158718
Amount Per Serving		Brand: WEST CRK	Class: DAIRY PROD & SUBS
Calories from Fat		Item: CHEESE	Category: CHEESE
Total Fat	2.00g	Genus: CHEESE	Origin: AMERICAN
Saturated Fat	1.50g	Grade: 3.0	Country: USA
Total Fat	2.00g	Shipping Information:	
Cholesterol	30mg	Case: 120	Weight: 120
Sodium	200mg	Case: 120	Temp: REFRIGERATED
Total Carbohydrate	270mg	Case: 120	Temp: REFRIGERATED
Dietary Fiber	0g	Case: 120	Temp: REFRIGERATED
Sugar	0g	Case: 120	Temp: REFRIGERATED
Protein	0g	Case: 120	Temp: REFRIGERATED
Allergens:		Contains: Milk, Eggs, Soybeans	
School Equivalents:		Nutrition Facts:	
Serving Size: 120		Total Fat: 2.00g	
Amount Per Serving		Saturated Fat: 1.50g	
Calories from Fat		Cholesterol: 30mg	
Calories		Sodium: 200mg	
Total Fat		Total Carbohydrate: 270mg	
Saturated Fat		Dietary Fiber: 0g	
Cholesterol		Sugar: 0g	
Sodium		Protein: 0g	
Total Carbohydrate		Allergens:	
Dietary Fiber		Contains: Milk, Eggs, Soybeans	
Sugar		Nutrition Facts:	
Protein		Serving Size: 120	
Allergens:		Amount Per Serving	
Contains: Milk, Eggs, Soybeans		Calories from Fat	
Nutrition Facts:		Calories	
Serving Size: 120		Total Fat: 2.00g	
Amount Per Serving		Saturated Fat: 1.50g	
Calories from Fat		Cholesterol: 30mg	
Calories		Sodium: 200mg	
Total Fat		Total Carbohydrate: 270mg	
Saturated Fat		Dietary Fiber: 0g	
Cholesterol		Sugar: 0g	
Sodium		Protein: 0g	
Total Carbohydrate		Allergens:	
Dietary Fiber		Contains: Milk, Eggs, Soybeans	
Sugar		Nutrition Facts:	
Protein		Serving Size: 120	
Allergens:		Amount Per Serving	
Contains: Milk, Eggs, Soybeans		Calories from Fat	
Nutrition Facts:		Calories	

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Click Ctrl + P to print the Product Card

Search Products within Item Master

When searching items within the Order Guide, if you cannot find the item you want, you can search the Item Master to view all items.

Type all or part of the item you are searching for then hit Enter.

To search the Item Master, click on the All Items button.

Item Master Search - Order Only

Order Form | Switch View | Cancel | All Items | Add Page | Check Avail | Advanced

Customer: Ship Name-170112 - 170112
Order #: 4613

dressing

Items 1 - 1 of 1

Item	Pack	Size	Brand	Description	Qty	Price
27120	4	1 GA	KENS	DRESSING PARMESAN PEPPERCORN GF		62.07

The search results yield all items within the Item Master. You can continue to filter down and narrow your search by typing the next search criteria.

Item Master Search - All Items

Order Form | Switch View | Cancel | Order Only | Add Page | Check Avail | Advanced

Customer: Ship Name-170112 - 170112
Order #: 4613

ranch

Items 1 - 44 of 66

Item	Pack	Size	Brand	Description	Qty	Price
3048	4	1 GA	KENS	DRESSING RANCH TFF		46.50
3279	4	1 GA	KENS	DRESSING RANCH FF TFF		48.81
22783	60	1.5 OZ	KRAFT	DRESSING RANCH TFF		15.45
27644	200	12 GM	HEINZ	DRESSING RANCH PACKET		17.84
29888	4	1 GA	KENS	DRESSING RANCH LITE TFF GF		49.59
29949	60	2 OZ	KENS	DRESSING RANCH BUTTERMILK TFF		14.58
35399	4	1 GA	KENS	DRESSING RANCH BUTTERMILK TFF		48.56
54242	100	.75OZ	HEINZ	DRESSING RANCH DUNK CUP		19.36
56039	4	1 GA	KENS	DRESSING RANCH DLX TFF		49.48

If desired, you can add quantity; or, if you do not see the item you want you can click the Clear button and search again. To get back to your entire Order Guide, click the Order Form button in the Tool Bar.

Search Products using Guided Search

When searching items, if you cannot find the item you want, you can use the Guided Search panel to narrow your search.

Type all or part of the item you are searching for then hit Enter. The Guided Search panel opens on the left:

The screenshot shows the 'Guided Search' panel on the left and the 'Item Master Search - Order Only' window on the right. The search term 'beef' is entered in the search box. The results table shows 5 items.

Item	Pack	Size	Brand	Description
22638	12	5 LB UP	IBP	BEEF TNDRLN NR PSMO
68328	1	70#AV	PACKER	BEEF CHUCK 2 PC CH BNLS
77037	6	12#AV	PACKER	BEEF STRIP LOIN 0X1 CH
966826	2	11-15LB	PFG CCM	BEEF FLANK STK CH
992406	5	15 L BUP	IBP	BEEF RIBEYE CH BNLS LION

Click on a Class, Category or Brand to filter your search. Your search results display to the right. To filter again, click on another guided search criteria. To clear a filter, in the Your Selections area, click on the X.

The screenshot shows the 'Guided Search' panel on the left and the 'Item Master Search - Order Only' window on the right. The search term 'beef' is entered. The results table shows 1 item, filtered by the brand 'PFG CCM'.

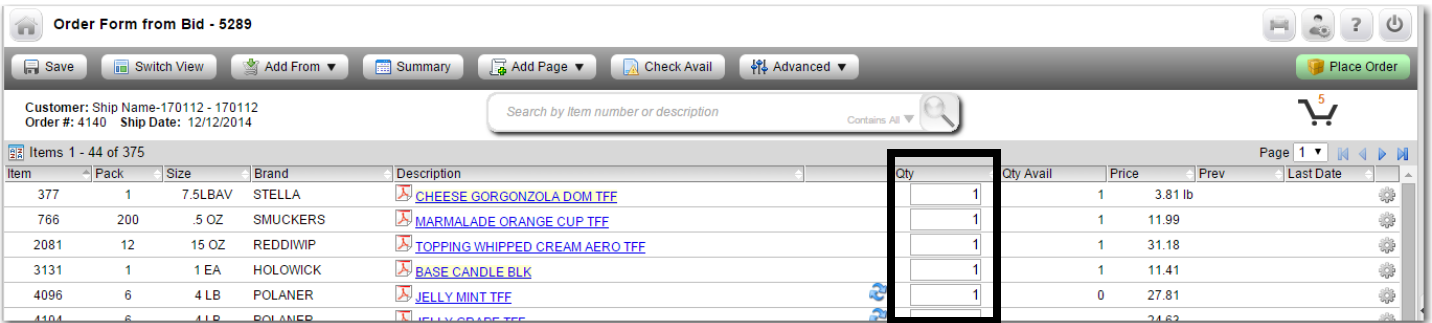
Item	Pack	Size	Brand	Description
966826	2	11-15LB	PFG CCM	BEEF FLANK STK CH

If desired, you can add quantity; or, if you do not see the item you want you can click the Clear button and search again. To get back to your entire Order Guide, click the Order Form button in the Tool Bar.

Enter Quantity

Enter Quantity/View Out of Stock Items

When you are ready to add an item to your order, click in the quantity field and type the quantity. You can use your Enter key to move to the next item, or click in the quantity cell for the next item you wish to order.



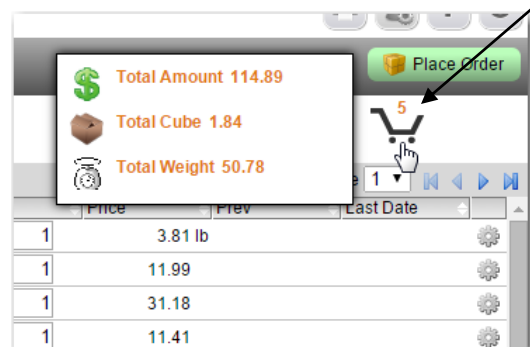
After entering quantity for all items, you should click the Check Avail button to ensure no products are not out of stock.



If a product is out of stock, meaning there is a zero in Qty Avail, click on the Substitute icon to view the substitute (when applicable).

View your Shopping Cart

As you order items, you can click on the Grocery Cart any time to see your order total amount, cube and weight.



Placing Orders

The following are the basic steps in placing an order:

1. Select the customer
2. Select the order guide/method of order entry
3. Search items and enter quantity
4. Review order summary
5. Review order header information (i.e. change delivery date/add special instructions)
6. Submit the order
7. View order confirmation

The order appears on the Order Status page.

There are a few other ways you can create an order in PerformanceNet:

Placing Orders/Quick Add - quickly order items by entering item number and quantity (you must know item# to use this method). To use this method, from the Dashboard, click the Create Order button and select Quick Add.

Entity	Code	Item	Quantity	Pack	Size	Brand	Description
Item							
Item							

Enter the Item number, then hit the Enter key. Enter quantity then hit Enter twice. Repeat this step for each item. When you are finished entering items, click the Check Items button to ensure you ordered the correct items.

Entity	Code	Item	Quantity	Pack	Size	Brand	Description
Item		22638	1				
Item							

After reviewing, click the Save button, then click the Order Form button to get back to the Quick Add page.

Placing Orders/Previous Order - quickly copy a previous order and make changes before submitting (orders are pulled up by Invoice#). To use this method, from the Dashboard, click the Create Order button and select Previous Order. From the pop-up window, click on the Invoice# hyperlink to use that order.

Invoice #	Order Date	PO #
4732688	05/14/2014	EOR0001594
4732687	05/14/2014	EOR0001597

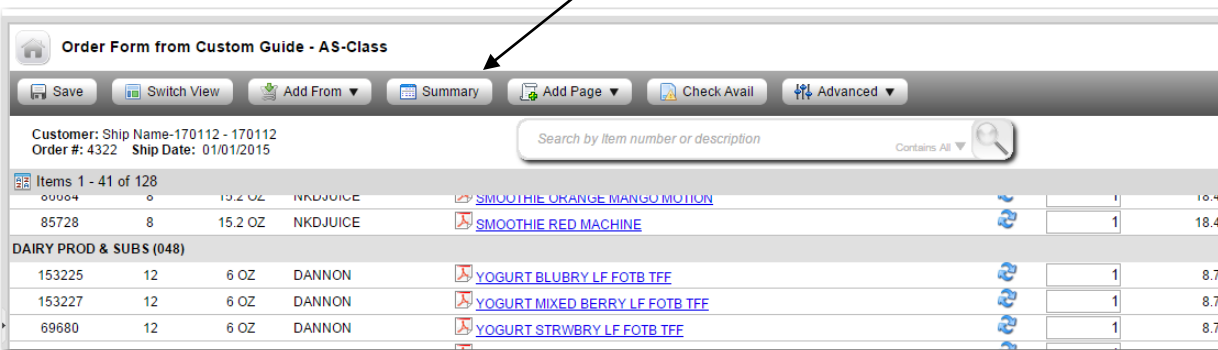
From the Order Form from Previous Order page, if desired, search and enter quantity for more items. When you are finished entering items, click the Check Avail button to view any out of stock items. After reviewing, click the Save button.

Item	Pack	Size	Brand	Description	Inventory	Par	Qty	Price	Prev	Last Date
DESSERTS FROZEN (03955)										
1967	6	36.5 OZ	SARA LEE	CAKELYR RSPBRY DREAM 8 TFF			1	56.04		
BEVERAGE COFFEE/TEA/COCOA (09621)										
487	6	28 CT	BIGELOW	TEA RSPBRY ROYALE TFF			1	5.81		
BEVERAGE PACKAGED DRY (09651)										

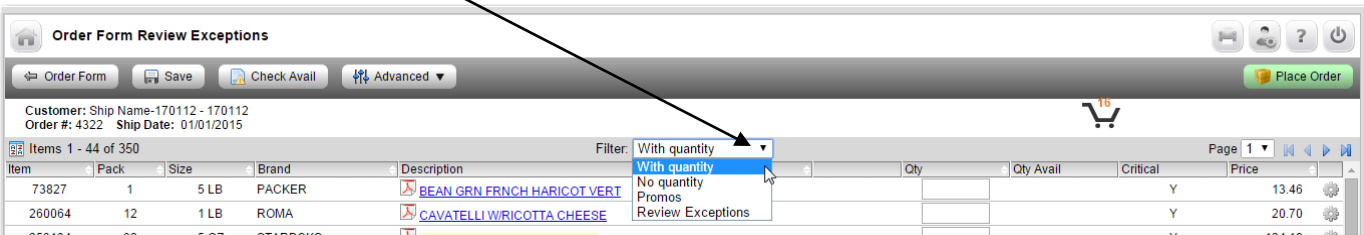
Review Order Summary

View Order Summary/Critical Items

Before submitting your order, you can use the Summary button to view your critical items list and your items ordered:



By default, the Summary page displays items that are exceptions, this is also know as your Critical Items list. You can click on the drop down and select With Quantity to view total items ordered.



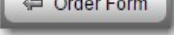
Summary Filter Options:

With Quantity = items ordered

No Quantity = items not ordered within the chosen Order Guide

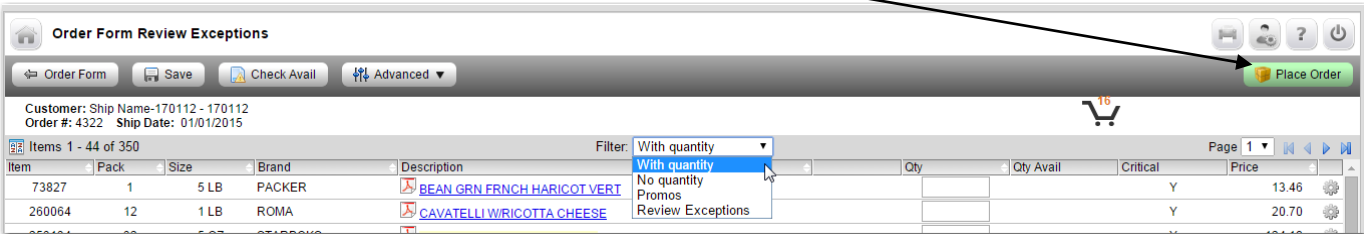
Promos = promotional item

Review Exceptions = critical items (frequently ordered items not included in this order)

At anytime, you can use the Order Form  button to return to the order. You should hit the Save button early and often as you move through the different areas of the website.

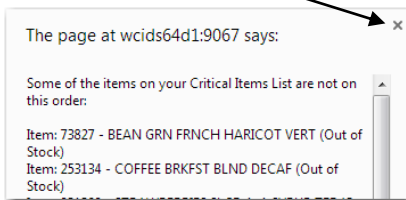
Review Order Header Information

When you are finished entering quantity, click the green Place Order button to view the Order Header Information.



Critical Items List

You may see a pop up of your frequently ordered and critical items list that displays items you did not order. Review the list, then click on the X in the top right corner to close the pop up.



Order Header Information

From the Place Order page, If desired, you can make changes to the order header such as change the delivery date or add special instructions.

The Special Instructions and Purchase Order # fields are free form fields. This information typed here makes it way to FoodStar and will appear on the invoice.

**Free Form
Fields**

Ship Date (MM/dd/yyyy):	01/01/2015	Route not available
Special Instructions:	<input type="text"/>	
Special Instructions (cont'd):	<input type="text"/>	
Purchase Order #:	<input type="text"/>	

To merge invoices for multiple orders in the same day:

The Special Instructions and/or Purchase Order # fields must be blank or display identical information.

To separate invoices for multiple orders in the same day:

The Special Instructions and/or Purchase Order# must display different information.

Submit the Order

After reviewing the order, click the Submit Order Button to place the order:

Place Order

Order Form | Check Avail | Advanced

Customer: Ship Name-170112 - 170112 Order #: 4340 Quantity: 5 Amount: 829.46 Total Cube: 3.23 Total Weight: 96.99

Ship Date (MM/dd/yyyy): 01/01/2015 Route not available

Submit Order

You are directed back to the PerformanceNet Orders Status page. Your order is listed, showing a Submitting status. Clicking the Refresh button should display a Confirmed status, letting you know the order is in our system.

All Power Net Orders Test Company

Refresh | Delete | Your Power Net Orders

Customer: Ship Name-170112 - 170112
17 WOODING AVE
EDISON, NJ 08817

Items 1 - 15 of 15 Status: All

Delete	Customer #	Customer	Order	PO #	Order Type	Confirmed Date - Time	Order Date	Ship Date	Lines	Qty Ordered	Qty Ship	Amt Ordered	Instructions	Status
<input type="checkbox"/>	170112	Ship Name-170112	4322		Custom Guide		12/30/2014	Fri 01/02/2015	16	16	0	\$223.78	Driver Pick Up Check	Submitting
<input type="checkbox"/>	170112	Ship Name-170112	2463		Dashboard		12/30/2014	Thu 01/01/2015	1	1	0	\$407.38		Pending



View Order Confirmations

There are two ways to confirm your order:

- Confirm via the Orders Panel
- Receive confirmation via Email

To view your order confirmation via the Orders Panel:

From the Dashboard, in the Orders panel, click on the Confirmed Order #.

Customer #	Customer	Order #	Order Type	Confirmed Date - Time	Order Date	Ship Date	Lines	Qty Ordered	Qty Ship	Amt Ordered	Status
170112	Ship Name-170112	4340	Previous	12/31/2014 - 09:57:03	12/31/2014	Fri 01/02/2015	5	5	5	2	\$829.46 Confirmed
170112	Ship Name-170112	4322	Custom Guide	12/31/2014 - 09:56:57	12/31/2014	Fri 01/02/2015	16	16	16	0	\$223.78 Confirmed
170112	Ship Name-170112	2463	Dashboard		12/30/2014	Thu 01/01/2015	1	1	1	0	\$407.38 Pending

Red indicates items out of stock

Customer: Ship Name-170112 - 170112 Order #: 4340

Status: Confirmed
Ship Date: Friday 01/02/2015
Route Info: Route not available
Special Instructions:
Special Instructions (cont'd):
Purchase Order #:

Quantity Ordered: 5
Quantity Shipped (Est.): 2
Amount Shipped (Est.): 37.03
Total Cube: 0.00
Total Weight: 0.000

Item	Pack	Size	Brand	Description	Reason	Qty	Qty Ship	Weight	Price
DESSERTS FROZEN (03955)									
1967	6	36.5 OZ	SARA LEE	CAKE LYR RSPBRY DREAM 8 TFF		1	0	16.720	56.04
BEVERAGE COFFEE/TEA/COCOA (09621)									
487	6	28 CT	BIGELOW	TEA RSPBRY ROYALE TFF		1	1	12.000	5.81
BEVERAGE PACKAGED DRY (09651)									
346	48	5.5 OZ	V8	JUICE VEG 100% CAN TFF		1	0	19.030	23.23 lb
KETCHUP/MUSTARD/VINEGAR (09840)									
55240	12	33.8 OZ	ROLAND	VINEGAR RED RSPBRY WINE TFF		1	0	43.000	329.01
MAYO/DRESSINGS/DIPS/MIXES (09848)									
158915	2	1 GA	VILL GDN	DRESSING RSPBRY VINGRT TFF		1	1	19.050	31.22

To receive your order confirmation via email, you must have your email address entered into the user settings. An email confirmation displays the same information as on the Orders Panel.

From: IDSAdmin@pfg.com
To: Jessica.Judd
Cc:
Subject: Order Confirmation for Order Number 4340; Customer: Ship Name-170112 (170112)

TEST IDS 6.2 - Test Company
Order Confirmation

Customer Name: Ship Name-170112
Order #: 4340
Ship Date: 01/02/2015
Route:
Stop Number: 0
Special Instructions:
Special Instructions (cont'd):
Purchase Order #:

Customer #: 170112
Quantity Ordered: 5
Quantity Shipped (Est.): 2
Amount Ordered: \$29.46
Amount Shipped (Est.): 37.03
Total Cube: 0.000000
Total Weight: 0.000

Item	Pack	Size	Brand	Description	Reason	Qty	Qty Ship	Weight	Price	Ext Price
1967	6	36.5 OZ	SARA LEE	CAKE LYR RSPBRY DREAM 8" TFF		1	0	16.720	56.04	0.00
Special Order										
487	6	28 CT	BIGELOW	TEA RSPBRY ROYALE TFF		1	1	12.000	5.81	5.81
346	48	5.5 OZ	V8	JUICE VEG 100% CAN TFF		1	0	19.030	23.23 lb	0.00
DWO or Discontinued										
55240	12	33.8 OZ	ROLAND	VINEGAR RED RSPBRY WINE TFF		1	0	43.000	329.01	0.00
158915	2	1 GA	VILL GDN	DRESSING RSPBRY VINGRT TFF		1	1	19.050	31.22	31.22

See User Settings to add an email address to receive email confirmations.

Orders Panel

The Orders panel displays your PerformanceNet orders. You can click on a Order# hyperlink to view more information or you can use the Status button in the Tool Bar to view and search all orders.

Order Status:

Pending - an order that has been created and saved, but has not been submitted

Confirmed - an order that has been received by Performance Foodservice

In Use - an order that is currently being accessed by another user

View All Orders

From the Dashboard click on the Status button then click on Power Net Orders. Orders are loaded with the most recent order at the top. Click on a Order# hyperlink to view that order.

Delete	Order	PO #	Order Type	Confirmed Date - Time	Order Date	Ship Date	Lines	Qty Ordered	Qty Ship	Amt Ordered	Instructions	Status
	4273		Previous		01/08/2015	Sat 01/10/2015	5	5	0	\$0.00		Pending
	2463		Dashboard		01/08/2015	Sat 01/10/2015	1	1	0	\$0.00		Pending
	4873		Par List		01/05/2015	Thu 01/08/2015	5	11	0	\$2149.46		Pending
	4663		History		01/05/2015	Wed 01/07/2015	0	0	0	\$0.00		In Use
	4850		Standard Guide	01/05/2015 - 14:25:33	01/05/2015	Wed 01/07/2015	2	3	2	\$0.00		Confirmed

Edit an Order with Pending Status

Orders that you start, then save to continue later will have a Pending order status. At any time, you can click on that Order# to go back into the order and continue.

From the Order Form page, continue with the steps to place then submit the order. Or, to save and continue later, click Save.

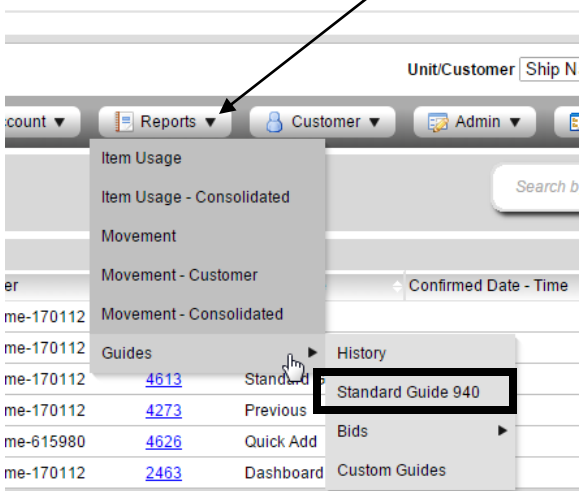
Item	Pack	Size	Brand	Description	Inventory	Par	Qty	Price	Prev	Last Date
2127	18	1 LB	FARMLAND	BACON 18-22 SHINGL SLCD FZ	2.00	5.00	3			
31458	2	5.94LB	HORMEL	BACON CANADIAN STYLE TFF	2.00	5.00	3			
39315	2	5 LB	HORMEL	BACON TOPPING 3/8 DICED FC TFF	2.00	4.00	2			
22638	12	5 LB UP	IBP	BEEF TNDRLN NR PSMQ		2.00	2			
260064	12	1 LB	ROMA	CAVATELLI W/RICOTTA CHEESE		5.00				

Overview

Within PerformanceNet you can view and print order guides created by your corporate office and/or Performance Foodservice. You can also create your own custom order guides, in the sequence you want.

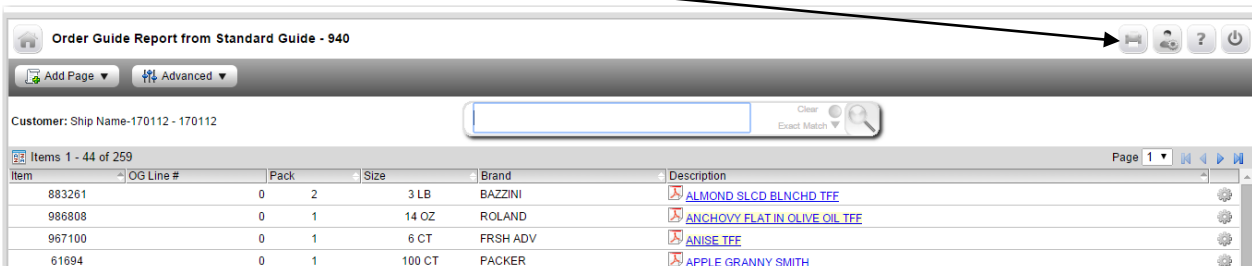
View/Print an Order Guide

From the Dashboard, click on the Reports button, hover over Guides then select the order guide you want to view and print. Items are sorted by Item Number.



To Sort an order guide, click on the Advanced button then select Sort. Choose an alternate first sort option (such as Item Description) then select Sort. This step ensures every time you create an order using this order guide, it will always be sorted in the manner you choose.

To print an order guide, click on the Print button and select Print.

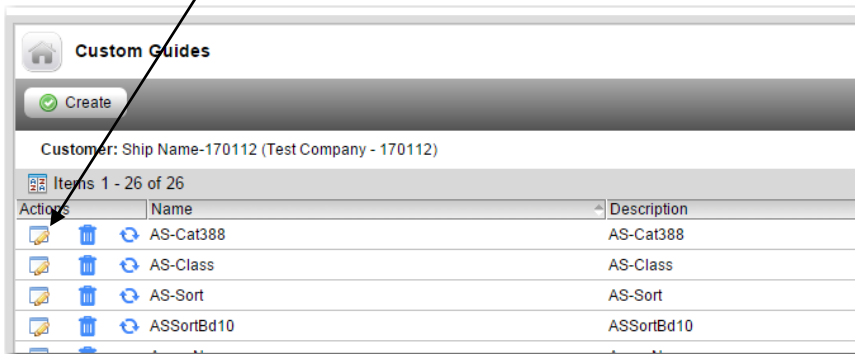


Custom Order Guides

[View Custom Order Guides](#)

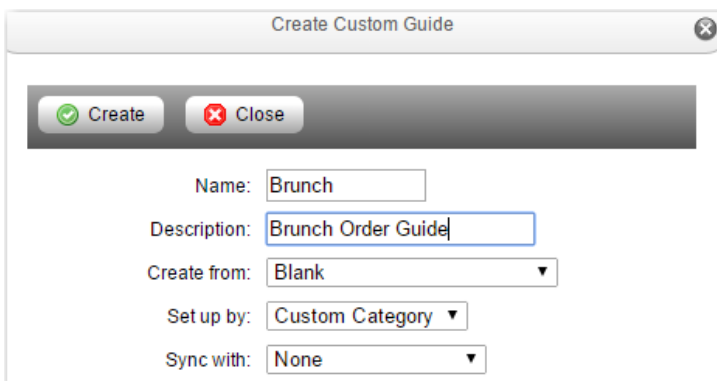
From the Dashboard, click on the Admin button then click on Custom Guides. A list of your custom order guides appear. From this screen you can view or edit an existing guide, or you can create a new guide.

Click on the Edit icon next to the custom guide to view and/or make changes.



[Create/Edit a Custom Order Guide](#)

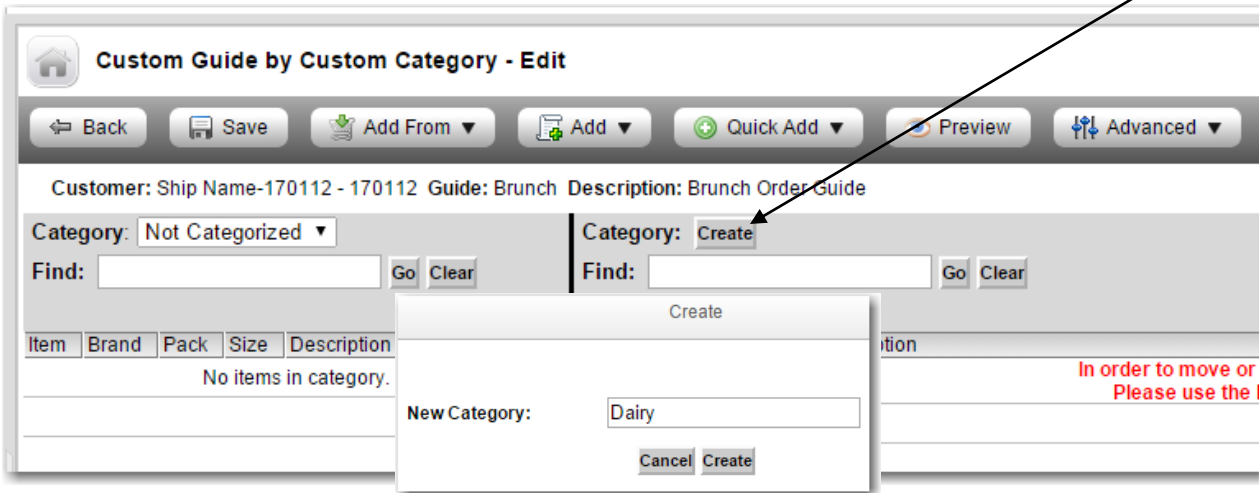
From the Dashboard, click on the Admin button then click on Custom Guides. Click on the Create button to create a new custom guide. Enter a Name and Description. You can create this order guide from scratch, or you can create it based on another order guide. Click on the Create button then click Edit.



The screenshot shows the 'Create Custom Guide' form. It has a title bar with a close button. Below the title bar are two buttons: 'Create' with a green checkmark and 'Close' with a red X. The form contains several fields: 'Name' with the value 'Brunch', 'Description' with the value 'Brunch Order Guide', 'Create from' with a dropdown menu set to 'Blank', 'Set up by' with a dropdown menu set to 'Custom Category', and 'Sync with' with a dropdown menu set to 'None'.

Create/Edit a Custom Order Guide Cont'd

To start, you will need to create at least one Category to place your items in. On the right side, click the Create button, from the pop up, type the first category then click Create (you can create as many categories as you would like).



There are multiple methods you can use to add items. From the Tool Bar, you can use the following buttons:

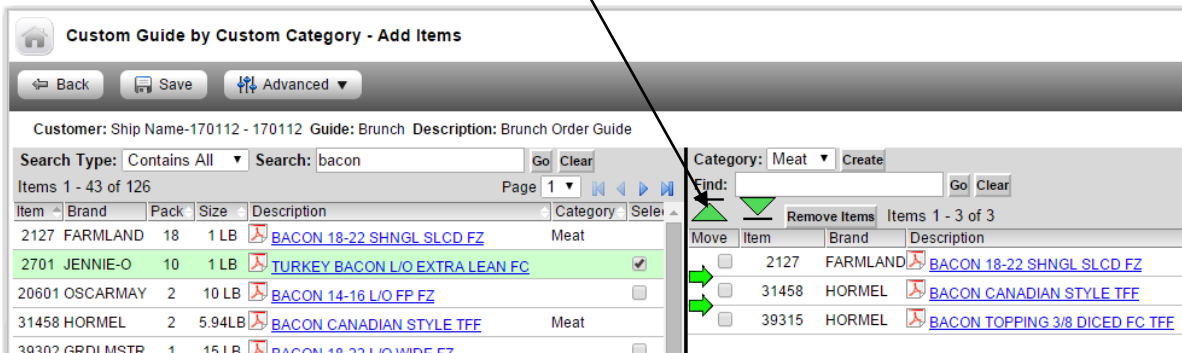
Add From - add items from an existing order guide. This method allows you to load or import an order guide, then search and select the items you want to add to the new custom guide. From the Tool Bar, click the Add From button then select the guide you want to load.

Add - add by Item (search by keywords to find items); Class (view items by classes); Category (view items by category). From the Tool Bar, click the Add button and select Item.

Quick Add - add items by entering item#. From the Tool Bar, click the Quick Add button.

Once you select your desired method, in the Search field type your item description or number, then click Go. On the right, select the desired Category, then select the item(s) from the left that you want to add to the new guide.

To move the item to the new guide, click the green up or down arrow. Make sure to Save your work.



At any time, you can use the Preview button to view your guide. Use the Back button to return to Edit mode.

Custom Guide by Custom Category - Edit

Customer: Ship Name-170112 - 170112 Guide: Brunch Description: Brunch Order Guide

Category: Not Categorized

Find: [] Go Clear

Item Brand Pack Size Description Select Move

No items in category.

Custom Guide by Custom Category - Preview

Customer: Ship Name-170112 - 170112 Guide: Brunch Description: Brunch Order Guide

Search Type: Exact Match Search: [] Go Clear

Items 1 - 12 of 12

Item	Pack	Size	Brand	Description
Dairy				
75374	4	5 LB	SORRENTO	CHEESE MASCARPONE BULK
130329	1	10 LB	GREENBAY	CHEESE CHED BLOCK WHI SHARP TFF
158813	4	5 LB	WEST CRK	CHEESE CHED MONT_JCK FTHR SHRED
158816	1	10#AV	WEST CRK	CHEESE CHED MILD YLW BLOCK
260064	12	1 LB	ROMA	CAVATELLI WRICOTTA CHEESE
157433	1	30 DZ	WEST CRK	EGG WHI LG GRD AA LOOSE
947701	6	5GA	HOOD	MILK 2% LF UHT TFF
Meat				
22638	12	5 LB UP	IBP	BEEF TNDRLN NR PSMO
37655	12	2 CT	PACKER	LAMB RACK FRNCHD 12-14 OZ FZ
2127	18	1 LB	FARMLAND	BACON 18-22 SHINGL SLCD FZ
31458	2	5.94LB	HORMEL	BACON CANADIAN STYLE TFF
39315	2	5 LB	HORMEL	BACON TOPPING 3/8 DICED FC TFF

Sequence Items

Once you finish adding items to your guide, you use the green arrows to put the items in the sequence that you want.

Select the item you want to move, then click the green arrow pointing right between the 2 items where you want to place the item. Make sure to save your work.

Description: Brunch Order Guide

Category: Dairy Create

Find: [] Go Clear

Remove Items Select All Items 1 - 7 of 7

Move	Item	Brand	Description
<input type="checkbox"/>	75374	SORRENTO	CHEESE MASCARPONE BULK
<input type="checkbox"/>	130329	GREENBAY	CHEESE CHED BLOCK WHI SHARP TFF
<input type="checkbox"/>	158813	WEST CRK	CHEESE CHED MONT_JCK FTHR SHRED
<input type="checkbox"/>	158816	WEST CRK	CHEESE CHED MILD YLW BLOCK
<input type="checkbox"/>	260064	ROMA	CAVATELLI WRICOTTA CHEESE
<input checked="" type="checkbox"/>	157433	WEST CRK	EGG WHI LG GRD AA LOOSE
<input type="checkbox"/>	947701	HOOD	MILK 2% LF UHT TFF

Once you've added items and sequenced, you are now ready to Save your work. Now when placing orders, you can select this order guide to order from.

To order from this order guide, from the Dashboard, click the Create Order button then select Custom Guide. From the pop-up, select the desired custom guide.

Import an Order Guide

When editing or creating a custom guide, you also have the ability to import an order guide. In order to use the import feature, the file must be comma delimited and saved with a csv or .txt file extension.

From the Dashboard, click on Admin then select Custom Guides. Click on the Create button to create a new custom guide. Enter a Name and Description. From the Create From field, select Import File. Click the Choose File button and navigate to your order guide file. Click Create then click Edit.

The screenshot shows a 'Create Custom Guide' dialog box with the following fields and options:

- Create** (green checkmark icon) and **Close** (red X icon) buttons.
- Name:** [Text input field]
- Description:** [Text input field]
- Create from:** [Dropdown menu with 'Import File' selected]
- Sync with:** [Dropdown menu with 'None' selected]
- File Location/Name:** [Choose File] No file chosen

The items are imported into the guide. On the right side, make sure you have the correct Category selected, then from the left side, select the items you want to move into the guide. Use the green up or down arrow to move items over.

The screenshot shows the 'Custom Guide by Custom Category - Add From - Import File' interface. It features a search bar, a category dropdown (Dairy), and two columns of items. The left column lists items with their Item, Brand, Pack, Size, and Description. The right column lists items with their Item, Brand, and Description. Green arrows indicate the movement of items from the left column to the right column.

Item	Brand	Pack	Size	Description	Category	Select
874187	NTL CHEK	1	1000 CT	LABEL FRI TRILINGUAL 1X1 ROLL		<input type="checkbox"/>
874186	NTL CHEK	1	1000 CT	LABEL MON TRILINGUAL 1X1 ROLL		<input type="checkbox"/>
874182	NTL CHEK	1	1000 CT	LABEL SAT TRILINGUAL 1X1 ROLL		<input type="checkbox"/>
874181	NTL CHEK	1	1000 CT	LABEL SUN TRILINGUAL 1X1 ROLL		<input type="checkbox"/>
874183	NTL CHEK	1	1000 CT	LABEL THURS TRILINGUAL 1X1 ROLL		<input type="checkbox"/>
874184	NTL CHEK	1	1000 CT	LABEL TUES TRILINGUAL 1X1 ROLL		<input type="checkbox"/>
874185	NTL CHEK	1	1000 CT	LABEL WED TRILINGUAL 1X1 ROLL		<input type="checkbox"/>

Move	Item	Brand	Description
<input type="checkbox"/>	75374	SORRENTO	CHEESE MASCARPONE BULK
<input checked="" type="checkbox"/>	130329	GREENBAY	CHEESE CHED BLOCK WHI SHARP TFF
<input checked="" type="checkbox"/>	158813	WEST CRK	CHEESE CHED MONT. JCK FTNR SHRED
<input checked="" type="checkbox"/>	157433	WEST CRK	EGG WHI LG GRD AA LOOSE
<input checked="" type="checkbox"/>	158816	WEST CRK	CHEESE CHED MILD YLW BLOCK
<input checked="" type="checkbox"/>	260064	ROMA	CAVATELLI W/RICOTTA CHEESE
<input checked="" type="checkbox"/>	947701	HOOD	MILK 2% LF UHT TFF

Once you've finished moving items, be sure to Save your work. If desired, use the right pointing green arrows to sort the items in the sequence you want.

Inventory works similar to Custom Order Guides. You can create a new Inventory Template from scratch or base it off of an existing order guide.

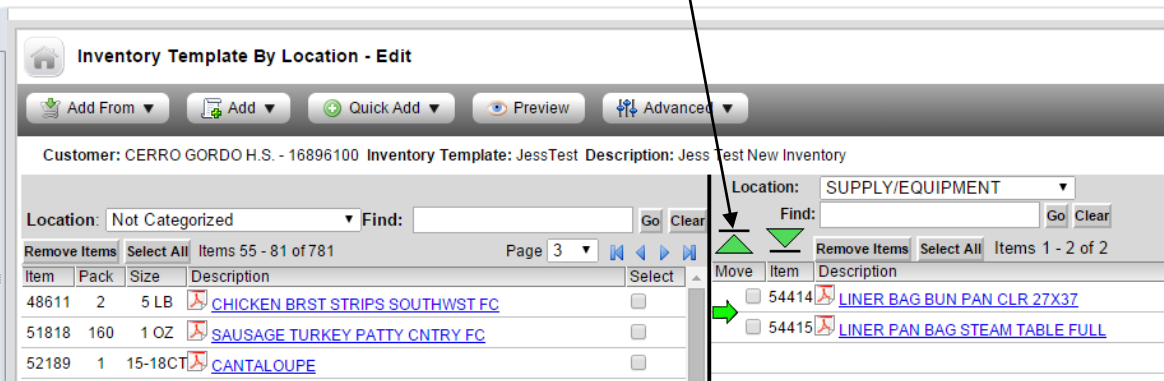
Create an Inventory Template using an Order Guide

From the Dashboard, click the Admin button, hover over Inventory, then hover over Inventory Template then click on Create.

From the pop-up, type a Name (no spaces) and Description. Click on the Create from drop down and select the order guide for which you want to create the inventory. Click on Create then click on Edit.

The order guide items load on the Inventory Template page. This screen works the same way as the Custom Order Guide options for adding items.

On the right, select the desired Location, then select the item(s) from the left that you want to add to the Inventory template. To move the item to the new template, click the green up or down arrow.



The screenshot shows the 'Inventory Template By Location - Edit' interface. At the top, there are buttons for 'Add From', 'Add', 'Quick Add', 'Preview', and 'Advanced'. Below these, the customer information is displayed: 'Customer: CERRO GORDO H.S. - 16896100 Inventory Template: JessTest Description: Jess Test New Inventory'. The interface is split into two panes. The left pane shows a list of items with columns for 'Item', 'Pack', 'Size', 'Description', and 'Select'. The right pane shows a list of items with columns for 'Move', 'Item', and 'Description'. A green arrow points to the 'Move' button between the two panes.

Item	Pack	Size	Description	Select
48611	2	5 LB	CHICKEN BRST STRIPS SOUTHWST.FC	<input type="checkbox"/>
51818	160	1 OZ	SAUSAGE TURKEY PATTY CNTRY.FC	<input type="checkbox"/>
52189	1	15-18CT	CANTALOUPE	<input type="checkbox"/>

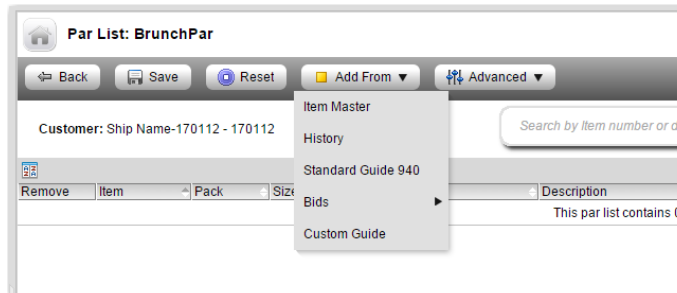
Move	Item	Description
<input type="checkbox"/>	54414	LINER BAG BUN PAN CLR 27X37
<input type="checkbox"/>	54415	LINER PAN BAG STEAM TABLE FULL

To enter inventory values into your new template, from the Dashboard, click on the Admin button, hover over Valuation, hover over Inventory, then click on your Inventory Template. Your Inventory Template appears with your items. Enter the Cases and Each quantity on hand. Be sure to save your work early and often.

Par Lists display the item quantity you always need on hand; and, work in conjunction with your Inventory. You can create a new Par List based off of an inventory sheet or an order guide.

From the Dashboard, click the Admin button and then select Par List. Click the Create button to create a new Par List. Enter a Name (no spaces) and Description. Click Create then click Edit.

From the Par List page, click the Add From button and select the guide or inventory sheet from which you want to create your Par List based on:



The items load, allowing you to enter the Par level in the Par column. Once you finish adding Par for each item, remember to Save your work.

Item	Pack	Size	Brand	Description	Par	Price
75374	4	5 LB	SORRENTO	CHEESE MASCARPONE BULK		73.24
130329	1	10 LB	GREENBAY	CHEESE CHED BLOCK WHI SHARP TFF		30.43
158813	4	5 LB	WEST CRK	CHEESE CHED MONT JCK FTHR SHRED		52.23
157433	1	30 DZ	WEST CRK	EGG WHI LG GRD AA LOOSE		39.49
158816	1	10#AV	WEST CRK	CHEESE CHED MILD YLW BLOCK		2.70
260064	12	1 LB	ROMA	CAVATELLI WRICOTTA CHEESE		20.70
947701	6	.5GA	HOOD	MILK 2% LFUHT TFF		14.95

Now, when creating orders, you will have a new option - Par. Choosing this option will load your Par sheet and all you need to do is enter your current inventory on hand and based on the Par you entered, the order quantity is calculated for you.

Item	Pack	Size	Brand	Description	Inventory	Par	Qty	Price
2127	18	1 LB	FARMLAND	BACON 18-22 SHNGL SLCD FZ	2	5.00	3	57
22638	12	5 LB UP	IBP	BEEF TNDRLN NR PSMO	0	2.00	2	9
31458	2	5.94LB	HORMEL	BACON CANADIAN STYLE TFF	2	5.00	3	4
37655	12	2 CT	PACKER	LAMB RACK FRNCHD 12-14 OZ FZ	0	1.00	1	10
39315	2	5 LB	HORMEL	BACON TOPPING 3/8 DICED FC TFF	2	4.00	2	52
75374	4	5 LB	SORRENTO	CHEESE MASCARPONE BULK		2.00		73

PerformanceNet reports consist of Item Usage and Movement reports; as well, you can view your order guides. You can select a date range and various parameters; and, you can print or export any report. If you have access to multiple accounts, you can choose to run individual or consolidated reports.

Item Usage Report

The Item Usage report shows items, description, quantity and sales. From the Dashboard, click the Reports button then select Item Usage. If you are running for multiple accounts, you may select Item Usage Consolidated.

Enter a date range, then select the desired parameters in the fields below. Once finished, click the Generate button at the top.

Item Usage

Generate Reset Save

From: 08/31/2012 To: 08/29/2014

Dates: Enter the from and to dates for the report (MM/dd/yyyy)
Data is available for this customer for the following dates inclusive:
From: 08/31/2012
To: 08/29/2014

ITEM: All

Items: Select all items by entering "All" in the text box or enter multiple items separated by a space.

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.

- All
- APPETIZERS BREADED/BATTER (03906)
- APPETIZERS/HORS D OEUVRES (03901)
- BAGS/WRAP/FILTERS (02901)
- BAKERY FROZEN (03914)

To export the report, click on the Advanced button then select Export with Headings. An export of comma or tab creates a text file, or you may select Excel. To print the report, click the Print button and select the printer.

Item Usage Report

Back Add Page Advanced

Customer: CERRO GORDO H.S. - 16896100
300 E. DURFEE RD.
CERRO GORDO DIST #100 **
CERRO GORDO, IL, 61818

Item: All
Categories: All
Brand: All
Manufacturer: All

Classes: All
From: 08/31/2012
To: 08/29/2014
Group By: Item
Sort: Name/Description(1)

Lines 1 - 41 of 526

Item	UPC Number	Pack	Size	Description	Qty	Wt	Ext Sales	Avg Price
378283		1	138 CT	APPLE GLDN FCY WASH	1	0.000	31.45	31.45
433108		1	125 CT	APPLE GOLD DEL FCY 125	7	0.000	295.27	42.18
397361	3075527620	200	2 OZ	APPLE SLCD IN BAG	2	0.000	126.29	63.15
881455		6	#10	APPLESAUCE	10	0.000	351.81	35.18
397879	0005254950	6	#10	APPLESAUCE JUICE PACK TFF	6	0.000	200.22	33.37
399360		6	1 LB	BACON BITS PURE	9	0.000	340.13	37.79
409532	1063276011	4	2.5LB	BACON 48-52 SLCD CANADIAN	1	0.000	34.41	34.41
958745	0007218078	96	2.6 OZ	BAGEL SAUSAGE BRKFST CN TFF	23	0.000	957.25	41.62

Movement Report

The Movement report displays item, description, and quantity for the date range you choose. Run the report to display your top sellers, or bottom dwellers.

From the Dashboard, click the Reports button then select Movement. If you are running for multiple accounts, you may select Item Movement Consolidated.

Enter a date range, then select the desired parameters in the fields below. Once finished, click the Generate button at the top.

Movement

Generate Reset Save

From: 09/02/2014 To: 10/31/2014

Dates: Enter the from and to dates for the report (MM/dd/yyyy)
Data is available for this customer for the following dates inclusive:
From: 08/31/2012
To: 10/31/2014

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)
BAR SUPPLIES (02713)

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.

Count: Select the number of items to be displayed in each category
10

Sort Order: Use the drop down list box to select whether you want the report ordered by top sellers or by slow movers.
Top Sellers

To export the report, click on the Advanced button then select Export. An export of comma or tab creates a text file, or you may select Excel. To print the report, click the Print button and select the printer.

Movement Report

Back Add Page Advanced

Category: All Display: 10 Top Sellers From: 09/02/2014 To: 10/31/2014

Lines 1 - 44 of 1391 Page 1

Item	UPC Number	Pack	Size	Description	Qty	Wt
BAR SUPPLIES (02713)						
404915	10011461008693	1	50 CT	ROLL REGISTER THERMAL 80 X 230	18	0.000
404914	10011461018142	12	4 PK	ROLL PRINTER 1 PLY KITCHEN	10	0.000
302428	00812944004583	1	1 EA	BAR STRAINER S/S 4 PRONG	4	0.000
16804	00077838004968	1	1 RL	MATTING TEXTLINER 40X2" BRWN	1	0.000
304663	00811642024510	1	1 CT	JUICER CITRUS 19" HD	1	0.000

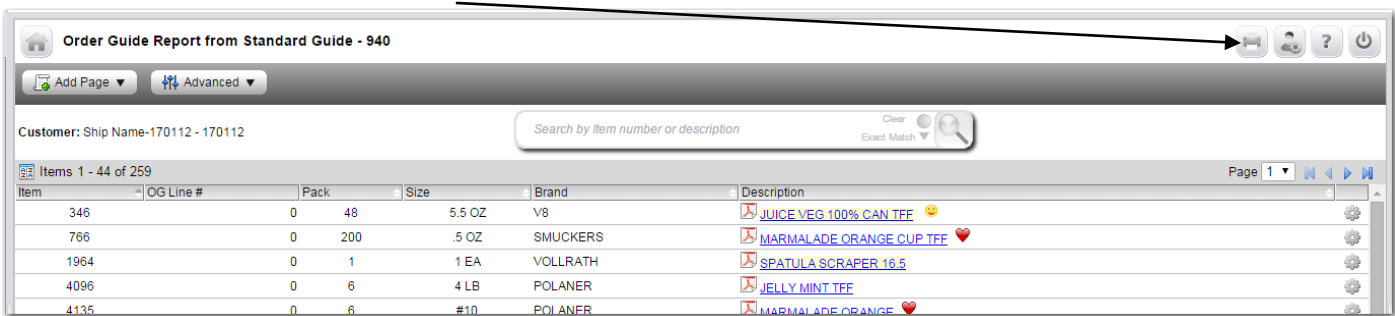
Guides Report

The Guides report allows you to view, print, or export your order guides.

From the Dashboard, click the Reports button, hover over Guides then select the guide you want to view. From the Order Guide Report page, use the Advanced button to display prices or export the content.

To export the guide, click on the Advanced button, Export, then select the desired export method.

To print the order guide, click the Print button.

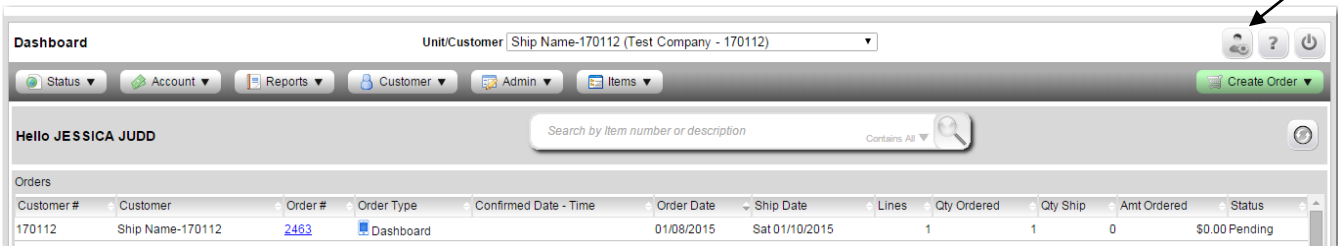


The screenshot shows the 'Order Guide Report from Standard Guide - 940' interface. At the top, there are buttons for 'Add Page' and 'Advanced'. Below that, the customer information is 'Ship Name-170112 - 170112'. A search bar is present with the text 'Search by item number or description' and a 'Clear' button. The main content is a table with the following data:

Item	OG Line #	Pack	Size	Brand	Description
346	0	48	5.5 OZ	V8	JUICE VEG 100% CAN TFF 🍌
766	0	200	5 OZ	SMUCKERS	MARMALADE ORANGE CUP TFF ❤️
1964	0	1	1 EA	VOLLRATH	SPATULA SCRAPER 16.5
4096	0	6	4 LB	POLANER	JELLY MINT TFF
4135	0	6	#10	POLANER	MARMALADE ORANGE ❤️

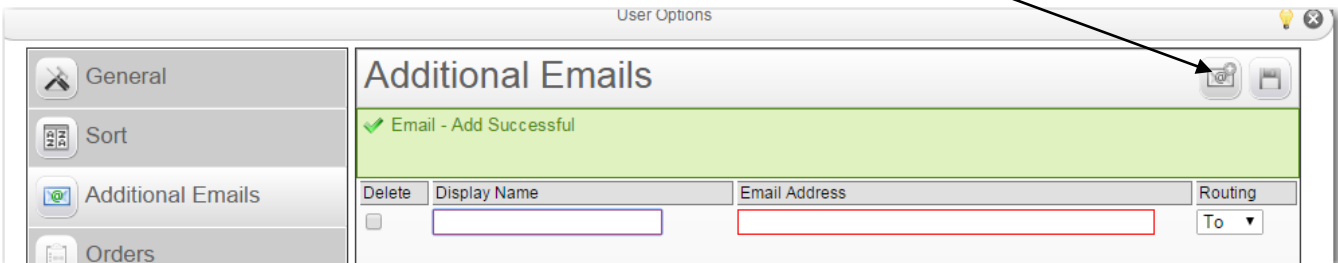
If you would like your items to print in alphabetical order, see User Options to change the default sort.

Within the PerformanceNet Use Options, there are a few basic options for you to maintain system settings, such as adding an email address, changing your password, or changing default view settings. From the Dashboard, click on the User Options button.



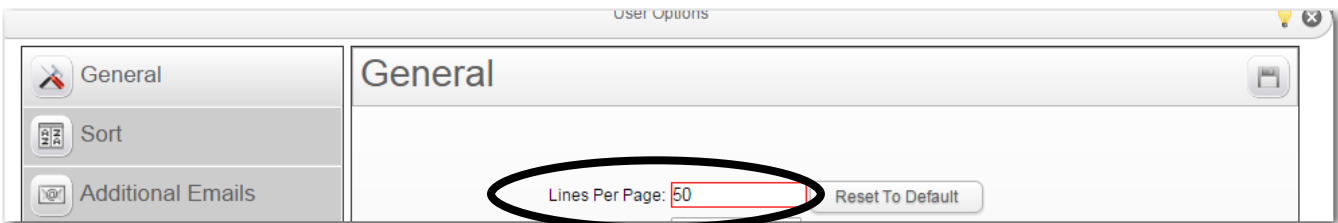
Add an Email Address to Receive Order Confirmations via Email


Click on the Additional Emails tab then from the top right select the Add button. Type your Name and Email Address, then click the Save button (top right next to the Add button).



Change the Default Lines Per Page View

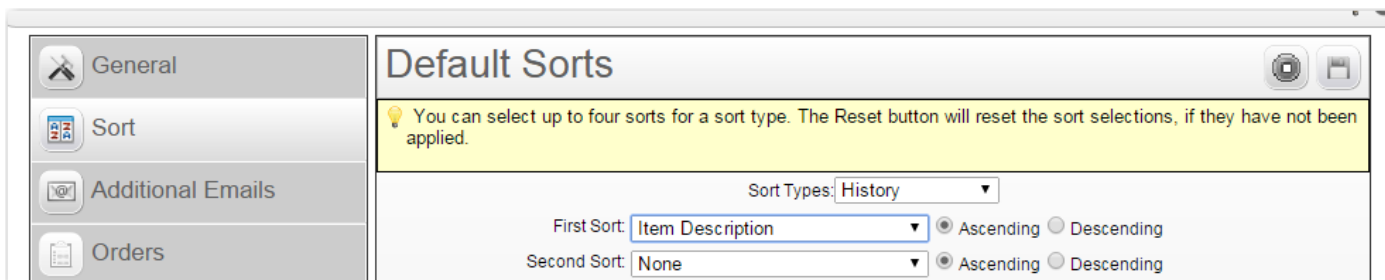
Click on the General tab, the default view is 34 lines per page. To change this view, enter a Lines Per Page number, it must be between 10—50, then click the Save button (top right next to the Add button).



From the Dashboard select the User Options  button.

Change your Default Order Guide Item Sort

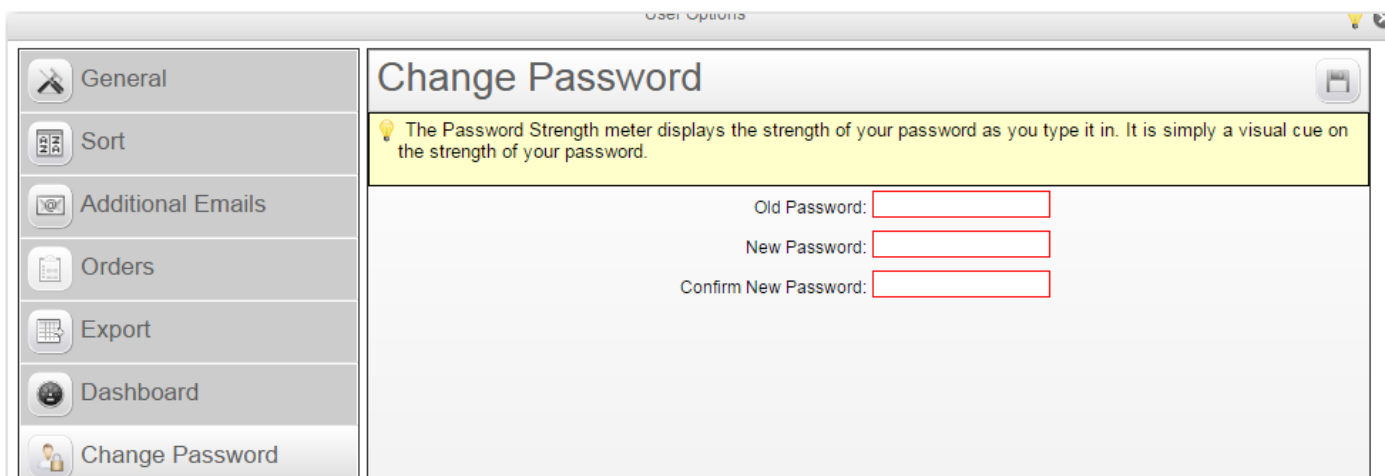
Items appear in the order guide sorted by Item#. To change your default sort, click on the Sort tab. Select the Sort Type dropdown and select the Order Guide. Select your desired First, Second, Third and Forth Sort. For example, you want order guide items to appear in alphabetical order, you would select the guide, then select First Sort - Item Description. After making your selections, click the Save button (top right next to the Add button).



The screenshot shows the 'Default Sorts' configuration window. On the left is a sidebar with tabs: General, Sort, Additional Emails, and Orders. The 'Sort' tab is selected. The main content area has a title 'Default Sorts' and a yellow informational box: 'You can select up to four sorts for a sort type. The Reset button will reset the sort selections, if they have not been applied.' Below this, there are two sort configuration rows. The first row is for 'Sort Types' (set to 'History'), with 'First Sort' set to 'Item Description' and radio buttons for 'Ascending' (selected) and 'Descending'. The second row is for 'Second Sort' (set to 'None'), with radio buttons for 'Ascending' (selected) and 'Descending'. A 'Save' button is visible in the top right corner.

Change your Password

Click on the Change Password tab, type your Old Password. Type a New Password, then type to Confirm New Password. Click the Save button (top right next to the Add button).



The screenshot shows the 'Change Password' configuration window. On the left is a sidebar with tabs: General, Sort, Additional Emails, Orders, Export, Dashboard, and Change Password. The 'Change Password' tab is selected. The main content area has a title 'Change Password' and a yellow informational box: 'The Password Strength meter displays the strength of your password as you type it in. It is simply a visual cue on the strength of your password.' Below this, there are three input fields: 'Old Password:', 'New Password:', and 'Confirm New Password:'. A 'Save' button is visible in the top right corner.

Account Panel

The Accounts panel displays invoice information. You can click on a Invoice# hyperlink to view more information or you can use the Account button in the Tool Bar to view all invoices.

View Invoices

From the Dashboard click on the Account button then click on Statement Status. Invoices are loaded with the most recent invoice at the top.

Click on a Invoice# hyperlink to view that invoice.

Invoice #	Date	Type	Amount	Customer Balance	Check #	Reference	PO #
4732688	05/14/2014	Invoice	551.45	61544.33			EOR0001594
4732687	05/14/2014	Invoice	688.70	60992.88			EOR0001597
4705215	05/11/2013	Adj	-44.71	60304.18		4706529	
4705885	05/10/2013	Invoice	83.14	60348.89			
4705215	05/10/2013	Invoice	3925.66	60265.75			

To export the invoice, click on the Advanced button, click Export then select the desired export method. Or, to print the invoice, click on the Print button.

Item #	Pack	Size	Description	Ordered	Shipped	Weight	Price	Total
336	12	46 OZ	JUICE VEG 100% TFF	1	1		26.06	26.06
346	48	5.5 OZ	JUICE VEG 100% CAN TFF	1	1	17.54	8.55	149.94
384	48	5.5OZ	JUICE VEG 100% LS TFF	1	1		6.39	6.39
441	24	7.25OZ	SOUP VEG RTS EASY OPEN TFF	1	1		11.17	11.17
487	6	28 CT	TEA RSPBRY ROYALE TFF	1	1		6.29	6.29
488	200	5 OZ	JAM STRWBRY CUP	1	0		14.74	0.00
677	2	5 LB	CHEESE PROV SLCD 3/4 OZ	1	1		5.70	5.70

Use the Back button to get back to the Statement Status page, or click the Home button to return to the Dashboard.